






Welcome

ACOG REGIONAL FREIGHT MOBILITY PLAN



-  Mute your microphone unless speaking during a Q&A session
-  Use the "Raise Your Hand" or chat box feature to ask questions
-  Announce your name whenever you speak
-  If you get disconnected, please reference the log-in instructions to reconnect audio or visual
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Appalachian Regional Freight Mobility Plan

Freight and Economics
Steering Committee Meeting #5
October 8, 2020



Introduction to Speakers

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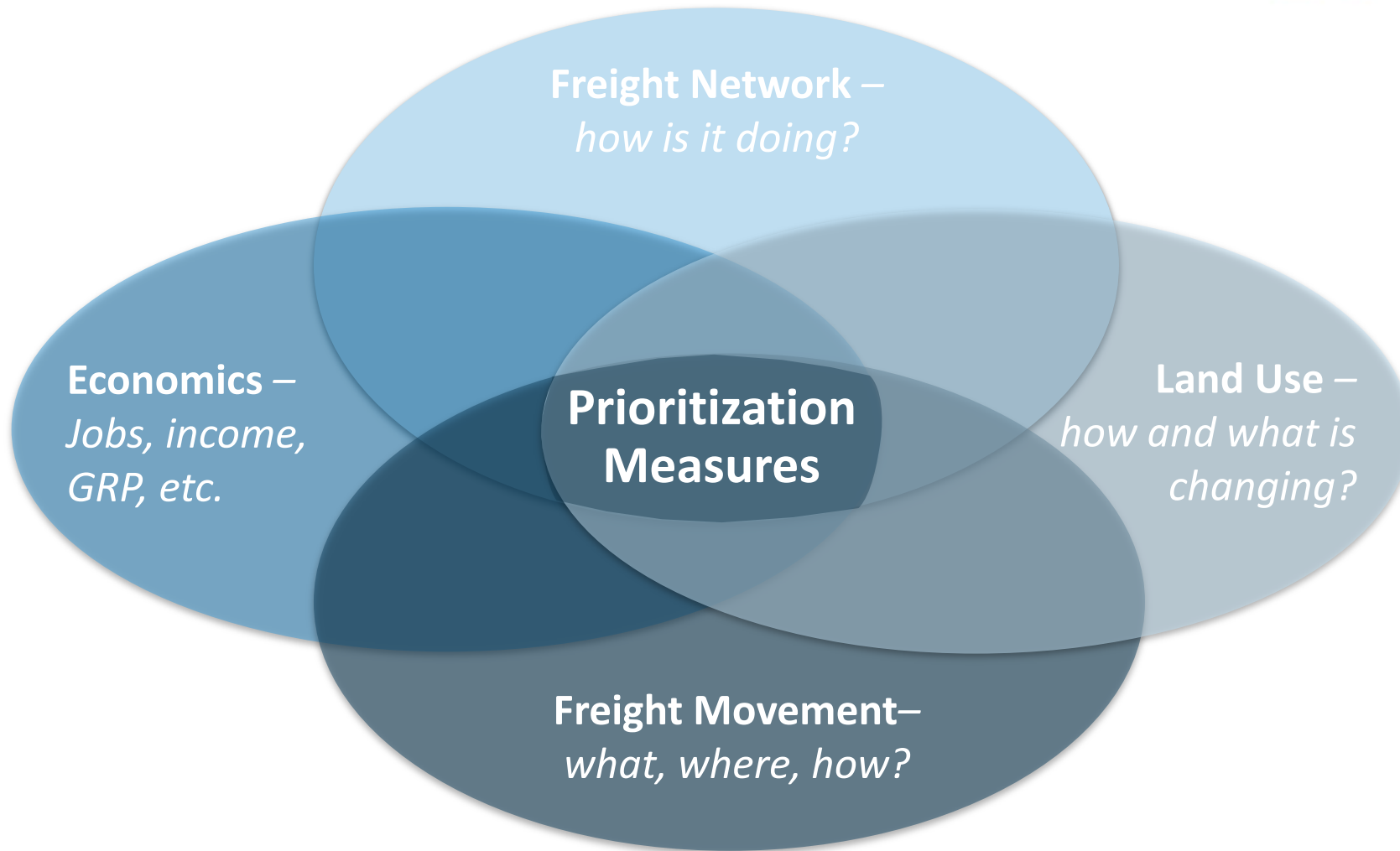
Eric McClellan
Lead Economist
Columbia, SC



