St. Louis Regional Freightway
Marketing Overview and 2020 Multimodal Priority List

St. Louis Region – Epicenter of the Midwest!

DRIVE TIME

The St. Louis region is located within 500 miles of one-third of the U.S. population, is in close proximity to mega regions with the largest concentration of manufacturing, transportation and warehousing, and a one-day truck drive to Chicago, Memphis, Kansas City, Nashville, Columbus and other important transportation hubs — linking the St. Louis region to the entire nation and the global supply chain.

The Ag Coast of America

Why is this area called the Ag Coast of America?

- 15 barge transfer facilities within a 15-mile section of the Mississippi handling agricultural and fertilizer products
- Capacity: Over 150 barges in a day. Is the highest level of barge handling capacity ANYWHERE along the Mississippi River.
- #1 Ranking in Site Selection magazine's 2017 Big Muddy Cup Competition when comparing Top Metros by total projects.
- Result of growing demand for agricultural exports, as well as **cost-effective** and **efficient transfer facilities**
- Inland Waterways Journal – Port of Year 2017

Marketing Updates

Marketing Overview: Promoting Our Competitive Advantages

Through Events | *Presentations* | *Public Relations* | *Social Media*

- Building Strategic Alliances & Forging New Partnerships
  - Ports of New Orleans & Plaquemines
  - Port of Savannah
- Establishing Our Position in the Marketplace *(Creative Story Telling)*
  - Container on Vessel, Industrial Real Estate Metrics, Freight Assets and Infrastructure Investment
  - 2019 FreightWeek STL
- **Earned Media Freightway: $981,276**
  - 5/1/18 - 7/31/19
- -- **Earned Media 2019 FreightWeek STL: $60,296**

Regional Partnerships

Building Strategic Partnerships: Port of Savannah

THE WALL STREET JOURNAL.

U.S. Edition ▾ | June 3, 2019 | Print Edition | Video

WSJ LOGISTICS REPORT

Today's Logistics Report: Delivering Parcels Daily; Raising Union Pressure; Disrupting Grain Flows

Today's Top Supply Chain and Logistics News From WSJ

By Paul Page

May 31, 2019 10:19 a.m. ET

Sign up: With one click, get this newsletter delivered to your inbox.

IN OTHER NEWS

Developers will build a $220 million rail facility to move goods more efficiently through Georgia's Port of Savannah. (Port Technology)

Amazon will open a 1 million-square-foot distribution center outside Winston-Salem, N.C., next year. (Winston-Salem Journal)

Google self-driving vehicle unit Waymo is resuming tests of autonomous tractor-trailers in Arizona. (CBS)

New Mode of Transportation for Containerized Cargo

Container on Barge

Container on Vessel

Project Delivery: Container on Vessel

2017

MOU
STL region
and
Port of New Orleans

2018

MOU
Plaquemines PHTD with STL region, KC, Jefferson City, Memphis, Cairo (IL), Western Arkansas (Fort Smith), Little Rock, and Joliet (IL)

Soybean Export Study

2019

IL and MO Ports of call form statewide partnership.

Align manufacturers with container on vessel service

APH / Louisiana Gateway Terminal finalizing negotiations with Ocean Carrier / International Terminal Operator

2020

Construction begins for vessels

Construction begins for Louisiana Gateway Terminal & upriver terminals

2022

Container on Vessel operations begin

50 Years of Container Vessel Evolutionary Growth

Old Panamax: 4,800 TEUs

Neo-Panamax: 14,800 TEUs

Near Term Mega Vessel: 24,000 TEUs

Source: Allianz Global Corporate & Specialty - Data: Container-Transportation.com

Midwest Battleground

Source: NW Seaport Alliance Strategic Business Plan, May 6,2015

ST LOUIS REGIONAL FREIGHTWAY

ST. LOUIS REGIONAL REAL ESTATE

Market Indicators & Workforce Statistics

SUMMER 2019

Market Indicators & Workforce Statistics

ST LOUIS REGIONAL FREIGHTWAY

ST. LOUIS REGIONAL ADVANTAGES

ST. LOUIS COMPARISON

	INVENTORY SIZE (SF)	# OF BLDGS	POPULATION
St. Louis	40.8MSF	80	2.8M
Kansas City	46.6MSF	85	2.1M
Indianapolis	85.3MSF	165	2.0M
Memphis	82.7MSF	149	1.4M
Louisville	35.9MSF	73	1.3M
Nashville	54.7MSF	103	1.9M

NNN ASKING RAT

REGIONAL RESIDENT POP

Source: *CoStar Regional MSA; Existing industrial buildings over 250,000 SF, over 24' Clear; Single Story;
**Resident Population – U.S. Census Bureau, Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2018

