

5 reasons Missouri is right for distribution centers



With a location at the center of a vast transportation network and with direct connections to U.S. and foreign markets, Missouri has a solid history of successful warehousing and distribution. And, with some of the lowest taxes, energy rates, and gas prices in the country, the state is positioned to shape the future of the industry.

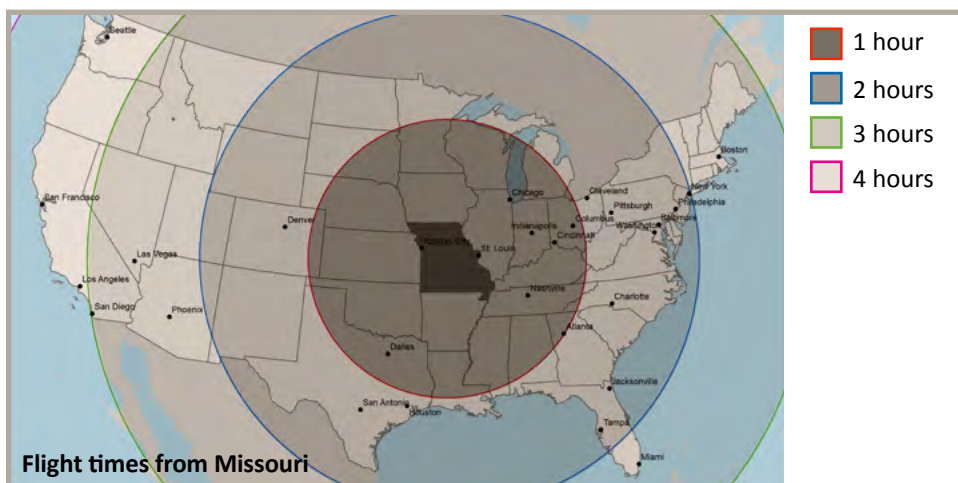
1 Missouri puts you closer to your customers and suppliers.

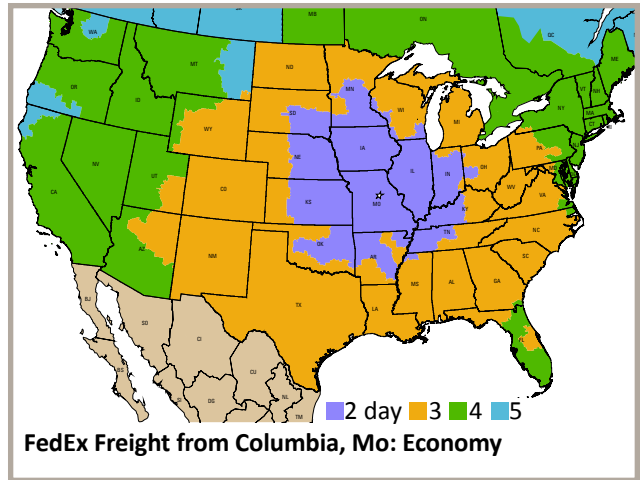
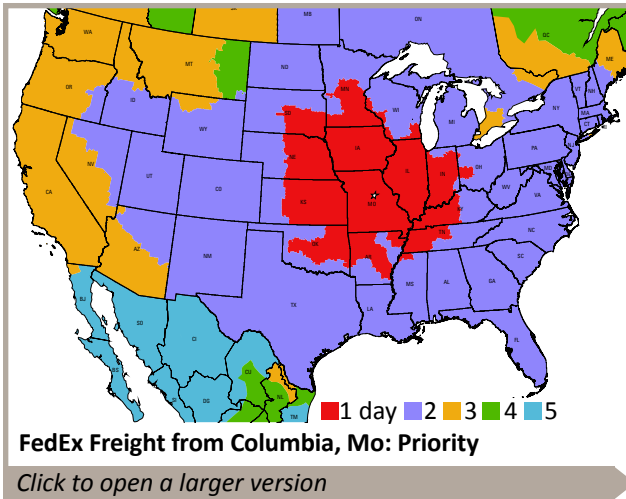


- Missouri is located within 600 miles of 50 percent of U.S. households, 52 percent of U.S. manufacturing establishments, and seven of the nation's fastest growing metro populations: Atlanta, Austin, Dallas, Denver, Houston, San Antonio, and Minneapolis.
- The population center of the U.S. is located in Texas County, Missouri (*Census Bureau, 2010*).
- Missouri is bordered by eight states, tied with Tennessee for the most of any U.S. State—providing access to even more markets and customers.