Evan Bigos
Senior Economist
Orlando, FL

Analysis Elements

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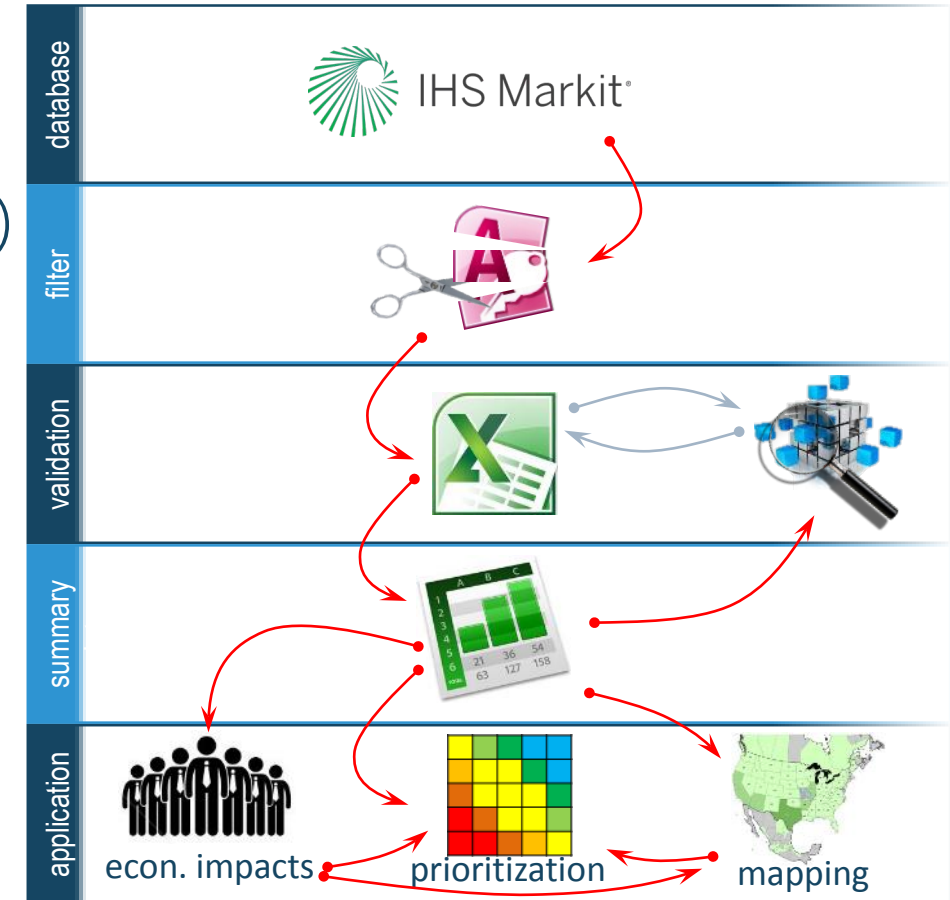


Today's Topics

ACOG REGIONAL FREIGHT MOBILITY PLAN



- Regional Freight Commodities
 - TRANSEARCH data
 - inbound, outbound, intra-regional (not through)
 - dollar value focused
- Regional Socioeconomics
 - existing population, employment, etc.
 - context for economic impacts
- Freight Economic Impacts
 - freight service providers
 - freight users: shippers/receivers



Polling Question

- Rank freight directions by economic significance



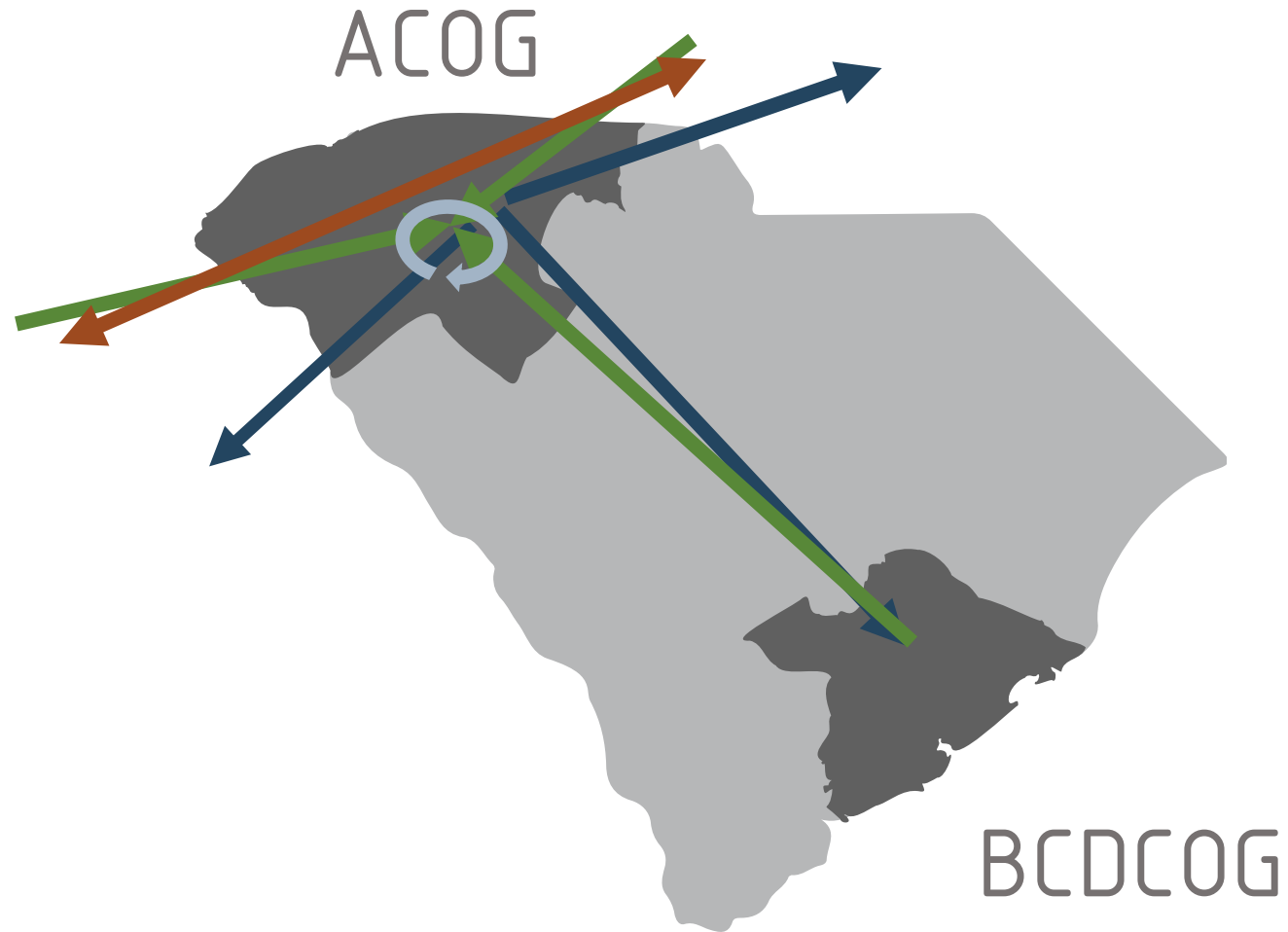
Regional Commodities

Source: IHS Markit's TRANSEARCH 2016



Directional Importance

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TRANSEARCH Summary (Rehash)

