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Q&A with John Nations, president and CEO of the Bi-State Development Agency, and Mary Lamie, executive director of the St. Louis Regional Freightway District

IBJ: Why did Bi-State launch the St. Louis Regional Freightway District?

Nations: We're very proud of that. St. Louis has key transportation assets. This is the northernmost point you can go on the Mississippi River completely unrestricted by locks and dams. There is tremendous highway capacity and airport capacity. Six of the seven Class I railroads come into the St. Louis region. Whether you measure by total tonnage or by value, the St. Louis Port District ranks as the second- or third-busiest port in the country. We have a lot of good infrastructure in place.

Nations

The East-West Gateway Council of Governments did a freight study that pointed out that we have all these assets in an ideal location. So, why were we not more of a logistics center? While there were multiple people involved in freight, it became clear that there was no one person or organization marketing for the region, advocating for the region in logistics and the freight economy. We put a business plan together for East-West Gateway Council of Governments, and in September of 2014 we were unanimously selected to be the freight district for the St. Louis region.

IBJ: Why freight?

Nations: It's an opportunity for growth for this region. Cities and regions are looking at where their individual cities can compete. St. Louis does very well in education, financial services and health care. And when you look at freight and logistics, the St. Louis region has a tremendous amount of assets. This could really be a growth sector. The freight study also pointed out that between now and 2040 there is a projected growth in freight of 30 percent. So, when you look at the country, St. Louis sits at a very advantageous place.

In 2014, both Missouri and Illinois ranked in the top five for states in terms of tonnage and value moved on freight rail. We are a key logistics portion of the country. With the opening of the new Panama Canal, everyone is looking for opportunities. This is an area we believe that we can grow our economy. The purpose of the freight district is to take on that responsibility. To grow and enhance this sector.

Lamie: The freight study indicated other regions had very aggressive marketing campaigns and we were being outmarketed. Efforts to attract site selectors for our region were not regional and focused on individual cities and counties. Our role is to promote the bi-state region. If we are collectively marketing the bi-state region and all of our competitive advantages, everyone stands to benefit. Our job is to go out and promote those competitive advantages; attract site selectors; have them recognize the region's competitive advantages; and start bringing their manufacturing and logistics industries to our area.

Lamie

IBJ: What's been accomplished so far?

Lamie: The first thing is that we launched the freightway.com website. It has an interactive map that tells you everything you need to know about our multimodal assets and our industrial real estate sites. Our target market is site selectors. The website has identified the top industrial real estate sites in the bi-state area. Before, site selectors considering the area had to work with a lot of different offices and different entities. We've streamlined that process. Now you can go to the website and find all the sites that meet the criteria for the next Amazon or Home Depot distribution center or fulfillment center.

We've also continued to build partnerships and relationships with other regions both in the Midwest and throughout the Gulf Coast area to continue to tell our story; to let others know what we have to offer from a competitive logistics perspective. It's an opportunity to meet shippers and carriers who are deciding how their commodities are going to move from one part of the world to the other part of the world. And it is also an opportunity to work collaboratively with them to decide where transportation corridors will be throughout the Midwest, and throughout the nation, and it allows us to work with them directly.

We are working closely with my counterpart in Kansas City, supporting each other for improvements to Interstate 70. We are also working with the Port of Kansas City. We work with the Chicago area. Chicago is obviously one of the top freight hubs in the nation, but they have a lot of congestion. Our message is that we are a good backup to Chicago when they are having weather or congestion issues. So, you need to consider investing in our infrastructure.

