

**Garden City
Economic
Development
Draft**

CHAPTER 4

ECONOMIC DEVELOPMENT ELEMENT

Economic Development Element

Introduction: Economic Development in the Regional Context

Purpose

The Economic Development Element provides a comprehensive overview of Garden City’s economic landscape, with particular attention to the infrastructure, labor force, and industry drivers that sustain the community over time. The purpose of this element is to offer a clear, fact-based resource for residents, businesses, and partner agencies, as well as a practical decision-making guide for elected officials and staff.

This element builds on the foundation established in the **Plan 2040** while incorporating updated data, regional trends, and emerging economic drivers documented through the 2025-2026 period. It explains how Garden City’s economy is shaped by forces that extend beyond its municipal boundaries, and it identifies where local policy choices can influence outcomes, particularly in land use, workforce development, transportation, and redevelopment. In doing so, the Economic Development Element is intended to be both descriptive and strategic: it documents current conditions and also frames the key questions that Garden City must address as it plans for long-term economic resilience and inclusive growth.

Regional Role and Coordination

As a critical node within the Savannah Metropolitan Statistical Area (MSA), Garden City serves a specialized role as the industrial and logistics hub for the Port of Savannah, concentrating port-adjacent freight activity, trucking operations, and warehouse capacity in a compact geography. While Garden City is a distinct municipality with its own governance, zoning authority, and public service responsibilities, its economic health is heavily influenced by regional assets, most notably the Georgia Ports Authority’s Garden City Terminal and the interstate corridors of I-95 and I-16 that connect the port to inland markets. The City’s industrial districts, rail spurs, and highway interchanges are part of a larger network that moves goods between global origins and destinations and distributes them throughout the Southeast.

This regional interdependence means that Garden City’s economic development goals cannot be pursued in isolation. Freight flows, workforce commuting patterns, and investment decisions by major employers are shaped by regional housing markets, transportation investments, and education and training systems. In turn, the region depends on Garden City to maintain efficient port operations, provide well-located industrial land, and manage local impacts such as traffic, noise, and land use transitions near neighborhoods.

Garden City depends on strong partnerships with Chatham County, neighboring cities, the Metropolitan Planning Commission (MPO), the Savannah Economic Development Authority (SEDA), the Georgia Ports Authority, and State agencies to align land use, infrastructure, and workforce strategies. This element recognizes those interdependencies and emphasizes coordination as a core principle of Garden City’s economic development approach.

Consistent with the Plan 2040 methodology, this update uses an asset-based approach that starts with Garden City’s existing strengths and then considers how to address constraints and emerging risks. The framework identifies local resources that give the City its economic identity, particularly its strategic port adjacency, freight infrastructure, and established industrial base, and develops strategies that accentuate these strengths while mitigating environmental, infrastructure, and quality-of-life challenges.

The planning framework also reflects the structural shifts documented in the Savannah-Chatham County Comprehensive Plan 2040 Update, including the logistics boom of the early 2020s, the arrival of the Hyundai Motor Group Metaplant and its supplier network, and the resulting increase in demand for technical skills and industrial land. These regional forces have heightened pressure on housing and transportation systems and increased the stakes for decisions about where and how Garden City grows. Within this context, the Economic Development Element is organized to move from regional conditions to local implications.

Regional Economy: The Savannah MSA

Regional Economic Structure

Garden City sits at the center of an integrated regional economic system that has experienced significant growth and diversification since the initiation of Plan 2040. The Savannah MSA is characterized by a high concentration of transportation, warehousing, and logistics activities anchored by the Port of Savannah, complemented by a growing advanced manufacturing sector, a robust tourism and visitor economy, a large healthcare system, and a stable military and government presence. This diversified structure has helped the region maintain stability and provides a strong foundation for future growth.

The Savannah Metropolitan Statistical Area (MSA), comprised of Chatham, Bryan, and Effingham counties, supported a population of approximately 431,589 residents in 2024, making it Georgia’s third-largest metropolitan area after Atlanta and Augusta. The region has demonstrated sustained population growth of about 1.8% per year, driven by in-migration of working-age adults and families attracted by employment opportunities and quality of life. Regional employment reached 199,762 jobs in the second quarter of 2025, with expansion concentrated in trade, transportation, and utilities; accommodation and food services; healthcare and social assistance; and manufacturing. As of the second quarter of 2025, the Savannah MSA unemployment rate stood at approximately 3.1%, and the average weekly wage reached \$1,184, a 4.3% increase over the prior year, signaling a competitive labor market that is favorable for workers but challenging for some employers.

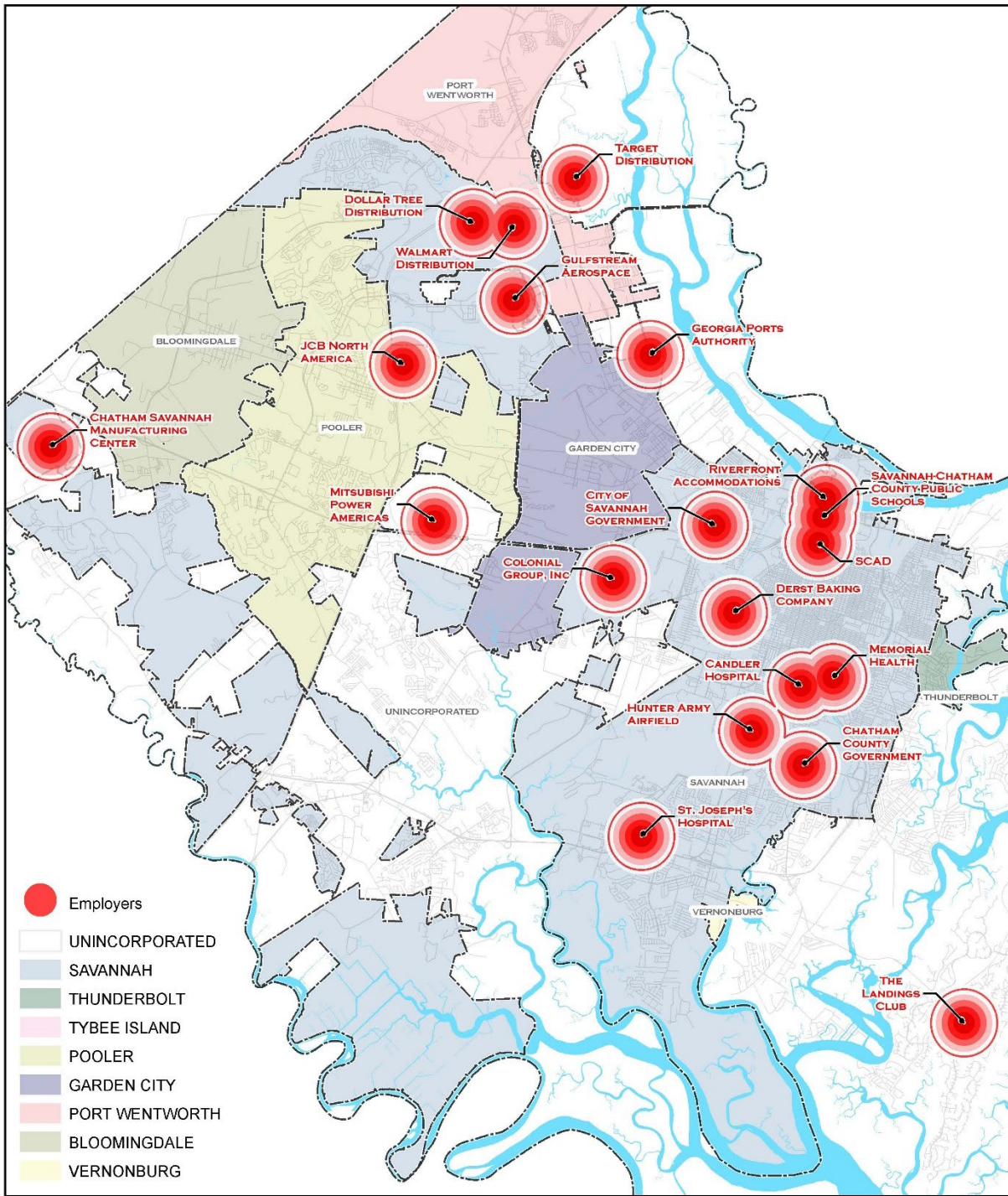
Employment by Industry			
Sector	Employment	Percent	Weekly Wage
Trade, Transportation & Utilities	48,410	24.2%	\$1,118
Accommodation & Food Services	28,201	14.1%	\$583
Health Care & Social Assistance	27,742	13.9%	\$1,253
Manufacturing	24,642	12.3%	\$1,803
Retail Trade	23,422	11.7%	\$794
Government	24,927	12.5%	\$1,291
Professional & Business Services	21,818	10.9%	\$1,063
Education & Training	3,987	2.0%	\$1,471
Construction	9,432	4.7%	\$1,403
Finance & Insurance	3,065	1.5%	\$1,926