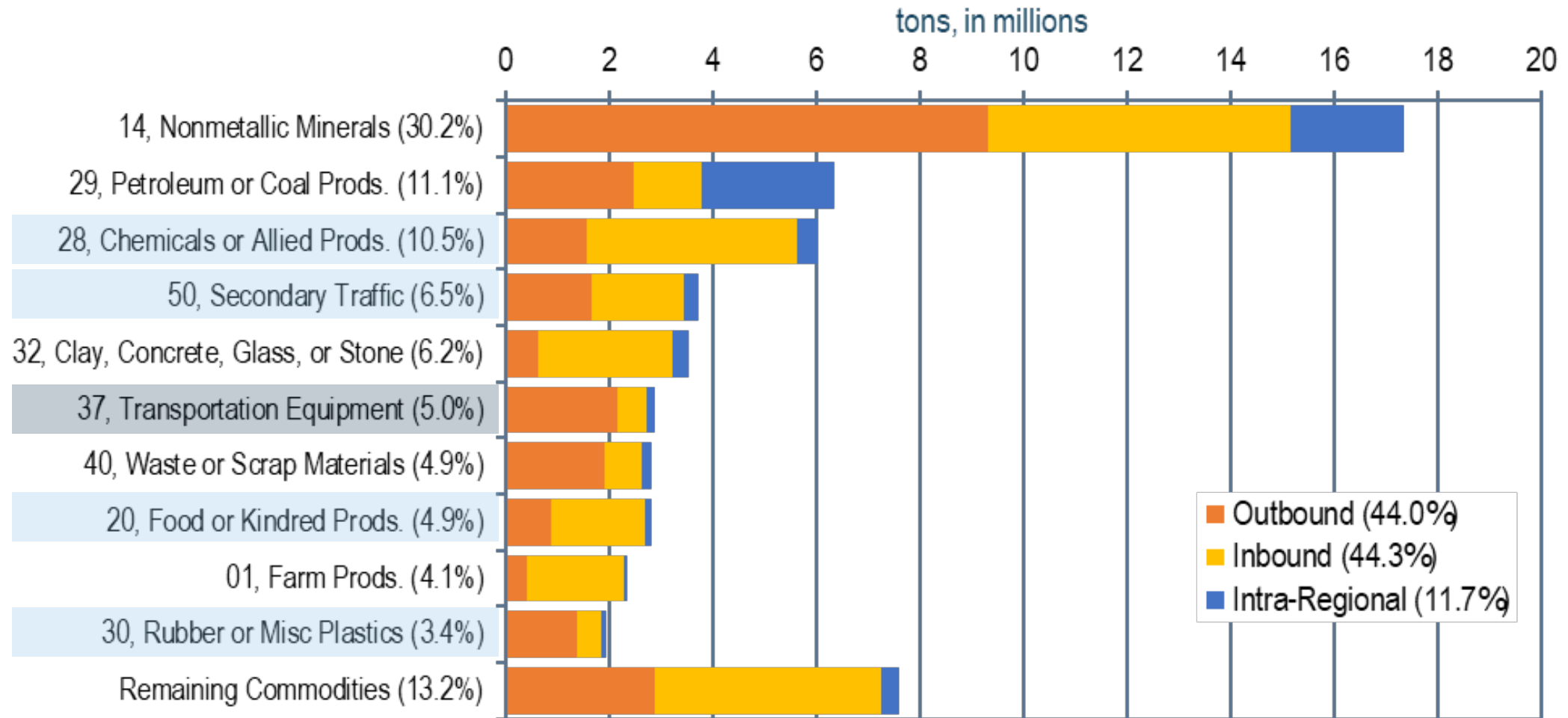
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Direction	Truck	Rail	Other	Air	Total
Tons					
Outbound	23,277,834	1,939,905	840	15,753	25,234,333
Inbound	22,359,643	3,16,116	38,648	15,279	25,429,686
Intra-Regional	6,710,030	20,920	#N/A	#N/A	6,730,950
Through	51,394,006	29,791,316	#N/A	#N/A	81,185,322
Total					138,580,290
Value, in millions					
Outbound	\$43,343	\$8,307	\$6	\$1,484	\$53,141
Inbound	\$31,412	\$5,891	\$409	\$1,598	\$39,311
Intra-Regional	\$6,217	\$41	#N/A	#N/A	\$6,258
Through	\$112,411	\$48,396	#N/A	#N/A	\$160,806
Total					\$259,517

Regional Commodities (by tons)

