The St. Louis region has the **industrial space**, the **available workforce**, and is ready to help you find the space you need.

The **ST. LOUIS REGIONAL FREIGHTWAY** has created this newsletter to educate business leaders about the recent growth in the industrial market and how the region is poised for further expansion.
This market report showcases the St. Louis regional industrial landscape and focuses on the freight, logistics and distribution market. The St. Louis Regional Freightway is spotlighting the hotspots within the market and highlighting the region’s capacity to deliver a job-ready workforce.

Explore this newsletter to find out why the St. Louis regional industrial market is a prime location for freight operations!

Interactive Newsletter Outline

1. Industrial Real Estate Market Indicators
2. Construction & Development Trends
3. Hotspot Spotlight - Industry Growth at Auto Plant Sites
4. Hotspot Spotlight - Route 3 Corridor
5. Industrial Job-Ready Workforce Statistics
6. St. Louis Regional Advantages
7. Featured Real Estate Sites Map
ST. LOUIS REGIONAL INDUSTRIAL MARKET REAL ESTATE INDICATORS

BULK DISTRIBUTION BUILDINGS OVER 250K SF

Source: CoStar – St. Louis MSA; Existing industrial buildings over 250,000 SF, over 24’ Clear; Single Story
West County, MO does not have inventory fitting the parameters on CoStar

ST. CHARLES COUNTY
Total Inv: 3.53msf
Avail: 2.7%

NORTH COUNTY
Total Inv: 13.16msf
Avail: 22.1%

MID COUNTY
Total Inv: 0.689msf
Avail: 0%

CITY OF ST. LOUIS
Total Inv: 2.47msf
Avail: 17.5%

SOUTH COUNTY
Total Inv: 1.23msf
Avail: 0%

MADISON COUNTY
Total Inv: 21.78msf
Avail: 5.4%

ST. CLAIR COUNTY
Total Inv: 1.08msf
Avail: 64.9%

MONROE COUNTY
Total Inv: 6.00msf
Avail: 85.1%

JEFFERSON COUNTY
Total Inv: 0.509msf
Avail: 0%

FRANKLIN COUNTY
Total Inv: 0.72msf
Avail: 0%

BULK DISTRIBUTION BUILDINGS OVER 250K SF

Q2 2021

Industrial Real Estate Market Indicators
ST. LOUIS REGIONAL INDUSTRIAL MARKET REAL ESTATE INDICATORS

INVENTORY BREAKDOWN (BY BUILDING SF)

MODERN BULK INVENTORY (BULK DISTRIBUTION OVER 250,000 SF)
TOTAL = ±51.2 MSF

Source: CoStar – St. Louis MSA; Existing industrial buildings over 250,000 SF, over 24' Clear; Single Story
*Only reported NNN asking rents were used

AVERAGE NNN DIRECT ASKING RENT & VACANCY RATE

ST. LOUIS REGIONAL INDUSTRIAL MARKET REAL ESTATE INDICATORS

BULK DISTRIBUTION NNN ONLY

Missouri

Jefferson County
St. Charles County
North County
Madison County
Mid County
City of St. Louis
South County
St. Clair County
Franklin County
Monroe County

Illinois

Q2 2021

Industrial Real Estate Market Indicators
TOTAL CONSTRUCTION OVER 100K SF
ST. LOUIS REGIONAL INDUSTRIAL MARKET - HISTORIC ACTIVITY

<table>
<thead>
<tr>
<th>Q2 2017</th>
<th>Q2 2018</th>
<th>Q2 2019</th>
<th>Q2 2020</th>
<th>Q2 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
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</tbody>
</table>

TOP MODERN BULK DEVELOPERS*
ACTIVITY OVER 5 YEARS

<table>
<thead>
<tr>
<th>Millions SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>NorthPoint</td>
</tr>
<tr>
<td>TriStar</td>
</tr>
<tr>
<td>Panattoni</td>
</tr>
<tr>
<td>Duke Realty</td>
</tr>
<tr>
<td>CRG</td>
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</tbody>
</table>

CONSTRUCTION & DEVELOPMENT TRENDS

SPECULATIVE DEVELOPMENT
SPEC & BTS CONSTRUCTION SINCE 2017

<table>
<thead>
<tr>
<th>Total SF of Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
</tr>
<tr>
<td>2018</td>
</tr>
<tr>
<td>2019</td>
</tr>
<tr>
<td>2020</td>
</tr>
<tr>
<td>2021*</td>
</tr>
</tbody>
</table>

Source: Steadfast City; CoStar (St. Louis, MO-IL MSA, Industrial buildings over 100,000 SF)
* Includes 2021 completions and under construction activity
Hotspot Spotlight: Industry Growth at Auto Plant Sites

The attractiveness of the St. Louis region is highlighted through its automotive manufacturing history.