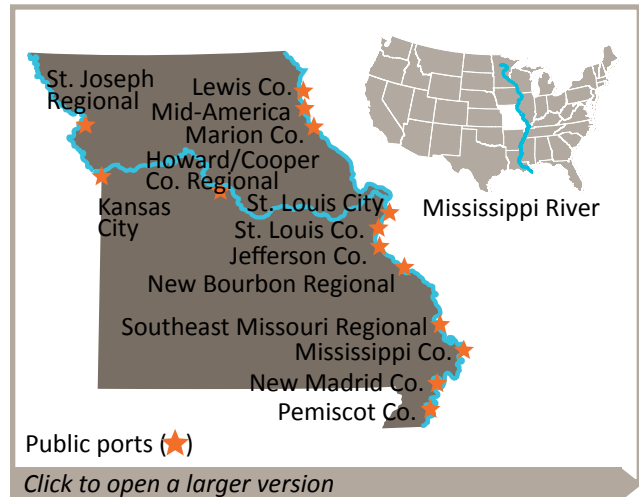
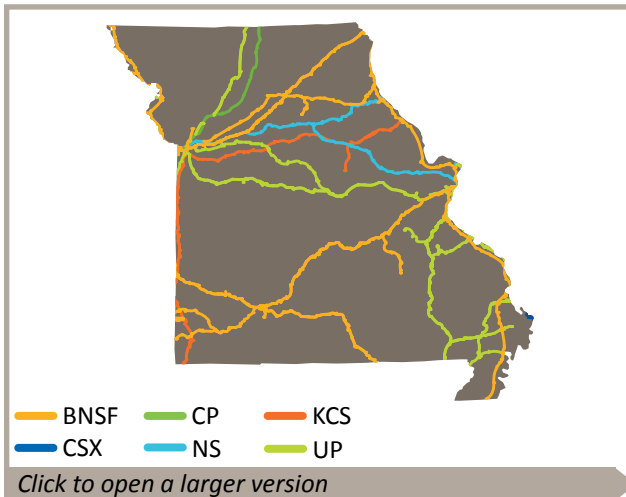
"For a business like ours that ships coffee to a lot of places, it is important to be centrally located. There are many places we can get to quickly from Missouri."

—Tricia Zimmer Ferguson, President
Kaldi's Coffee Roasting Co.





2 Missouri's top-ranked transportation network can get your product to market faster *and* cheaper.



- CNBC ranked Missouri's transportation and infrastructure 5th best in 2013 based on the value of goods shipped by air, land and water, the availability of air travel, and the quality of the roads.

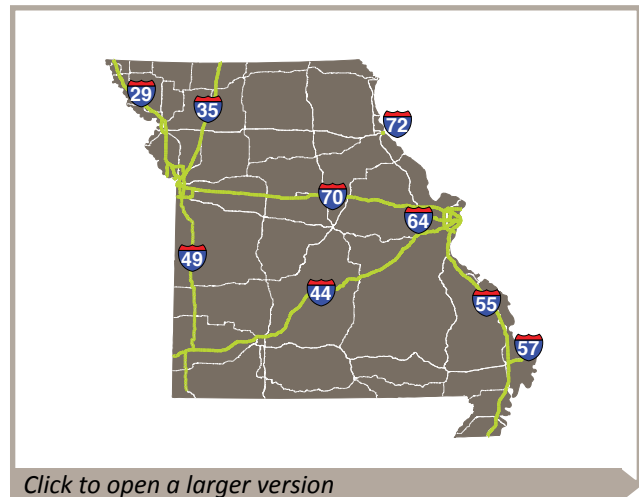
Rail

- Missouri provides efficient, low-cost shipping across the country via all class-one carriers: Burlington Northern Santa Fe (BNSF), Kansas City Southern (KCS), Norfolk Southern (NS), Union Pacific (UP), CSX, Canadian National Railway (CN), and Canadian Pacific (CP).
- Missouri is ranked in the top ten for U.S. railroad mileage (*Association of American Railroads*).
- Missouri is ranked fourth in tons and third in rail carloads carried by state (*Association of American Railroads*).
- Two of the largest U.S. rail terminals are located in Kansas City and St. Louis, linking nearly 4,000 miles of track throughout the state.
- The 1,340 acre CenterPoint KCS Intermodal center includes a thousand acre industrial park located directly adjacent to the newly opened Kansas City Southern Intermodal Facility. With infrastructure in place, these sites are build-ready for facilities up to 1+ million SF. KCS will offer direct rail service to CIC-KC from the natural deepwater Port of Lazaro Cardenas, Mexico.