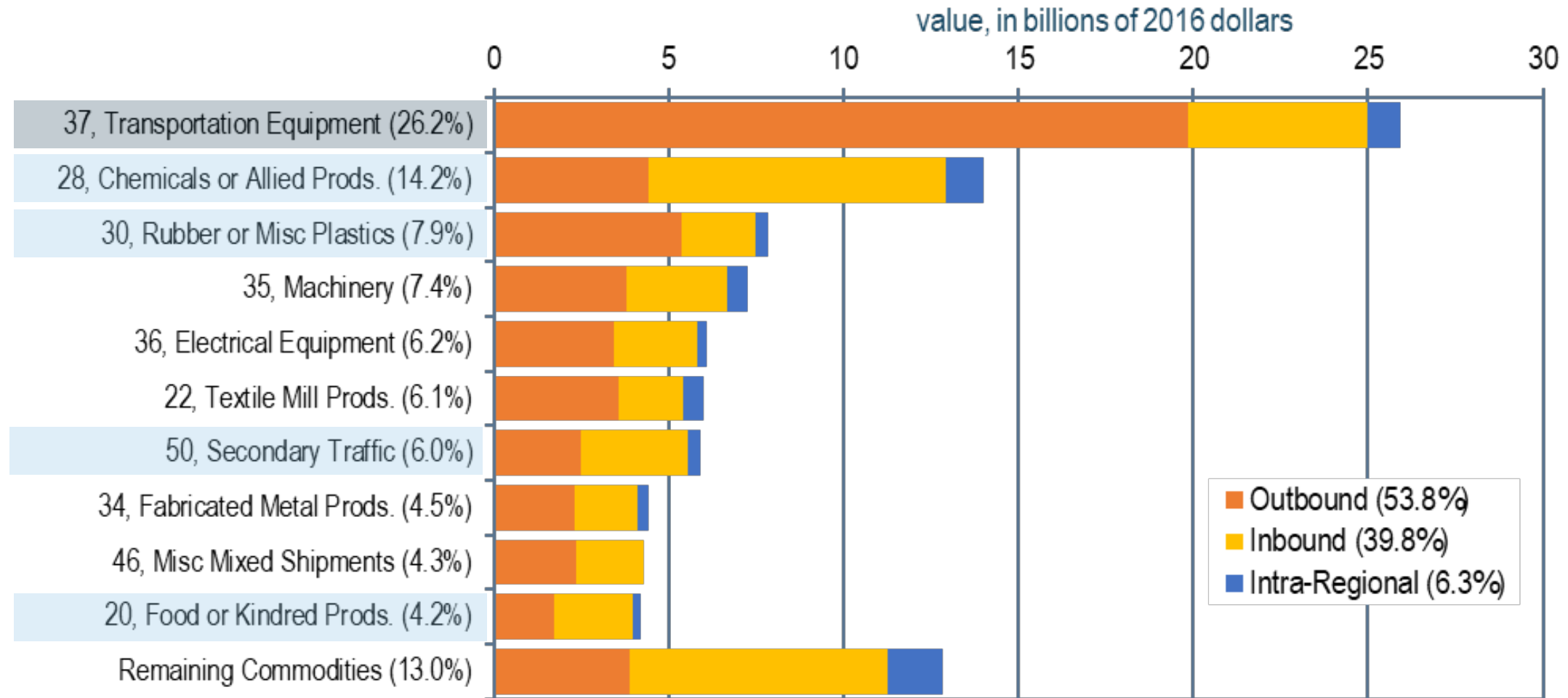
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economically relevant

Regional Commodities (by value)

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in top 10 by tons

Polling Question

- What industry sector employs most in the region?

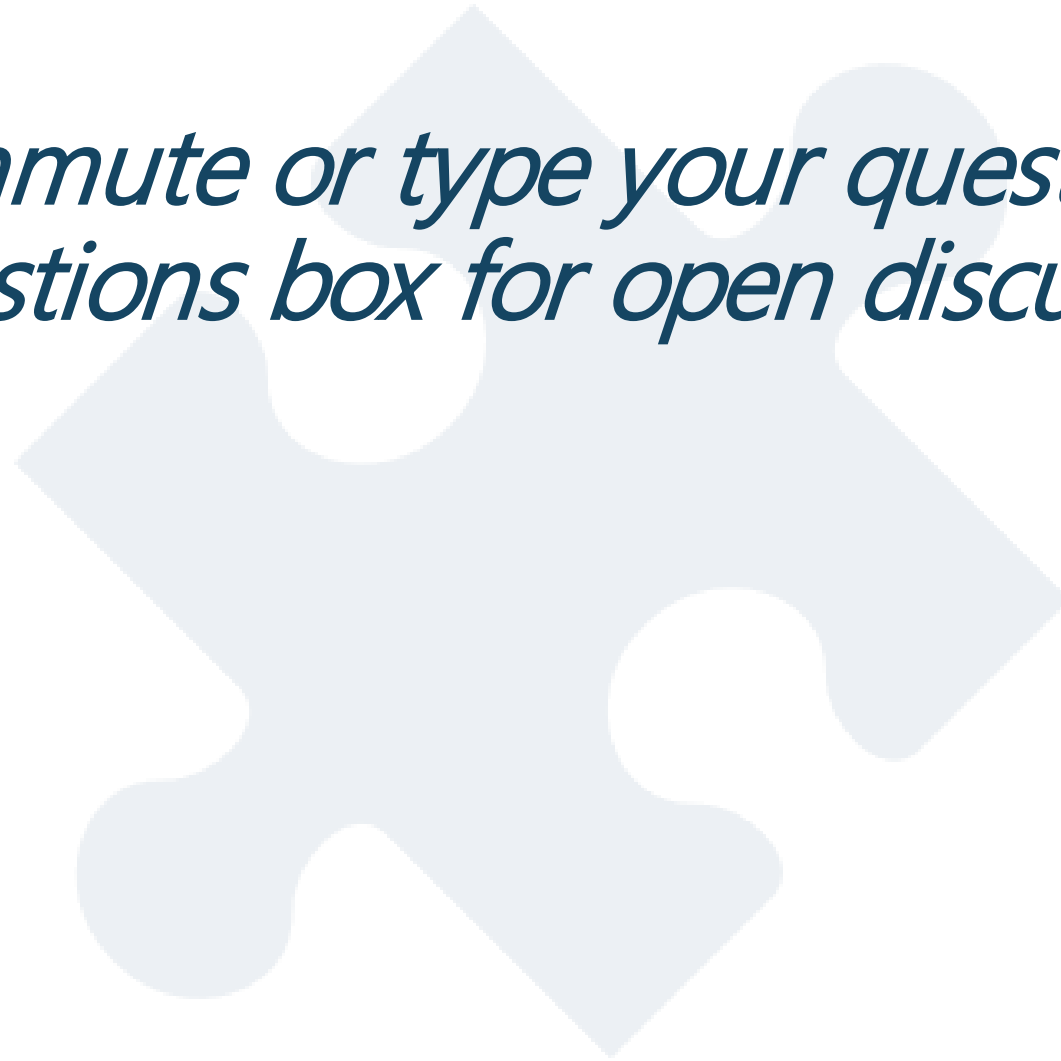


Stop and Pause

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Please unmute or type your questions in the questions box for open discussion



