



**ST LOUIS REGIONAL
FREIGHTWAY**

Your Gateway to the World

Freight Industry Outlook

St. Louis Regional Freightway

The Port Working Group
Monthly Meeting, April 6, 2016



AECOM

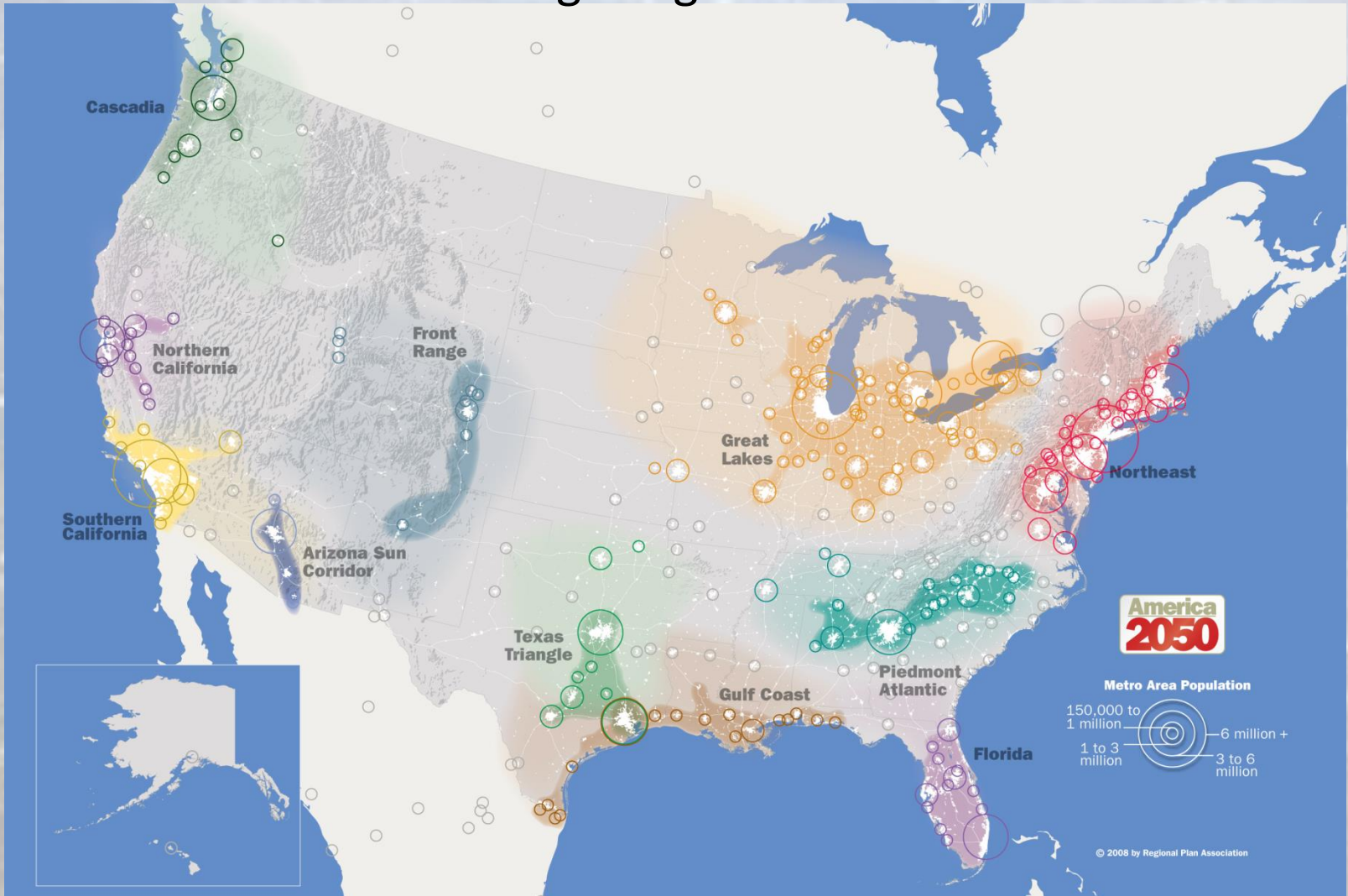
Our conversation today

- Regions across the United States and North America
- Peer Metropolitan Areas
- The Region's Transportation
- Regional Land Use
- FAST Act Implications
- Land Use and Transportation – Information Matters