Waterways

- Missouri is ranked tenth for inland waterway mileage (1,000 miles), moving an average of \$4.1 billion in cargo annually.
- Nearly 3,300 acres are available for development adjacent to Missouri's 14 public port authorities (*Missouri Port Authorities*).

- Twenty-nine industrial centers, with a combined population of 90 million, can be reached from St. Louis by barge. St. Louis is the northern-most point on the Mississippi River that normally remains ice-free and open throughout the year. The city is also the location of the southern-most lock and dam on the Mississippi (*Missouri Port Authorities*).



Airports

- Missouri travelers can reach most cities in the United States and Canada in less than three hours by air.
- The airport system in Missouri consists of 130 public airports, two of which support international traffic: Lambert-St. Louis International and Kansas City International.
- Springfield, Branson, Joplin, Columbia, Cape Girardeau, Kirksville and Waynesville (Fort Leonard Wood) also have commercial service.
- Missouri has three U.S. Customs Ports of Entry located in Kansas City, Springfield, and St. Louis.

Foreign Trade Zones

- Missouri has three foreign trade zones located in Kansas City, Saint Louis, and Springfield.
- The FTZ at Lambert-St. Louis International Airport was recently expanded to include all of St. Louis and St. Louis County under the Alternative Site Framework.
- The KCI Intermodal BusinessCentre includes 8,000 acres of multi-use land for development on the airfield designated FTZ and enhanced enterprise zone.

Roads

- Missouri has the 6th largest public road and highway system in the nation (*Federal Highway Administration, 2012*).
- Major interstates include I-64, I-44, I-70, I-55, I-35, I-49 and I-29.
- I-70, which bisects Missouri, is over 2,000 miles long and passes through 10 states. Interstates 29 and 35 are located within the NAFTA corridor, providing easy access to

Canada and Mexico.

- I-25 and I-35 are located within the NAFTA corridor, providing easy access to Canada and Mexico.
- There are more than 110,000 commercial trailers registered in Missouri (*Bureau of Transportation Statistics, 2011*).

Missouri roads by the numbers

All public roads:	131,978 miles
Interstate miles:	1,379 miles
Road bridges:	24,334 miles

Source: Federal Highway Administration and the Bureau of Transportation Statistics, 2012

Maximum dimensions allowed on Missouri highways

Width:	8.5 ft
Height:	14 ft (15ft in a commercial zone)
Length (single motor vehicle):	45 ft
Length (truck-trailer combination):	65 ft
Length (each trailer when pulled in tandem):	28.5 ft
Length (tractor-trailer combinations):	No limit
Weight (single axle):	20,000 lbs (22,400 lbs in a commercial zone)
Weight (tandem axle*):	34,000 lbs
Gross Weight Limit:	80,000 lbs

*A tandem axle is defined as a group of two or more axles, arranged one behind the other, separated by a distance of no less than 40 inches nor more than 96 inches.