Source: Georgia Department of Labor, Area Labor Profile for Savannah MSA (December 2025)

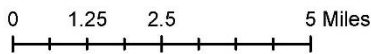
Figure 4.1 – Employment by Industry

Garden City’s Competitive Regional Position

Within this regional economy, Garden City possesses several competitive advantages that position it well for continued investment and job creation. The City remains a Tier 1 community for State job tax credits under Georgia’s Military Zone designation, which allows eligible businesses to receive up to \$3,500 per job created. This incentive can be especially powerful for logistics, manufacturing, and technology employers that need to assemble large workforces and that benefit from being near the Port. Garden City’s Military Zone status is complemented by its official recognition as a Broadband Ready community, signaling that the City has put streamlined processes and policies in place to make broadband investment easier, and is recognized by the State as being proactive on preparation for installation of digital infrastructure (see Quality of Life Element).



CHATHAM COUNTY - SAVANNAH
METROPOLITAN PLANNING COMMISSION



THIS MAP IS A COMPILATION OF INFORMATION FROM VARIOUS SOURCES AND SCALES. IN MOST CASES THE INFORMATION HAS NOT BEEN FIELD VERIFIED. USE THIS MAP FOR GENERAL PLANNING PURPOSES ONLY.

Exhibit 4.1 – Regional Employment Centers

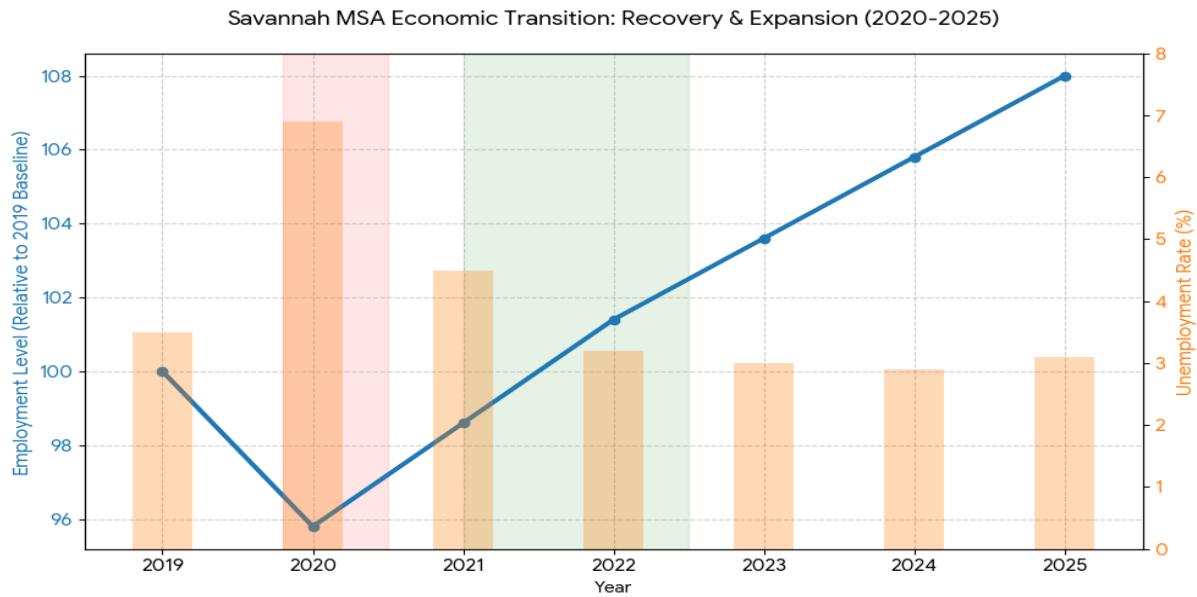
Garden City's most significant structural advantage is its direct adjacency to the Garden City Terminal and its position at the convergence of Interstate 95, Interstate 16, and major rail corridors operated by CSX and Norfolk Southern. This combination of deep-water port access, on-dock rail capacity, and interstate connectivity gives businesses in Garden City an uncommon ability to move goods efficiently across domestic and international markets.

At the regional scale, Chatham County functions as the primary employment engine, with roughly 170,424 jobs across approximately 11,012 establishments as of first quarter 2025 (Bureau of Labor Statistics QCEW). This place-of-work total significantly exceeds the number of employed residents in the county, confirming its role as a job center that imports workers daily from neighboring areas. Garden City is one of the high-intensity nodes within this network, with employment density far out of proportion to its small residential population, particularly in industrial and port-adjacent areas in the eastern portion of the City. The City's competitive position therefore depends not only on maintaining a business-friendly regulatory environment but also on ensuring that industrial and logistics expansion is balanced with neighborhood protection, environmental stewardship, and support for local-serving commercial development, including workforce housing.

Post-Pandemic Economic Recovery

The Savannah MSA has demonstrated strong economic resilience in the years following the COVID-19 pandemic. In 2020, regional unemployment briefly spiked above 6%, and total employment declined by roughly 4.2% as lockdowns and public health measures curtailed travel, disrupted supply chains, and slowed consumer spending. However, the region's diversified economic base helped moderate the severity and duration of the downturn. By 2021 and 2022, employment rebounded by approximately 5.8%, driven by the reopening of businesses, rapid growth in e-commerce logistics, and a resurgence in tourism.^[2]

Between 2023 and 2025, the region entered a phase of sustained expansion, with unemployment normalizing in the 3% range and total employment surpassing pre-pandemic levels by an estimated 8%. The hospitality sector, initially the hardest hit, achieved full recovery by late 2022 and has since exceeded previous visitor totals. At the same time, manufacturing remained comparatively stable, and healthcare continued to expand in response to demographic change. The logistics sector experienced accelerated growth as companies reconfigured supply chains and increased inventory levels, while government and military employment provided a stabilizing backbone for incomes and local spending.



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS), 2019–2025; Georgia Department of Labor, Workforce Statistics Division

Figure 4.2: Regional Employment and Unemployment Trends, 2019–2025

For Garden City, regional trends translate into a labor market where demand for skilled workers in transportation, warehousing, and manufacturing remains consistently high, and employers face ongoing competition for talent. The City’s industrial base benefits from the logistics boom and the acceleration of e-commerce, but also faces new pressures related to warehouse vacancy and tenant leverage as the market adjusts from earlier rapid build-out. In this environment, long-term economic resilience for Garden City will depend on maintaining efficient freight operations, diversifying beyond bulk warehouse development, and ensuring that residents can access education and training pathways that position them for the higher-skill roles emerging in advanced logistics, manufacturing, and healthcare.

Commuting Patterns and Labor Inflow/Outflow

Garden City’s commuting patterns highlight its role as both a regional employment hub and a bedroom community tied into wider labor markets. The City is a net importer of labor, in which more people commute into the City for work than commute out to jobs elsewhere.

According to OnTheMap and Longitudinal Employer–Household Dynamics (LEHD) data, nearly 96% of workers employed within Garden City live outside the City limits, travelling along Highway 21, Highway 80, and key interstate corridors to reach the Garden City Terminal, nearby logistics parks, and industrial facilities.