Regional Socioeconomics

Source: IMPLAN 2018

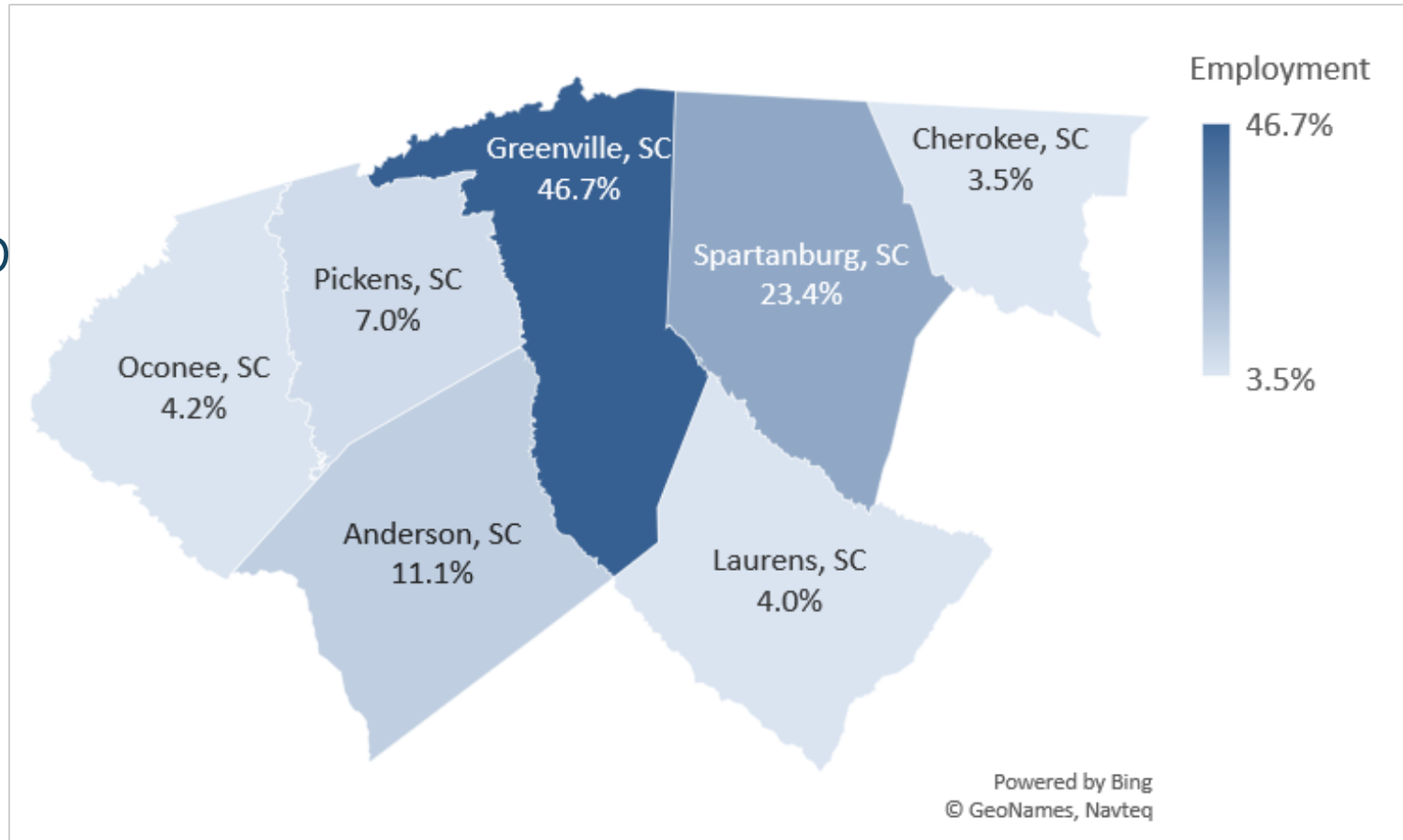


ACOG Socioeconomics (2018)

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- Population: 1,356,000
- Employment: 790,200
- Value Added (GRP): \$67.8b
- Output: \$147.2b
- 1/4 to 1/3 of SC

