

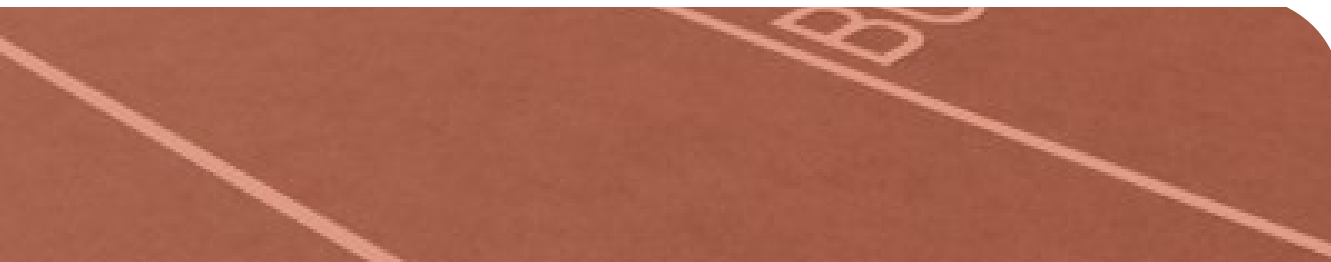
ST LOUIS REGIONAL FREIGHTWAY



ST. LOUIS REGIONAL
INDUSTRIAL REAL ESTATE

**Market Indicators &
Workforce Statistics**

Q2 2026



THE ST. LOUIS REGIONAL FREIGHTWAY

is pleased to present this annual newsletter as a resource to stay informed about the industrial market in our region. Our goal is to provide valuable insights into recent growth trends, as well as to highlight the many advantages that make the bi-state St. Louis region a prime location for logistics and manufacturing businesses looking to expand.

Visit: THEFREIGHTWAY.COM

Table of Contents:

[Pg 3. One Location, Global Access](#)

[Pg 4. The Nation's Aerospace Supply Chain Corridor](#)

[Pg 11. Industrial Job-Ready Workforce Statistics](#)

[Pg 12. Infrastructure Improvements and Rail Accessibility](#)

[Pg 14. Target Industries - Strategic Sector Strengths](#)

[Pg 16. Industrial Real Estate Market Indicators](#)

[Pg 22. Summary Conclusions](#)

CONTACT:

MARY C. LAMIE, P.E.

Bi-State Development

Executive Vice President of Multimodal Enterprises

Phone: 314.982.1562

Email: MCLamie@TheFreightway.com

THE ST. LOUIS REGION IS STRATEGICALLY POSITIONED ON THE BACKBONE OF AMERICA'S AEROSPACE SUPPLY CHAIN CORRIDOR

Interstate 44 runs 650 miles from the St. Louis region to North Texas, connecting one of the most concentrated clusters of aerospace manufacturers, defense contractors, and suppliers to the aerospace and aviation industry in the United States. Every major node along that corridor - Tulsa and Oklahoma City in Oklahoma, Fort Worth, Texas - depends on surface transportation to move components, sub-assemblies, and finished systems between facilities. The St. Louis region is positioned at the origin of that artery, where the corridor serving some of the bi-state area's highest-value manufacturing operations begins.

ADDITIONAL COMPETITIVE ADVANTAGES HIGHLIGHTED IN THIS REPORT INCLUDE:

1. Job-Ready Labor Force ([page 11](#)),

The St. Louis region leads comparable metro regions in the Midwest in total number of workers, with nearly 1.5 million workers in the labor force and a 65.0% labor force participation rate (LFPR) and 86.3% prime-age LFPR, both higher than the national rates of 63.3% and 83.2%, respectively.

2. Available Industrial Real Estate ([page 16](#))

The St. Louis region is a competitively sized and priced market in the Midwest in terms of industrial inventory and rents. The region has a total inventory size of 194.4 million sq ft. It also has 727 existing buildings with more than 100,000 sq ft, an average under construction building size of 490,000 sq ft, and 17.9 million sq ft of total available space.

3. Strategic Geographic Location & Multimodal Infrastructure ([page 22](#))

The St. Louis region is the confluence of four major interstate highways (I-44, I-55, I-64 and I-70) and six Class I railroads, making the region one of the largest rail hubs in the United States. St. Louis Lambert International Airport serves 20 airlines and offers non-stop service to 68 cities, and MidAmerica St. Louis Airport in St. Clair County, Illinois, recently underwent a 41,000 sq ft expansion, nearly doubling the size of its terminal, to meet increased passenger demand.

INTRODUCING THE I-44 AEROSPACE SUPPLY CHAIN CORRIDOR:

THE LOGISTICS BACKBONE OF AMERICA'S AEROSPACE INDUSTRY

As the origin point of I-44, the St. Louis region is positioned at the gateway to a continuous aerospace manufacturing and supply chain artery stretching southwest through Tulsa, Okla., Oklahoma City, and into the Dallas-Fort Worth metro area (via I-35 to the south from Oklahoma City). This corridor represents one of the densest concentrations of OEMs, Tier 1 suppliers, maintenance, repair, and operations companies, and defense contractors in the nation. The St. Louis bi-state area is bolstered by key players that have organically clustered in the region over decades, creating an ecosystem that supports growth.

Boeing Defense anchors the region's manufacturing base, producing F/A-18s, F-15EXs, and next-generation platforms from its St. Louis campus, representing the highest-value production node on the entire corridor. St. Louis is home to Boeing's Defense, Space & Security Headquarters, and in March 2025 Boeing announced the multi-billion contract to build the F-47 - the United States Air Force's newest sixth-generation fighter jet. Boeing is also expanding the production in St. Louis for the F-15EX and will increase to two per month in early 2027 with deliveries set to begin in early 2028. These announcements reinforce the region's role as a national aerospace and defense hub that is also complemented by the recent opening of the \$1.7 billion National Geospatial Intelligence Agency in St. Louis serving as the agency's western headquarters.

St. Louis Lambert International Airport, directly adjacent to Boeing's operations, is undergoing a \$3 billion-plus terminal modernization that will transform the region's global air connectivity and, combined with Boeing's expansion, is projected to generate more than \$32.4 billion in new annual economic impact and more than 133,000 jobs by 2032, according to the *St. Louis Business Journal*.

INTRODUCING THE I-44 AEROSPACE SUPPLY CHAIN CORRIDOR: THE LOGISTICS BACKBONE OF AMERICA'S AEROSPACE INDUSTRY

Across the Mississippi River, **MidAmerica St. Louis Airport** has evolved into an active aerospace manufacturing site. Boeing's new \$200 million, 300,000-sq-ft production facility at this location now manufactures the MQ-25 Stingray, the U.S. Navy's first carrier-based unmanned aerial refueling aircraft. The airport itself recently completed a \$34 million project to double its terminal and a \$37.7 million taxiway investment, and construction is underway to add a new Federal Inspection Station to its newly constructed General Aviation Facility for U.S. Customs and Border Protection. A new MetroLink extension totaling approximately \$100 million will connect MidAmerica St. Louis Airport directly to St. Louis Lambert International Airport, linking the two airports into a single, integrated aviation system.

MidAmerica St. Louis Airport shares its runways with **Scott Air Force Base (SAFB)**, and that relationship defines the region's strategic ceiling. SAFB is home to both Air Mobility Command and U.S. Transportation Command, the command-and-control center for all Department of Defense global logistics across air, land, and sea. A 2026 study by Steadfast City Economic & Community Partners puts SAFB's annual economic impact to the region at \$12.9 billion. Boeing's drone manufacturing, military flight operations, and commercial aviation all operate from the same airfield. That integration of civilian production and defense logistics infrastructure exists nowhere else on the corridor.

Tulsa has Spirit AeroSystems; Oklahoma City has Tinker Air Force Base and the Federal Aviation Administration Mike Monroney Center; Fort Worth has Lockheed and Bell. Each is a formidable node, but none holds the origin position, which is the point where a prime-level defense manufacturer, the world's preeminent military logistics command, two international airports under active expansion, unmatched rail and barge access, and the interstate artery of the entire network all converge.