***Transportation provides mobility
to depart origins and reach
destinations – both are land use
and development choices***

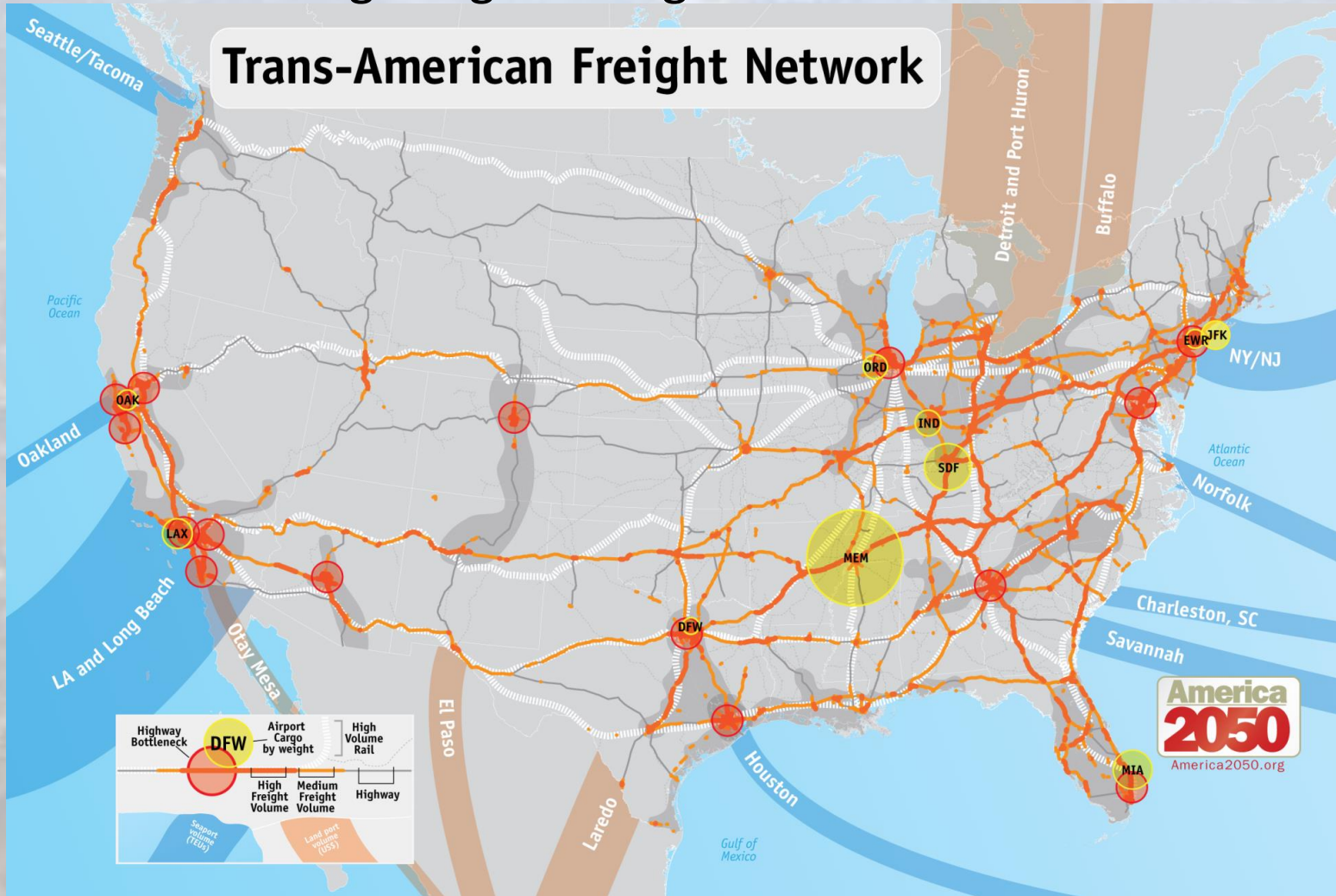


St. Louis and Mega Regions of the United States



