

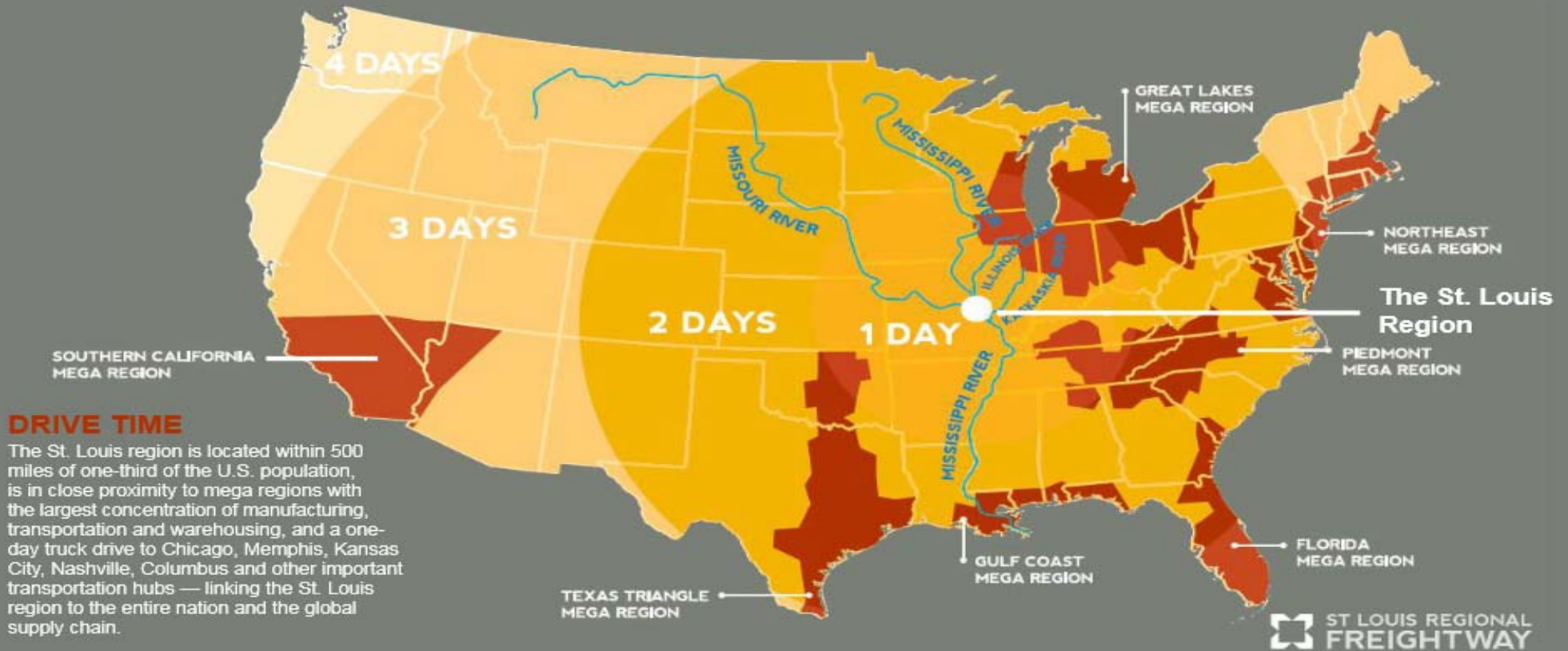


ST LOUIS REGIONAL FREIGHTWAY

Your Gateway to the World

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

St. Louis Region – Epicenter of the Midwest!