**THAT CONVERGENCE IS THE ST. LOUIS REGION.
AND THE CORRIDOR TAKES OFF FROM HERE.**

INTRODUCING THE I-44 AEROSPACE SUPPLY CHAIN CORRIDOR:

THE LOGISTICS BACKBONE OF AMERICA'S AEROSPACE INDUSTRY

Aerospace Companies in the St. Louis Region



Sonaca North America (formerly LMI), is a leading supplier to the commercial, business, regional and defense aerospace markets and has nine factories across the United States, five of which are along or in close proximity to I-44. These include plants in Washington, Mo., Cuba, Mo. and Tulsa, Ok., - all directly served by I-44 - as well as two plants and the company's headquarters in St. Charles, Mo., just a few miles north of I-44. Every part the company produces at the St. Charles or Washington plants goes to Cuba or Tulsa for surface treatments, with many being shipped from there back to St. Louis or Fort Worth, Texas. Customers include industry giants such as Boeing and Gulfstream as well as other suppliers like Patriot Machine, Inc. and Spirit AeroSystems.



"For Sonaca, being in Missouri with locations along the I-44 artery contributes to our success because we can be competitive with other suppliers that may have everything on one campus," said **Kevin Goossens, CEO of Sonaca North America**. "Easy access and easy connections along I-44 were factors as the company expanded through acquisitions and they continue to support movement of our products between our facilities. It's the closest we can get to being a one-stop shop."

INTRODUCING THE I-44 AEROSPACE SUPPLY CHAIN CORRIDOR:

THE LOGISTICS BACKBONE OF AMERICA'S AEROSPACE INDUSTRY

WHAT IS NAICS 3364?

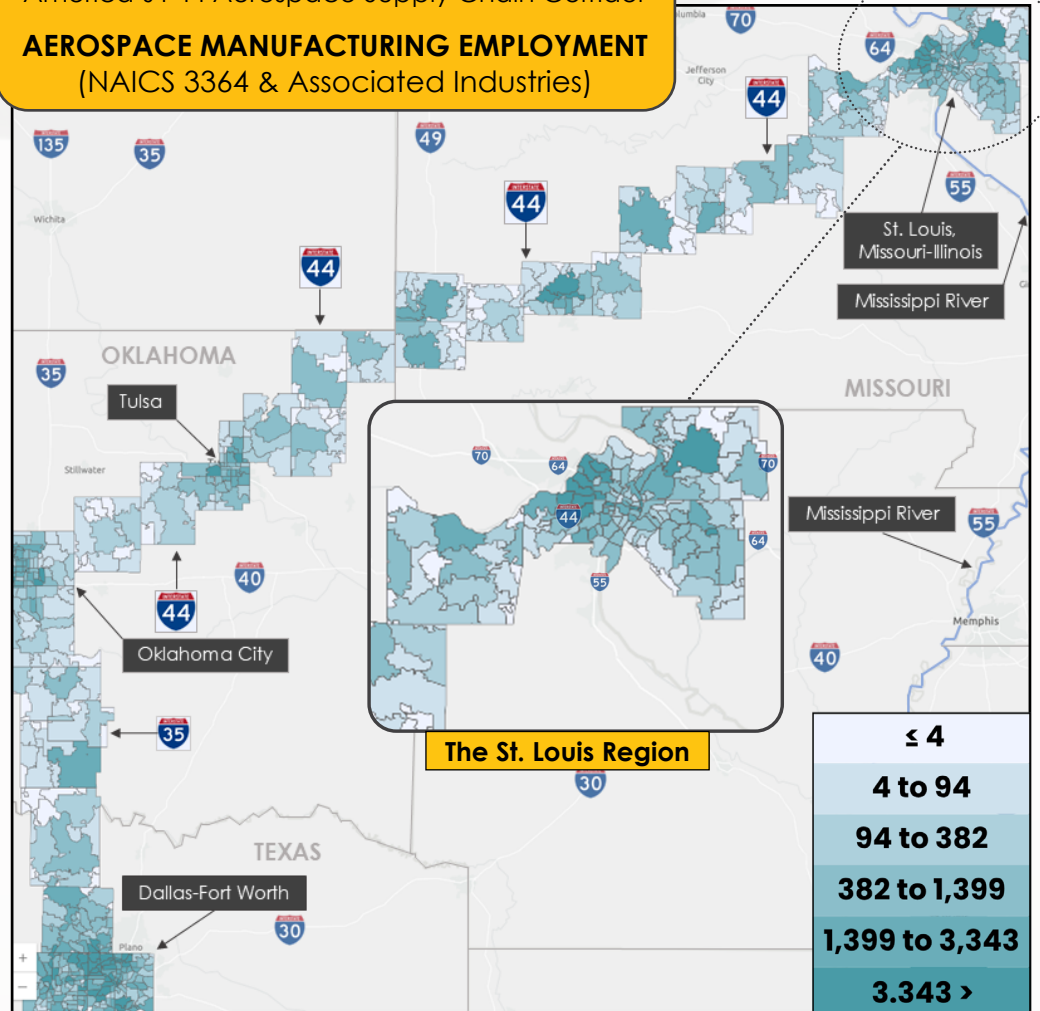
- » The North American Industry Classification System (NAICS) standardizes the way industries are categorized throughout North America. The primary goal of NAICS is to enable federal agencies to collect, analyze, and publish statistical data related to the U.S. economy more effectively.
- » NAICS 3364 is the code for Aerospace Parts & Products Manufacturing, the official name for establishments engaged in manufacturing aircraft, missiles, space vehicles and their engines, propulsion units, auxiliary equipment, and component parts of the aforementioned products. The development and production of prototypes is classified in this industry, as is the factory overhaul and conversion of aircraft and propulsion systems.

THE MAP TO THE RIGHT →

shows the total number of jobs in Aerospace Manufacturing (NAICS 3364) and the related secondary, tertiary, and supporting industries along the I-44 Aerospace Supply Chain Corridor.

