

2021 Missouri State Freight and Rail Plan Regional Stakeholder Meetings Summary

Overview:

The Missouri Department of Transportation hosted the Missouri State Freight and Rail Plan (SFRP) Stakeholder Meetings on May 4th, 5th, 11th, and 13th from 9 a.m. – 11 a.m. The objectives of the meetings were to gather insight, input and feedback from Missouri planners and policymakers on regional economic and industry trends, as well as important freight transportation needs. A PowerPoint presentation was provided to review all the trends.

Meeting Summary:

1. **Welcome:** Cheryl Ball, MoDOT Freight and Rail Plan Project Manager, provided a welcome and encouraged participation and input to help shape the freight plan.
2. **Introduction:** Paula Dowell, Cambridge Systematics (CS), provided an overview on the background of the SFRP and what would be discussed in the meeting. Stakeholder engagement for the plan includes initial interviews with key stakeholders, SFRP steering committee, interviews and surveys, industry forums and stakeholder meetings.
3. **Missouri Freight Profile:** Katie Kirk, CS, provided an overview of the current plan. The plan encompasses four main modes that carry freight: the state highway system, railroad network, marine ports and waterways, and cargo-handling airports. A total of 985 million tons of goods were shipped in 2018 worth \$1.1 trillion. By 2045, it is predicted that 1.2 billion tons of goods will be shipped throughout Missouri (within the state, through the state, and to the state) worth \$1.8 trillion. Commodities are not predicted to change significantly except for coal, which is already trending downward nationally. Most of the freight moves through the state without stopping. Freight supports some of the biggest industries in the state: agriculture, mining, manufacturing, etc.
4. **Economic Futures:** Katie Kirk and Paula Dowell presented how MoDOT is working to update future forecasts and how national trends may or may not affect Missouri. MoDOT will then pick two or three trends to study in-depth and model in the MoFAS tool. National trends impacting freight include renewable energy, multimodal infrastructure, instability due to climate, retail & e-commerce, technology adoption, and trade agreements.
5. **Freight System Needs:** Katie Kirk and Paula Dowell gave an overview of the process for identifying freight system needs. Multiple rounds of stakeholder engagement meetings have provided insight about freight system needs. MoDOT is looking at six categories: safety, truck parking, technology, mobility & reliability, asset preservation, and rural highways. A mapping tool was developed and used during the meetings to gain feedback from stakeholders and identify places in the state with freight system needs and potential projects.
6. **Passenger Rail Update:** Katie Kirk discussed the Virtual Open House which is focusing on passenger rail in Missouri. The Open House is active May 3rd through June 21st on MoDOT's website.

7. **Schedule and Next Steps:** The project kicked off in February 2020 and will wrap up in fall 2021. There will be another round of participation and engagement before finalizing the SFRP. The next steps are to finalize MoFAS tool and make it useful to any planner working in the state.

Tuesday, May 4: NW & NE Districts

The northwest and northeast districts meeting was held on Tuesday, May 4, 2021. The overarching themes expressed by stakeholders were:

- The impacts of climate change and flooding along the Mississippi River;
- The future of electric vehicles and charging stations; and
- The need for additional truck parking near Cameron, MO at US 36, and I-35.

Wednesday, May 5: STL & SE Districts

The St Louis and southeast districts meeting was held on Wednesday, May 5, 2021. Overarching themes expressed by stakeholders were:

- The importance of multimodal connections and
- Safety on roadways.

Tuesday, May 11: KC & Central Districts

The Kansas City and central districts meeting was held on Tuesday, May 11, 2021. The overarching themes expressed by stakeholders were:

- Changes in the work-force;
- Partnerships with surrounding states; and
- Increased port access.

Thursday, May 13: SW District

The southwest districts meeting was held on Thursday, May 13, 2021. The overarching themes expressed by stakeholders were:

- Electric vehicles and the implementation of charging stations; and
- The importance of multimodal connectivity.

Conclusion

Many of the same topics were brought up across all meetings by stakeholders. The main themes that spanned all meetings were:

- The need for multimodal connections in all districts (including increased access to ports);
- The future of electric vehicles, charging stations, and how that could affect the gas tax; and
- Partnering with nearby states- as most of the freight traveling in the state goes through the state and Missouri is not its destination.