The General Motors Wentzville Assembly Plant in St. Charles is vibrant and growing with a recent announcement of a $1.5B investment into the facility by GM in 2019.

Between 2000 and 2010, both the Ford Motor Plant in Hazelwood and the Chrysler Auto Plant in Fenton closed, leaving empty and blighted sites. The locations of both plants along key intermodal sites and the flexibility & ingenuity of public-private partnerships allowed national developers to see the potential of the sites and attract impactful tenants at the newly constructed, modern industrial business parks.
HOTSPOT SPOTLIGHT:
INDUSTRY GROWTH AT AUTO PLANT SITES

A STORY OF THE ST. LOUIS REGION’S RESILIENCE

General Motors
Wentzville Assembly Center
» 500 Acre Auto Plant
» 4,330 Jobs
» +30,300 Total Jobs Impact

Fenton Logistics Park
(Former Chrysler Plant)
» 150 Acre Industrial Park
» 1.3M SF of New Construction
» $300MM Investment
» 2,000 Jobs

Aviator Business Park
(Former Ford Plant)
» 160 Acre Industrial Park
» 2.6M SF of New Construction
» $250MM Investment
» 1,150 Jobs

The Transportation and Warehousing Industry grew 11% faster in the 5-Mile radius around the GM plant than the national average.
The IL Route 3 highway is the backbone of a 60-mile long logistics and manufacturing corridor with access points to six Class 1 railroads, five airports with capacity, four interstates with national access, and America’s third largest inland port.

“The Rail service along this corridor is unique; it’s whatever a manufacturer or rail shipper wants. You have the six Class 1 railroads you can ship with directly or through the Terminal Railroad. There’s five intermodal facilities, if not on the border within a five-to ten-minute drive. And what we do is we’re that last mile service provider. So, we provide a safe interchange of goods between Class 1 railroads and their end users. The river, the rail and the interstate access in this area truly give you the best multimodal options.”
- Matt Whitney, Dir. of Business & Industrial Dev. for Terminal Railroad Assoc. of St. Louis

“The Route 3 corridor from Dupo to Alton has some very favorable zoning ordinances in communities that are going to welcome heavy manufacturing. The Route 3 arterial route, which is a four-lane highway, is relatively uncongested and traverses parallel to the Mississippi River. It intersects multiple interstates, rail and river access points. It has access to heavy utilities and a skilled labor pool. And many of these communities are relatively easy to work with and don’t have a lot of red tape to overcome.”
- Steve Zuber, SIOR, CCIM, Principal with Barber Murphy

“When you think about the location and the infrastructure alone, this is just a fantastic, fantastic location for site selection and new business investment.”
- Doug Rasmussen, President & CEO of Steadfast City Economic & Community Partners

“We’ve enjoyed the fruits of the corridor and been part of it for nearly 150 years... But one thing that’s been fairly constant is we rely heavily on getting product to us, as well as shipping our product, and being geographically located in the Midwest, as well as having all of those transportation ways, if you will, there’s been a huge advantage for this facility and one of the reasons we’re still here.”
- Mike Patton, General Manager of U.S. Steel
### OCCUPATIONAL EMPLOYMENT & WAGE ESTIMATES