America's I-44 Aerospace Supply Chain Corridor

**AEROSPACE MANUFACTURING EMPLOYMENT
(NAICS 3364 & Associated Industries)**



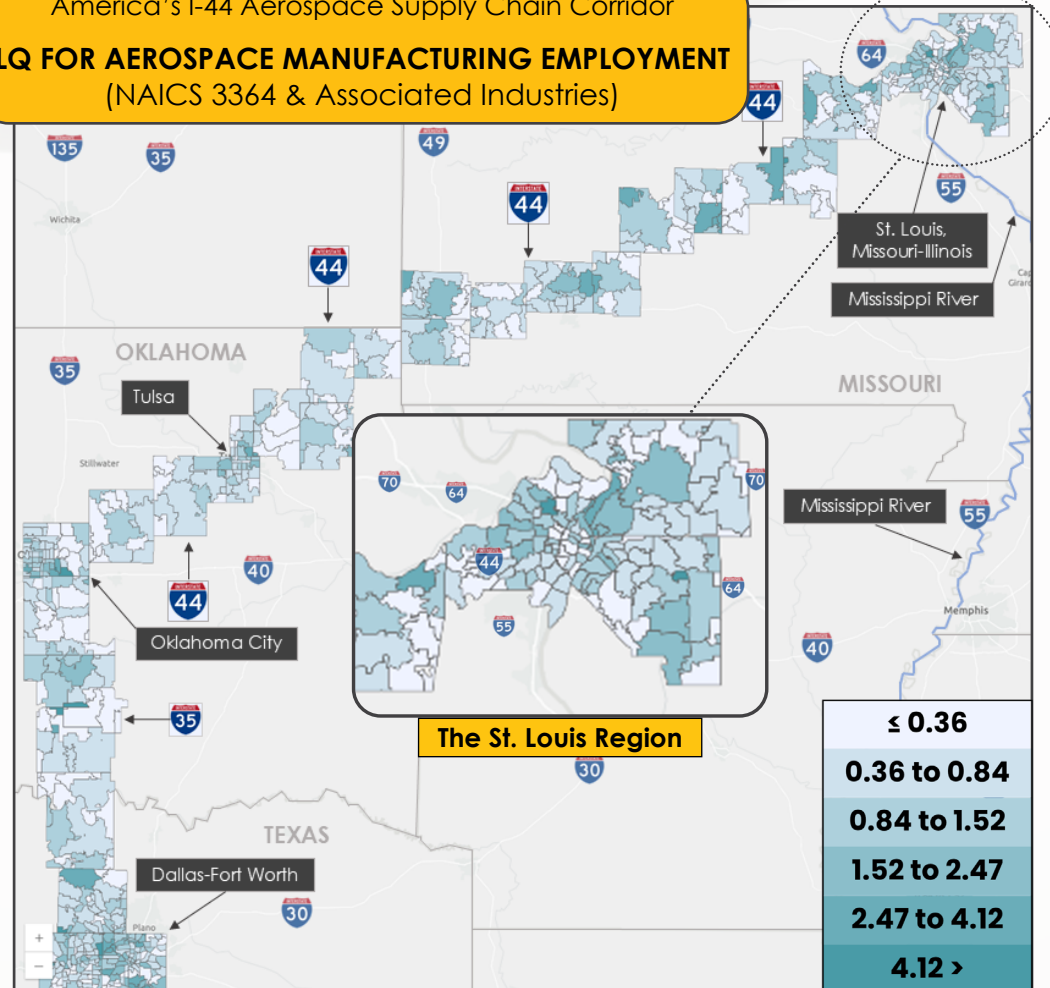
INTRODUCING THE I-44 AEROSPACE SUPPLY CHAIN CORRIDOR:
THE LOGISTICS BACKBONE OF AMERICA'S AEROSPACE INDUSTRY

THE MAP TO THE RIGHT →

shows the location quotient of Aerospace Manufacturing (NAICS 3364) and the related secondary, tertiary, and supporting industries along the I-44 Aerospace Supply Chain Corridor. Location quotient is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation, and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation. Anything above 1.25 is a competitive advantage. The average LQ of the corridor is 2.81.

The map shows that there is significant concentration in Aerospace Manufacturing and related jobs along the corridor in areas depicted in the deep teal color, especially in the St. Louis region, where **multiple zip code tabulation areas have LQs above 4.0. This means that there is a 400% higher concentration of jobs in those areas** compared to similarly sized areas in the U.S.

America's I-44 Aerospace Supply Chain Corridor
LQ FOR AEROSPACE MANUFACTURING EMPLOYMENT
(NAICS 3364 & Associated Industries)



KEY FACTS ABOUT AMERICA'S AEROSPACE SUPPLY CHAIN CORRIDOR

1. Economic Data Supports the Corridor's Competitive Advantage.

- The 72 secondary, tertiary, and supporting industry subsectors that make up the aerospace supply chain ecosystem in this 29-county region represent \$233 billion in GDP and 1.6 million jobs. These industries include key complements to aerospace and defense manufacturing such as primary metals and component manufacturing, maintenance and repair, distribution and logistics, and other related subsectors.
- America's I-44 Aerospace Supply Chain Corridor (including I-35 moving south from Oklahoma City into the Dallas-Fort Worth metro area), runs through 29 counties that have a total of 58,000 jobs in Aerospace Manufacturing (NAICS 3364) and an industry GDP of more than \$17 billion. When considering the full extent of aerospace supply chain related industries present along the corridor, the corridor's job impact represents 2,510 jobs per mile.
- Aerospace Manufacturing has a Location Quotient of 2.81 along the corridor, a metric indicating that the corridor has a concentration of aerospace manufacturing jobs nearly 3X higher than the national average. Aerospace Manufacturing jobs on the corridor have also grown by nearly 40% in the past five years alone, showing companies in the industry are choosing to reinvest in job creation along this critical supply chain corridor.

2. Investment in I-44 Upgrades Strengthens the Entire Corridor. In 2024, the State of Missouri approved \$577.5 million to fund several projects along I-44. This is on top of the \$433 million of I-44 improvements that MoDOT already has programmed in the Statewide Transportation Improvement Program (STIP) including those beyond the study limits into St. Louis County as well. The work on I-44 will be delivered through several projects over the coming years. In the St. Louis region, the STIP-funded corridor improvements include about \$100 million for pavement and bridge improvements on I-44 in St. Louis City and County and neighboring Franklin County.

3. Superior Geographic Positioning Reinforces the St. Louis region's Impact on the Aerospace Supply Chain Corridor. I-44 was built along the former U.S. Route 66 corridor, connecting the industrial Midwest to the Sun Belt. The St. Louis region's position at the origin of I-44 places it at the convergence of the corridor's highest-value manufacturing operations and the broader Midwest freight network, a combination no other node along the corridor can replicate. This is a major competitive advantage for manufacturing companies, distribution and logistics companies, and suppliers.

KEY FACTS ABOUT AMERICA'S AEROSPACE SUPPLY CHAIN CORRIDOR *cont.*

- 4. St. Louis Anchors the Corridor with a Unique Defense & Aerospace Heritage.** Boeing's St. Louis-area operations, producing F/A-18s, F-15EXs, F-47s, and MQ-25s, give the corridor its highest-value node at the top. When primary aerospace companies in Tulsa (like Spirit AeroSystems) or Fort Worth (like Lockheed) need a supply chain partner with the security clearances, precision manufacturing capability, and engineering depth to work at the prime level, they look up the corridor to St. Louis.
- 5. Surface Transportation Connectivity Is an Essential Ingredient for Site Selection.** Aerospace manufacturing depends on surface transport for materials and components that can't be palletized for air transport. I-44's direct run from St. Louis to Dallas-Fort Worth, combined with the St. Louis region's convergence of additional interstates (I-70, I-55, I-64), the Mississippi, Missouri and Illinois Rivers, and highly connective rail access, makes it the most competitive metro on the corridor that can originate, receive, and redistribute supply chain flows in all directions simultaneously.
- 6. Talent Flows Along the Corridor Too, and Workers Flow Toward St. Louis.** The I-44 corridor moves both parts and people. Engineers, technicians, program managers, and defense contractors follow private sector investment. The St. Louis region's position at the top of the corridor, combined with its research university ecosystem, affordable cost of living and doing business, and well-established aerospace workforce, means it attracts talent from the corridor rather than competing with it.

BOTTOM LINE:

The St. Louis region holds the one of the only positions on the aerospace supply-chain corridor that combines infrastructure, prime-level defense manufacturing, Midwest supply chain connectivity, and a research & development and talent base that feeds the entire network downstream.

KEY TAKEAWAY: America's aerospace supply chain corridor, anchored in the St. Louis region, is home to more than **1.6 million aerospace manufacturing and related jobs**, representing more than **\$250 billion in economic impact**, and **one in five** of those jobs are located within the St. Louis region.