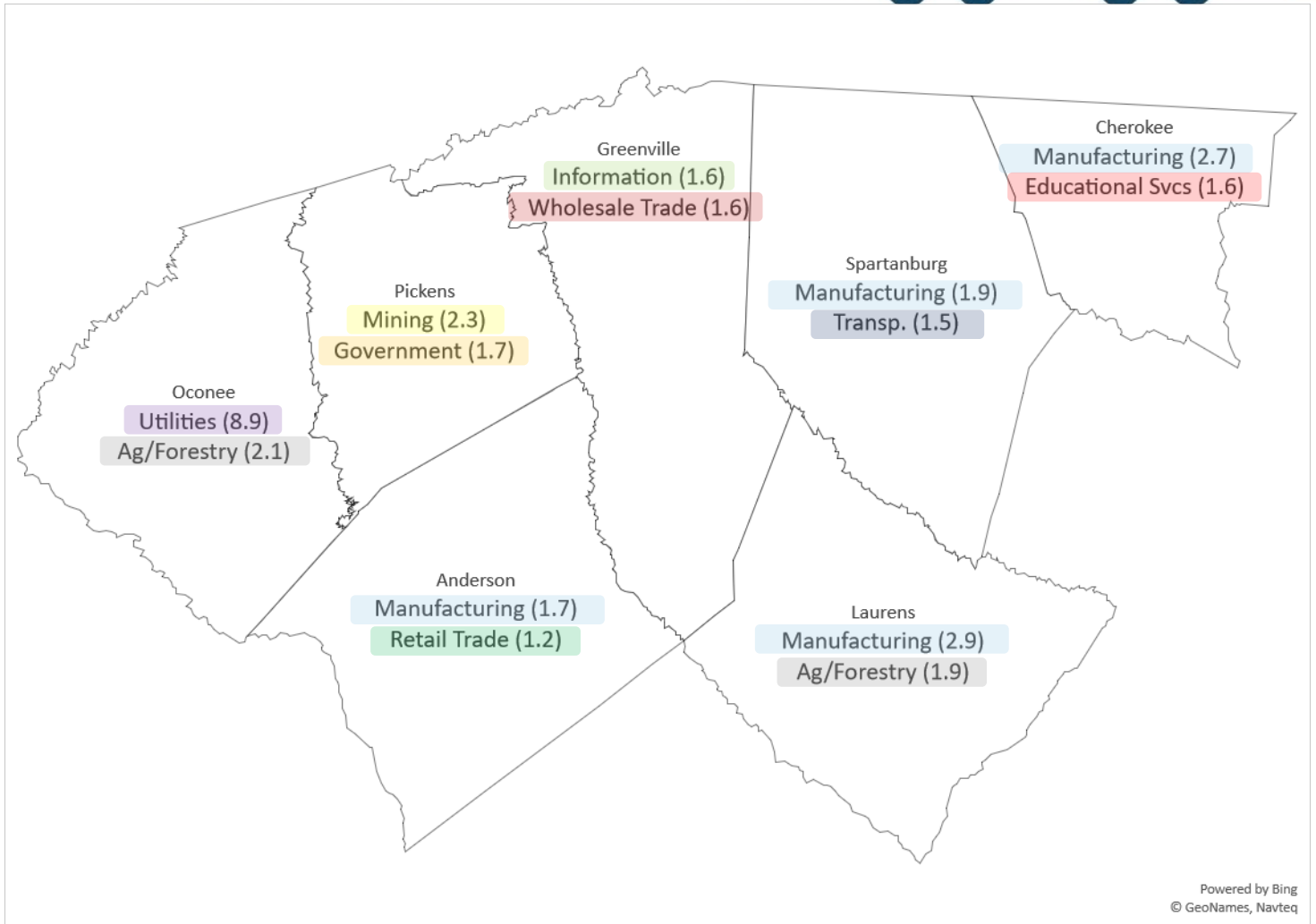


ACOG Employment LQ

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	Industry	ACOG
Goods	11 Ag/Forestry	0.64
	21 Mining	0.72
	22 Utilities	0.77
	23 Construction	0.97
	31-33 Manufacturing	1.44
	42 Wholesale Trade	1.31
	44-45 Retail Trade	0.95
	48-49 Transp.	1.05
Services	51 Information	1.05
	52 Finance/Insurance	0.91
	53 Real Estate/Rental	0.86
	54 Prof. Svcs	0.99
	55 Management	1.13
	56 Admini./Waste	1.16
	61 Educational Svcs	1.24
	62 Health/Social Svcs	0.92
	71 Arts/Entertain/Rec.	0.82
	72 Accom./Food Svcs	0.90
	81 Other Services	1.02
	92 Government	0.81