<table>
<thead>
<tr>
<th>ST. LOUIS MSA</th>
<th># Workers</th>
<th>Annual Mean Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Occupations</td>
<td>1,300,210</td>
<td>$54,210</td>
</tr>
<tr>
<td>Production Occupations</td>
<td>77,060</td>
<td>$43,950</td>
</tr>
<tr>
<td>First-Line Supervisors of Production and Operating Workers</td>
<td>5,390</td>
<td>$67,140</td>
</tr>
<tr>
<td>Machinists</td>
<td>3,670</td>
<td>$51,830</td>
</tr>
<tr>
<td>Packaging and Filling Machine Operators and Tenders</td>
<td>5,510</td>
<td>$42,450</td>
</tr>
<tr>
<td>Computer Numerically Controlled Tool Operators</td>
<td>2,250</td>
<td>$43,650</td>
</tr>
<tr>
<td>Computer Numerically Controlled Tool Programmers</td>
<td>310</td>
<td>$70,340</td>
</tr>
<tr>
<td>Production Workers, All Other</td>
<td>1,310</td>
<td>$37,390</td>
</tr>
<tr>
<td>Transportation and Material Moving Occupations</td>
<td>105,210</td>
<td>$39,310</td>
</tr>
<tr>
<td>First-Line Supervisor of Transportation and Material Moving Workers</td>
<td>3,660</td>
<td>$62,190</td>
</tr>
<tr>
<td>Heavy and Tractor-Trailer Truck Drivers</td>
<td>17,760</td>
<td>$50,700</td>
</tr>
<tr>
<td>Light Truck Drivers</td>
<td>8,340</td>
<td>$43,390</td>
</tr>
<tr>
<td>Industrial Truck and Tractor Operators</td>
<td>6,660</td>
<td>$37,710</td>
</tr>
<tr>
<td>Laborers and Freight, Stock, and Material Movers, Hand</td>
<td>25,600</td>
<td>$35,660</td>
</tr>
<tr>
<td>Stockers and Order Fillers</td>
<td>20,310</td>
<td>$32,010</td>
</tr>
</tbody>
</table>

Mean Average Wage Comparison
St. Louis, MO-IL vs USA

**America’s Third Largest Inland Port**
Northernmost lock-free/ice-free access on the Mississippi River to and from the Gulf of Mexico, making the region the 3rd largest port for domestic tonnage, among all inland ports in the U.S.

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

**Five Airports with Capacity**
The region includes two international cargo airports (St. Louis Lambert International Airport and MidAmerica St. Louis Airport) with rail access, foreign trade zones and developable land.

**Six Class I Railroads**
National railroads providing connection to regional and global markets, including BNSF, CN, KCS, NS, CSX and UP, utilizing a single switching carrier through the Terminal Railroad Association of St. Louis.

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**Sample of Recently Funded Projects:**

- **$600 MIL**
  - I-270 from I-70 (MO) to IL Rte 157 (IL) (Partially Funded)
- **$222 MIL**
  - TRRA Merchants Rail Bridge over Mississippi River (MO/IL)
- **$115 MIL**
  - IL Rte 3 Access in St. Clair County (IL) (Partially Funded)
- **$80 MIL**
  - IL Rte 3 Connector in St. Clair County (IL)
- **$62 MIL**
  - I-70 Outer Road in St. Charles County (MO) (Partially Funded)
- **$42 MIL**
  - I-255 / Davis Street Ferry Road Interchange (IL)
- **$36 MIL**
  - I-64 Improvements - Green Mt Rd to IL Rte 158 (IL)
- **$34 MIL**
  - North Riverfront Commerce Corridor Improvements (MO) (Partially Funded)
- **$32 MIL**
  - I-70 Interchange Expansion of Improvement Projects (MO)
- **$20 MIL**
  - IL Rte 158 (Air Mobility Drive) Expansion from IL Rte 161 to IL Rte 177 (IL)
- **$13 MIL**
  - America’s Central Port Intermodal Improvements (IL) (Partially Funded)
- **$9 MIL**
  - Union Pacific Railroad Lenox Tower Replacement & Track Realignment (IL)
- **$8 MIL**
  - I-70 Additional Lane from TR Hughes Blvd to Bryan Rd (MO) (Partially Funded)
- **$4 MIL**
  - Earth City Access (MO)
- **$3 MIL**
  - North Park Access Improvements (MO)
- **$2.4 MIL**
  - J.S. McDonnell Connector Access Improvements (MO)
The St. Louis region is rich with industrial parks and development-ready land for all types of industrial or corporate use. Click on the map or visit TheFreightway.com for details on sites that are ready for you and your business.
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.