We are working with Paducah and Louisville to see how we can improve our barge movements and try to maximize those movements from the Midwest to New Orleans. We are working with New Orleans. We went to New Orleans earlier

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Q&A

Continued from previous page

this year and signed a Memorandum of Understanding with the Port of New Orleans. From a marketing perspective, it shows we offer a tremendous amount to shippers and carriers. And symbolically it wasn't just the Freightway, it wasn't just John Nations and myself going down there, we had our three public port representatives from two states. We had America's Central Port in Granite City, Illinois; the St. Louis Municipal River Terminal that is operated by the City of St. Louis; and the Kaskaskia Regional Port District in Illinois. It was a regional effort. At times, those ports are in competition with each other but we were trying to promote the whole region. The goal was that as we work with shippers and carriers, any success that any of them have, benefits the whole region.

Nations: One of the five elements of the business plan that East-West Gateway was looking for was a freight development and needs analysis plan. There wasn't a needs analysis for freight in St. Louis as to what the infrastructure was, where it was and what needed attention. One of the biggest things Mary was able to accomplish was to get public entities and private entities and different modes of transportation to agree on a needs analysis, which resulted in the Merchants Bridge becoming the No. 1 priority on the list. Already we have bi-state, bipartisan, political support for that project and already have gotten pledges for two-thirds of the cost for the bridge replacement.

IBJ: Most St. Louisans have never heard of the Merchants Bridge. Why was that No. 1 one?

Nations: By the combination of the Merchants and the MacArthur Bridges, more freight moves across the Mississippi River at St. Louis than anywhere else. They are two of the oldest structures across the Mississippi. So, Mary in a very short period of time did something that people still marvel at. She got all the modes, all the sectors, public, private, to come up with the needs analysis and the infrastructure list that resulted in everyone coalescing around the Merchants Bridge being the No. 1 priority. That is a key accomplishment.

IBJ: How did you get all of those different groups to agree on the Merchants Bridge as the top infrastructure priority?

Lamie: It sells itself because the private sector recognizes the value of us all working collectively together. And, when we asked the private sector what we needed to do from an infrastructure perspective for you to stay in the St. Louis area and create opportunities for growth, they said, you need to invest in the Merchant Bridge; you need to invest in Interstate 270, you need to invest in first mile/last mile projects. Next to the interstate system, the Merchants Bridge is one of the most important transportation projects in the region, maybe even in the nation.

IBJ: Why would the barge industry agree that a railroad bridge is the top priority?

Lamie: It surprised me, too, but they said that in order for us to have low competitive barge rates we have to have low competitive freight rail rates and, more importantly, we have to have that interconnectivity with all the modes of transportation. If we don't have good rail access to the St. Louis area, that drives our costs up.

IBJ: What needs to be done to the Merchants Bridge?

Lamie: While the bridge has two sets of tracks, only one track can be used at a time because it wasn't designed or built 126 years ago to carry today's loads. The superstructure needs to be replaced so that it will be able to handle two trains at the same time.

IBJ: What is the project cost?

Nations: $200 million. $125 million is already available through a commitment by the Terminal Railroad Association of St. Louis and its members. We are working on securing the last one-third. An application for a grant for federal funding will be resubmitted with the help of the Missouri Department of Transportation.

IBJ: What are the chances of receiving the grant?

Nations: We can't predict that. What we do know is that we have an application for a project that is of national significance. We believe it is a very strong application and have been told so by multiple people. It has the unanimous support of the bi-state region as well as our U.S. senators and congressional delegation that this is a priority. So, what we believe is that we have an application that ought to compete very well nationally for federal dollars on a critical infrastructure program.

Lamie: We also feel it is a model for private-public partnerships with two-thirds of the funding coming from the private sector. The bridge is unique in the fact that six Class I railroads are utilizing it as well as Amtrak, so from a commerce perspective it really serves the entire nation. We're hopeful they will make federal funding announcements sometime in the spring of 2018. Part of the criteria for evaluating these projects is project readiness. The Terminal Railroad Association will essentially have those plans completed by the fall of this year and if funding were available, they could begin construction as early as this fall.

IBJ: What comes next?