ACOG Industry Composition

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jobs



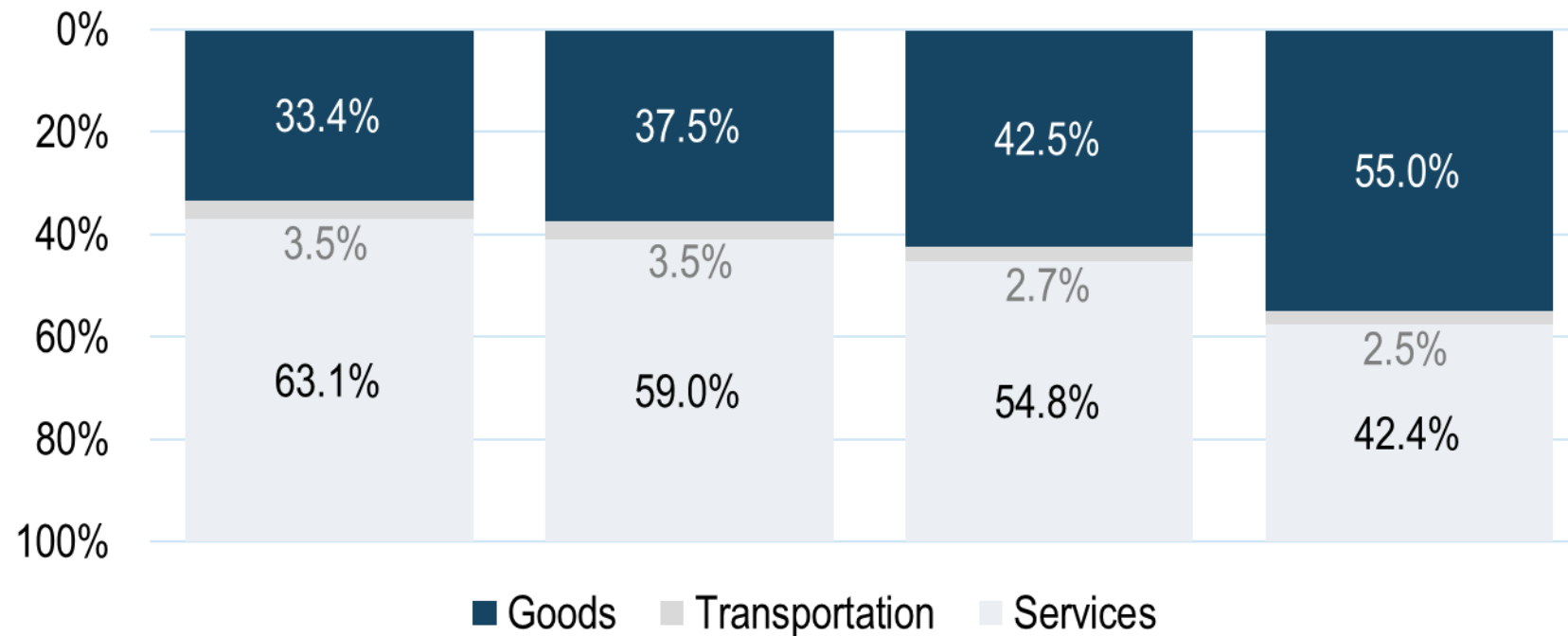
income



GRP



output



Freight Economic Impacts

*Draft Estimates



Freight Economic Impact Process

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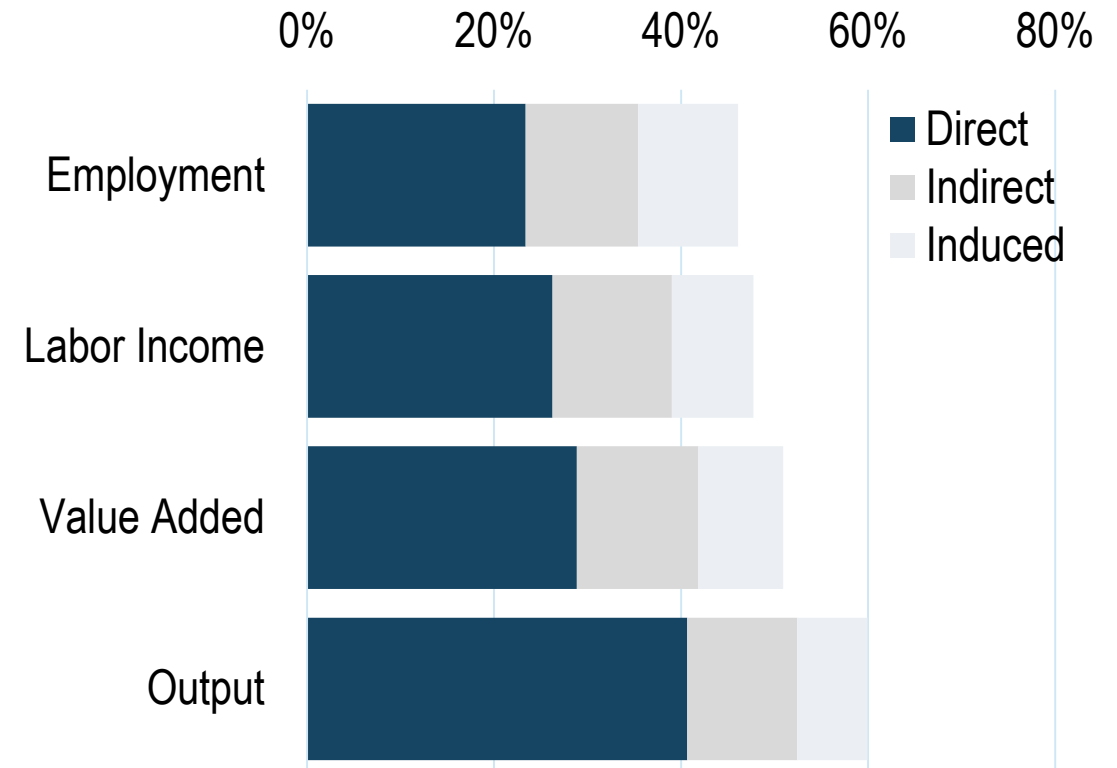
- Bridge TRANSEARCH w/ IMPLAN
 - IMPLAN identifies commodity-to-industry structure
 - TRANSEARCH provides directional freight values
 - Adjust for:
 - through (and misattributed outbound/inbound)
 - self-supplied intra-industry production
 - economically irrelevant commodities
 - other anomalies
- Estimate Impacts via IMPLAN
 - Activities:
 - freight users (shippers/receivers)
 - freight service providers
 - Type: direct, indirect, and induced
 - Measures: employment, income, VA, and output