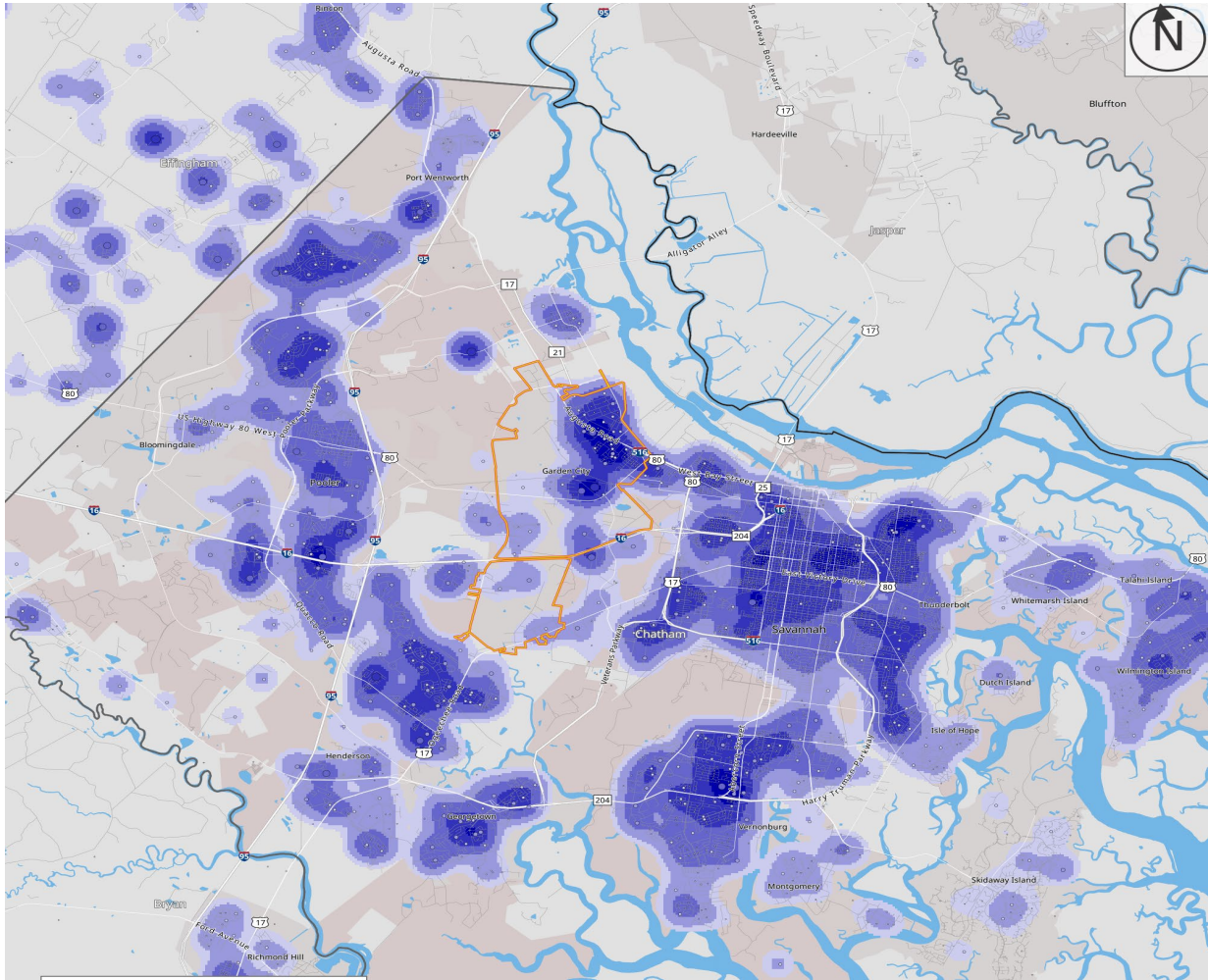


Exhibit 4.2: In-Bound Workforce to Garden City

Conversely, approximately 93% of Garden City’s working residents commute to jobs outside the City, primarily in Savannah, Pooler, other parts of Chatham County, and increasingly in the Bryan County manufacturing corridor anchored by the Hyundai Metaplant. Average commute times for Garden City residents generally fall between 18 and 20 minutes one way, a reasonable distance that nevertheless reflects the necessity of cross-jurisdictional travel to access employment.

This high volume of in-and-out commuter traffic contributes to notable peak-hour congestion on local and regional routes and places additional wear on Garden City’s roadway network. However, while the City hosts a large employment base and absorbs the impacts of freight and commuter traffic, a substantial portion of the wage income and retail spending occurs in other jurisdictions where workers live. Capturing even a modest share of the in-commuter workforce as residents, through expanded housing options, improved neighborhood amenities, and enhanced quality of life, would increase local consumer spending, strengthen the City’s tax base, and reduce regional vehicle miles traveled.

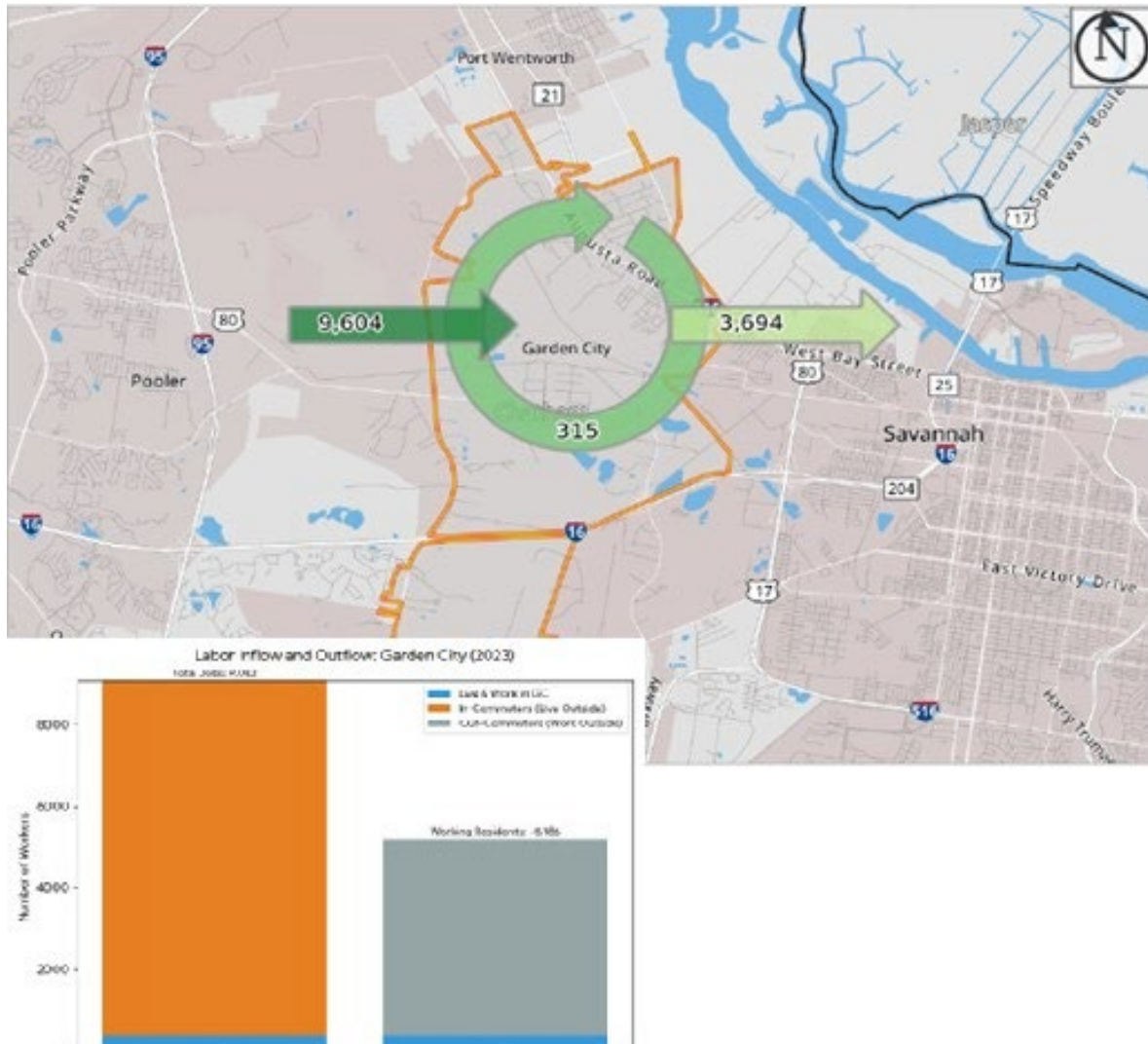


Exhibit 4.3 - Worker In and Out Flows (To/From Garden City)

From a planning perspective, these commuting patterns emphasize the need for Garden City to coordinate land use, transportation, and housing policies with regional partners. They also argue for economic development strategies that seek not just to create jobs, but to align local education and training with the higher-skill positions in logistics, manufacturing, and services that are already present in the City. By doing so, Garden City can improve economic outcomes for its residents while maintaining the efficient operations that make it a vital node in the Savannah region’s economy.