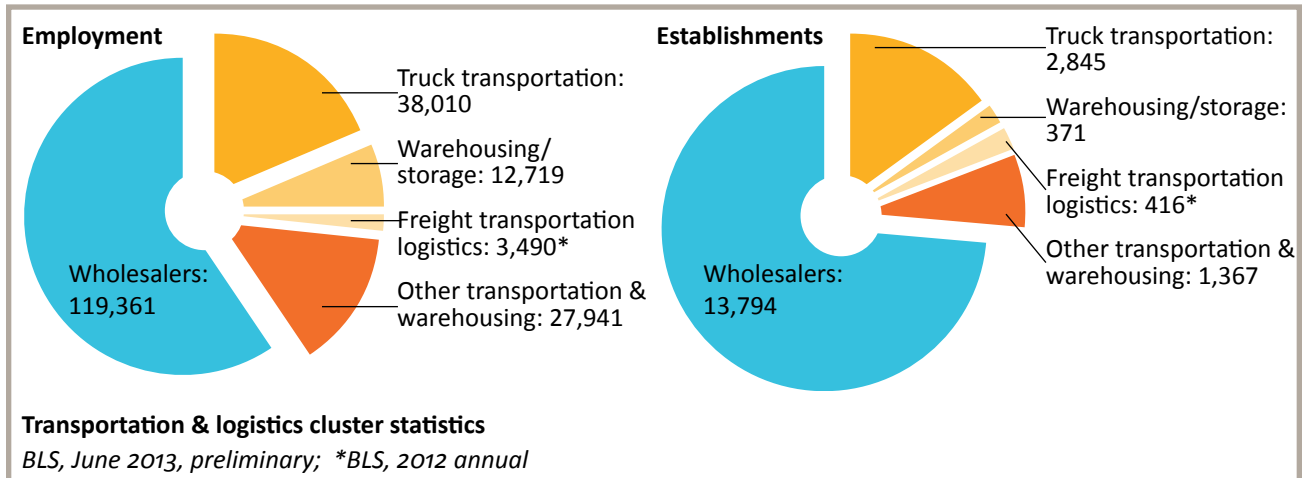
Recent transportation improvements

- In 2013, construction was completed on a new \$20 million, 1,200-foot railroad bridge across the Osage River that is designed to add capacity and reduce delays on the route used by Amtrak Missouri River Runner trains between Kansas City and St. Louis.
- Missouri's Safe & Sound Bridge Improvement Program received the People's Choice Award—decided by popular vote of the general public—in the America's Transportation Awards 2013 competition. The project built new bridges in each of Missouri's 114 counties and was completed more than a year early and under its \$685 million budget.
- The Missouri Department of Transportation won top honors in the Mid America Regional "America's Transportation Awards" competition for a project that was completed ahead of schedule and one that demonstrated the best use of innovation: the statewide Safe & Sound Bridge Improvement Project and the Route 5 Shared Four-Lane Project in Camden and Laclede counties.
- The Stan Musial Veterans Memorial Bridge, the first new bridge to link St. Louis and southwestern Illinois in over 40 years, is scheduled to open in February 2014. The new bridge will alleviate congestion on the existing Poplar Street Bridge by relocating I-70.

Did you know?

- St. Louis, Springfield, and Kansas City all have Intelligent Transportation Systems called Gateway Guide, Ozarks Traffic, and Scout, respectively. These centers monitor the roadways, respond to congestion and incidents and deliver information to travelers via a number of means, including web sites, email, sms messages, dynamic message signs, and highway advisory radio (*MoDOT*).
- The first three contracts under the Federal-Aid Highway Act of 1956 were signed in Missouri. The first contract signed was for U.S. 66. On August 13, 1956, Missouri awarded the first contract based on new Interstate Highway funding.
- Springfield, Missouri was the first community in the U.S. to construct a diverging diamond interchange.

3 Missouri “gets” distribution centers. Look who’s here!



- In 2013, over 18,000 Missouri establishments were involved in the transportation/logistics industry sector, which includes wholesalers, truck transportation, warehousing, and freight transportation logistics.
- Walmart, Dollar General, General Mills, Toys R Us, and Kraft Foods all have distribution centers in Missouri.
- Missouri has intermodal facilities located around the state with thousands of acres of shovel-ready sites.

Recent projects

Click on [orange](#) text for a link to more information.

2013

- [Artur Express](#), an independent contractor trucking company, announced plans to invest \$1 million for expansion of its headquarters in south St. Louis County. The expansion will provide space for recently hired workers and allow the company to purchase a new location in nearby Bridgeton.
- Covington Retail Partners announced plans to build a new distribution center in Republic creating 32 new jobs and bringing a capital investment of \$1.73 million. The new facility will house corporate offices and allow for further company growth.
- [FedEx](#), one of the largest American courier delivery services company, announced plans to build a distribution center in St. Joseph. The company anticipates hiring additional employees for the \$3.9 million center, scheduled to open in early 2014.
- [Hartzell Hardwoods](#) announced plans to expand its operations in Kirksville, adding 35,000 SF to its warehouse. The company, a leading producer of walnut, red oak, and white oak lumber, will bring 15 new jobs to the state with this expansion.

- **QC Supply**, an international distributor of agricultural goods, announced plans to open a new distribution center in Sedalia, bringing nine new jobs and a capital investment of \$1.2 million to the state.

2012

- **Arrowhead**, located near Springfield, is a distributor and wholesaler of exterior building supplies and materials. In 2012, the company announced plans to invest \$3 million to purchase equipment and construct a new 30,000 square-foot building for their Strafford facility. The company also added ten new positions.
- **Blue Buffalo**, one of the country's largest independent pet-food companies, broke ground in Joplin on a new manufacturing and distribution center, an investment is expected to create up to 150 new local jobs.
- **Coca-Cola** broke ground on a new \$5.5 million distribution center in Joplin which opened in early 2013. The 56,000-square-foot center will consolidate company operations, adding 55-100 new jobs.
- **Don's Cold Storage**, an Arkansas-based company providing temperature-controlled warehouse and transportation services for a variety of industries, announced plans to construct a new cold storage and distribution center in Joplin. This capital investment of \$14 million is expected to create 52 new local jobs.
- **Portals Hardware** announced plans to move to Kansas City, bringing 16 new jobs to Missouri. The producer of luxury hardware and accessories for kitchens and bathrooms will make a \$200,000 investment in the warehouse and parts-distribution facility.
- **Vistar**, a snack and beverage vending distributor, announced that it is moving operations and about 75 employees to Riverside. Vistar's move represents an investment of \$8.2 million.