Mega Region Freight Movement

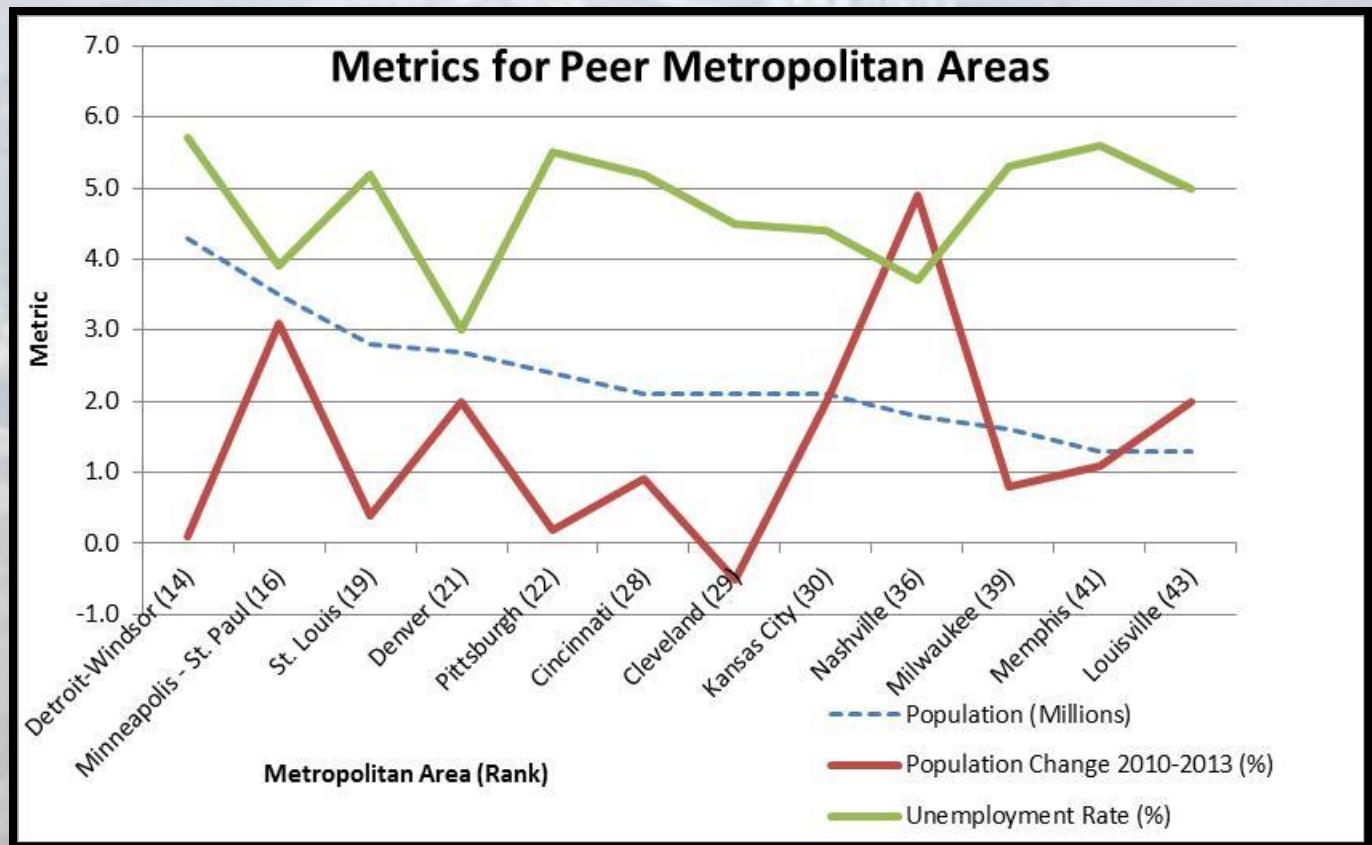
Trans-American Freight Network



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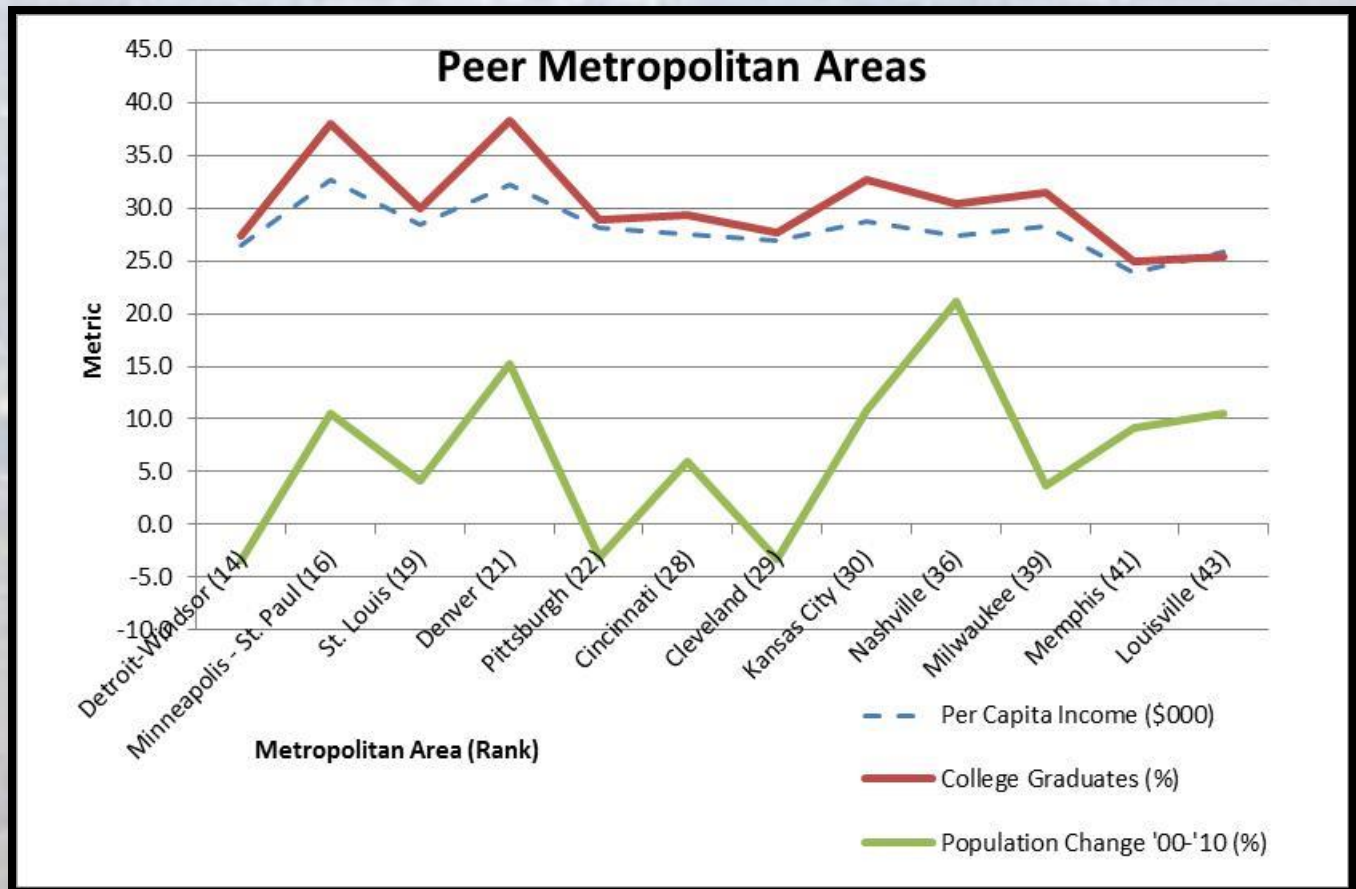
Candidate peer metropolitan areas in the central core of the United States, and North America

- Other metropolitan areas may impact St. Louis
- Unique transportation and land use configuration, as well as resident core industries



