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Missouri's Freight System

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# Missouri Freight System: Business Targets, Commodity Generators and Freight Flows

Missouri's freight system is a critical driver of the state's economy, linking agricultural production, advanced manufacturing, distribution centers and global markets through its multimodal network. To assess how future business growth, site selection activity and commodity demand will shape this system, the consultant team engaged with the Missouri Department of Economic Development (DED), St. Louis Regional Freightway, Kansas City SmartPort (KC SmartPort) and Missouri Partnership. Input from these organizations was paired with quantitative analysis of 2023 Transearch data. Transearch, developed by S&P Global, is a comprehensive freight data system that integrates proprietary industry data, commodity flow data, public datasets and forecasts based on employment, output and consumption trends.<sup>1</sup> From this dataset, district-level commodity flow results were developed to highlight variations in freight patterns across the seven Missouri Department of Transportation (MoDOT) districts.

This combined approach provides both qualitative insight into Missouri's economic development priorities and quantitative evidence of how freight demand is likely to evolve. The following sections summarize:

- Business targeting and site selection trends, as identified by state and regional partners
- Freight generators and existing clusters that currently drive network demand
- Commodity and supply chain analysis based on Transearch
- District-level commodity flows, including projected cumulative and compound annual growth rate (CAGR) changes through 2050
- Network and corridor implications for Missouri's future freight system

<sup>1</sup> Adapted from S&P Global, "Transearch," accessed December 12, 2025, <https://www.spglobal.com/market-intelligence/en/solutions/products/transearch-freight-transportation-research>.

## Freight-Based Business Targeting and Site Selection

Missouri's economic development partners are actively pursuing industries and business clusters that align with the state's freight strengths. Discussions with the St. Louis Regional Freightway, KC SmartPort, Missouri DED and Missouri Partnership revealed consistent emphasis on advanced manufacturing, agriculture, food and beverage, automotive, aerospace and emerging energy-related industries. Each organization also highlighted unique regional opportunities and site requirements that directly influence freight demand.

### St. Louis Regional Freightway

St. Louis Regional Freightway identified agriculture exports, advanced manufacturing, aerospace, automotive and metals as priority clusters. Location quotient analysis confirms the region's competitive concentration of these industries. Infrastructure investments, such as port expansions, new grain crushing facilities and rail improvements along Hall Street, are expected to strengthen the export of soybeans, corn and related commodities, while positioning the region to compete for electric vehicle (EV) battery manufacturing.

### KC SmartPort

KC SmartPort emphasized Kansas City's growing role as a hub for industrial manufacturing, food and beverage production, plastics, automotive components and batteries. The region benefits from Foreign Trade Zone status, which allows businesses to defer or reduce customs duties and streamline international trade processes, enhancing the region's competitiveness for global investment and export-oriented industries. Kansas City also benefits from relatively uncongested freight corridors and proactive partnerships with Union Pacific Railroad (UP) and Norfolk Southern Railway (NS) to expand intermodal access. Recent land acquisitions, including a 400-acre NS site and large tracts owned by UP, have added to the portfolio of rail-served industrial sites. Stakeholders also noted rising demand for automated "dark facilities," which are highly automated warehouses and production sites that operate with minimal human presence using only robotics and Artificial Intelligence (AI). These facilities are reshaping freight patterns by increasing throughput while shifting workforce needs toward more advanced technical and maintenance roles, further reinforcing Kansas City's position as a hub for next-generation logistics and industrial activity.

## Missouri Department of Economic Development

The Missouri DED described a statewide strategy centered on transportation and defense, advanced materials, food and beverage, biotechnology and financial services. These clusters leverage Missouri's established strengths in raw materials, chemicals and value-added manufacturing while underscoring the importance of information technology (IT) and logistics as enabling industries. The state is also assessing "mega site" readiness, with utilities, four-lane highway access and rail connectivity identified as critical factors for attracting new large-scale employers.

## Missouri Partnership

Missouri Partnership, which serves as the primary point of contact for site selectors (working directly with approximately 70 percent of prospects), confirmed ongoing interest in agricultural technology firms, food and beverage companies, metals and recycling operations and distribution centers. Companies consistently highlight requirements for reliable power supply, multilane highway access and major airport and workforce availability within one to two hours. While rail access is not universally required, firms seeking it are typically satisfied if new spurs can be delivered within a 12-month timeframe. Community amenities, including schools and childcare, were also cited as increasingly important for workforce attraction and retention.

Together, these perspectives highlight the close connection between Missouri's business attraction strategy and its freight system. Target industries not only depend on efficient multimodal connectivity but also drive investment in infrastructure that will shape long-term freight flows.