Companies with major distribution centers in Missouri include:

- **Aldi** (St. Peters)
- **American Red Cross** (St. Louis)
- **Bass Pro Shops** (Springfield)
- **Blount International, Inc.** (Kansas City)
- **Blue Buffalo** (Joplin)
- **Brookstone** (Mexico)
- **Coca-Cola** (Joplin and St. Louis)
- **Dollar General** (Fulton)
- **FedEx** (Kansas City, St. Joseph, and St. Louis)
- **Flex-N-Gate** (Kansas City)
- **General Mills** (Joplin)
- **Hallmark** (Kansas City)
- **Home Depot** (Mexico)
- **Johnson Controls, Inc.** (Kansas City)
- **John Deere Reman** (Springfield)
- **Kohl's** (Kansas City)

- **Kraft Foods** (Springfield)
- **La-Z-Boy** (Neosho)
- **Macy's** (St. Louis)
- **Musician's Friend** (Kansas City)
- **McLane** (Republic)
- **O'Reilly Auto Parts** (Kansas City, Springfield)
- **QuikTrip** (Kansas City)
- **Rawlings Sporting Goods** (St. Louis)
- **Scholastic** (Jefferson City)
- **SuperValu** (St. Louis)
- **SYSCO Corporation** (St. Louis)
- **Trane** (St. Louis)
- **Toys R Us** (Kansas City)
- **Tyson Foods** (Montgomery City)
- **UPS** (St. Louis)
- **Walmart** (Kansas City, Moberly, St. James)

Major third party logistics (3PL) companies in Missouri

- **C.H. Robinson** (St. Louis, Springfield) is one of the world's largest 3PL providers, with 2012 gross revenues of \$11.4 billion.
- **Cheyenne Logistics** (HQ St. Louis) provides worldwide shipping, packing, crating and logistical services.
- **Ditzfeld Transfer** (HQ Sedalia) is one of the leading logistics firms in the Midwest, operating 921,000 SF of warehouse space.
- **Exel** (Kansas City and St. Louis) is part of the supply chain division of Deutsche Post DHL, the world's leading logistics group. Deutsche Post DHL is the parent company of DHL, the global leader in international express, overland transport, and air freight.
- **Freightquote**, (Kansas City) the nation's largest online freight-shipping broker, recently moved its headquarters and 1,225 jobs from Lenexa to Kansas City.
- **Fastrans Logistics** (HQ St. Louis) is engaged in logistics management, national warehousing and distribution, and freight auditing.
- **Graybar** (HQ St. Louis) is a Fortune 500 company specializing in supply chain management distribution, and materials for the electrical/telecommunications industries for over 80 years.
- **The Hub Group** (St. Louis) is a shipper's agent and freight forwarder that markets intermodals to companies in eastern Missouri and southern Illinois. The Hub Group's parent company is the nation's largest intermodal marketing company, acting as a transportation manager for uninterrupted movement of freight between carriers.
- **LMS** (HQ St. Louis) emerged from the transportation logistics division at Monsanto in 1996 and has quickly become a formidable contender within the highly competitive 3PL industry.

- **Materialogic** (HQ St. Louis) is a nationally-recognized third party fulfillment, distribution, logistics and marketing support services provider delivering outsourced business processing solutions.
- **Murphy Warehouse Co** (Kansas City) recently expanded their North Kansas City facility, adding 85,000 SF and 12 new jobs.
- **OHL** (Kansas City) is a full service 3PL providing supply chain management solutions for international and domestic transportation, warehousing, customs brokerage, freight forwarding and trade consulting services.
- **SRC Logistics** (HQ Springfield) provides a broad range of logistics services, including public and contract warehousing, non-asset-based transportation management, fulfillment, distribution, and reverse logistics.
- **Wagner Logistics** (Kansas City) is a 3PL that collaborates with companies for outsourcing of fulfillment, distribution, warehousing, and transportation management.
- **World Wide Technology** (HQ St. Louis) is a leading Systems Integrator providing technology products, services, and supply chain solutions to customers around the globe. WWT has a national network of distribution centers linked to a centralized inventory and order management application hosted in their secure data center in St. Louis.