ST LOUIS REGIONAL FREIGHTWAY

Industrial Job-Ready Workforce Statistics

To understand how competitive the bi-state St. Louis region's workforce is compared to peer metros in the Midwest, consider occupational data related to two key categories of workers: **Production Workers and Transportation & Material Moving Workers.**

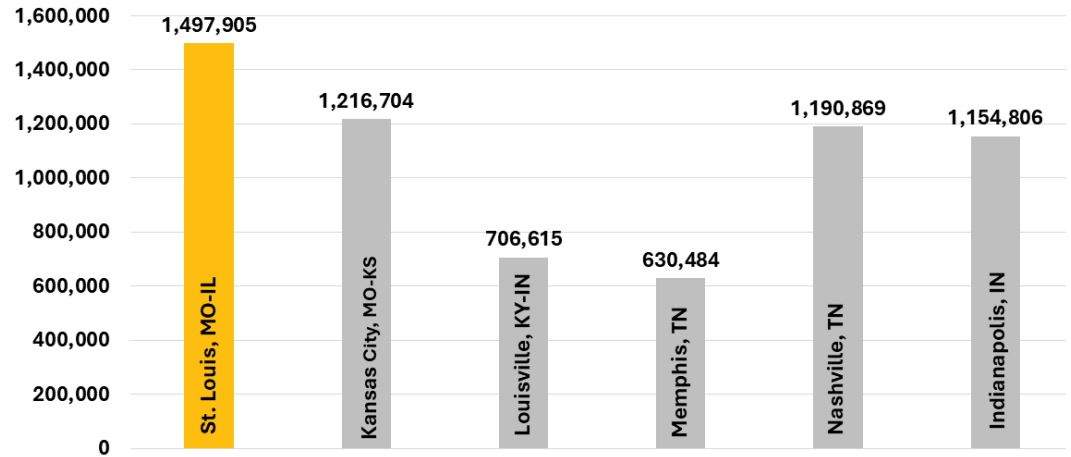
Production Workers help construct products by assembling materials and operating machinery. Production workers are most often employed in the **Manufacturing** industry sector.

Transportation & Material Moving Workers support all activities that involve transporting people and goods, including by surface (rail and road), air, and water. Transportation & Material Moving Workers are most often employed in the **Transportation, Warehousing, Logistics, and Distribution** industry sectors.

In total, there are nearly **200,000** workers in the St. Louis region powering Production and Transportation & Material Moving jobs, more than other cities in the Midwest like Kansas City, Louisville, Memphis, and Nashville.

Source: Chmura JobsEQ Q3 2025 dataset; Bureau of Labor Statistics via St. Louis FRED Q1 2026 dataset

REGIONAL COMPARISON: Total # of Workers



KEY TAKEAWAY: The St. Louis region leads comparable metro regions in the Midwest in total number of workers, with nearly 1.5 million workers in the labor force and a 65.0% labor force participation rate, which is higher than the national labor force participation rate, 63.3%.

REGIONAL COMPARISON: Total # of Workers per Occupation



Prime age labor force participation rate (age 25-54) STL MSA: 86.3% | U.S.: 83.2%

KEY TAKEAWAY: The St. Louis region leads comparable metro regions in the Midwest in Production Occupations and has an above-average number of Transportation & Material Moving Occupations.

Regional Collaboration Guides Infrastructure Investment

Annually, the St. Louis Regional Freightway compiles its Priority Projects List in collaboration with various public and private sector partners. This valuable tool is used to advocate for support and funding for critical freight infrastructure improvements that strengthen the St. Louis region's position as a world-class freight and logistics hub.

The newly released list includes 29 projects representing a total investment topping \$9.2 billion. As of May 2026, more than \$581 million in projects on the list had been completed and almost \$3.8 billion in total funding had been secured. Construction was underway on projects totaling more than \$1.6 billion, and given that more than 40% of the total project costs on the list are funded, additional projects will soon be advancing to construction.

“The numbers reflected in our Priority Projects List, which continue to grow year over year, underscore the tremendous commitment to working collaboratively to improve freight infrastructure in the St. Louis region.”

MARY LAMIE

Executive Vice President of Multimodal Enterprises for Bi-State Development and Head of the St. Louis Regional Freightway

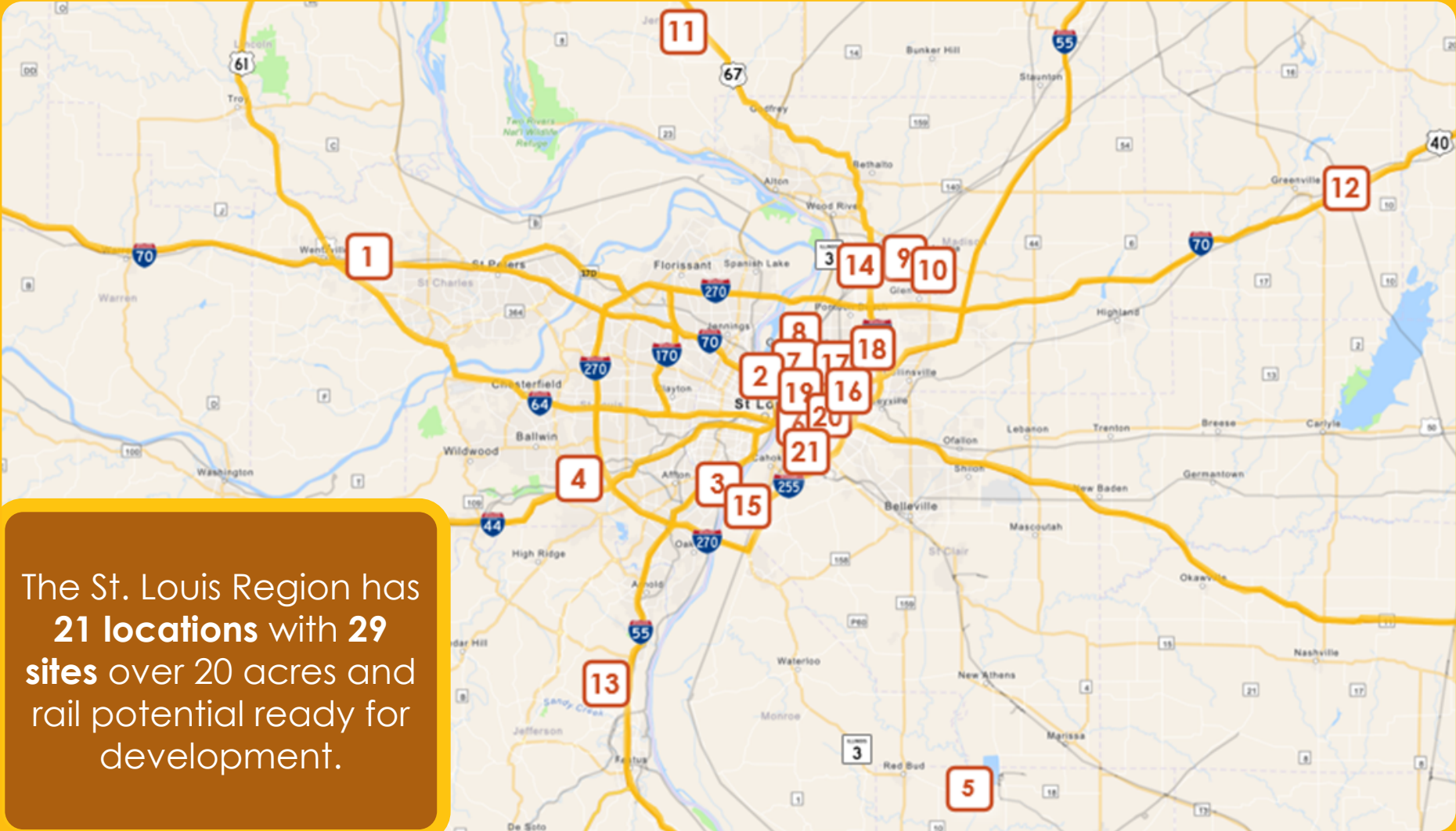
“Rail distribution continues to grow in importance, and the St. Louis region is already recognized as one of the largest rail hubs in the nation. Rail service and infrastructure in the St. Louis region are constantly improving, thanks to the commitment of public and private leaders who are collaborating to identify priority projects and advocate for funding for them.”

BRENT WOOD

President of Terminal Railroad Association of St. Louis and Chair of the St. Louis Regional Freightway's Freight Development Committee

RAIL ACCESSIBILITY

NEW SITES ADDED TO OUR ONLINE DATABASE! 



The St. Louis Region has **21 locations** with **29 sites** over 20 acres and rail potential ready for development.

Companies are making strategic choices to relocate and expand in the St. Louis region. Our growth in these sectors is catalyzed by the region's ability to make high-value goods and have a talented and efficient workforce. We have the ingredients for success for these targeted sectors and beyond.