Attachment 1 consists of questions and comments from stakeholders that participated in each meeting. Menti, a real-time polling platform, was used to gather feedback on the Missouri SFRP during each meeting. Attachment 2 lists all Menti questions and responses for each meeting.

Attachment 1

Stakeholder Questions & Comments

The question (Q), answers (A), and comments (C) are organized into the sections of the presentation in which they were discussed.

NW & NE Districts

- Missouri Freight Profile
 - Q - Was 2018 a flood year on the MI?
 - A - 2019 was a significant flood year, but 2018 had some flooding. We have had flooding on the Missouri 3 of the last 5 years.
 - Q - What modes are used when flooding occurs?
 - A - Depends on the shipper. Flooding doesn't impact one mode, it can impact ports, roads and depends on the shipper. When flooding occurred, wind turbines changed over to truck.
- Economic Futures
 - C - Tesla is putting a charging station in Hannibal right now at a Casey's!
 - Q - Thinking of autonomous trucks and broadband impacts on rural areas
 - A - The impacts will not be evenly spread. Pre-COVID, e-commerce was seeing a surge in rural areas. With climate change and flooding, some of that will be geographic based and may not be equal between urban and rural areas.
 - Q - What about drone delivery for some packages?
 - A - Yes, drones working in rural areas and cargo blimps. We will see more robots on the sidewalks and technology lockers.
 - Q - Backing up to climate change info--does the mix of concrete and asphalt need to be reexamined as things change to make them better and longer lasting?
 - A - That's what we call hardening of the infrastructure and falls under resiliency.
 - Q - I don't know that 5G is possible on our major highways in rural areas.... that is what CAVs take...
 - A - Some of the technology we already have on our cars and not as reliant on 5G
 - Q - Don't blockchains take a lot of energy?
 - A - Yes, they can.
 - C - my idea of untapped potential was lots of river space with no ports, lots of room distribution centers and warehouses
- Freight System Needs
 - Q - Can we get the link to the mapping tool in the chat
 - A - The link will be provided
 - Q - Where are the rail lines where goods can get into the system and off?
 - A - The dashed layer on the map
 - C - I'm working on a port expansion in Lewis County in northeast
 - Q - Is there any rail freight access in northeast Missouri? Is there any rail/port access?
 - C - I'm assuming that rail is all just cross thru
 - Q - Air expansion in Cameron, MO, Interstate Interchange improvements in Cameron and St. Joseph, port development in St. Joseph
 - Q - Does the rail cross Highway 63 in La Plata? that might be a decent location
 - C - NE part of the state would be ideal for rail/port/highway access.

- C - Cameron is working towards improving truck parking, but needs the highway improvements to help facilitate and improve safety
- C - Port need in Alexandria, MO identified on map. They had a private individual ready to go. Was for a dry fertilizer port.
- C - For the Alexandria thing, the NE MoDOT people to talk with would be Amy Crawford, Area Engineer and Rob Frees, Planning Manager.
- Expanding the runway in Cameron, MO to allow for larger freight and passenger with access at US 36 and I-35.
- Hwy. 63 and rail crossing improvements in La Plata.
- Cameron, MO truck parking improvement. They have invested in a private truck stop around Hwy. BB on the east side of I-35. The desire is for interchange improvements to allow better access to the truck stop.
- C - Need improved rail access (comment from Cheryl Ball) to encourage business location.
- C - Broadband in Lewis County can be spotty
- C - I would just add that continuing the four-lane highway from Kirksville north to Iowa is a priority for us.
- C - Looking at the map you get a feel of how important the rural roads are for all north Missouri depend almost entirely on low volume and minor routes

STL & SE Districts

- Missouri Freight Profile
 - Q - When you show the different categories, are those broken down by corporation or totaled as a whole?
 - A - We used a couple of different sources. The stats presented earlier were statewide industry stats.
- Economic Futures
 - Q - Just a reminder that air is also an important part of multimodal, but I don't see it listed here?
 - A - We recognize it's an important mode and will discuss it further.
 - C - The STL airport has seen the uptick of e-commerce on the air side for online retail and shopping. Last month was almost a 20%-30% growth rate year over year in air-cargo. MCI might be seeing the same thing. There is a need for quick demand. Air-cargo networks have played a key role for cargo to get on trucks and then get to its destination.
 - C - We are seeing more and more door to door delivery with e-commerce and a greater increase in that last mile service. More freight moving through neighborhoods. Panel trucks, vans, autos, cargo bikes.
 - C - In the SE district, there are a lot of spots where you can't get broadband or service.
- Freight System Needs
 - C - I-70 throughout the STL region, it is a primary corridor in St. Louis. As a primary E/W corridor it supports several industrial sites and GM Wentville site and part of a system that supports overall manufacturing in the region. Capacity and condition are a concern. The section in St. Charles Co. where Norfolk southern goes over the I-70 sees a daily congestion point. 141 to 170 in front of St. Louis airport where it supports industrial sites. Existing manufacturing sites.
 - C - Safety concerns on I-70 near the airport. There are backups due to crashes.
 - C - The road network east out of Missouri at Charleston is very limiting for freight movement and involves Illinois and Kentucky.