Lamie: Replacing the Interstate 270 Chain of Rocks Bridge over the Mississippi River and improving the I-270 corridor from Illinois Route 111 to Lindbergh Boulevard in Missouri. The I-270 outer belt is one of the most traveled freight corridors in the region and is a link to the national freight network with connections to Interstate 44, Interstate 55, Interstate 64 and Interstate 70. The Chain of Rocks Bridge has experienced rising maintenance costs due to the age of the structure and increases in traffic volumes. Unfortunately, the construction schedule could be over a 20-year period of time. We're working with regional and national leaders to help maximize infrastructure investment to reduce travel time delays for commuters and the freight industry. Infrastructure investment for projects like I-270 is critical to ensure both the region and the nation have a reliable and efficient transportation system and have a freight network that remains competitive with the global market.

Terminal Railroad Association, owners, pledging $136 million to Merchants Bridge

By ALAN J. ORTBALS

One of the keys to success of the St. Louis Regional Freightway effort is the strength of the area's railroads.

Railroads are divided into three classes based on their operating revenue. Class I railroads are those with operating revenue in excess of $250 million and carry the most volume of freight. Of the seven Class I railroads servicing the country, six traverse the St. Louis terminal — the Union Pacific Railroad, the Norfolk Southern, CSX, the Canadian National, the Kansas City Southern and the Burlington Northern Santa Fe – BNSF. The Canadian Pacific is the only Class I railroad that does not come through the region.

While the first railroads reached the Illinois bank of the Mississippi River in the 1830s, the first bridge to span the Mississippi River in St. Louis, the Eads Bridge, wasn't completed until 1874 and it was privately owned and operated as a monopoly.

Responding to exorbitant fees to use the bridge, the merchants of St. Louis came together to build their own bridge in 1889 north of the Eads, which became known as the Merchants Bridge. The 127-year old Merchants Bridge is still in service today.

In the late 1800s, St. Louis had 24 railroads serving the St. Louis terminal, each either terminating or originating in the metropolitan area with their own track. The Terminal Railroad Association of St. Louis was formed in 1889 to streamline rail traffic through St. Louis. It is currently owned by five of the six Class I railroads that serve St. Louis.

In the 1980s when the MetroLink light rail system was being planned, the TRRA owned the Merchants Bridge and the Eads Bridge which last ran trains in the 1970s as the car lengths of modern rail traffic could no longer clear the sharp curvature of the Broadway Tunnel between Laclede's Landing and Busch Stadium. Through a deal with the City of St. Louis, the TRRA swapped the Eads Bridge for the MacArthur Bridge to free the Eads up to carry MetroLink.

Today, with a combination of the Merchants and MacArthur Bridges, St. Louis is the No. 1 geographic rail crossing across the Mississippi River with more than 70 crossings per day. But, that total is held down because the Merchants Bridge, due to the bridge's age and the weight of modern trains, is only able to handle one train at a time despite having two tracks.

■ ***Continued on the next page***

Artist's rendering of renovated Merchants Bridge.

MidAmerica St. Louis Airport entertains international cargo carrier prospects

By ALAN J. ORTBALS

MASCOUTAH — MidAmerica St. Louis Airport, one of two international airports in metro St. Louis, boasts a 10,000-foot runway, 17 acres of aircraft parking ramps and 2,300 acres of developable land with immediate access to Interstate 64 and all of it backed by a Foreign Trade Zone and Illinois Enterprise Zone.

With these advantages in mind, North Bay Produce located its 60,000 square-foot perishable handling terminal and Midwest hub at MidAmerica in 2012. It hauls produce from Latin America to Europe and Asia.

In describing the transport of those goods Airport director Tim Cantwell explained that planes coming from South America are unable to fly nonstop to the Far East.

"South America air service doesn't have airplanes that will fly to China nonstop," Cantwell said. "They have to land en route. The infrastructure in South America doesn't match the infrastructure in the United States. The airplanes coming out of South America into the United States don't have the trans-Pacific capabilities. The planes coming out of the United States to China do. The goal is to link up South America with China through the United States. There's no better base for that service than the Midwest from South America to China. And, MidAmerica has all of the tools to support the specific needs of that commerce – international perishable handling and air transport."