Labor Force Characteristics

Garden City’s labor force reflects its dual identity as a small residential community and a major industrial employment center.

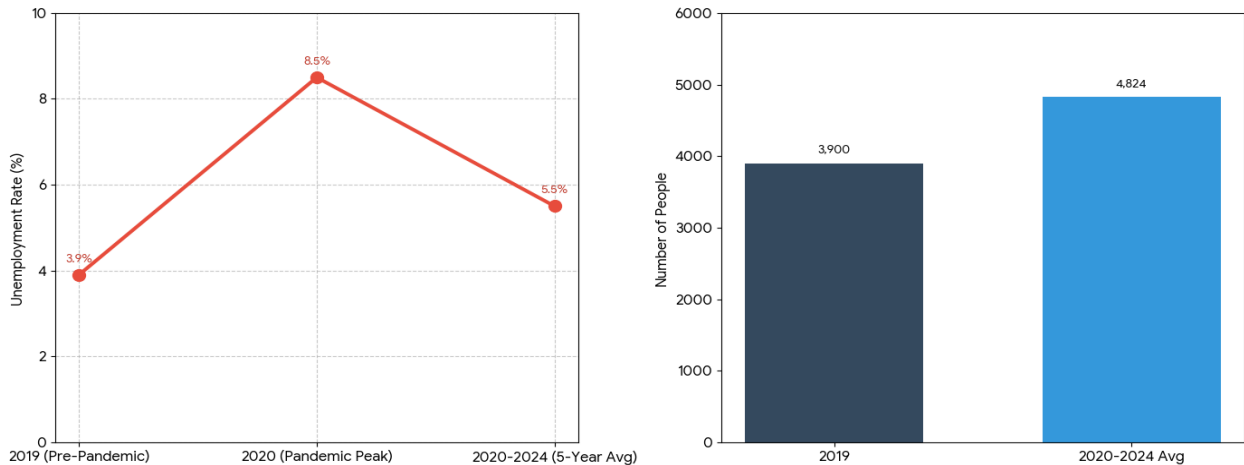
Key Socio-Economic Characteristics			
Key Characteristic	Garden City (Local)	Chatham County (Regional)	% / Comparison to County
Population	10,375	298,143	3.5%
Households	3,350	109,868	3.1%
Total Employment	9,082	169,483	5.4%
Average Weekly Wage	\$1,023	\$1,099	93.1%
Unemployment Rate	5.5%	7.4%	
Drove Alone to Work	76.0%	76.8%	
Carpooled to Work	19.2%	9.6%	Twice as likely to carpool to work
Mean Travel Time (Min)	19.7	22.4	
Median Household Income	\$42,013	\$57,739	72.8% of County
Per Capita Income	\$22,713	\$33,106	68.6% of County
Uninsured Rate	29.5%	14.0%	More than twice as likely to be uninsured
Poverty Rate (All People)	17.6%	14.4%	More likely for income below poverty level

Sources: Georgia Department of Labor, Area Labor Profile for Savannah MSA (December 2025); U.S. Census Bureau, ACS DP03, DP05 2019–2023 5-Year Estimates; BLS QCEW 2023 US Census Bureau, OnTheMap Application 2023 LEHD Origin-Destination Employment Statistics

Figure 4.3 – Key Socio-Economic Characteristics Chatham County & Garden City

Labor Force and Unemployment

Historically, Garden City’s unemployment rate has tended to track just above the regional average due to its concentration in trade-sensitive industries; as global trade volumes and regional logistics demand have normalized following the pandemic, this gap has narrowed.



Source: US Bureau of Labor Statistics; US Census Bureau, ACS DP03 5 Year Average (2020 - 2024)

Figure 4.4 -Garden City Unemployment Rate Trend and Growth in Labor Force

Even with current low unemployment, the structure of Garden City’s labor market presents important considerations for policy. Many jobs located in the City are filled by non-residents who commute from surrounding jurisdictions, while a majority of working residents travel to jobs outside the City limits.

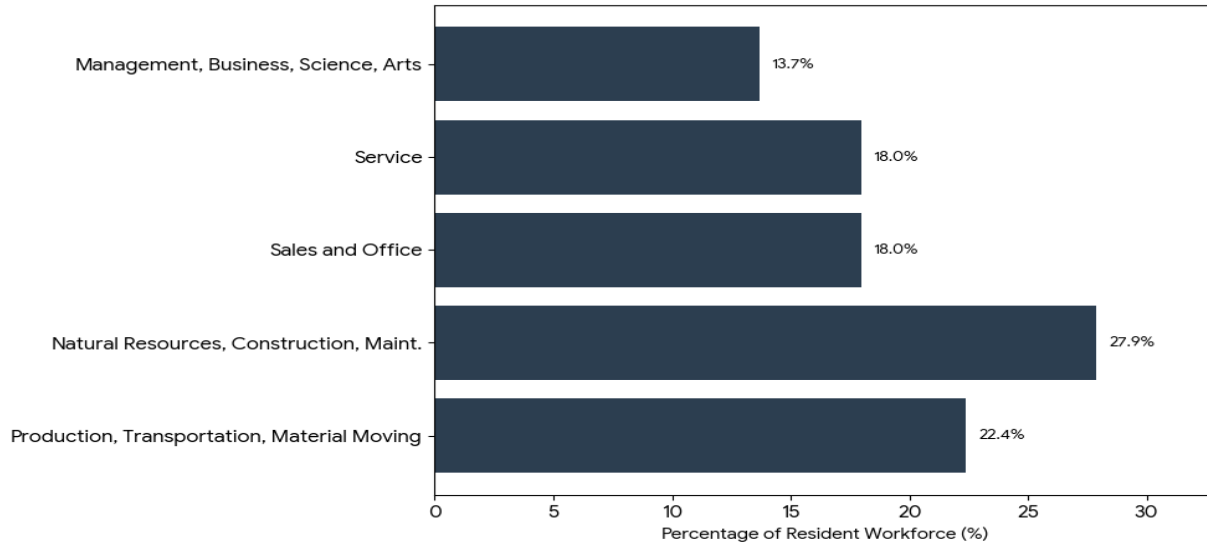


Figure 4.5 – Occupational Breakdown of Garden City Residents

The challenge for Garden City is not simply creating jobs but improving the match between local residents and higher-quality positions. Achieving this alignment will require investments in education, technical training, and supportive services, coordinated land use and housing policies allowing more workers to live closer to their jobs.

Educational Attainment

Educational attainment is a key determinant of Garden City’s ability to attract and retain higher-value industries and to ensure that residents can access the full spectrum of regional employment opportunities. The City has made steady progress in high school completion, reflecting improvements in the Savannah-Chatham County Public School System (SCCPSS) and heightened regional focus on graduation outcomes. However, there remains a notable gap between Garden City and the broader County and MSA in terms of post-secondary credential attainment, particularly at the bachelor’s level.