1 Industrial Real Estate Market I

ST LOUIS REGIONAL FREIGHTWAY

HOT SPOT SPOTLIGHT: NORTH I-270 CORRIDOR

NEW CONSTRUCTION IN LAST FIVE YEARS

NATIONAL DEVELOPERS

Source: Colliers International

3 Hot spot Spotlight: North I-270 Corridor

Market Indicators & Workforce Statistics

August 21 – American Journal of Transportation
Key logistics corridor in St. Louis Region spurs historic growth in construction and development of bulk distribution buildings

August 21 – Construction News and Review
Key Logistics Corridor in St. Louis Region Spurs Historic Growth

August 23 – Real Estate (RE) Journals
Bigger is better: Large spaces propel St. Louis industrial market

September 13 – Logistics Management
Key logistics corridor in St. Louis region continues to strengthen

September 13 – Supply Chain Management Review
Key logistics corridor in St. Louis region continues to strengthen

Logistics MANAGEMENT

Key logistics corridor in St. Louis region continues to strengthen

Historic growth in construction and development of bulk distribution buildings

By Patrick Burnson, Executive Editor · September 13, 2019

Recent trends in construction and development in the St. Louis region show that bulk distribution buildings (over 250,000 square feet) is a growing sector for the regional inventory. Since 2014, more than 18 million square feet of new industrial space has been constructed or is currently under construction in the St. Louis region, and more than 50% of that represents buildings of that significant size.

This surge in construction of large distribution buildings has been evenly split between speculative developments and build-to-suit projects for occupiers. In addition, over the past five years, 85% of all construction and 70% of the new major industrial parks have been focused on the North I-270 Corridor, which is a major logistics corridor for local and national manufacturers, suppliers and distributors and reinforces the vital link between Missouri and Illinois.

"The St. Louis region's central location in the U.S. and its logistics capabilities has made the metro area a coveted destination for industrial users," said Katie Haywood, Vice President on the Industrial & Logistics, Advisory & Transaction team at CBRE. "As consumers demand faster shipping times, the St. Louis region becomes very attractive to e-commerce users. In the past 24 months, e-commerce users and 3PLs have leased massive amounts of space. Not to mention existing companies expanding in the area, such as World Wide Technology, Medline and FedEx. Vacancy continues to hover around record lows. The St. Louis region is expected to deliver over 5.5 million square feet of new inventory in 2019, with more than 50% of that inventory being spec construction, a good sign that developers are not seeing a slow-down in demand."

The St. Louis region boasts triple net lease (NNN) rates of $3.75 per square feet (PSF) for the bulk distribution market, which is lower than the average rate of similarly sized Midwestern cities, including Kansas City, Louisville and Nashville. The region also has 90,000 workers employed in all transportation/material moving occupations, significantly more than Kansas City or Louisville. When looking at all production occupations, the St. Louis region also has a larger workforce than both competing cities.

Logistics in the News

September freight shipments and expenditures see annual declines in September, reports Cass

Light-industrial properties gaining traction, says CBRE in new report

DHL Global Forwarding expands service offerings in El Paso, Texas facility

AAR reports U.S. rail carload and intermodal units are down for week ending October 5

Port of Los Angeles urges negotiators to seek end to U.S.-China trade war

More Logistics News

Logistics Resource

Consolidation offers Faster Transit and Greater Efficiency for Canada-bound Shipments

Thursday, September 12, 2019 | 2pm ET

All Resources

Updates to TheFreightway.com

ILLINOIS

Madison County
1. America's Central Port
2. Gateway Commerce Center
3. Lakeview Commerce Center
4. Gateway TradePort
5. Lewis and Clark Industrial Development

St. Clair County
6. I-64 Prime Development Sites
7. Belle Valley Industrial Park III
8. Sauget Business Park

MidAmerica Airport
9. MidAmerica Airport Sites

Jersey County
10. Mid-American International Gateway

Bond County
11. Howard M. Wolfe Business Park
12. Kelsey Business Park

Monroe County
13. MCEC Property
14. Rock City Business Complex

MISSOURI

Fenton
15. Fenton Logistics Park

Franklin County
16. Heidmann Industrial Park
17. Union Corporate Center

Hazelwood
18. Aviator Business Park
19. Hazelwood Logistics Center
20. Hazelwood TradePort
21. Park 370 Business Center

St. Louis Lambert International Airport
22. St. Louis Lambert International Airport Sites

North St. Louis County
23. Earth City Industrial
24. Riverport Business Park
25. NorthPark

North Riverfront
26. 8000 Hall Street
27. North Riverfront Business Park
28. North Broadway Distribution Center

South City
29. River City Business Park
30. Soulard Business Park

St. Charles County
31. Fountain Lakes Commerce Center
32. Premier 370
33. West 70 Commerce Center