- C – The I-40 corridor in Arkansas is maxed out and freight movement north south is important to Missouri.
- C - Don't forget about the passenger rail as well and how that can help the region.

KC & Central Districts

- Missouri Freight Profile
 - No questions or comments were presented by stakeholders.
- Economic Futures
 - Q - How do we start that process at a local level? Is there a plan in place on where to start? Is it with Union Pacific Rails in our area? What guidelines are there for this process?
 - A - As part of the state freight plan, we're engaging with rail lines as to where those opportunities may be. At any level, there is an opportunity to discuss these issues. As far as guidelines are, those are in the planning process.
 - C - One consideration to add: Workforce location and availability related to supportive land use. We have an active goods movement committee at MARC. One Opportunity to consider: Containerized freight on inland waterways.
 - C - MoDOT works with planning organizations in the region for projects. It helps the state decide where we want to head in the future. MPOs and agencies are major partners in the plan and in implementation.
 - C - Looking ahead at upcoming slides. In KC region, we looked at similar driving forces of change during our last MPO long-range plan. We considered all the ones mentioned in these set of slides, plus one additional not mentioned here. Demographic changes. Some factors which could be impactful in the future:
 - Fewer working adults to support retiree benefits.
 - Competition for resources between ages and races.
 - Demand for transportation choices.
 - Labor shortages and rising unemployment.
 - C - Thanks Martin- those are all very good and are captured in our alternative economic forecasts. The items we are discussing now are considered as potential disruptors- things that are not easily predicted with regards to potential impacts.
 - C - Another set of measures not listed here is how we can mitigate potential impacts to the future.
 - C - One of the key lessons we learned was partnering with neighboring states and to look at this as a regional or national level. Processes need to take place to develop coordinated frameworks.
 - C - Many neighboring states have developed policy frameworks for the adoption of CAV technologies as part of their transportation planning processes.
 - C - For autonomous vehicles we will really need national level adoption of visual cues and signage for these vehicles to read and use for guidance. Fragmentation won't allow these vehicles to navigate on our roadways.
 - C - I love these intermodal connectors from Canada to Mexico. Great move!!!!
 - C - Our eco devo partners here in KCMO have expressed that multimodal transportation options is by far the most impactful to freight and good movement.
- Freight System Needs
 - C - Access to the proposed port in Jefferson City.

- Q - The port in Cooper Howard county, they own the area of the port but were having issues with expanding the port and cannot get the adjacent company to communicate with them. Is there anything that could be done about that?
- A - It sounds like a conversation with local planners and the entity that owns the adjacent land.
- C - Big time customer of the river runner
- Q - Could we schedule an update on these plans to MARC's Total Transportation Policy Committee in July or August?

SW District

- Missouri Freight Profile
 - C- An analysis of transloading facilities would be helpful to include in the data. How much freight is moving through that and the types of freight.
 - The freight analysis includes a section on freight generators and digs deeper into the topic.
 - Q - What are you seeing as automaker are changing fleets to electric and how you would handle production of implement infrastructure that could support the transition?
 - A - It really depends on the manufacturer themselves. Tesla, for example, builds their own charging stations. Gas stations themselves could add them to their facilities or people could put them on their own land. It is in the early implementation stage.
 - C - The time it takes to charge an electric vehicle is interesting. I'm wondering if how often to charge an electric vehicle could have an impact on delivery and freight.
 - Q - On the last consideration, do you think sites will be identified that serve as multi-modal facilities?
 - A -The freight generators analysis helped establish the network of terminals and freight infrastructure throughout the state to help understand the broader picture. When we talk with stakeholders, that's a great opportunity to learn about opportunities and ideas coming up.
- Economic Futures
 - C - what have we heard for electric vehicle infrastructure keeping up with automaker predictions of electric vehicles.
 - A - There are no good projections of electric vehicle charge stations.
 - C - Electric vehicle charging time concerns
 - A - There are DC fast chargers which reduce charge time.
 - C - Is the study going to identify additional sites that could include multimodal site. This would be helpful for MPO planning. -
 - A - Freight generator work the team did helps understand where some of the industries and needs are located. We will document these sites.
 - A - This Could be a recommended strategy. (Cheryl Ball)
 - C - We are getting a new Amazon fulfilment facility in the area, so we are thinking of some of these things but don't have any solutions right now.
 - C - Wilson logistics (or Locomotion) is doing a pilot with Peloton that they might want to test on our roads.
- Freight System Needs