Cantwell said hauling perishable cargo requires uninterrupted refrigeration.

"China doesn't have the last mile refrigeration and that's key in food quality," Cantwell said. "Refrigeration

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Cargo plane on tarmac at MidAmerica St. Louis Airport.

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MidAmerica ST. LOUIS AIRPORT

International agribusinesses developing Sauget riverfront

By ALAN J. ORTBALS

Development of materials handling facilities along the Sauget riverfront has been booming in recent years. Rich Sauget, Sr., president of East County Enterprises, said that it started about eight years ago when the Archer Daniels Midland Co., a global agribusiness company headquartered in Chicago, built a terminal on the river. They've been joined by others since.

Seacor Marine, an international company with headquarters in Houma, La., and Dubai, has built a transfer facility on the Sauget riverfront that brings in products by truck, rail and pipeline for transfer to barges. It includes four, 100,000-gallon tanks for liquid storage.

Seacor and ADM have been joined by Gavilon, a commodity management firm located in Omaha, Neb., that ranks 13th on the Forbes list of privately held companies. Its focus in Sauget is on its fertilizer business.

Eagle Marine Industries has opened a facility to manufacture barges. And, David Jump, president of American Milling Co. in Cahokia, has also sold property to two global commodities companies: the Louis Dreyfus Group, headquartered in Amsterdam and Cofco Corp., a Chinese company.

"What's going on on the riverfront in Sauget is monstrous," said Sauget. "These unit trains of between 80 and 120 grain cars come in. They have hatches on the bottom to release their grain from the hopper cars and they have 24 hours to unload. A lot of these trains are moving as they are unloading. It's hard to describe how big of an operation this is."

Riverfront land in Sauget and Cahokia is becoming scarce, but Sauget says there is still 450 to 500 acres available in the nearby Sauget Business Park.

"On one side of the park is a 100-acre rail yard," Sauget said. On another, the third busiest airport in the state of Illinois. On the east side is I-255 providing ready truck access east, west, north and south.

The FedEx Ground building in Sauget Business Park.

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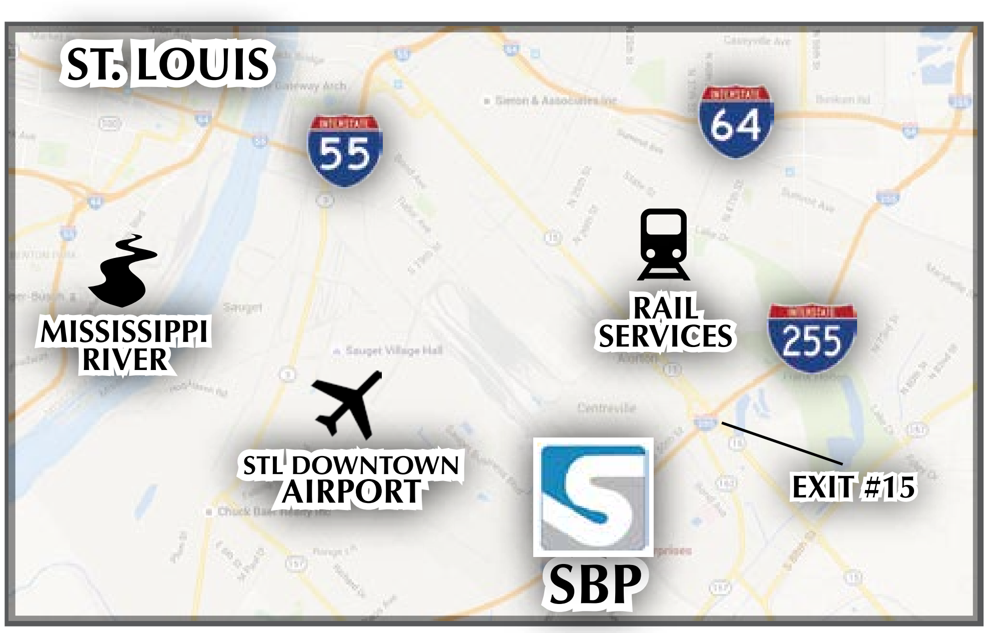