ADVANCED MANUFACTURING



- » **Boeing:** Two project announcements expanding operations in St. Louis region, in North St. Louis County and at MidAmerica St. Louis Airport, totaling \$2 billion in investment and adding to an existing regional workforce of more than 18,000.
 - Boeing was awarded the contract to build the Air Force's next-generation F-47 fighter jet, with the new manufacturing site part of Boeing's \$1.8 billion expansion project in North St. Louis County near Lambert St. Louis International Airport.



- » **PierTech Systems,** a leading manufacturer of helical piers, piles, anchors, and foundation repair equipment, will invest \$23 million to build a 120,000-sq-ft headquarters, warehouse, and manufacturing campus on 13.6 acres in Chesterfield, Missouri. The project is expected to add 70 new jobs to its 55 existing jobs.

METALS



- » **U.S. Steel's Granite City Works,** a major domestic producer of steel, restarted its blast furnace in early 2026 to meet demand, reversing a 2023 idle decision. The Granite City, Illinois, facility, capable of 2.8-million net tons of raw steelmaking, will bring back 400–500 jobs, secured until June 2027 by an agreement with Nippon Steel.

CHEMICALS



- » **Teklab** invested \$10 million to construct a 36,500-sq-ft, state-of-the-art facility to meet the growing demand for its environmental analytical services, creating 40 new full-time jobs at its Collinsville, Illinois, facility, while retaining nearly 100 positions.

INVESTMENT GROWTH:

Site Selection Magazine reported in March 2026 that the bi-state St. Louis region ranks second among all the cities and towns along the entire Mississippi River corridor by total number of corporate facility investment projects, as well as third overall in the Midwest, driven by investments in target industry sectors.

Since 2019, new industrial investments in the bi-state St. Louis region totaled more than **\$10.2 billion**.

FOOD & AGTECH



- » **Prairie Farms** is building a \$9 million, 42,000-sq-ft headquarters complex in Edwardsville, Illinois.



- » **American Foods Group** opened a new \$800 million, 775,000-sq-ft beef processing facility in Warren County, Missouri, in 2025 and expects to grow to 1,300 jobs and an estimated regional impact of \$1 billion.



- » **Sensient Food Colors** is expanding its North St. Louis facility, which is already the world's largest food color manufacturing facility. Once completed, the project will represent a \$250 million investment, add 200 jobs, and expand the facility's footprint to 530,000-sq-ft.



- » **Tyson Foods** is investing \$180 million to expand its plant in Caseyville, Illinois, retaining 300 existing jobs, creating 400 new jobs, and adding seven more production lines.



- » **Bayer AG** is investing \$100 million to upgrade its two campuses in the region, which support thousands of employees. In Chesterfield, Missouri, plans are to invest in research infrastructure including new lab space, greenhouses, and offices. In Creve Coeur, Missouri, investment will focus on state-of-the-art conference space as well as upgrades to workspaces, meeting rooms, and technology.

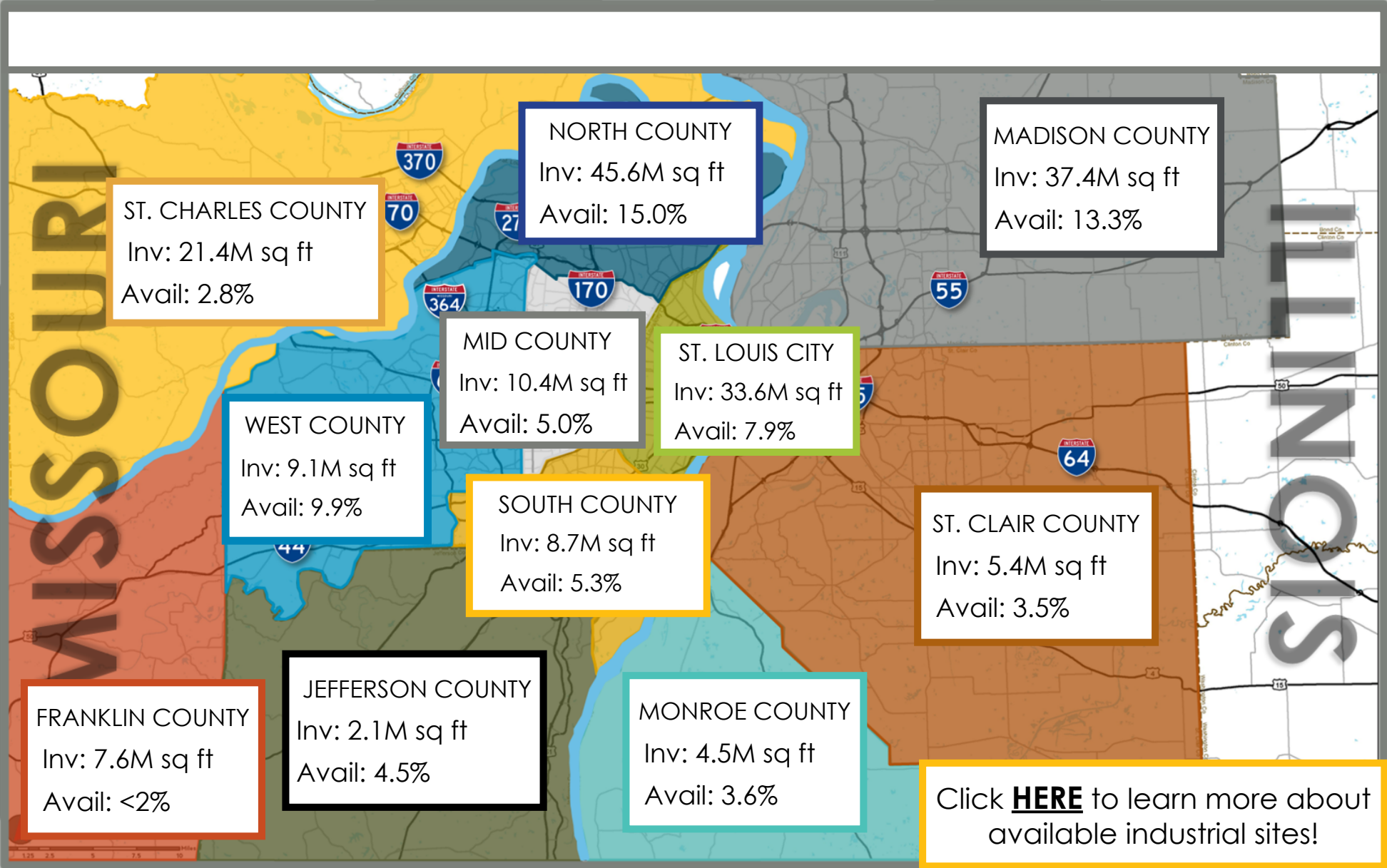


- » **Winland Foods**, a global manufacturer of pasta and related food items, is expanding in South St. Louis, investing \$38.5 million and creating 25 new jobs.



- » **Pivot Bio**, an agtech company developing crop nutrition technology meant to be more climate-resilient, is investing \$7 million and adding 40 new jobs by expanding its footprint in the St. Louis region. The investment expands two Centers of Excellence: an operations and manufacturing hub in Hazelwood and a research, development, and innovation center in Creve Coeur's 39 North AgTech Innovation District.

**ST. LOUIS REGIONAL
INDUSTRIAL MARKET
REAL ESTATE INDICATORS**



Click **[HERE](#)** to learn more about available industrial sites!