- C - East side of Springfield. Working on grant opportunities to widen road. Lecompton drive needs improvement for intermodal facility
- C - Interchange at Hwy 13 and I-44. Affecting ability for region to grow.
- Q - opportunity to connect the rail network to the airport for a transloading facility.
- A - Traditionally not since airports are usually low weight, high volume and trains are the opposite.
- C - City of Republic is very interested in Route MM corridor improvements. Highway 60 to I-44 along MM corridor. City would like to connect Route MM to ZZ.
- C - entire US 60 corridor east of Republic to east of state line to address at grade crossings.
- C - City of Monet has a lot of manufacturing but there is no great way to get to I-44 to the north.
- C - Improved connections to NW Arkansas which is a major activity center. Route 39 south or Route 37 south out of Monet.
- C - Nevada, MO - Need better intermodal access with rail and road.

Attachment 2

Menti Questions & Responses

During this section of the meeting a series of interactive questions were asked, and participants were asked to respond. Questions were asked through www.menit.com and real-time responses were shown on the screen and are captured in the summary PowerPoint presentations. The following is a review of the questions by area.

NW & NE Districts

Question: How might these trends affect Missouri's economy?

- Results will be checked after the meeting
- For the most part, folks think there's a high probability this will happen except for climate

Question: Are there other trends that you think will impact Missouri's businesses & industries?

- Continuing refusal to invest in transportation
- Ensuring a qualified workforce
- Lack in skilled workers
- Demographics as the average age of Missourians increases
- Need to react to climate change and climate change mitigation measures
- Reaction and aftermath of COVID pandemic
- Increased traffic without adequate funding to keep infrastructure up to date
- People leaving rural areas for urban areas
- No dedicated funding for other modes limits ability to respond and build resiliency
- Disparity between rural/ urban
- Increased polarity in politics
- Population trends, investment in improving transportation options and roads, ensuring a qualified workforce, competing to further our economic development, and bringing new businesses to our area, how will we bounce back from COVID
- When the next pandemic hits and what the response will be

Question: How prepared are Missouri's businesses and industries to respond to these trends?

- Very Prepared (1)
- Prepared (0)
- Neutral (5)
- Unprepared (13)
- Not sure (0)

Question: For companies that rely on Missouri's multimodal freight transportation network, what are your region's strengths?

- Strong rail and ports in the region
- River, road, rail
- Good passenger air
- River and rail served
- Space for development

- Untapped potential (my idea of untapped potential was lots of river space with no ports, lots of room distribution centers and warehouses)
- Modal connectivity
- Access to interstate, the MO river, and railways plus we are within just over an hour from MCI
- Versatile network that can serve all needs

Question: What are your region's weaknesses?

- Lack of river and rail
- Undeveloped river infrastructure
- Need to start tapping into our potential
- Road improvements especially I-70
- Inadequate funding to develop freight transportation assets
- MO River instability
- Poor highway quality (need that to get to ports or rail)
- Low population means low traffic means limited MoDOT investment

Question: What are your region's opportunities?

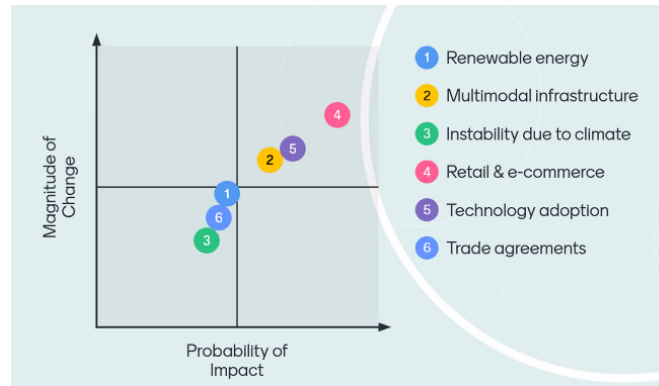
- Access to I-70
- Unlimited
- Expanding ports
- Working as a mega region throughout Midwest
- Lots of space for development and expansion
- Potential passenger rail
- Updating highway connectivity, utilization of rail and ports
- Attractive place to live
- Potential opportunities at roecrans airport
- Low cost of living

Question: What are your region's threats?