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Mid America

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is key to what we've set up between here and China. It's called a 'closed cool chain,' which is an industry-specific standard for keeping the temperature consistent from MidAmerica Airport to Ningbo, China, our partner airport who completed construction on a 25,000-square-foot perishable center on their cargo aircraft parking ramp."

Cantwell is seeking a cargo carrier that will run three flights a week but, in the meantime, he says charter business is doing well.

"As an example, Sabreliner Corp. is retrofitting internationally-owned helicopters at its plant in Perryville, Mo.," Cantwell said. "Twice this year, they came in here to move project freight out to the Middle East. That is a growth area for the region because we don't have any scheduled freighter services into or out of the region. The charters work out really well."

But the focus continues to be on securing a bulk freight carrier that will fly out of MidAmerica multiple times per week.

"Having the first one decide to do that is like having the first restaurant in the mall," Cantwell said. "You have to get one and then you can get the others."

Cantwell said that he is in constant contact with North Bay Produce, which currently trucks product in and distributes from the Midwest. "But, when we get a carrier based here on a scheduled route, we will get all of North Bay's cargo flying out. Then that's an opening to export fresh, Midwest foods to China.

When that cargo carrier is secured, it will require changes to MidAmerica, Cantwell said. There are already 457 non-county employees working on the property and the parking lot is 85 percent full.

"All the pieces are coming together," Cantwell said. "The freighter cargo is not the toughest thing but it is the next thing. I entertain prospects every day about what they need and what we can do for them. We have 2,300 developable acres adjacent to the new Rieder Road exit on I-64 that is currently under construction and it's perfect for light manufacturing, warehousing and associated uses."

Terminal Railroad Assoc.

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One of the top priorities of the newly organized St. Louis Regional Freightway is to coalesce a regional consensus on priority projects. Number one on that list, by unanimous decree of all parties involved, is the renovation of the Merchant's Bridge.

The $211 million project will seismically retrofit the bridge by drilling new piling, encasing the existing masonry piers in concrete and replacing all three steel river trusses. The new structure will be constructed to modern clearances and load ratings to carry the next 100 years of heavier and wider freight. About $136 million is funded privately by TRRA and its owners. The Missouri Department of Transportation has agreed to apply for $75 million in federal funding through the Infrastructure for Rebuilding America grant program. While competition for the grants is stiff, Asim S. Raza, the TRRA's chief legal officer and director of real estate and marketing, says the project has a good chance.

"It's a project of national significance," Raza said, "because these are the only two rail crossings available to all the various Class I railroads up and down the Mississippi for approximately 130 miles in either direction. There's not a lot of rail crossings across the Mississippi River so the St. Louis area serves as a vital transportation gateway."

Raza said that they are hoping that grant awards will be made during the first quarter of 2018. If that comes to pass, he said, construction will begin soon afterward since all of the engineering has been completed and the plans are ready to bid.

Construction is expected to take three to four years, Raza said. The three spans will be built on land then floated in by barge. Depending on the grant, the project is expected to begin in 2018 and be completed in 2021/22.

"At one-time St. Louis was the fourth-largest city in the United States and that was based upon its geographic assets and location," Raza said. "What the Freightway is doing is focusing on those assets and marketing them regionally, nationally and internationally as a logistics area of importance."

Sauget Business Park

Continued from previous page

It's also in an Illinois Enterprise Zone and a Tax Increment Finance District. We have everything you need."