Trucking companies

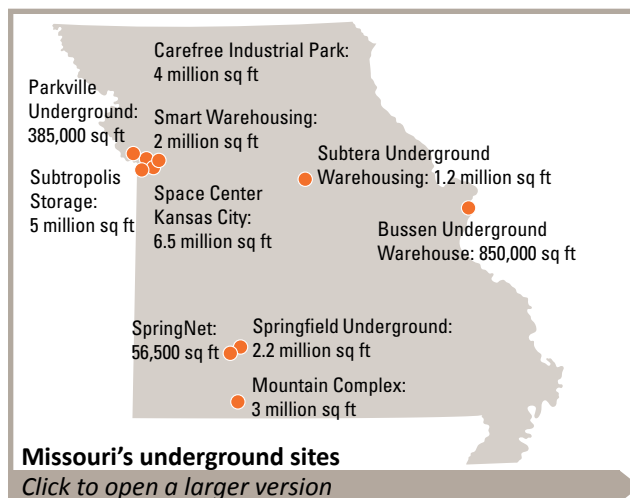
- **Con-way Truckload** (HQ Joplin) is a world class carrier with over 2,600 tractors and more than 8,000 trailers.
- **Hogan 1** (HQ St. Louis) has been in St. Louis for 80 years, growing from a small cartage to a national trucking company. Its two largest companies are Hogan Motor Leasing and Hogan Transport.
- **Jack Cooper Transport** (HQ Kansas City) is one of the largest privately owned auto transport carriers in the nation and the recipient of the Outstanding Carrier Award from General Motors.
- **OrTran Inc.** (HQ Independence) is an asset based distribution management company that provides a variety of transportation services.
- **Prime, Inc.** (HQ Springfield) is North America's most successful refrigerated, flatbed, and tanker carrier.
- **Slay Industries** (HQ St. Louis) is a diverse group of transportation and distribution companies including a trucking unit operating a fleet of 700 tractors and 1,200 trailers for 20 locations, mainly east of the Mississippi river.
- **UniGroup Inc.**, (HQ St. Louis) a local and long-distance household goods mover, is the parent company of United Van Lines and Mayflower Transit. Its other subsidiaries insure movers, sell and lease trucks, sell moving supplies, and rent portable storage and moving.
- **Witte Brothers Exchange Inc.** (HQ St. Louis) is one of the nation's leading truckers specializing in refrigerated trucking, a field it pioneered in the 1980s.

Organizations

- **KC SmartPort** is a non-profit economic development organization comprised of investors representing every link of the supply chain. Its mission is to support the transportation and logistics industry in the Kansas City area and to make it more competitive.
- **Missouri Transportation Alliance (MoTA)** is a non-partisan, citizen-led group of transportation stakeholders, first responders, small businesses, cities, counties, and community leaders who are committed to delivering a smart, sustainable long-term statewide transportation plan that will provide greater safety to Missouri's families and spur the economy.

Underground sites

- Missouri's underground sites, former limestone mines, total over 25 million SF and offer natural climate control (60-70 degrees year-round), enhanced security, and reduced vulnerability to natural disasters. Limestone is three-times stronger than concrete.
- Companies with warehouse or distribution operations in Missouri underground sites include: Advanced Logistics & Fulfillment, Arctic Food Services, DBK Salt Supply, Hallmark Cards, Highway Distribution Services, Kraft Foods, Mid-America Logistics, Nor-Am Cold Storage, Paris Brothers, Vanguard Packaging, and the United States Postal Service.