Source: CoStar – St. Louis MSA; Existing industrial buildings over 100,000 sq ft

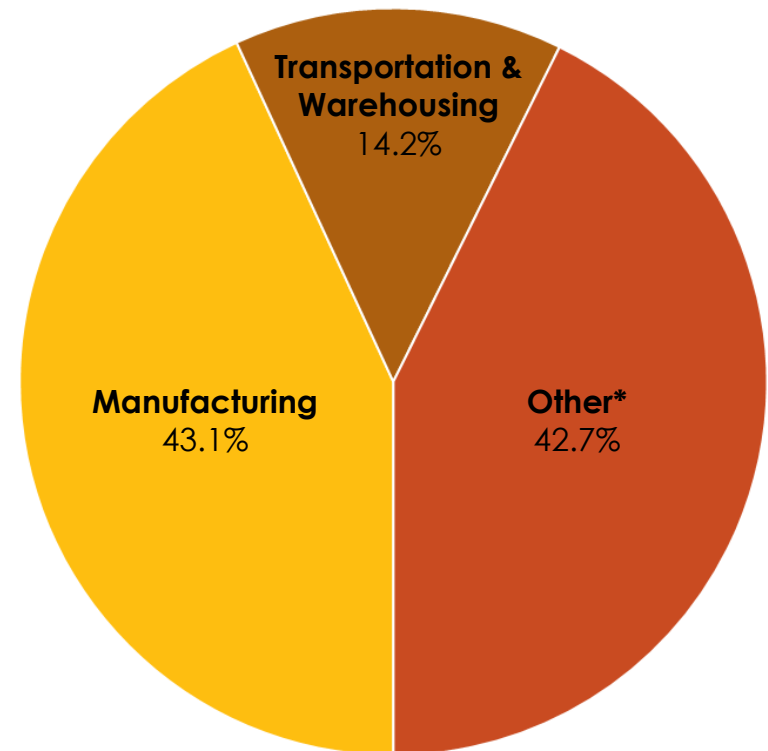
The Bi-State St. Louis region is defined as St. Louis City and the counties of Franklin, Jefferson, St. Charles, and St. Louis in Missouri and the counties of Madison, Monroe, and St. Clair in Illinois.

ST. LOUIS MO-IL MSA: TENANT NOTES

- » **450** Occupiers with over 100,000 sq ft
 - **↑ 39.3%** from 2025
- » **133** Occupiers with over 250,000 sq ft
 - **↑ 5.6%** from 2025
- » **49** Occupiers with over 500,000 sq ft
 - **↓ 3** occupiers from 2025

Overall growth in number of industrial real estate tenants from 2025-2026: **26.1%**

St. Louis Region Inventory Breakdown
Total Building Sq Ft

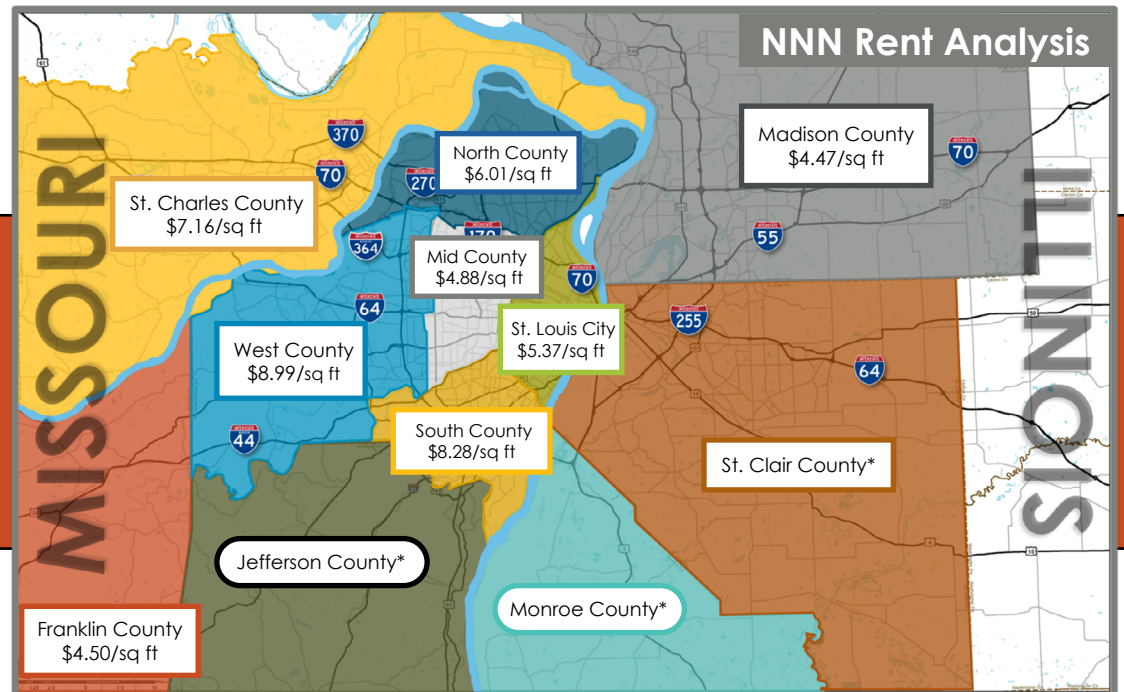
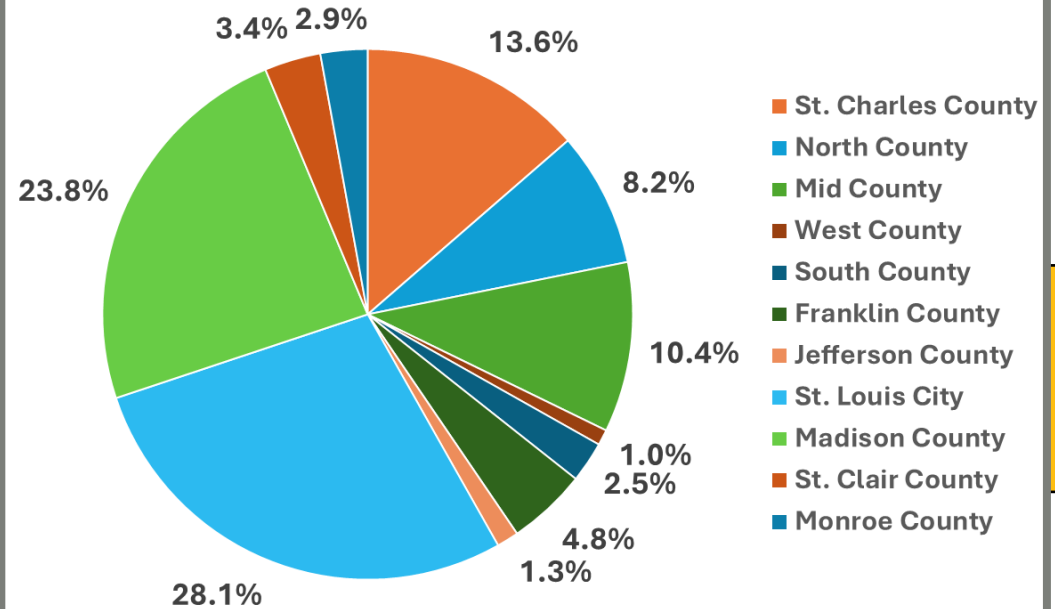


*May include industrial maintenance and repair facilities, data hubs, freight consolidation centers, etc.