Approximately 85.0% of Garden City residents aged 25 and older have a high school diploma or GED equivalent, a rate that signals strong participation in basic education but also leaves a remaining share of adults without a secondary credential. By comparison, roughly 91.2% of adults in Chatham County hold at least a high school diploma. At the post-secondary level, an estimated 16.1% of Garden City residents aged 25 and older hold a bachelor’s degree or higher, a figure substantially lower than the approximately 36.8% county-wide and

regional share. This pattern suggests that Garden City’s workforce is more heavily represented in occupations that rely on technical training, certifications, and on-the-job experience, rather than four-year degrees, aligning with the City's industrial profile.

Educational Attainment		
Educational Attainment	Chatham County	Garden City
Population 25 years and over	%	%
Less than 9th grade	2.9%	5.4%
9th to 12th grade, no diploma	5.8%	9.6%
High school graduate (includes equivalency)	24.6%	38.1%
Some college, no degree	22.4%	25.4%
Associate's degree	7.4%	5.4%
Bachelor's degree	22.0%	11.4%
Graduate or professional degree	14.7%	4.7%
High school graduate or higher	91.2%	85.0%
Bachelor's degree or higher	36.8%	16.1%
Source: ACS 2023 5-Year Estimates (S1501)		

Figure 4. 6 - Educational Attainment

Regionally, four-year institutions, including Savannah State University, Georgia Southern University’s Armstrong Campus, and SCAD, collectively support roughly 78,000 student enrollments annually and provide a steady pipeline of graduates in fields such as engineering, health professions, business, and the arts. While these institutions are not located within Garden City’s boundaries, their graduates contribute to the broader talent pool available to employers in the City and offer advancement pathways for residents who choose to pursue bachelor’s or graduate degrees. For many Garden City residents, however, cost, time, and transportation constraints make two-year programs and technical certifications a more accessible initial route into higher-skill jobs.

Economic Base and Industry Drivers

Major Employment Sectors Savannah MSA		
Major Employment Sector (% of MSA Employment)	Major Employers Chatham County Exclusively	Description of Activity
Logistics, Warehousing, Retail Trade, Transportation & Utilities 24.2%	Georgia Ports Authority	Seaport terminal operations; largest single-terminal container facility in North America.
	Target Distribution Center	Import warehousing and regional retail distribution.
	Walmart Distribution Center	Regional distribution hub for retail goods.
	Colonial Group, Inc.	Diversified energy, chemicals, and logistics; headquarters operations.
	Dollar Tree Distribution	Large-scale retail distribution logistics.
Education & Health Services Medicine, Higher Ed 13.9%	Memorial Health (HCA)	Region's largest private employer; Level 1 Trauma Center & Teaching Hospital.
	St. Joseph's / Candler	Health system specializing in cardiac, cancer, and outpatient services.
	Savannah-Chatham Co. Public Schools	Public K-12 education system (Largest county-wide employer).
	Savannah College of Art & Design	Private university for creative careers; major real estate holder.
Leisure & Hospitality Tourism, Dining, Accommodations 14.1%	The Landings Club	Private luxury golf and country club community operations.
	Various Hotel Groups	(Marriott, Westin, etc.) Supporting 17.3+ million visitors annually.
Manufacturing Aerospace, Industrial 12.3%	Gulfstream Aerospace	Jet aircraft manufacturing, R&D, and maintenance (Largest mfg. employer).
	JCB North America	Manufacture of construction and agricultural heavy equipment (HQ).
	International Paper	Paper products, linerboard, and pulp production.
	Mitsubishi Power Americas	Manufacture of gas turbines and power generation equipment.
	Derst Baking Company	Large-scale commercial bakery (Nature's Own, Sunbeam).
Government Federal, Local, Defense 12.5%	Hunter Army Airfield	Military airfield, training, and logistics support (Part of Ft. Stewart complex).
	City of Savannah	Municipal services, police, fire, water, and administration.
	Chatham County Government	County administration, sheriff, courts, and engineering.
Source: Georgia DOL Area Labor Profile MSA, Parker College of Business, Georgia Southern, Savannah Chamber of Commerce		

Figure 4.7 – Major Employment Sectors

Regional Top Ten Employers		
Rank	Employer	Estimate of Employees *
1	Gulfstream Aerospace Corp.	13,144
2	Savannah-Chatham County Public School System	5,882
3	St. Joseph's/Candler Health System	5,553
4	Memorial University Medical Center (HCA)	4,400
5	Walmart (Retail)	2,750–5,000
6	Chatham County Government	2,403
7	Savannah College of Art & Design (SCAD)	2,320
8	City of Savannah Government	2,310
9	Georgia Ports Authority	1,790
10	SNF Chemicals (Located in Liberty Co., but a regional major employer)	1,766

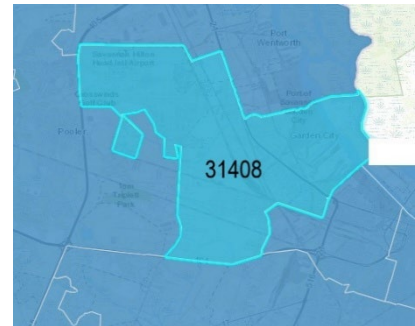
*2025 Data/2026 Report
Source: Parker College of Business, Georgia Southern, via Savannah Area Chamber of Commerce

Figure 4.8 – Regional Top 10 Employers

The Regional Port and Logistics Cluster

The Georgia Ports Authority’s Garden City Terminal’s scale and efficiency shapes both Garden City’s tax base and day-to-day conditions on the ground, supporting jobs directly at the terminal and indirectly through trucking, freight forwarding, customs brokerage, equipment maintenance, container storage, and an array of logistics and support services.

Location quotient analysis confirms that Garden City’s economic structure is far more heavily concentrated in logistics than the Savannah MSA as a whole, with ZIP code 31408 showing logistics and freight-related employment densities well above national averages. Industrial land in the City has been steadily absorbed by large-scale distribution centers, cross-dock facilities, container yards, and truck terminals, creating a land use pattern dominated by port-supporting functions. This specialization has historically provided a stable and growing tax base and consistent job creation, but also makes Garden City more sensitive to fluctuations in global trade volumes, shipping patterns, and national trade policy than more diversified communities, as well as land use inconsistencies and quality of life impacts.



The Port of Savannah’s capital investments reinforce the long-term importance of Garden City’s logistics cluster. Deepening of the Savannah Harbor to 54 feet at high tide allows

larger Neo-Panamax vessels to call more frequently, while the Mason Mega Rail Terminal provides unmatched on-dock rail capacity, connecting Garden City directly to Atlanta, the Midwest, and other inland markets. Additional capacity projects and inland port initiatives, such as the Blue Ridge Connector near Gainesville, extend the port's reach and are expected to generate additional container volumes that move through Garden City. These projects collectively ensure that the City's role in global supply chains will continue to be central to the region's economy for decades, even as logistics operators adapt to changing technologies and market conditions.

Manufacturing and Emerging “Meta-Pro” Sector

Garden City is increasingly tied into a regional transition toward advanced manufacturing and clean energy. The Hyundai Motor Group Metaplant in neighboring Bryan County represents a multi-billion-dollar investment that has elevated manufacturing's share of regional GDP and spurred the announcement of dozens of supplier facilities across the Savannah MSA. As production ramps up through the mid-2020s, this cluster is reshaping land demand, commuting patterns, and workforce needs throughout the region.

For Garden City, Hyundai's impact is most immediately felt through supply-chain and logistics roles rather than direct production. Components, raw materials, and finished vehicles moving between the Metaplant, its suppliers, and global markets rely on the Port of Savannah and the trucking and warehousing infrastructure concentrated in Garden City. This positions the City as a key logistics and inventory management hub for the emerging electric vehicle ecosystem, with opportunities for local firms to provide higher-value services such as just-in-time delivery, specialized handling, and logistics technology solutions. As regional manufacturing now accounts for roughly 18–19% of economic output, Garden City has a strategic opportunity to evolve from a pure freight-handling center to a node where component assembly, light manufacturing, and advanced logistics co-locate.