Freight Economic Impact Summary

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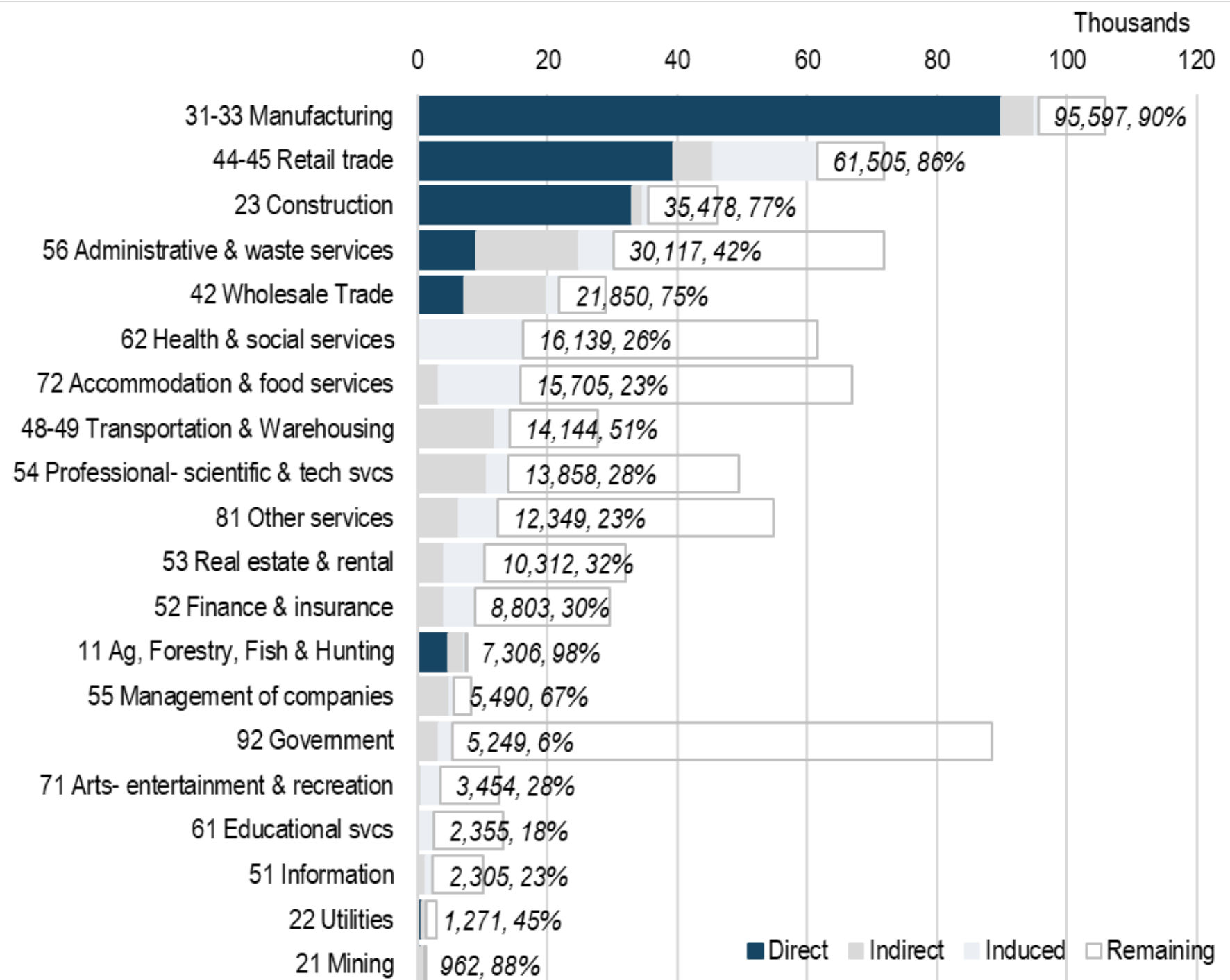


	Employment	Labor Income*	Value Added*	Output*
Impact Type				
Direct	184,709	\$10,680	\$19,570	\$59,849
Indirect	95,348	\$5,185	\$8,827	\$17,321
Induced	84,192	\$3,553	\$6,144	\$11,037
Total	364,249	\$19,418	\$34,541	\$88,207
% of Region				
ACOG	790,234	\$40,666	\$67,822	\$147,219
Direct %	23%	26%	29%	41%
Indirect %	12%	13%	13%	12%
Induced %	11%	9%	9%	8%
Total %	46%	48%	51%	60%



*in millions of 2018\$

Industry Sector Employment Impacts



Conclusions

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- Regional Impacts
 - *Relevant*
 - Direction – inbound, outbound, intra-regional
 - Commodities – chemicals, food, trans. equipment, etc.
 - Other Directions/STCC Economically Irrelevant
 - Direction – through (incl. repositioned in/outbound)
 - Commodities – secondary traffic, most waste, empty containers
- Freight Economic Impacts
- ~45-60% of ACOG Economy, mostly goods-related
 - Relies heavily on other State infrastructure

Polling Question

- How will COVID-19 change freight?



Questions/Comments?

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Next Steps

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STEERING COMMITTEE MEETING DATES	STEERING COMMITTEE MEETING TOPIC	LUNCH & LEARN WEBINAR TOPICS
June 4	Introduction to Freight Planning	N/A
July 16	Best Practices & Network Assessment	Smart Cities & Railroad Technology
August 13	Land Use Analysis	Truck Parking & Automation
September 10	Goals, Objectives, & Performance Measures	Freight Data Analysis
October 8	Economic Impact Analysis	N/A
November 12	Draft Plan Recommendations	TBD
December/ January Final Plan		

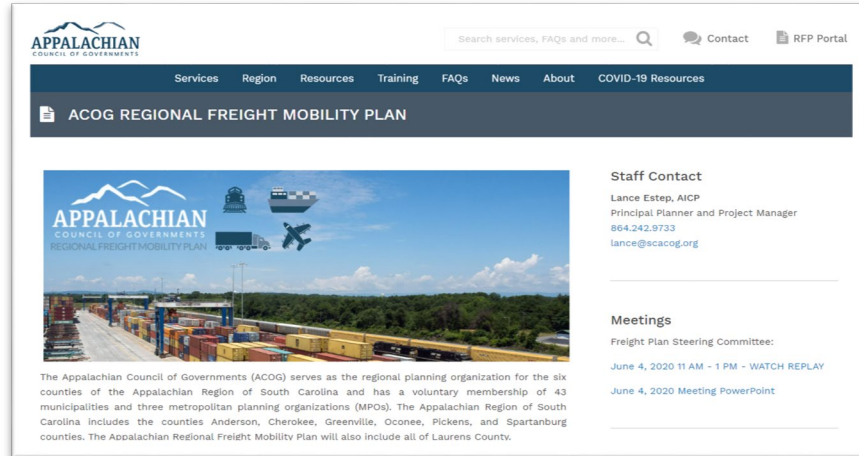
Thank You

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[SCACOG.org/acog-freight-plan](https://scacog.org/acog-freight-plan)



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