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**



ST LOUIS REGIONAL FREIGHTWAY

Your Gateway to the World

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

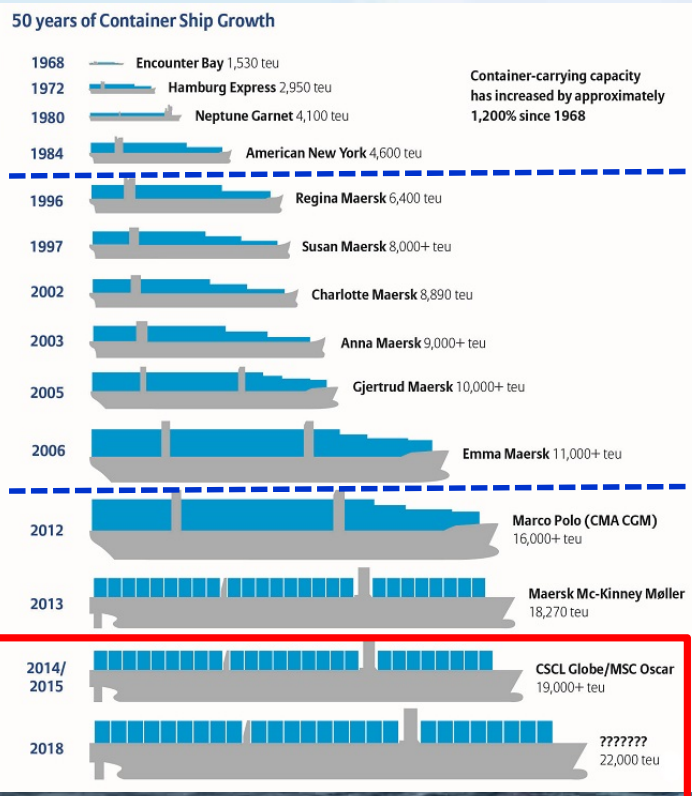
Container on Barge



Container on Vessel



50 Years of Container Vessel Evolutionary Growth



Old Panamax:
4,800 TEUs

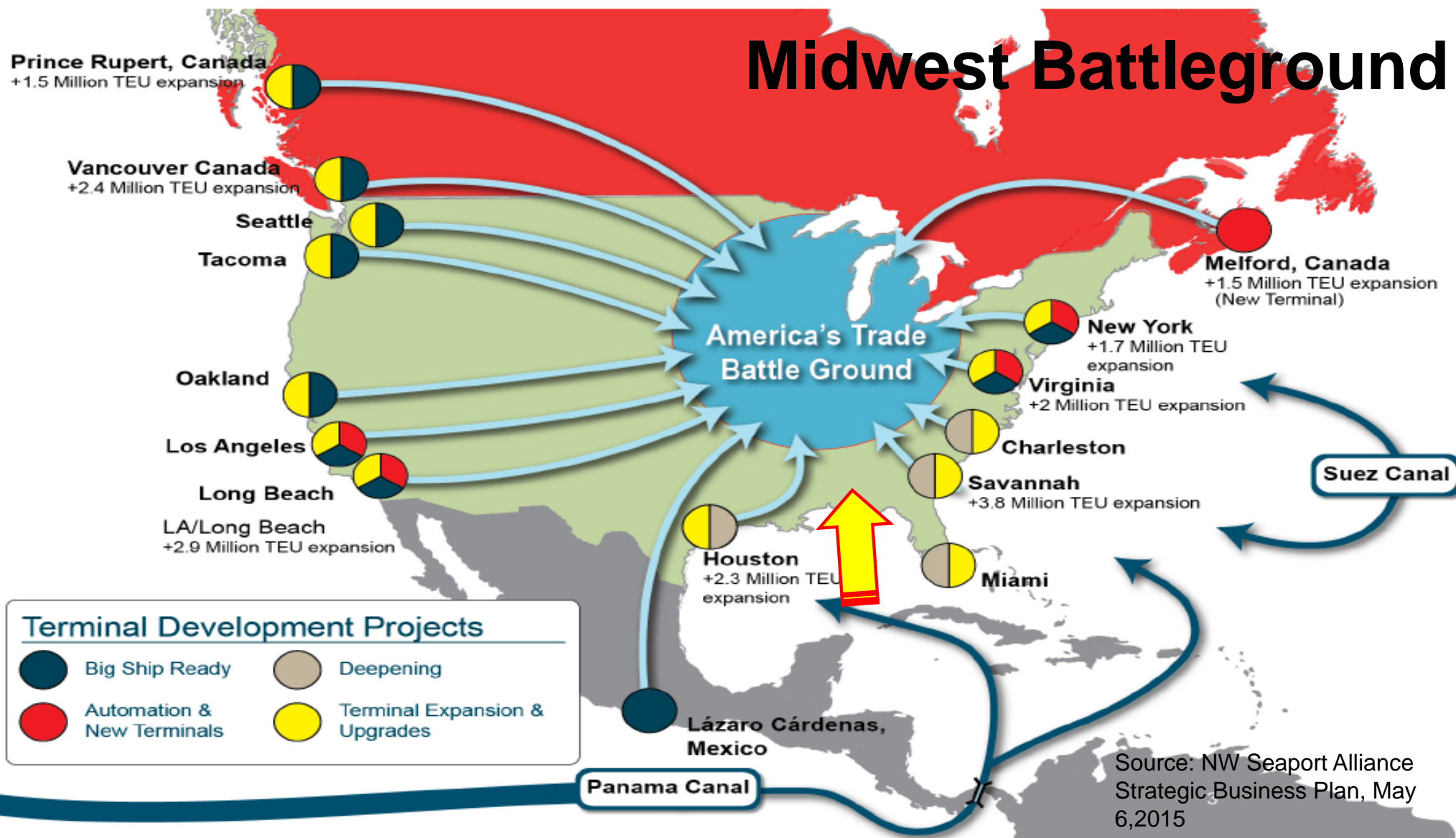
Neo-Panamax:
14,800 TEUs

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

Market Indicators & Workforce Statistics

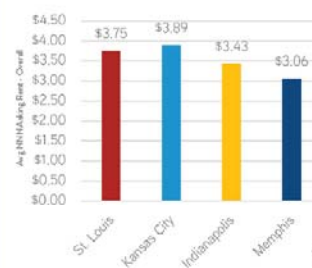
ST LOUIS REGIONAL FREIGHTWAY

ST. LOUIS REGIONAL ADVANTAGES

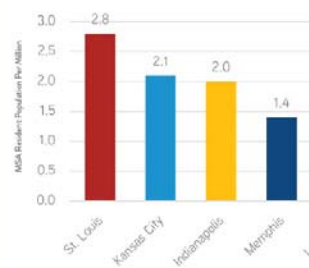
ST. LOUIS COMPARISON

	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 RATE



REGIONAL RESIDENT POPULATION



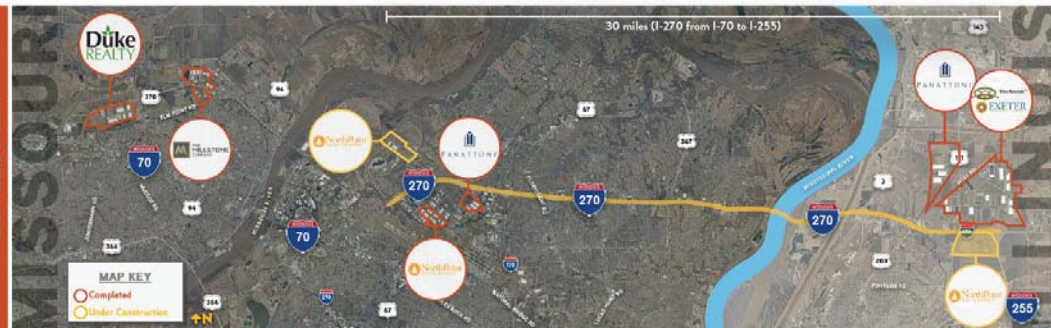
ST LOUIS REGIONAL FREIGHTWAY

HOT SPOT SPOTLIGHT: NORTH I-270 CORRIDOR

NEW CONSTRUCTION IN LAST FIVE YEARS



NATIONAL DEVELOPERS



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

Source: Colliers International

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 foot (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 | 12pm 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



ST. LOUIS REGIONAL FREIGHTWAY


ST. LOUIS REGIONAL ADVANTAGES

MODES OF TRANSPORTATION




AMERICA'S THIRD LARGEST INLAND PORT

Northernmost lock-free/ice-free access on the Mississippi River to and from the Gulf of Mexico, making the region the 7th largest port for domestic tonnage.




FOUR INTERSTATES WITH NATIONAL ACCESS

The St. Louis region's system of interstates (I-70, I-44, I-55, and I-64) allow for one-day drive or less to major cities such as Chicago, Memphis, Nashville, Kansas City and Columbus.