This shift is creating demand for a “meta-pro” workforce: workers who combine technical skills in automation, quality control, and equipment maintenance with logistics and digital competencies. For Garden City residents, these roles offer higher wages and more stable career paths than many traditional warehouse positions. State and regional programs such as Savannah Technical College's precision manufacturing and industrial systems technology programs, the Regional Industry Support Enterprise (RISE) initiative, and Georgia Quick Start provide structured pathways for upskilling existing logistics workers into advanced manufacturing and technical roles. Aligning local workforce strategies with these programs will be critical to capture a meaningful share of the new jobs associated with the Hyundai supply chain rather than serving solely as a pass-through for freight.

Healthcare and Institutional Drivers

Healthcare and social assistance constitute one of the Savannah MSA's largest employment sectors, providing nearly 14% of total jobs and above-average wages relative to many service industries. Major institutions such as Memorial Health University Medical Center and St. Joseph's/Candler anchor this sector, offering a full range of acute care, specialty services, and medical education programs. While these flagship hospitals are located in Savannah, their reach extends across the MSA, including Garden City, through outpatient facilities, physician offices, and associated service providers.

For Garden City, healthcare functions both as an employer for residents and as an essential local service. Many residents work in regional hospitals, clinics, and long-term care facilities, accessing career ladders in nursing, allied health, and support roles. Locally, facilities such as the Good Samaritan Clinic provide primary care and preventive services to uninsured or under-insured residents, illustrating the importance of institutional partners in addressing health equity and workforce readiness. As the region's population ages and healthcare demand grows, Garden City's commercial corridors present opportunities for additional medical offices, outpatient clinics, and supportive services that can diversify the local economic base while improving access to care.

Retail, Services, and Small Business

Garden City's retail and service economy is concentrated along major transportation corridors, including Highway 21, Highway 80, and south-side arterial streets, that connect neighborhoods, industrial areas, and regional roadways. These corridors host a mix of small, locally owned businesses and regional chains providing convenience retail, restaurants, personal services, automotive services, and neighborhood-scale professional offices. For residents and workers, these businesses supply day-to-day goods and services and contribute to the City's social and cultural fabric.

Despite this activity, recent trends show that Garden City continues to experience significant retail leakage to larger shopping and entertainment destinations in Pooler, west Chatham, and downtown Savannah, as well as to online commerce. While industrial demand has been largely self-sustaining, requiring relatively limited public incentive to attract large projects, larger commercial and mixed-use developments face higher perceived risk. Sites envisioned for catalytic projects, particularly in the southern corridors and potential Town Center area, often require infrastructure upgrades, site assembly, or environmental remediation that the private market is reluctant to undertake alone. In response, the City is exploring targeted tools such as Tax Allocation Districts (TADs), strategic capital improvements, and streamlined permitting to help bridge these gaps and make non-industrial projects more competitive.

At the same time, there is emerging interest in heritage entrepreneurship and place-based businesses that reflect Garden City’s industrial history, cultural traditions, and evolving community identity. Opportunities exist to support small manufacturers, food and beverage concepts, logistics-adjacent services, and creative enterprises that can anchor future mixed-use nodes. As the City looks toward a long-term Town Center concept, nurturing these homegrown businesses can help differentiate Garden City from regional competitors and ensure that new development builds on local character rather than replicating generic retail models.

Business Profile and Market Trends

Local Business License Data

Local business license data points to a steadily expanding commercial base in Garden City, with a large share of firms remaining active and only a modest number of closures relative to total licenses on file. As of 2026, the City’s business license database lists more than 800 active establishments, compared with just over 100 businesses recorded as closed, suggesting a net gain in licensed enterprises rather than simple turnover. Monthly tracking sheets for 2026 also show a consistent trickle of new business licenses and name changes throughout the year, indicating ongoing small-scale investment and business evolution rather than a one-time spike.

The mix of business names points to a local economy anchored by transportation and logistics, auto-related services, construction and trades, and industrial support firms, complemented by a thinner but visible band of personal services, small retail, and financial and property-related services that support residents and the industrial workforce. License data indicates activity is dispersed along Garden City’s primary industrial and commercial corridors rather than concentrated in a single node, reinforcing that the City is adding and maintaining businesses at a rate that supports continued absorption of both industrial and commercial space.

Industrial vs. Commercial Land Absorption

Development activity in Garden City over the last several years has been dominated by industrial projects tied to port logistics, even as a steady stream of smaller commercial applications has come before the City Council. A review of land development approvals and building permits between 2020 and 2025 shows that industrial projects account for the overwhelming share of both total capital investment and land absorption, reflecting strong private-market confidence in logistics and warehouse uses. In contrast, commercial projects typically occupy smaller sites and represent more modest individual investments, resulting in a land use pattern where industrial footprints far exceed commercial footprints.

This disparity indicates that the private market is effectively meeting industrial demand without requiring extensive local incentives, relying instead on Garden City’s inherent locational advantages and regional port growth. However, it also reveals that larger, transformative commercial and mixed-use projects face larger challenges. Developers perceive elevated risk for non-industrial investments because of factors such as competition from nearby retail destinations, uncertainty about tenant demand, aging corridor aesthetics, and the need for public infrastructure upgrades. To address this imbalance, the City is evaluating targeted public tools, such as TADs, special assessment districts, or focused infrastructure improvements, that can reduce upfront costs, enhance site readiness, and make strategic commercial locations more attractive to investors.

Regional Logistics Market

As of early 2026, the regional logistics market appears to be moving out of a phase of perceived undersupply. Years of rapid speculative warehouse construction following the pandemic e-commerce boom have produced a substantial inventory of modern distribution space across the Savannah MSA. Recent market data from the Savannah Area Chamber of Commerce indicates that logistics vacancy rates have increased to around 10.6%, the highest level in several years, as new buildings come online faster than they can be fully absorbed by tenants. This new phase does not necessarily signal a lack of demand, but it does represent a more balanced or even a tenant-favorable market environment than the conditions experienced during the Plan 2040 early 2020s period.

For Garden City, this shift has several implications.

- First, industrial tenants now have greater negotiating power on lease terms, concessions, and site selection, meaning that local governments must be more strategic about where and how they accommodate additional logistics development.
- Second, the era of “easy” industrial growth is likely concluded in the near term. New bulk speculative projects carry higher absorption risk and may face longer lease-up periods.
- Third, the abundance underscores the importance of diversifying the industrial base toward more specialized, higher-value activities such as cold storage, value-added logistics, light assembly, and logistics technology operations that are less commodity-like than standard bulk distribution.

In this context, Garden City’s economic development focus is expected to shift from simply facilitating more warehouse square footage toward curating the mix and quality of industrial uses. This may involve encouraging projects through outreach efforts that provide higher wages, invest in automation and technology, or integrate training partnerships, as well as protecting key sites for future port and rail needs. It also reinforces the argument for using

some of the City's remaining redevelopment capacity to support commercial, mixed-use, and employment types that are currently underrepresented.

Business Environment and Support

Garden City maintains a business-friendly environment that combines state-level incentives with local regulatory tools. All businesses operating in the City are required to obtain an Occupational Tax Certificate (business license) annually, which helps the City monitor business activity, ensure zoning and code compliance, and maintain updated contact information for outreach and emergency communications.

The City recognizes that neighborhood-serving businesses often face different challenges than large industrial firms. Small retailers, personal service providers, and local restaurants can struggle with limited access to capital, older building stock requiring upgrades, and competition from larger regional centers. To support these enterprises, Garden City is working to streamline permitting, clarify development standards, and, where feasible, connect local businesses to technical assistance resources offered by regional partners such as SEDA, the Small Business Development Center, and nonprofit organizations. These efforts are intended to complement the City's strong industrial base by strengthening a small-business ecosystem that enhances quality of life and helps retain more household spending within Garden City.

Growing and Declining Industries

Growing Sectors

The Savannah MSA's growth trajectory through the early to mid-2020s has been defined by a combination of logistics expansion, advanced manufacturing investment, healthcare growth, and the steady evolution of creative and technical services. Within this regional pattern, Garden City's economic opportunities lie both in reinforcing its existing strengths and in capturing emerging niches that build on those strengths rather than attempting to replicate sectors better suited to other parts of the region.