Some of the major tenants of Sauget Business Park are Affton Fabricating & Welding Co. Inc., the 255 Logistics Center, FedEx Ground, Gasket & Seal Fabricators Inc., Holten Meats, Hulcher Services, Mid-America Fiber Co., Peterbuilt Truck, R&L Transfer, Treehouse Foods, Stellar Manufacturing and Universal Air Filter.

America's Central Port harbor improvements aim for cargo carriers

By ALAN J. ORTBALS

America's Central Port has been busily working on expansions, additions and improvements over the last year, including the erection of a new 126,000-square-foot distribution facility that is now fully leased.

A 25,000-square-foot distribution building has also been leased. And, 4.5 new miles of new rail track was finished late last year. All of that is part of the continuing development of the new Madison (formerly, South) Harbor.

One of the buildings is leased to River's Edge Terminals, a trans-loading operation that brings in commodities by rail and exits by truck. Dennis Wilmsmeyer, the port's executive director, said the district's board is considering extending additional rail track to other undeveloped areas of the port's grounds to help attract new tenants. The focus, he said, would be primarily on manufacturers that can take advantage of all the modes of transportation supplied by the port.

"We have a unique opportunity in the St. Louis region to continue to develop a world-class multimodal transportation facility," said Dennis Wilmsmeyer, the port's executive director. "If you look around at the different industrial parks and distribution centers, they do a fantastic job but it's usually just one mode of transportation. We have barge, rail and truck here, giving those companies that need multiple modes of transportation — primarily manufacturers — an opportunity to locate here and take advantage of that to lower their overall transportation costs."

Construction of the Madison Harbor just south of Lock 27 was a $50 million project. Some 9,600 feet of rail track was built, more than one million cubic yards of dirt was moved and more than 8,000 cubic yards of concrete was poured to create the new rail/truck/barge terminal and general cargo barge dock. The location of the harbor allows for full operation of its facilities all year during all water levels. Rail service includes Class I rail carriers that can be accessed via the new rail loop with 24/7 switching service provided by Port Harbor Railroad.

Wilmsmeyer said the Madison Harbor project was done with an eye toward the changes in global transportation including the expansion of the Panama Canal that was completed last year. With the Madison Harbor, America's Central Port is now well situated to handle the growth in container-on-barge business that is expected as a result of the canal expansion, he said.

Earlier this year representatives of the St. Louis Regional Freightway District, including Wilmsmeyer, traveled to New Orleans to sign a marketing agreement with its port district.

"The creation of the St. Louis Regional Freightway District was one of the smartest moves the region has made in many years," Wilmsmeyer said. "Bringing together under one umbrella all the regional freight services and marketing it, showing to the rest of the country and the world that St. Louis is the true transportation capital of the United States."

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The Madison Harbor at America's Central Port.

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Agriculture freight network in region poised for growth

GRANITE CITY — One 15-mile section of the Mississippi River in the St. Louis region delivers the highest level of grain barge handling capacity anywhere along the Mighty Mississippi — so much so that it is now being called the "Agriculture or Ag Coast" of the nation in terms of barge transfer facilities for agricultural products.

To sustain and grow the market share, infrastructure investment in multimodal interconnectivity is critical, local officials say.

As production and demand for commodities like corn and soybeans increases, the St. Louis region is said to be strategically positioned to handle a significant portion of the expected increase in freight volume along the mostly inland waterway.

Those findings were revealed in August during a panel discussion at America's Central Port in Granite City, with David Jump, president of Cahokia-based American Milling, and Jeff Keirn from the Illinois Department of Transportation. The meeting, hosted by Bi-State Development, St. Louis Regional Freightway and America's Central Port, provided a positive outlook on the bi-state region's role as a national and global freight hub.

Jump said the amount of river business in the St. Louis region has disproportionately increased over the past three decades. There is an increased demand for the transfer of grain across the industry, but the bi-state region's barge transfer facilities are earning recognition as a more cost-effective and efficient means to transfer products by barge for shipment to the Port of New Orleans as compared to other areas north of St. Louis.