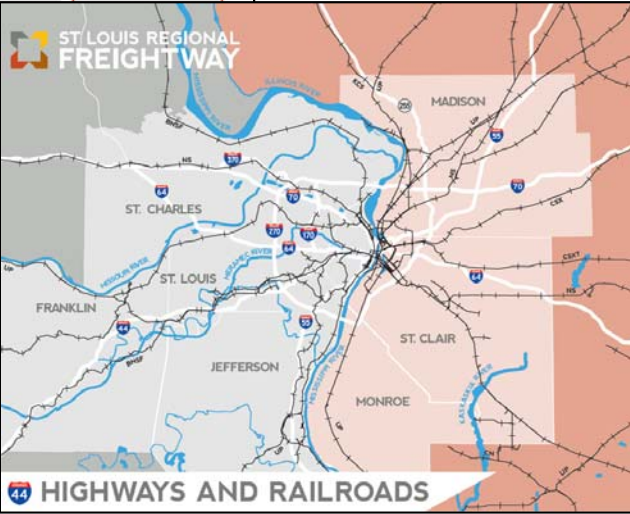


FIVE AIRPORTS WITH CAPACITY

The region has two international airports (St. Louis International Airport and MidAmerica St. Louis Airport) with room for foreign trade and development.



SIX CLASS I RAILROADS

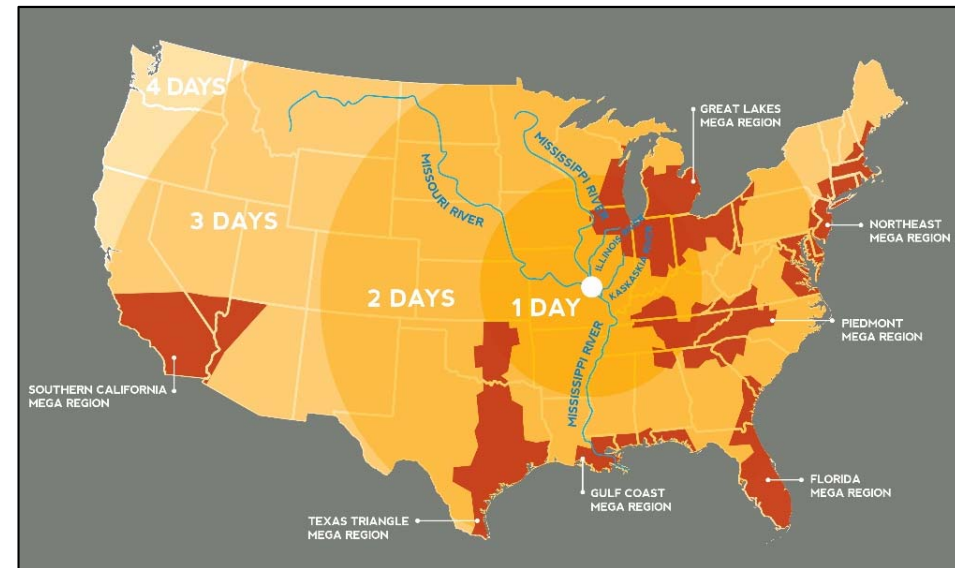


ST. LOUIS REGIONAL FREIGHTWAY

HIGHWAYS AND RAILROADS

RECENTLY FUNDED PROJECTS INCLUDE:

- \$220 MIL I-270 Mississippi River Bridge (MO/IL)
- \$250 MIL I-270 improvements along northern corridor (MO)
- \$23 MIL I-270 interchange at I-64 (IL)
- \$53 MIL I-255/Davis Street Ferry Road interchange





ST LOUIS REGIONAL FREIGHTWAY

Your Gateway to the World

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)