Advanced manufacturing and clean energy represent one of the most significant growth opportunities. The Hyundai Metaplant and its supplier network have cemented

Top Employers - 2025*

TEN LARGEST EMPLOYERS

Savannah, GA MSA

Candler Hospital, Inc.
FedEx
Gateway Terminals, LLC
Gulfstream Aerospace Corp
Gulfstream Services Corporation
Publix Super Markets, Inc.
Savannah College of Art and Design
Savannah Health Services, LLC
St. Joseph's Hospital, Inc.
Walmart

*Note: Represents employment covered by unemployment insurance excluding all government agencies except correctional institutions, state and local hospitals, state colleges and universities. Data shown for the Second Quarter of 2025. Employers are listed alphabetically by area, not by the number of employees.

Source: Georgia Department of Labor

manufacturing as a primary regional growth driver, increasing manufacturing employment and raising average industrial wages. This dynamic is expected to generate sustained demand for logistics, component warehousing, and specialized transportation services that directly benefit Garden City. At the same time, it creates opportunities for local firms that adopt automation, quality control, and supply-chain technology to plug more deeply into multi-tier manufacturing supply and resource chains

Logistics and supply-chain technology are also evolving rapidly. While speculative construction of standard warehouse space has slowed, there is a clear shift toward “technology-ready” supply chains that rely on robotics, real-time data, and AI-driven inventory management. Companies are investing in systems that require technicians, programmers, and operators who can manage automated equipment and complex software, shifting labor demand from exclusively general laborers toward hybrid technical roles. For Garden City, this means the logistics sector can continue to provide substantial employment, but the mix of required skills will change, reinforcing the need for digital literacy and technical training among residents.

Growth Industries				
Industry	2024 Employment	Projected 2030	Growth	Annual
Healthcare & Social Assistance	27,742	31,200	3,458	2.2%
Accommodation & Food Services	28,201	29,800	1,599	1.1%
Manufacturing	24,642	27,500	2,858	2.2%
Construction	9,432	10,500	1,068	2.3%
Professional & Business Services	21,818	23,400	1,582	1.4%
Government	24,927	25,600	673	0.6%
Note: Projections based on Georgia Department of Labor industry trends, HMGMA ramp-up, and regional growth patterns. Actual outcomes are dependent on trade policy, interest rates, and infrastructure investments.				

Figure 4.9 – Growth Industries

Healthcare and specialized services are expected to remain resilient growth sectors, driven by demographic trends and continued capital investment in facilities and medical education. As new outpatient centers, urgent care facilities, and specialty practices locate throughout the region, Garden City’s commercial corridors can capture some of this growth by offering accessible sites for clinics, therapy practices, and related services. Additionally, Georgia’s position as the nation’s top destination for film production supports an ongoing niche in film and digital media, with the Savannah region hosting productions that generate high-wage temporary jobs and demand for logistics, hospitality, and local services. While most film infrastructure is concentrated in Savannah, Garden City benefits indirectly through service contracts and the potential reuse of industrial spaces for production support activities.

Sectors in Decline or Facing Challenges

Even as the regional economy grows, several sectors are experiencing flat or declining employment due to technological change, shifting consumer behavior, and long-term structural trends. These impediments are important for Garden City because they influence which legacy uses may become candidates for redevelopment and which skill sets may require transition support.

Traditional paper and timber industries, once central to the coastal Georgia economy, face some of the most significant challenges. The 2025 closure of International Paper's pulp and paper mills in Savannah and Riceboro led to the loss of hundreds of high-wage industrial jobs and disrupted the regional timber supply chain, raising questions about the long-term viability of similar facilities. While Garden City does not host these specific plants, the broader regional impact is a reminder that older, commodity-based industrial sectors can contract quickly when exposed to global competition and evolving environmental standards.

Speculative bulk industrial development also appears to be entering a more constrained phase. The oversupply of large, generic warehouse buildings delivered in recent years has pushed vacancy rates higher, and the market has become more cautious about financing additional such projects. This does not imply that industrial development will cease; rather, it suggests that future projects will need to be more targeted, aligned with specific tenant needs, or differentiated through function (e.g., cold storage, specialized logistics, or value-added processing).

Similarly, traditional brick-and-mortar retail trade continues to feel pressure from e-commerce and regional competition. Older strip centers and highway commercial properties that lack strong anchors or updated formats struggle to maintain occupancy, contributing to corridor underperformance and deferred maintenance in visible locations.

For Garden City, these trends point to the need for proactive planning around legacy sites and at-risk properties. Industrial parcels tied to declining sectors may become opportunities for reinvestment or repurposing into new logistics formats or mixed employment uses. Aging retail segments along key corridors may require a combination of zoning flexibility, façade improvements, access management, and public realm upgrades to attract reinvestment. By recognizing where challenges are strongest, the City can prioritize intervention in locations where market forces alone are unlikely to deliver desired outcomes, and where strategic action can reposition corridors and districts for the next generation of economic activity.

Workforce Education and Training

Regional Educational Infrastructure

Garden City’s workforce is supported by a broad regional education network that includes K–12 systems, technical colleges, and four-year universities, all of which play distinct roles in preparing residents for logistics, manufacturing, healthcare, and service-sector careers. The Savannah-Chatham County Public School System (SCCPSS) has made steady gains in graduation outcomes, achieving a district-wide graduation rate of 87.2% in the 2024-2025 school year and consistently exceeding both state and comparison-group averages. A total of 2,229 students graduated, with some schools, such as Savannah Early College High and Woodville-Tompkins, achieving 100% rates. These improvements strengthen the foundation for post-secondary training and employment readiness for Garden City’s youth.

At the post-secondary level, Savannah Technical College is the primary provider of technical education in the region and an especially important partner for Garden City. The college offers programs in logistics, commercial truck driving, industrial systems, precision manufacturing, welding, construction trades, aviation technology, and healthcare support; fields that align closely with the industrial, trucking, and service employers that operate in and around Garden City. Nearby four-year institutions, including Georgia Southern University’s Armstrong Campus, Savannah State University, and the Savannah College of Art and Design (SCAD), add capacity in engineering, health professions, business, marine science, and creative disciplines, collectively generating tens of thousands of enrollments and graduates annually for the regional labor market.

Program Highlights of Technical School Graduates			
Program	Graduates	Trend	Employment Alignment
Welding	495	↑ Growing	Manufacturing, Construction
Nursing Assistant	161	↑ Growing	Healthcare
HVAC Technician	105	↑ Growing	Construction, Facilities
Aircraft Maintenance	60	↑ Growing	Aerospace, Aviation
Commercial Truck Driver	160	→ Stable	Logistics, Transportation
Cosmetology	142	→ Stable	Hospitality, Services
Heating/AC/Refrigeration	105	↑ Growing	Construction, Facilities

Source: Technical College System of Georgia via GDOLMSA Labor Profile

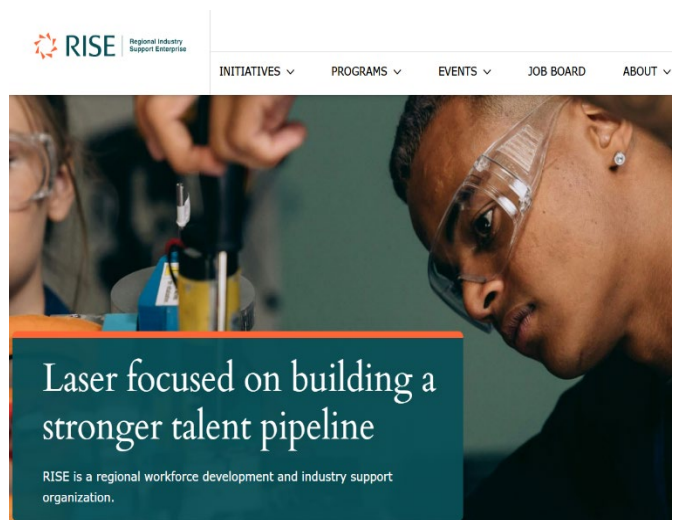
Figure 4.10 – Program Highlights of Technical School Graduates

For Garden City, the key challenge is not just the presence of regional educational institutions but the alignment between program offerings and the skills demanded by local employers. In logistics and manufacturing, employers increasingly seek workers who combine basic academic proficiency with technical certifications, safety training, and digital literacy. By coordinating with Savannah Technical College and regional universities on curriculum, internships, and work-based learning placements, the City can help ensure that programs reflect current industry needs and that residents are aware of the pathways available to them.