That recognition comes on the heels of investment of more than $200 million in the region's agricultural product barge transfer infrastructure facilities since 2005, he said.

"The St. Louis region is a rail and interstate highway gateway," said Jump. "It is more cost-effective to move commodities into, out of and through St. Louis by combinations of truck, rail and barge than points upstream on the Mississippi and Illinois Rivers. The freight cost to ship large cargoes through places like Davenport (Iowa) or Peoria (Illinois) to and from New Orleans has increased significantly, while the freight cost to ship through St. Louis to New Orleans has not increased at all, and is in fact, netted down for this year."

The reason it is more cost-effective for companies to transfer freight through the St. Louis region is due to the more efficient infrastructure and handling capacity offered via the region's open waterways and barge transfer facilities.

According to Jump, there has been consolidation in the river transportation industry over the last decade, and barge lines are becoming more streamlined by focusing on efficiency. Railroads have offered cheaper rates to large barge-loading facilities that can turn unit trains — carrying 110 to 125 railcars of grain and agricultural product — in just a few hours.

"Barge loading and unloading capacity has expanded in the St. Louis area to take advantage of these train rates and barge freight rate adjustments," Jump said. "The four highest capacity grain barge loading facilities in the entire inland waterway are in Cahokia. Three of the four were built in the past five years. As a result of increased handling capacity and favorable barge freight values, the St. Louis region has become a very significant destination for these trains."

The four agricultural product transfer facilities in Cahokia are operated by Consolidated Grain and Barge Company; Louis Dreyfus; and China National Cereals, Oils and Foodstuffs Corporation (COFCO International) — China's state-owned grain and food processing manufacturer and trader. Jump noted that China has become a large buyer of soybeans, with 35 percent of soybeans grown in the United States being exported to China. COFCO never owned a grain/agriculture barge transfer facility in the interior of the United States until last year when it invested in the St. Louis region. Jump said China will begin buying grain coming into Cahokia this fall.

The frequency of unit trains along Illinois Route 3 has increased since 2016 and is expected to increase again this fall. In 2016, fluctuations resulted in as many as two unit trains crossing Route 3 a day, with each unit crossing Route 3 twice a day. In early 2017, the fluctuation reached four unit trains per day. In the fall, CGB will complete unit train rail improvements, which will increase the amount of unit trains that cross Illinois Route 3 to potentially six. According to Jump, COFCO has the capability for two additional unit trains, with the potential to accommodate a four-unit train per day capacity. In addition, Jump said American Milling is planning for an additional barge transfer facility, which would increase the St. Louis region's capacity to handle even more grain and grain products in the future.

The growth in capacity comes as the demand for exports continue to increase. Jump told the Freightway port working group members that U.S. soybean exports have increased from 20 million tons to 57 million tons over the past 30 years, and corn exports increased from 32 million tons to 57 million tons.

The St. Louis region is seeing a direct economic impact as a result of this increase and its capacity to handle additional amounts of grain and agricultural products.

"In 1985, more than 5 percent of grain barges arriving in the New Orleans harbors were coming from the St. Louis region, and now that number has increased to about 30 percent," Jump said. "The factors that are forcing growth in the St. Louis region are not going away. There is nothing on the river like the St. Louis region."

America's Central Port

Continued from previous page

Wilmsmeyer said that the port encompasses 1,200 acres and they made a strategic move a couple years ago to get the district's enabling legislation changed to expand its boundaries far to the north. He said that he is hopeful that in the coming years the port will be able to start attracting industry, manufacturing and distribution companies to some of the other communities that it serves.

"We continue to strive to find the next company out there that needs the services we provide, that needs a great transportation opportunity. A company that wants to grow and potentially needs a new facility," he said. "We are targeting those manufacturers out there that may be working today in very old or outdated facilities that are inefficient. Is there a way to get them to come look at what we have to offer? We can greatly lower a company's costs in terms of the build-out of rail or roadway because a lot of that infrastructure is already right here."