## Freight Generators and Existing Business Clusters

Missouri hosts a diverse set of freight-intensive industries that generate significant demand on the state's multimodal network. These freight generators include both established industrial clusters and emerging facilities, which together influence commodity flows, modal requirements and corridor priorities.

- St. Louis Region:** The region's freight activity is anchored by chemical manufacturing, food and beverage production and advanced aerospace and automotive facilities. Notable generators include Boeing, Anheuser-Busch InBev, General Motors and specialty chemical and plastics plants. America's Central Port is developing new crushing facilities, while the Jefferson County Port is being considered for EV battery production due to its industrial zoning and proximity to critical minerals such as magnesium, nickel and copper.
- Kansas City Region:** The region's freight activity is driven by major automotive assembly plants, data centers and large distribution hubs. Key generators include General Motors in Fairfax and Ford in Claycomo. Kansas City's rail-served industrial sites and Foreign Trade Zone status enhance the region's competitiveness for inbound components and outbound manufactured goods.
- Rural Areas:** Freight activity across rural Missouri is dominated by agricultural production. Grain, soybeans and other farm products move through processing facilities and river terminals, placing strong demand on highways, rail and inland waterways.

**Table 1** summarizes prominent freight generators, associated commodities and possible modal requirements. These generators not only shape current network utilization but also provide insight into future infrastructure and capacity needs.

By mapping these freight generators to commodity flows and modal requirements, the analysis identifies both high-demand corridors and strategic opportunities for investment. These clusters serve as anchors for Missouri's freight system while also signaling emerging areas of growth, such as EV battery production and advanced manufacturing, which will require targeted multimodal support.

Table 1 – Freight Generators, Industry Clusters and Modal Needs

Freight Generator Industry/Cluster	Primary Location(s)	Associated Commodities	Modal Needs
Aerospace Manufacturing	St. Louis Region	Aircraft parts and precision metals	Air cargo, truck and rail
Automotive Manufacturing	Kansas City (Fairfax)	Finished vehicles and inbound auto parts	Rail and truck
Automotive Manufacturing	Kansas City (Claycomo)	Finished vehicles and inbound auto parts	Rail and truck
Food & Beverage	St. Louis	Beverages and packaging materials	Truck, rail and cold chain (temperature controlled supply chain)
Agricultural Technology	Kansas City/ Statewide	Biotechnology inputs for crops	Truck and air cargo (research and development inputs)
Intermodal/Agribusiness	Granite City (Metro East, Illinois)	Grain, soy, fertilizer and industrial cargo	Barge, rail and truck
Port/Industrial	Jefferson County, Missouri	Agriculture products, metals and EV battery materials	Barge, rail and truck
Information/Logistics	Kansas City Region	Energy-intensive electronics hardware	Highway access, high-capacity power
Chemicals & Allied Products	St. Louis Region/ Statewide	Chemicals, plastics and allied materials	Rail, truck and pipeline
Logistics & Warehousing	St. Louis & Kansas City Metro Areas	Consumer goods, secondary traffic	Truck, rail (intermodal)

Source: GFT Analysis of Transearch Data, 2023; Stakeholder Meetings (STL Freightway, KC SmartPort, MoDOT DED, Missouri Partnership, 2025)

## Commodity and Supply Chain Analysis

District-level analysis of Transearch data confirms the central role of Missouri's key industry clusters in shaping freight flows. Across the state, farm products, food and kindred products and nonmetallic minerals consistently rank among the top commodities by tonnage, reflecting the continued strength of agriculture and construction-related industries. By contrast, commodities with higher growth in value, such as chemicals, transportation equipment and secondary traffic, dominate in the Kansas City, St. Louis and Southwest districts, highlighting the expansion of advanced manufacturing and distribution hubs. Declines in petroleum and coal products are evident across multiple districts, aligning with broader national energy transitions.

Building on stakeholder input and commodity data, five supply chains emerge as critical to Missouri's future freight system. These supply chains are summarized below. **Table 2** provides an analysis of each supply chain:



**Agriculture Exports** – Soybeans, corn and other grains flow through central and southeast Missouri farms and river ports. Dominant transportation modes include barge, rail and truck, with strong projected export growth requiring resilient river infrastructure.



**Aerospace Manufacturing** – Aircraft parts and precision metals generated by Boeing and its supplier network in the St. Louis region rely on air cargo, truck and rail. This high-value sector is expanding, with significant export potential.



**Automotive Production** – Finished vehicles and inbound auto parts from General Motors (GM), Ford and suppliers statewide are transported primarily via rail and truck. Long-term demand is stable, with particular emphasis on inbound logistics efficiency.