TheFreightway.com: Site Selector Resource Tab

Site Selector Resources:

- Real Estate Map
- News
- **Maps**
- Research Report
- Labor & Recruitment
- Visual & Media

TheFreightway.com: Site Selector Resource Tab

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- Real Estate Map
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- Labor & Recruitment
- **Visual & Media – Digital Infographics**

Freight Development Committee Updates

Freight Development Committee

Multimodal Infrastructure List

- Updated annually with support from public and private sector leaders and experts from the manufacturing and logistics industries.
- IDOT, MoDOT, East-West Gateway Council of Governments, Class I railroads, trucking, barge, airports, industrial real estate brokers and site selectors and regional chambers of commerce/ economic development organizations.

Freight Development Committee

- Unanimous approval of this list each year signifies regionalism and the importance of infrastructure investment.
- Model allows private sector representatives to help public sector leaders understand how freight travels through the region's infrastructure and how efficient and reliable transportation impacts on-time delivery and costs.

Freight Development Committee

- Identify funding opportunities – alert committee members of grant funding opportunities from IDOT, MoDOT, FHA, FRA, etc.
- Committee members help promote our region's freight assets – participate in editorial review boards, letters to the editor and trade magazine interviews; submit letters of support for grant applications.

2020 Multimodal Project List Process

Jan 22, 2019

Freight Development Committee met and projects were vetted with public and private stakeholders from across the region.

During this meeting the

I-255/Davis St. Ferry Rd. Interchange was elevated to a high priority.

April 3, 2019

Freight Development Committee reconvened and finalized the list.

May 22 the State of IL announced funding for the I-255/Davis St Ferry Rd Interchange and the I-64

Improvement from Green Mount Rd to IL Rte. 158

August 19, 2019

Freightway Council approves the 2020 project list.

September 27,2019

Bi-State Development Board of Commissioner approves the 2020 project list.

Freightway Non-Interstate Truck Corridor Study

Final report is intended to be a planning tool from the regional freight perspective, particularly the movement of goods by truck. The intent is to provide bi-state regional transportation planners a guide for infrastructure improvement considerations to enhance the freight movement by truck.

Report will be completed early 2020.

Sources include:

- Overall truck volumes
- Percentage of traffic representing heavy vehicles
- Proximity to warehouse facilities and logistics centers
- Associated routing to/from interstate corridors
- Existing truck corridor designations where available

2018 $175 mil Merchants Bridge Replacement over the Mississippi River
Terminal Railroad Association of St. Louis (TRRA)

Recently Funded Projects: 2018

2018 I-270 North Corridor

$250 mil	I-270 from I-70 to Mississippi (MO)	MoDOT
$223 mil	I-270 Chain of Rocks Replacement	MoDOT/IDOT
$ 19 mil	I-270 interchange reconstruction at IL Rte. 111 (IL Competitive Freight Program)	
$492 mil		

2018 Infrastructure Investments: $690 mil

$492 mil	I-270 Improvements	MoDOT and IDOT
$175 mil	Merchants Bridge Replacement	TRRA
$ 18 mil	IL Competitive Freight Program	IDOT and Private Investment
$ 5 mil	Lenox Tower	UP, IDOT, Amtrak
$ 690 mil		

BARGE TIME | Ice-Free, lock-free with superior logistics and low costs, quick turnaround time.

RAIL TIME | Low congestion = cheaper rates, shorter travel time. Six Class 1 Railroads.

DRIVE TIME | A one-day drive to one-third of the U.S. via Interstates 70, 64, 44, 55.

The St. Louis region delivers. Let us get you moving.

2019 IL Capitol Bill: I-255/Davis St. Ferry Rd Interchange (IL) – **$33 mil**

Total Project Cost: $53 mil

ST LOUIS REGIONAL FREIGHTWAY

HOT SPOT SPOTLIGHT: NORTH I-270 CORRIDOR

10-MINUTE DRIVE TIME

NATIONAL TENANTS WITHIN 10-MINUTE DRIVE TIME

10-MINUTE DRIVE TIME DEMOGRAPHICS

±12,000 BUSINESSES*

±200,000 EMPLOYEES*

Source: Colliers International; CoStar (Tenants over 100,000 SF); Demographics - ESRI
*Data includes all business types.