Candidate peer metropolitan areas

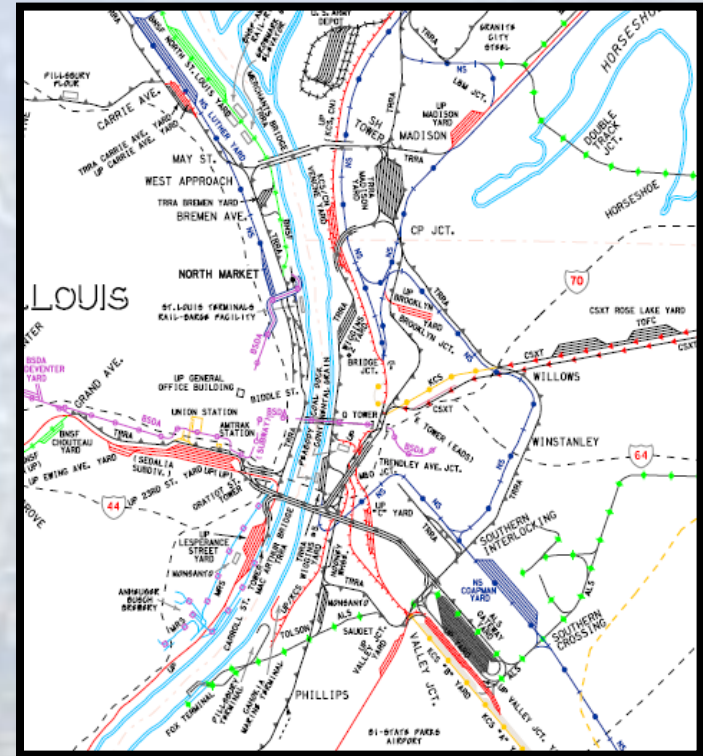
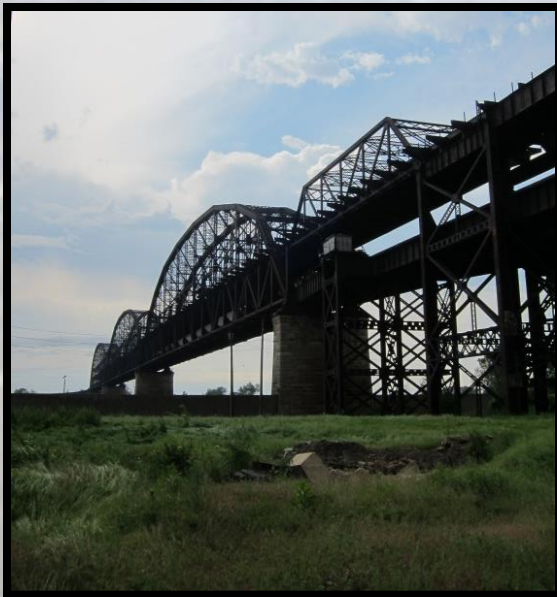
- Recent population changes are consistent with the longer term trend
- May also track cohort populations, resident mobility
- Substantial trends come into force, e.g., changing crude oil prices



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Transportation

- Local industry access and regional network connections are braided together
- Stan Musial Veterans Memorial Bridge adds $\pm 20\%$ freight network capacity
- Waterfront freight seeing improved transfer velocity



St. Louis regional roadway congestion, the top 25 spots in the nation

Location	Congestion Ranking
Chicago, IL: I-290 at I-90/I-94	1
St. Louis, MO: I-70 at I-64 (West)	5
Louisville, KY: I-65 at I-64/I-71	6
Cincinnati, OH: I-71 @ I-75	8
Chicago, IL: I-90 at I-94 (North)	12
Denver, CO: I-70 @ I-25	13
Minneapolis - St. Paul, MN: I-35W at I-494	17
Nashville, TN: I-24 @ I-440N Interchange	19
Indianapolis, IN: I-65 @ I-70 North	22
Chicago, IL: I-90 at I-94 (South)	25



Location	Congestion Ranking
Houston, TX: I-610 @ US 290	2
Austin, TX: I-35	3
Fort Lee, NJ: I-95 at SR-4	4
Houston, TX: I-45 at US-59	7
Houston, TX: I-10 @ I-45	9
Dallas, TX: I-45 at I-30	10
Houston, TX: I-10 @ US 59	11
Atlanta, GA: I-285 at I-85 (North)	14
Los Angeles, CA: SR-60 at SR-57	15
Houston, TX: I-45 @ I-610 north	16
Hartford, CT: I-84 at I-91	18
Brooklyn, NY: I-278 at Belt Parkway	20
Houston, TX: I-10 @ I-610 west	21
Ft. Worth, TX: I-35W at I-30	23
Atlanta, GA: I-75 at I-285 (North)	24