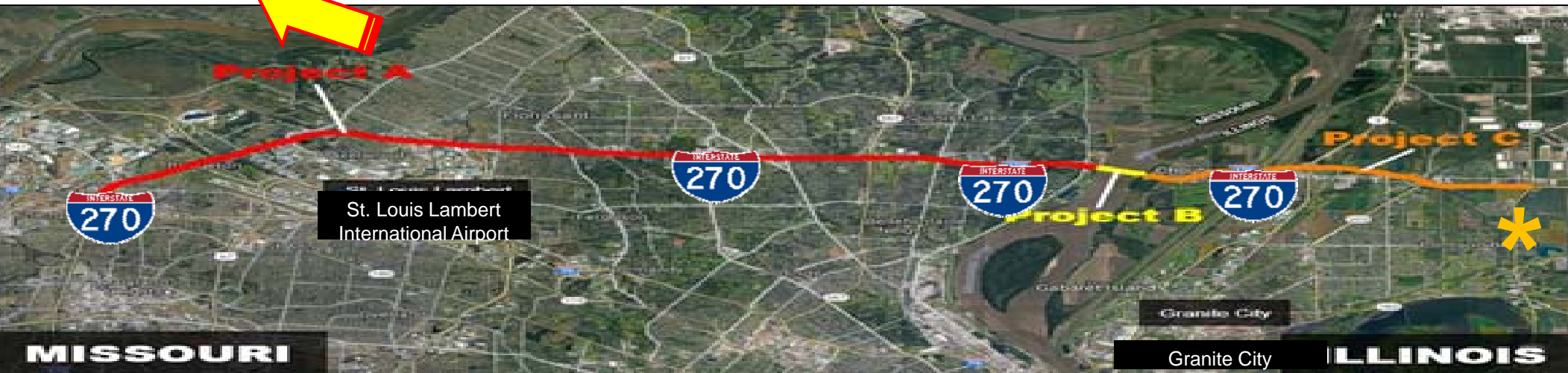


Recently Funded Projects: 2018

2018 I-270 North Corridor

- \$250 mil I-270 from I-70 to Mississippi River – partial funding (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)