**ST. LOUIS REGIONAL
INDUSTRIAL MARKET
REAL ESTATE INDICATORS**

St. Louis Regional Industrial Market
TOTAL INVENTORY SIZE
 (Industrial & Flex over 100,000 SF)
TOTAL: 194.9M SQ FT

St. Louis Region Inventory Breakdown: Total Building Sq Ft



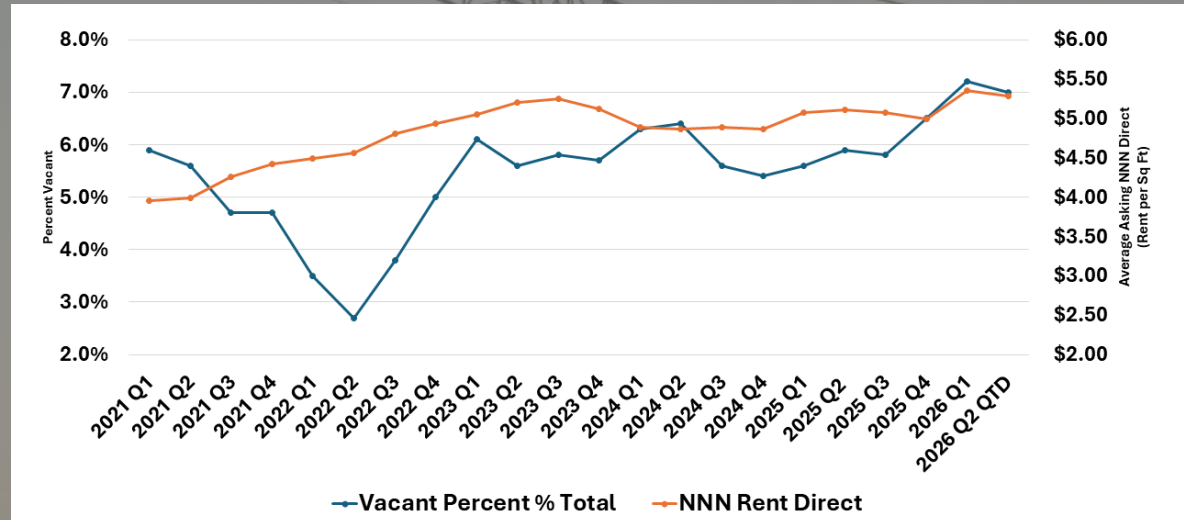
Source: CoStar – St. Louis MSA; Existing industrial buildings over 100,000 sq ft
 *Only reported NNN asking rents were used



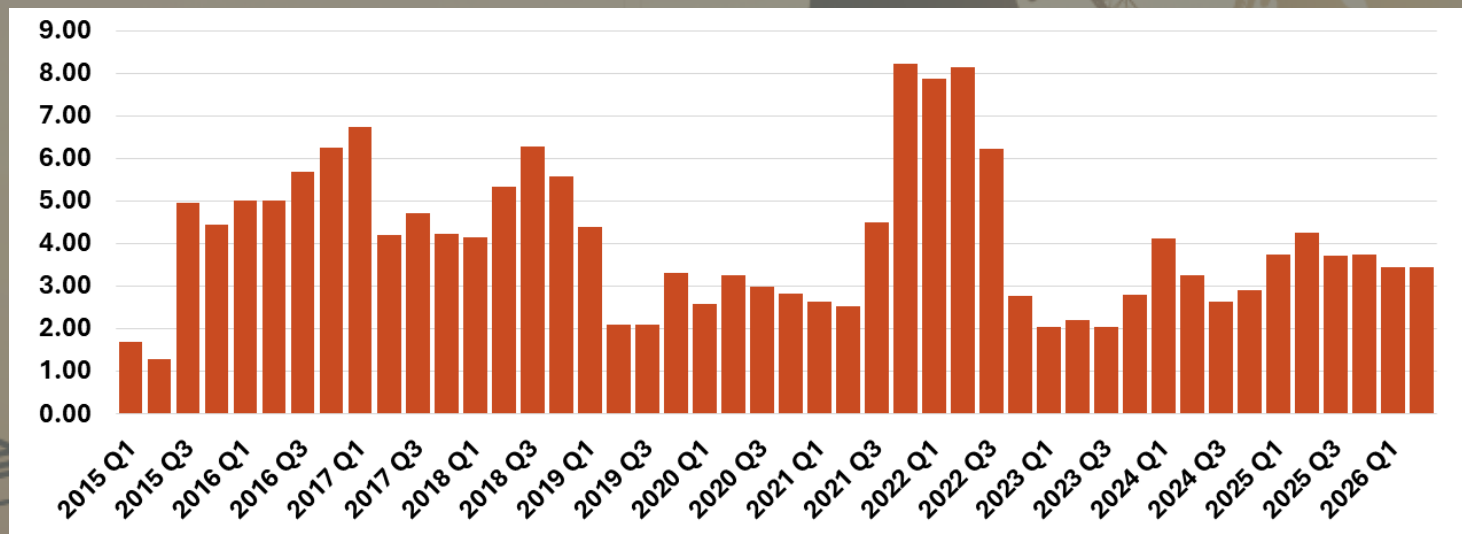
**ST. LOUIS REGIONAL
INDUSTRIAL MARKET
REAL ESTATE INDICATORS**

As of Q1 2026, there are 3.4 million sq ft of industrial space over 100,000 sq ft under construction in the region.

St. Louis Regional Industrial Market



St. Louis Regional Industrial Market - Square Footage Under Construction



Source: Source: Steadfast City; *Co-Star (St. Louis, MO-IL MSA, Industrial buildings over 100,000 sq ft)
*As of Q2 2026

ST LOUIS REGIONAL FREIGHTWAY

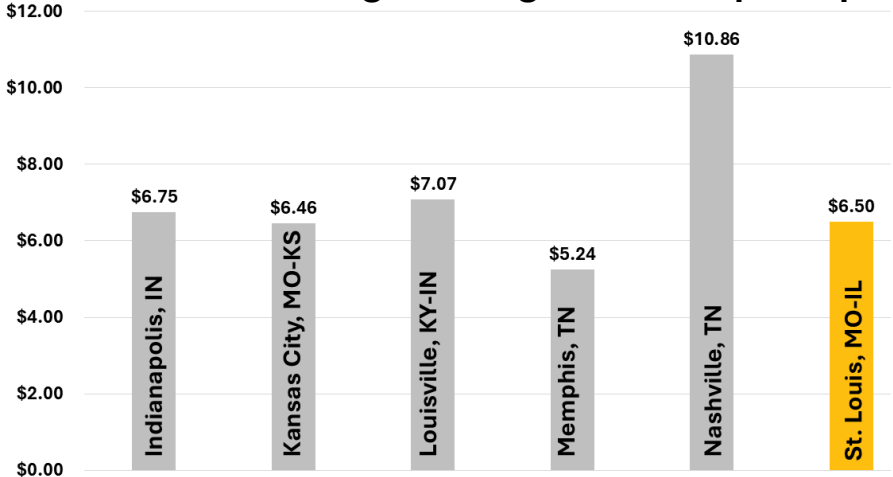
ST. LOUIS REGIONAL INDUSTRIAL MARKET REAL ESTATE INDICATORS

MIDWEST COMPARISON:

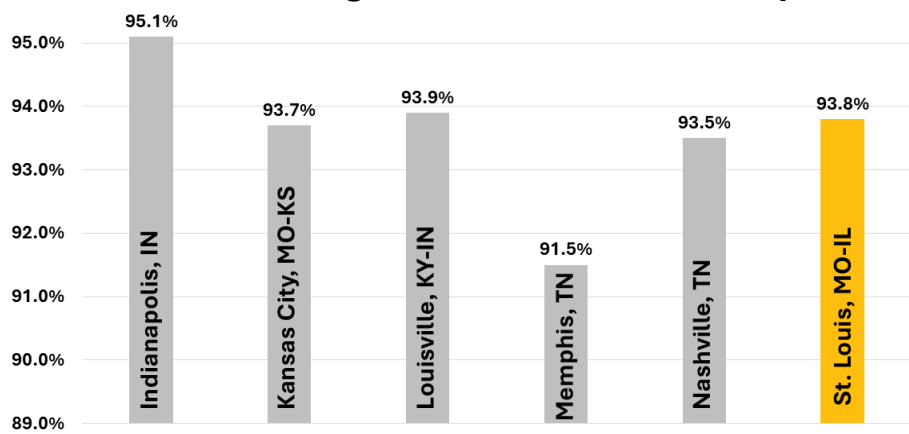
KEY TAKEAWAY:
 The St. Louis Region is a competitively sized and priced market in the Midwest in terms of industrial inventory and rents. The region has **727 existing buildings** with more than 100,000 sq ft, an average under construction building size of **490,000 sq ft**, and **17.9 million sq ft** of total available space.