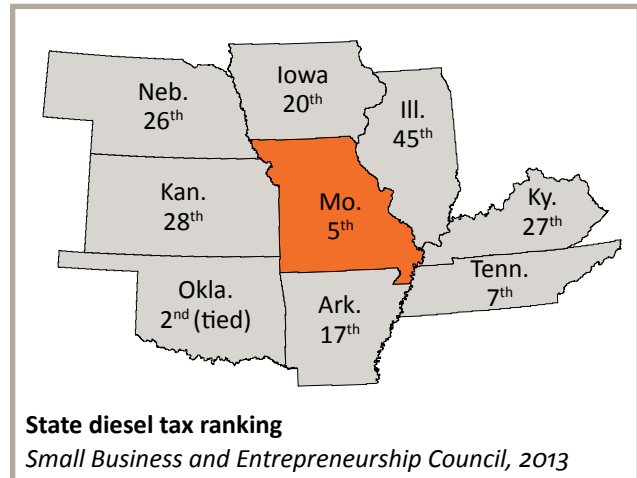
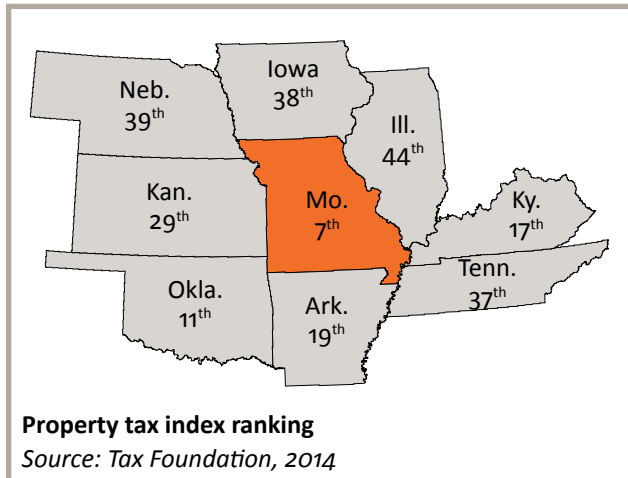


Missouri's logistics companies

- Major distribution centers
- Trucking companies
- 3PL companies
- ⚓ Port authority
- ✈ Major airport

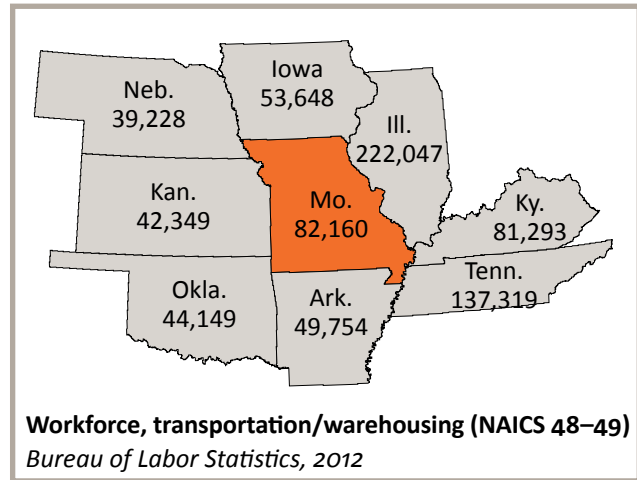
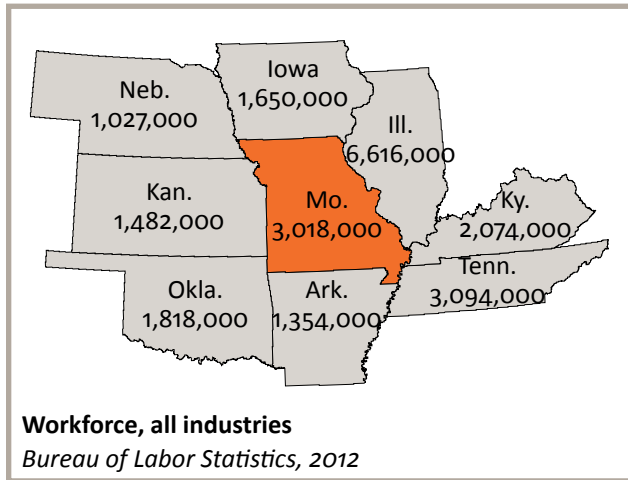


4 Missouri is more pro-business than other Midwestern states.



- Missouri has earned a spot on Pollina Corporate Real Estate's top 10 list of pro-business states for four years.
- Missouri's diesel tax is the 5th lowest in the U.S. at 17.3 cents/gallon (*Small Business and Entrepreneurship Council, 2013*). The state also has some of the lowest gasoline prices in the country. In 2013, Missouri had the lowest regular gasoline and 2nd lowest diesel costs (*AAA, December 2013*), meaning lower transportation costs for truck fleets.
- Missouri is tax-friendly! The state has no inventory tax and low property taxes, ranking 7th in the U.S. for the latter (*Tax Foundation*). Property tax abatements are available for qualifying companies.
- In 2013, Missouri was one of only nine states to receive the highest bond rating by all three rating agencies—Fitch Ratings, Standard & Poors and Moody's Investor Service—providing a more stable business environment for long term growth. Missouri's track record with Standard & Poors alone is even more distinctive, having earned the AAA rating for 47 years. Only three other states can make that claim.
- Missouri ranks in the top ten states for regulatory environment (*Forbes, 2013*).