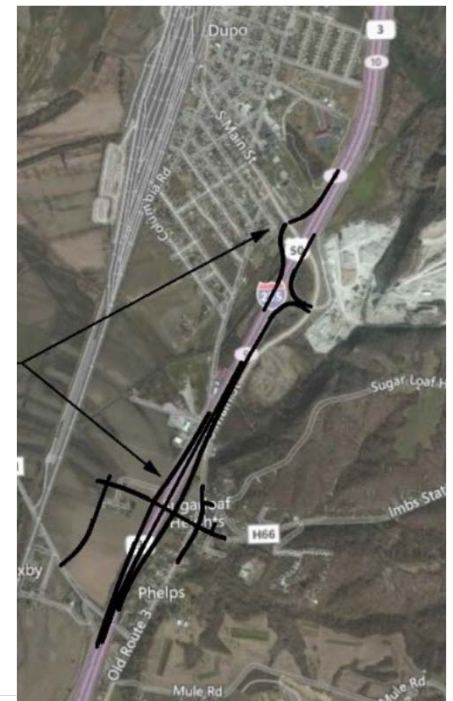
\$492 mil



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



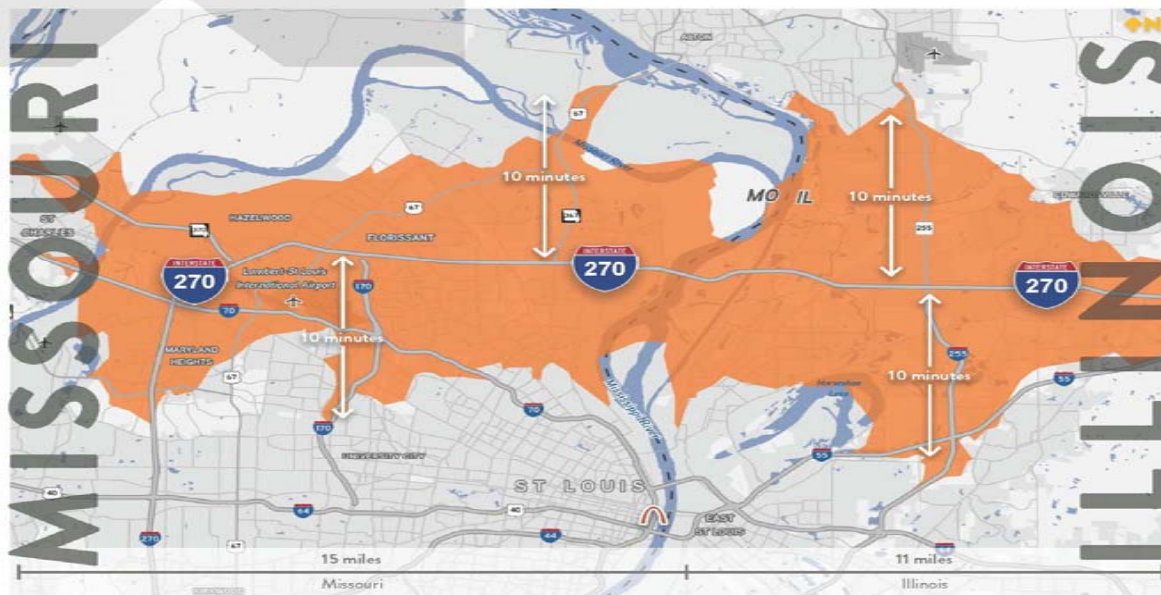
Total Project Cost: \$59 mil





ST LOUIS REGIONAL FREIGHTWAY

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.

HOT SPOT SPOTLIGHT: NORTH I-270 CORRIDOR

NATIONAL TENANTS WITHIN 10-MINUTE DRIVE TIME





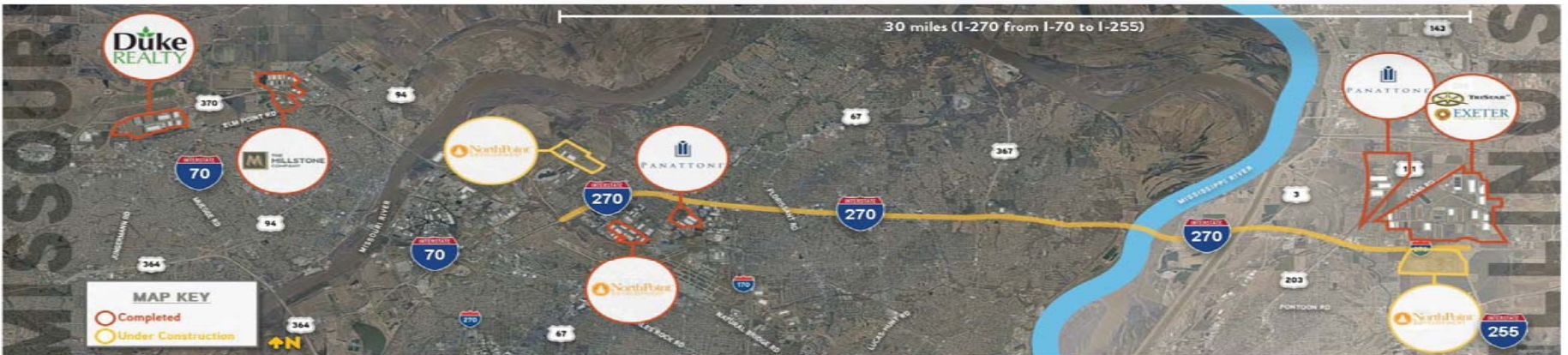
ST LOUIS REGIONAL FREIGHTWAY

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: \$176 mil



I-270 Improvements from I-70 (MO) to Illinois Route 157 (MO-IL)
(B) Chain of Rocks Bridge Replacement
(C) I-270/IL-111 Interchange Reconstruction
Highest Priority Project



Funded: Spring 2018
(A) \$260 mil (B) \$211.6 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: \$9 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 2018
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: \$69 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: \$32 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: \$39.9 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 (**partially funded \$250 mil**) (MO)
(C) Widening from Mississippi River to Route 157 (**IL-111 Interchange Funded**)
Highest Priority Project



Estimated Cost: \$1.2 bil
Unfunded: (A) \$460 mil (C) \$268 mil
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) \$59M**
- **2019 I-64 Improvements from Green Mount Rd to IL 158/Air Mobility Dr (IL) \$32M**
- **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)**
- **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) \$20M**
- **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**



Thank you!