- Declining population
- Flooding
- Aging population
- Road closures due to flooding
- Get left behind
- Flooding, climate issues
- Lack of infrastructure investments
- Nearby states with more business-friendly policies
- Taxes don't support infrastructure projects
- Perception
- Lack of change or willingness to change

STL & SE Districts

Question: How might these trends affect Missouri's economy?



Question: Are there other trends that you think will impact Missouri's businesses & industries?

- Healthcare/ bio tech
- The growth of distribution centers is impressive and drives demand
- Availability of workforce
- Workforce development
- Need to think how to assess non-fossil fuel vehicles so contribute to transportation fund
- Telework changing where employees are located
- Growth patterns
- Future pandemics
- 3D printing
- University costs and options
- Fewer owning and driving cars
- Current administration looking at connections in transportation

Question: How prepared are Missouri's businesses and industries to respond to these trends?

- Very Prepared (0)
- Prepared (1)
- Neutral (6)
- Unprepared (5)
- Not sure (0)

Question: For companies that rely on Missouri's multimodal freight transportation network, what are your region's strengths?

- Multimodal connectivity
- Rail/water connections
- MI River system access and port network
- Capacity availability via air
- SEMO Port, two rail systems, interstate
- Connected highway system

Question: What are your region's weaknesses?

- Workforce
- Underfunded needs, especially non-highway

- Lack of funding
- Workforce in general
- Aging infrastructure
- Infrastructure funding sustainability
- Desire to widen highway versus total transportation network
- Aging bridges on farm to market roads maintained by the state
- Farm to market roads with little funding

Question: What are your region's opportunities?

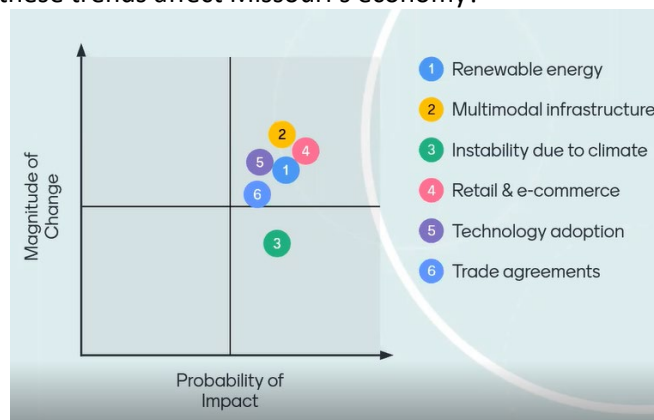
- Public ports can expand
- Serve as a larger air freight hub
- Connections with I-57, I-55 and 60 for distribution centers
- Land for development

Question: What are your region's threats?

- Competition from neighboring states
- Lack of broadband in many areas
- River flooding
- Lack of workforce
- Other states are getting very competitive and stepping up their game and we cannot afford to lag behind
- Workforce shortage, need to comment on contributing factor
- New Madrid earthquake fault line

KC & Central Districts

Question: How might these trends affect Missouri's economy?



Question: Are there other trends that you think will impact Missouri's businesses & industries?

- Automated vehicles
- Autonomous truck drivers
- Remote work
- Driver demographics
- Dilapidated roads and bridges

- Disinvestment in public infrastructure
- Automated warehouses
- Population shifts-rural to urban, urban to suburban, and suburban to rural
- Cyber security
- Automation and gas emissions in agriculture
- Competition from other areas
- The trends we can model or attempt to model, but I think it's the unexpected event that will create the biggest impacts both in the long and short term
- 3-D printing?
- Political instability

Question: How prepared are Missouri's businesses and industries to respond to these trends?

- Very Prepared (0)
- Prepared (1)
- Neutral (6)
- Unprepared (4)
- Not sure (2)

Question: For companies that rely on Missouri's multimodal freight transportation network, what are your region's strengths?