ST LOUIS REGIONAL FREIGHTWAY

HOT SPOT SPOTLIGHT: NORTH I-270 CORRIDOR

NEW CONSTRUCTION IN LAST FIVE YEARS

NATIONAL DEVELOPERS

Source: Colliers International

2020 Multimodal Transportation Project List

ST LOUIS REGIONAL FREIGHTWAY

Advanced to Construction

Merchants Bridge (TRRA) Replacement over the Mississippi River (MO-IL)

Replacement of Terminal Railroad Association of St. Louis 130-year old rail bridge

Freightway's #1 Priority

Funded: Summer 2018
Estimated Cost: $175 mil

I-270 Improvements from I-70 (MO) to Illinois Route 157 (MO-IL)

(A) Improvements from US-67 to MO-367
(B) Chain of Rocks Bridge Replacement
(C) I-270/IL-111 Interchange Reconstruction

Highest Priority Project

Funded: Spring 2018
(A) $250 mil (B) $211.8 mil (C) $19 mil

North Park Access Improvements (MO)

Safety and capacity improvements along Hanley Road from I-70 to Madison Avenue

Funded in 2018
Estimated Cost: $3 mil

Earth City Access Improvements (MO)

(A) St. Charles Rock Road preservation of 1.3-mile corridor

(B) Arterial roadway pavement repairs in Earth City

Construction Nearing Completion
Estimated Cost: $4 mil

J.S. McDonnell Connector Access Improvements (MO)

Roadway improvements to enhance truck traffic movements and replace deteriorated rail crossing

Construction Funding Approved 2019
Estimated Cost: $20.7 mil

Advanced to Construction

I-255 / Davis Street Ferry Road Interchange (IL)

New interchange and connecting roadways to serve emerging industrial area near Union Pacific Dupo Intermodal Yard including future grade separation over five rail tracks

Highest Priority Project

Funded: Summer 2019
Estimated Cost: $53 mil

I-64 Improvements from Green Mount Road to Illinois Route 158 (Air Mobility Drive) (IL)

Expansion of I-64 to six lanes as well as other safety and capacity improvements

Funded: Summer 2019
Estimated Cost: $22 mil

Union Pacific Railroad Lenox Tower Replacement (IL)

Remove Lenox Rail Tower in Mitchell, Illinois in order to centralize dispatching in Omaha, Nebraska

Funded: Spring 2018 and 2019
Estimated Cost: $8 mil

Partially Programmed for Construction

North Riverfront Commerce Corridor Improvements (MO)

(A) Hall Street and Riverview Drive improvements *(Partially Funded)*

(B) Branch Street improvements

(C) I-70 westbound off-ramp to North Broadway relocation *(Complete)*

Highest Priority Project

Estimated Cost: $33.9 mil
Unfunded: $28 mil

I-270 Improvements from I-70 (MO) to Illinois Route 157 (MO-IL)

(A) Improvements and some widening from I-70 to Mississippi River *(US-67 to MO-367 Funded)*

(C) Widening from Mississippi River to Route 157 *(IL-111 Interchange Funded)*

Highest Priority Project

Estimated Cost: $1.2 bil
Unfunded: (A) $450 mil (C) $268

October 2019

Priority Project Progress

2020 Project List Multimodal Connectivity

Advanced to Construction (Funded)

- 2018 **Merchants Bridge (TRRA) Replacement over the Mississippi River (MO-IL) $175M**
- **I-270 Improvements**
  - **2018 Mississippi River Chain of Rocks Bridge Replacement (MO-IL) $211M**
  - **2018 I-270 / Illinois Route 111 Interchange (IL) $19M**
- **2019 I-255 / Davis Street Ferry Road Interchange (IL) $53M**
- **2019** I-64 Improvements from Green Mount Rd to IL 158/Air Mobility Dr (IL)
- **2019** J.S. McDonnell Connector Ave Improvements (MO) $20.7M
- 2018**/2019** Union Pacific Railroad Lenox Tower Replacement and Track Realignment (IL) $9M
- 2018 North Park Access Improvements (MO) $3M
- Earth City Access Improvements (MO) $4M

Partially Programmed for Construction

- **I-270 Widening from I-70 (MO) to Illinois Route 157 (IL) Approx. $1B**
- St. Louis Lambert International Airport North Cargo Improvements (MO) $20.7M
- **North Riverfront Commerce Corridor Improvements (MO) $33.9M**
- **Illinois Route 3 Access Improvements (IL) $147-$192M**
- America's Central Port Improvements (IL)

Concept Development or Planning

- **I-70 Improvements from Warrenton to Stan Musial Veterans Memorial Bridge (MO) $650M**
- MidAmerica St. Louis Airport Distribution Improvements (IL) $45M
- St. Louis Lambert International Airport Access Improvements (MO) $30.25M
- Illinois Route 158 (Air Mobility Drive) Expansion from Route 161 to Route 177 (IL) $10M
- Kaskaskia Regional Port District Improvements (IL) $8.2M
- I-255 / Fish Lake (Ramsey Road) Interchange (IL) $27M
- Mississippi River Port Development Projects (MO) $17.5M

Projects in **bold indicate the St. Louis Regional Freightway's highest priority projects*

Thank you!