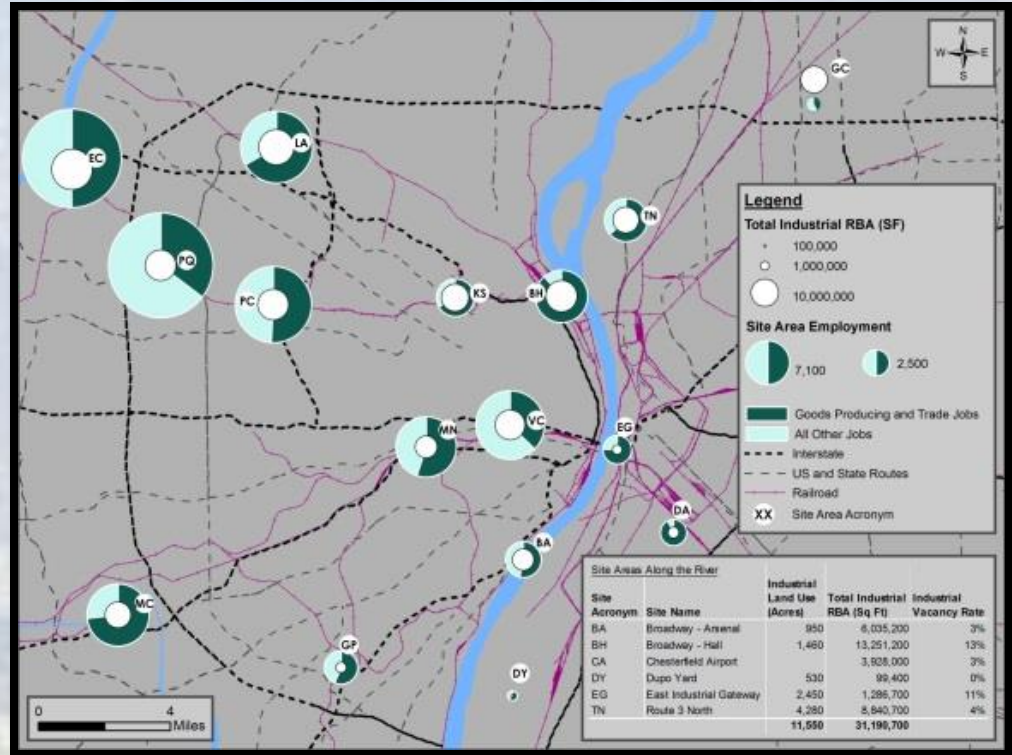
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Core industrial sectors for the St. Louis Metropolitan Area

- Financial and Information services
- Health Sciences and Services
- Biosciences
- Multimodal Logistics and Advanced Manufacturing

FAST Act

- National Multimodal Freight Policy
- National Freight Strategic Plan
- Nationally Significant Freight & Highway
- National Highway Freight Program
 - Critical urban and rural corridors
- Innovative finance and expedited delivery
- Efficient environmental reviews

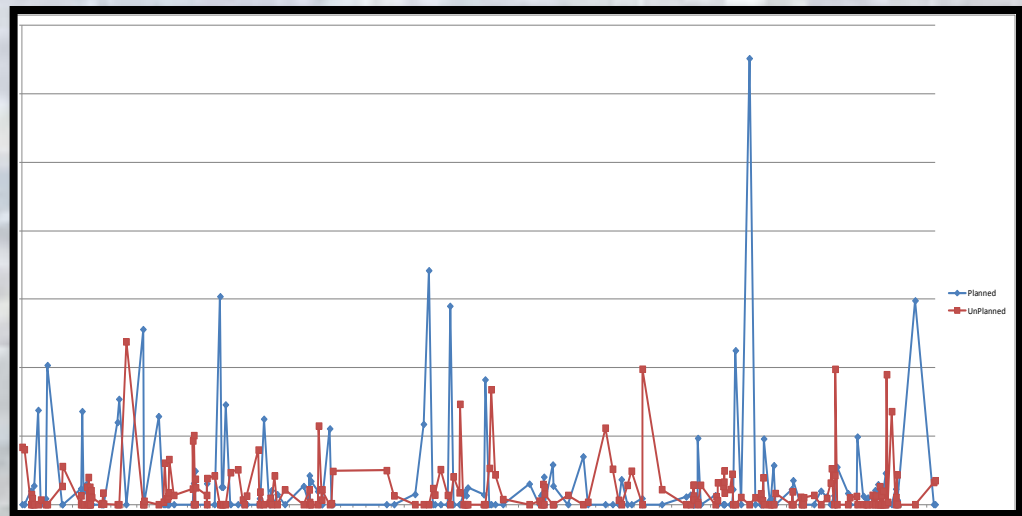


FAST Act implications for St. Louis

- Recent legislation created new categories while extending past practices
- Safety, efficiency and reliability purposes, essential for freight movement
- Urban area and rural designations need statewide participation
- Performance metrics matter, resources will be scarce
- More than volume and ton metrics
- State and MPO / planning area freight plans will be utilized

Data will become a significant differentiator, for facilities and networks

- Planned (blue) and Unplanned (red) bulk material loading from industry stockpiles
- Saved $\pm 15\%$ of the capital cost
- Link facility and network data



Thank you

Questions ?