Source: CoStar

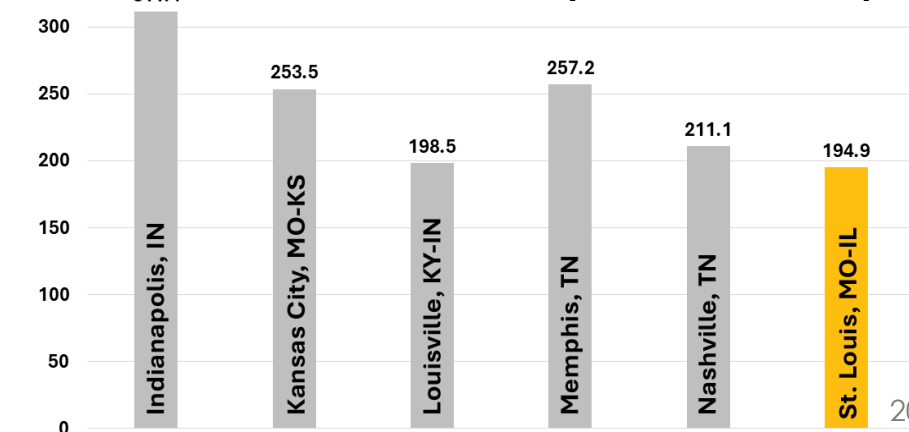
Average Asking NNN Rent per Sq Ft



Average Percent Leased Comparison

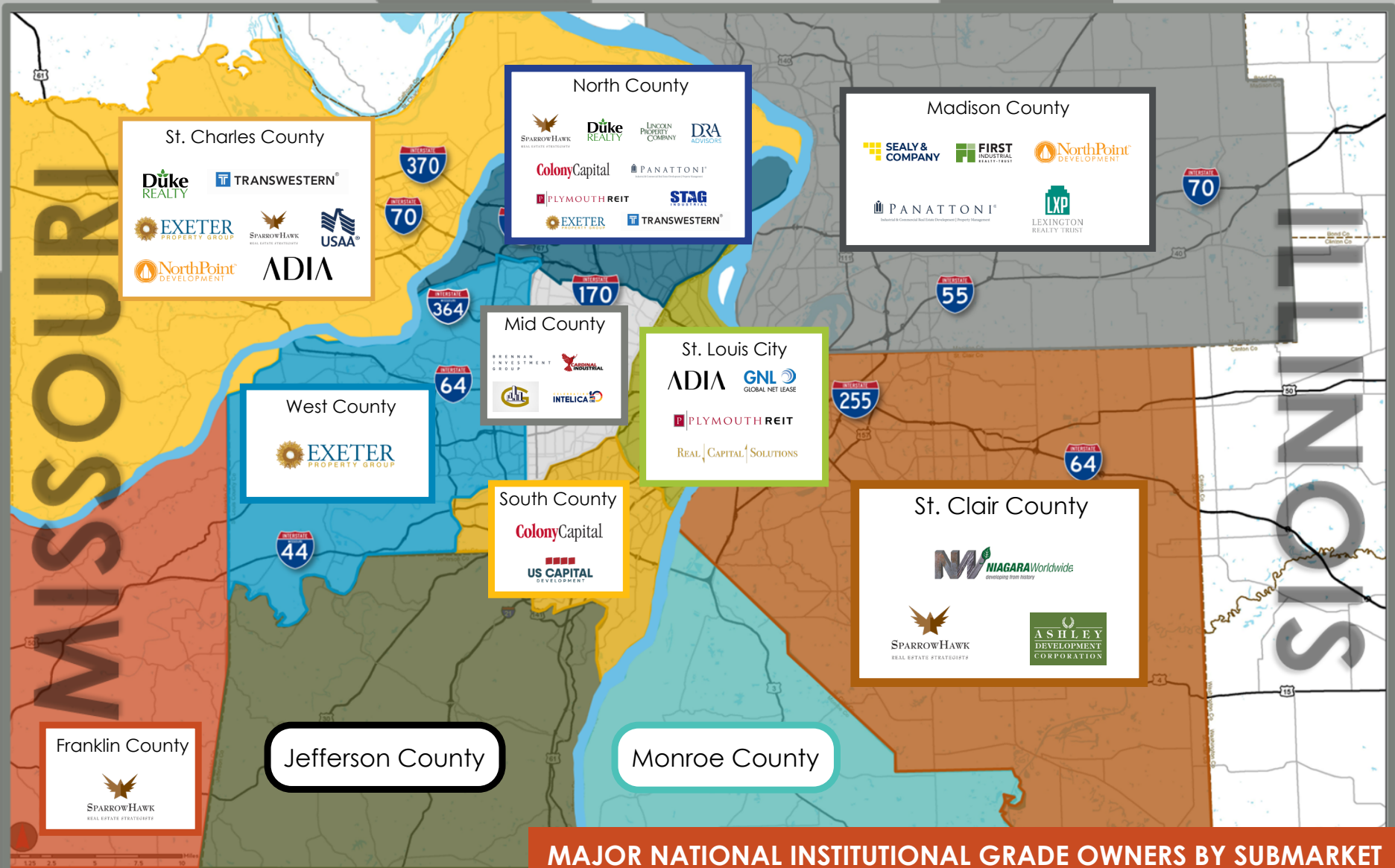


Total Inventory in Millions of Sq Ft



ST LOUIS REGIONAL FREIGHTWAY

ST. LOUIS REGIONAL INDUSTRIAL MARKET REAL ESTATE INDICATORS



MAJOR NATIONAL INSTITUTIONAL GRADE OWNERS BY SUBMARKET

Click [HERE](#) to learn more about available industrial sites!

Source: CoStar – St. Louis MSA; Existing industrial buildings over 100,000 sq ft, over 24' Clear; Single Story, Class A & B

» THE BACKBONE OF AMERICA'S AEROSPACE SUPPLY CHAIN CORRIDOR

- America's aerospace supply chain corridor, anchored in the St. Louis region and running 650 miles through Oklahoma City and south to Dallas-Fort Worth, is home to more than 1.6 million aerospace manufacturing and related jobs, representing more than \$250 billion in economic impact, and one in five of those jobs are located within the St. Louis region.

» JOB-READY LABOR FORCE

- The St. Louis region leads comparable metro regions in the Midwest in total number of workers, with nearly 1.5 million workers in the labor force and a 65.0% labor force participation rate (LFPR) and 86.3% prime-age LFPR, both higher than the national rates of 63.3% and 83.2%, respectively.

» THRIVING TARGET INDUSTRY SECTORS

- Overall, since 2019, new industrial investments in the bi-state St. Louis region totaled more than \$10.2 billion in the region's targeted industry sectors of Chemicals, Metals, Food & AgTech, and Advanced Manufacturing.
- The St. Louis region offers competitive NNN asking rents, around \$6.50 per sq ft, and boasts 3.4 million sq ft of industrial space under construction as of Q4 2025.

» STRATEGIC GEOGRAPHIC LOCATION & MULTIMODAL INFRASTRUCTURE

- The St. Louis region is home to America's most efficient inland port, the confluence of four major interstate highways (I-44, I-55, I-64 and I-70) and six Class-I railroads, making the St. Louis region one of the largest rail hubs in the United States. St. Louis Lambert International Airport serves 20 airlines and offers non-stop service to 68 cities, including the newly added London Heathrow route. MidAmerica St. Louis Airport continues to grow and will soon welcome the opening of the new MetroLink expansion linking St. Louis Lambert International Airport to MidAmerica St. Louis Airport.



ST LOUIS REGIONAL FREIGHTWAY

Q2 2026

St. Louis Regional Market Indicators & Workforce Statistics

Disclaimer: Information contained herein has been obtained from sources believed to be reliable. While every reasonable effort has been made to ensure its accuracy, we cannot guarantee it. No responsibility is assumed for any inaccuracies. Readers are encouraged to consult their professional advisors prior to acting on any of the material contained in this report.

CONTACT: **MARY C. LAMIE, P.E.**

Bi-State Development | Executive Vice President of Multimodal Enterprises
Phone: 314.982.1562 | Email: MCLamie@TheFreightway.com

THEFREIGHTWAY.COM