5 Missouri's got talent!



Educational attainment in Missouri

Graduate or professional degree	9.6%
Percent high school graduate or higher	87.2%
Percent bachelor's degree or higher	25.8%

Source: U.S. Census Bureau, American Community Survey, 5-year estimates, 2012

- Six Missouri post-secondary institutions offer programs in truck driver training: Crowder College (Neosho), East Central CC (Union), Metropolitan Community College-Blue River (Independence), Mineral Area CC (Park Hills), Ozarks Technical CC (Springfield), and State Fair CC (Sedalia).
- Eleven Missouri colleges and universities offer programs or courses in logistics or supply chain management: Fontbonne University, Metropolitan Community College, Missouri State University, Park University, Saint Louis University, St. Louis Community College, University of Central Missouri, University of Missouri at Columbia, University of Missouri-Kansas City, University of Missouri-St. Louis, and Washington University in St. Louis.

Missouri is also home to the following transportation & logistics research centers

Click on [orange](#) text for a link to more information.

- [Center for Engineering Logistics and Distribution \(CELDi\)](#) at the University of Missouri at Columbia is a multi-university, multi-disciplinary research center sponsored by the National Science Foundation with a focus on supply chain modeling, material flow design and improvement, and intelligent systems. Missouri companies that have worked with MU-CELDi include Leggett & Platt, Ameren, Boeing, and Hallmark.

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- **Missouri University of Science and Technology Center for Transportation Infrastructure and Safety** is one of only ten National University Transportation Centers in the nation. The UTC program, created in 1988, combines research, education, and technology transfer for safe, efficient, and environmentally sound movement of people and goods. Participating universities are involved in advanced and applied research in such areas as intelligent transportation systems, fuel-efficiency, improved passenger safety, and reduced traffic and freight congestion. National UTCs provide advancing research and technology solutions to address America's transportation challenges.
 - **UMSL Center for Transportation Studies** has performed transportation analysis for companies such as Forward Air Corporation, St. Onge Company, Lanter Company, and Emerson Motor Company.

Workforce

- With more than 3 million highly educated workers, Missouri's growing, diverse population is a strong point of distinction from other Midwestern states. In fact, Missouri's labor base exceeds the entire populations of 20 states, including neighboring Kansas, Arkansas, and Nebraska.
- A well-educated population provides an easily trainable labor pool. Missouri has a high school graduation rate higher than 42 other states (*Education Week*).
- Average hourly wages in Missouri are lower than wages in 32 other states. This, coupled with Missouri's graduation rate, gives Missouri one of the most valuable workforces in the U.S.
- Over 82,000 Missourians were employed in the Transportation/Logistics sector in 2013.

Occupation information for distribution centers

Occupation code	Occupation title	Missouri employment	Missouri median hourly wage	U.S. median hourly wage
00-0000	All Occupations	2,605,910	\$15.21	\$16.71
53-0000	Transportation and Material Moving Occupations	176,490	\$13.77	\$13.92
53-1021	First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	3,050	\$20.38	\$21.72
53-1031	First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	3,160	\$22.39	\$25.60
53-3031	Driver/Sales Workers	9,520	\$10.75	\$10.90
53-3032	Heavy and Tractor-Trailer Truck Drivers	40,680	\$18.26	\$18.37
53-3033	Light Truck or Delivery Services Drivers	13,030	\$13.52	\$14.13
53-3099	Motor Vehicle Operators, All Other	2,250	\$9.14	\$12.95
53-7051	Industrial Truck and Tractor Operators	11,700	\$14.06	\$14.53
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	38,970	\$11.18	\$11.49
53-7063	Machine Feeders and Offbearers	2,460	\$14.23	\$13.04
53-7064	Packers and Packagers, Hand	8,880	\$9.44	\$9.57
53-7081	Refuse and Recyclable Material Collectors	2,010	\$15.19	\$15.83
53-7121	Tank Car, Truck, and Ship Loaders	60	\$14.43	\$21.20
53-7199	Material Moving Workers, All Other	380	\$14.43	\$17.94

Source: Bureau of Labor Statistics, Occupational Employment and Wage Estimates, May 2012

The Missouri Partnership is a public-private, non-profit focused on recruiting new business to the state. To find out how the Missouri Partnership can assist at any stage of your project, contact us by:

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