The RISE Initiative and Advanced Manufacturing

The region’s shift toward advanced manufacturing, driven most visibly by the Hyundai Motor Group Metaplant and its suppliers, has prompted new efforts to coordinate workforce strategy across multiple counties. The Regional Industry Support Enterprise (RISE) initiative is designed to align state economic development resources with sector-specific training needs, focusing on manufacturing competency, automation skills, and career pathways that connect entry-level positions to higher-skilled roles. RISE and similar initiatives build on Georgia’s long-standing emphasis on workforce readiness as a core economic development asset.

For Garden City, programs like RISE offer a framework to transition existing logistics and warehouse workers into higher-skill manufacturing and component-assembly roles without requiring residents to leave the region. Many “meta-pro” positions in advanced manufacturing and logistics technology draw on skills that can be developed incrementally through short-term certificates, stackable credentials, and on-the-job learning, making them accessible to workers with high school diplomas and some technical training. By promoting awareness of these pathways and partnering with employers to support tuition assistance, flexible scheduling, and transportation solutions, Garden City can help residents move up the wage ladder while also supplying the talent needed to sustain regional industrial growth.



Beyond degree and diploma programs, the Savannah region offers several specialized training resources that directly support Garden City’s economic base. The Georgia Quick Start Program provides customized, no-cost workforce training for eligible companies

locating or expanding in Georgia, with particular strength in manufacturing, logistics, and biotech. This program is instrumental in helping large employers ramp up operations quickly while ensuring that workers are prepared for specific production processes and equipment.

Garden City also benefits from specialized logistics and maritime training tied to Port operations. Training in crane operation, yard management, hazardous materials handling, and heavy equipment operation supports the unique skill sets required at the Garden City Terminal and nearby industrial facilities. At the K–12 level, SCCPSS continues to expand Career, Technical, and Agricultural Education (CTAE) pathways, introducing students to logistics, engineering, construction, and healthcare concepts before graduation. These pathways, combined with initiatives like Youth Apprenticeship, Junior Achievement, and Step Up Savannah’s Chatham Apprentice Program (CAP), provide early exposure to career options and soft-skill development, which local employers consistently cite as crucial.

Programs such as WorkSource Coastal and EmployAbility complement this landscape by offering job training, placement, and support services for adults, dislocated workers, veterans, youth, and individuals with intellectual and developmental disabilities. For Garden City, these organizations represent important partners in expanding labor force participation, addressing barriers to employment, and ensuring that economic growth is inclusive across age, ability, and background.

Workforce Preparedness Challenges:

- Post-Secondary Attainment Gap: Many residents lack formal credentials beyond high school relative to the Metropolitan Statistical Area (MSA), restricting access to higher-wage technical and professional roles.
- "Soft Skills" Deficiencies: Employers report ongoing concerns about essential skills like dependability, communication, teamwork, and problem-solving.
- Housing and Transportation Constraints: Rising regional housing costs and transportation difficulties make it hard for workers, especially lower-wage households, to live near training centers and major job sites.

Digital Divide Risk:

- As logistics and manufacturing become more technology-dependent, a lack of targeted efforts in broadband access, digital skills, and adult on-ramp programs risks leaving some residents behind as employers modernize.

Required Action:

- Addressing these challenges necessitates coordinated action across education providers, employers, workforce agencies, and local governments.
- For Garden City, this means prioritizing education and training as central to economic development and integrating workforce considerations into decisions about transportation, housing, and land use.

Strengths, Weaknesses, Opportunities, and Threats (SWOT)

The Savannah Economic Development Authority’s (SEDA) SWOT Analysis identifies Strengths, Weaknesses, Opportunities, and Threats (SWOT) associated with our local economy based on:

- SEDA - Business Plan (2024)
- SEDA - Workforce Organization Update/RISE Partnership (2024)
- SEDA - Strategy and Action Plan by Deloitte (2025) Specialized Training and Professional Development

SWOT Analysis	
Strengths	Weaknesses
World-class logistics platform: deep-water Port of Savannah, Mason Mega Rail, I-16/I-95, on-dock rail, and ongoing capital investments.	Workforce quantity and skills gap: projected labor deficit beginning in 2025 and persistent soft-skill and technical readiness gaps for high-skill logistics and manufacturing jobs.
Diverse economic base including logistics, tourism/hospitality, healthcare, education, government/military, plus a fast-growing advanced manufacturing and clean-energy cluster anchored by Hyundai Metaplant and suppliers.	Housing affordability and availability constraints as job growth outpaces production, prompting a regional housing needs assessment by Georgia Tech’s Center for Economic Development Research.
Strong higher education and creative assets (GSU/Armstrong, Savannah State, SCAD, film/creative sectors) supporting both analytical and creative “sides” of the regional economy.	Infrastructure strain and site-readiness challenges: limited inventory of fully serviced industrial and office/professional sites and pressure on roads and utilities from rapid growth.
Significant military presence and talent pipeline, now reinforced by RISE’s military working group and events like the Military Partnership Summit with Fort Stewart.	Limited worker transportation options and first/last-mile access; public transportation gaps now elevated within RISE’s transportation working group but not yet fully resolved.
Coordinated regional workforce structure via RISE (Regional Industry Support Enterprise) with six working groups (military, underrepresented, housing, education, transportation, marketing) and active outreach to employers and organizations.	Underrepresentation of headquarters/office and knowledge-based projects relative to logistics and manufacturing, constraining growth in high-wage professional jobs.
Strong institutional capacity through SEDA and partners, with authority to administer incentives and lead regional initiatives, and a high quality of life and brand built on historic character, coastal amenities, and creative identity.	Persistent equity and poverty challenges, including high poverty rates, uneven K-12 outcomes, and limited advancement pathways for underrepresented residents and some young professionals.

SWOT Analysis	
Opportunities	Threats
Leverage Hyundai and the advanced manufacturing/EV cluster to grow high-skill, high-wage jobs in manufacturing, engineering, logistics technology, and related HQ/R&D functions.	Workforce shortfall and competition for talent: without effective implementation of RISE and other strategies, labor deficits could constrain growth while peer metros recruit from the same talent pools.
Use RISE as a vehicle for coordinated regional action across workforce, housing, transportation, military talent, education, and underrepresented groups, building on its membership structure, working groups, and employer forums.	Housing, infrastructure, and quality-of-life pressures: if housing, transportation, and public services lag behind growth, congestion and rising costs could erode quality of life and fuel resistance to new projects.
Align housing and infrastructure planning with workforce needs through the multi-phase regional housing needs assessment and related transportation planning.	Site and utility constraints: limited ready-to-develop sites with sufficient utilities and multimodal access could cause the region to lose strategic projects to better-prepared competitors.
Advance industry diversification and innovation in sectors such as aerospace/defense, creative/tech, logistics and supply-chain innovation, and robotics/automation, building on both “left-brain” and “right-brain” strengths.	Over-reliance on a few major drivers (port/logistics, tourism, Hyundai and key manufacturers), which increases vulnerability to trade policy shifts, global supply disruptions, automation, or sector downturns.
Expand entrepreneurship and small-business development in logistics-adjacent services, advanced manufacturing suppliers, tourism/experiential firms, and creative industries by improving capital access and technical assistance.	Environmental and climate risks associated with coastal exposure, storms, and heat, which can disrupt port, logistics, and tourism operations and require substantial resilience investment.
Deepen employer–education linkages through RISE’s education working group, SEDA workforce initiatives, and expanded K-12/technical college/university pipelines into future jobs (automation, robotics, EV manufacturing, logistics tech).	Governance fragmentation and implementation risk: multiple jurisdictions and institutions must sustain coordination; status quo bias or political turnover could slow or weaken implementation of regional workforce, housing, and transportation solutions.