- KC multi modal network is very robust
- Actual options in multimodal
- At the intersection of many roads and rail corridors
- Railroad system
- Diverse industry sectors in the KC region
- Diversity of options
- State's position in the national network
- Well organized to promote via KC Smart Port
- Significant highway capacity
- Cost of construction

Question: What are your region's weaknesses?

- Funding uncertainty
- Workforce capacity constraints
- As others have mentioned- top would be disinvestment
- Reluctance to adopt changes
- Ability to get workers to jobs via transit
- Aging infrastructure

Question: What are your region's opportunities?

- Strong e-commerce base exists
- Strong automotive industry
- River as mode of transport
- Build more multi-modal access points to rail

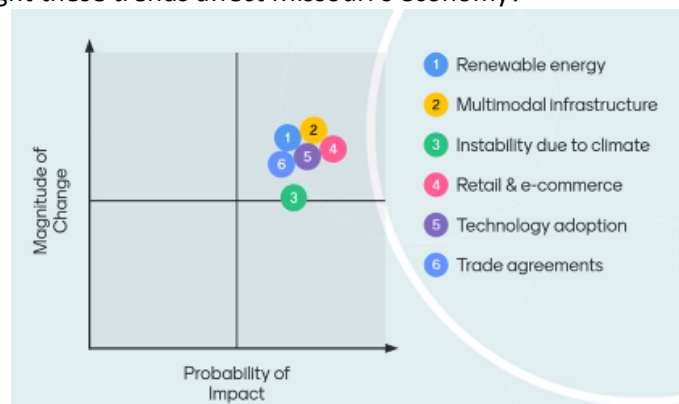
- Container on barge
- Focus on traded sectors- advanced manufacturing
- Regional hub
- Progressive utility Evergy

Question: What are your region's threats?

- Capacity limits
- Competition with other states
- No industry sector focus area
- Floods and other extreme climate events
- Matching workforce to needs
- Pass through is fine, but not being a destination limits market and industry participation
- Underinvestment at state level on infrastructure
- Disinvestment in public infrastructure
- Adapting infrastructure to changing needs
- Lack of transportation and childcare for the workforce

SW District

Question: How might these trends affect Missouri's economy?



Question: Are there other trends that you think will impact Missouri's businesses & industries?

- Workforce
- Changing workforce (skills and availability) – negative
- Infrastructure
- Social political policies that discourage new businesses from locating to Missouri or make recruiting talent difficult
- Gig workers- e-commerce – delivery
- Population growth
- Remote working and mobility of Gen z and Millennial workers, livability over job opportunities
- Infrastructure and workforce
- Telework will enable more people to locate far away from their workplace

- Continued rural population loss
- Lack of resources/ state-enabled toll for local governments to take on infrastructure projects
- Missouri expansion of biofuels
- Connectivity of communities and highways and transition areas. Finding cost-share resources for smaller metro and communities to participate in needed infrastructure. More resources for transload buildouts to connect communities closer to home

Question: How prepared are Missouri's businesses and industries to respond to these trends?

Responses recorded within Menti, delayed on screen

Question: For companies that rely on Missouri's multimodal freight transportation network, what are your region's strengths?

- Intermodal connections
- Large rail network
- SWMO is positioned well with BNSF and CP/KCS crossroads here
- Locations near I-44 and 249
- Interstate system
- Pavement/Bridge/System conditions
- Central continental location
- BNSF and KCS with east/west and north/south access.
- Rail and airports
- Geographic location
- I-49 corridor connector completion to NWA and region

Question: What are your region's weaknesses?

- Lack of water transport access
- Difficulty attracting and retaining talent
- No dedicated funding for modes
- Limited resources for major infrastructure buildouts needed
- No passenger rail transport

Question: What are your region's opportunities?

- Connect rail to air facilities for shorter international transport times to central US on high value goods
- Expansion of navigable waterway designations for port authorities
- Central location good for distribution centers
- Given connectivity of I-44/49 corridors, regionally embracing attributes for better positioning and regional growth
- Well positioned with interstate and air as those modes grow in use
- Tourism exposure
- Think of ourselves as a megaregion, rather than region within a state within the Midwest

Question: What are your region's threats?

- Weather

- Stagnant dedicated state funding
- Impacts of climate change- fuel costs, economy, etc.
- Cybersecurity!