**Chemicals and Allied Products** – Concentrated mainly in St. Louis and statewide manufacturing clusters, these commodities are transported via rail, truck and pipeline. The sector is experiencing rapid growth and is essential to Missouri's value-added manufacturing base.



**Food and Beverage** – Processed foods and beverages, including those from Anheuser-Busch and Pivot Bio, rely on truck, rail and refrigerated facilities. Demand remains high and underscores the importance of cold chain logistics—the temperature-controlled supply chain that promotes perishable goods, such as food and beverages, remain safe and high-quality from production through distribution.

These supply chains illustrate a balance between Missouri’s traditional economic base and targeted growth industries, providing a framework for understanding current and future freight demand. Promoting efficient multimodal connectivity across truck, rail, barge, pipeline and air travel will be essential to sustain investment, enabling competitiveness and supporting the state’s evolving economy.

**Table 2 – Stakeholder Input Supply Chain Analysis**

Supply Chain	Key Commodities/ Inputs	Primary Generators/ Locations	Dominant Modes	Growth Outlook
Agriculture Exports	Soybeans, corn and grains	Central/Southeast MO farms; river ports	Barge, rail and truck	Strong export growth; requires river resiliency
Aerospace Manufacturing	Aircraft parts and precision metals	Boeing (St. Louis), supplier base	Air cargo, truck and rail	Expanding cluster; high-value exports
Automotive Production	Finished vehicles and auto parts	GM (KC), Ford (KC), suppliers statewide	Rail and truck	Stable long-term demand; focus on inbound parts logistics
Chemicals & Allied	Chemicals, refined products and plastics	St. Louis cluster; statewide producers	Rail, truck and pipeline	Rapid growth; essential to manufacturing
Food & Beverage	Processed foods, beverages and cold storage	Statewide producers; Anheuser-Busch; Pivot Bio (Ag Tech)	Truck, rail and refrigerated facilities	High demand; requires cold chain infrastructure

Source: GFT Analysis of Transearch Data, 2023; Stakeholder Meetings (STL Freightway, KCSmartPort, MoDOT DED, Missouri Partnership, 2025).

## District Level Commodity Flow Analysis

Commodity flow patterns vary across the seven MoDOT districts, reflecting differences in industrial activity, agricultural production, population density and multimodal freight infrastructure. To capture these variations, district-level analyses were developed using 2023 Transearch data. <sup>2</sup>For each district, the analysis identifies the top five commodities by tonnage and by value, along with the projected percentage change between 2023 and 2043, reported

<sup>2</sup> Transearch integrates public and proprietary sources—including the Surface Transportation Board’s Waybill Sample, Census Bureau commodity flow data and modal statistics—reconciled through a commodity-based freight demand modeling framework. The dataset represents modeled estimates rather than direct observations but is widely recognized as the industry standard for state and regional freight planning.



as both the cumulative change and the CAGR. This approach provides a clear indication of current freight movement profiles and expected long-term shifts in demand.

Commodity classifications are reported using the Standard Transportation Commodity Code (STCC) system at the 2-digit level, which allows for consistent aggregation and comparison of commodity groups across districts and modes. This level of detail provides meaningful insights into dominant freight categories while avoiding over-fragmentation of the data.

The **Table 3** through 9 present district-specific commodity flow profiles. For each MoDOT district, the tables highlight the top five commodities by tonnage and value in 2023, along with the projected cumulative change and CAGR through 2043. These summaries illustrate both the current composition of freight movements and anticipated long-term shifts in demand at the district level. While the analysis provides a high-level overview, **Appendix G** contains more detailed district-level tables that expand the view to the top ten commodities by mode, offering additional insight into modal distributions and commodity-specific growth patterns.

While not specifically called out in the commodity flow profiles per district, a declassified discussion of military freight is included later in this chapter. Each MoDOT district supports military freight corridors that provide efficient travel within and through the state. The districts of Kansas City, Northwest, Central and St. Louis are home to key military installations that support the nation’s defenses. MoDOT consistently prioritizes maintaining these corridors in a state of good repair and expanding capacity to meet statewide and nationwide military operations.

**Table 3 – Central District All Modes Freight Data; Top Commodities Ranked by 2023 Tonnage and Value with Projected 2043 Growth**

Tonnage				Value			
Rank	Commodity	% Change	CAGR	Rank	Commodity	% Change	CAGR
1	Nonmetallic Minerals	41%	1.7%	1	Food or Kindred Products	28%	1.2%
2	Farm Products	26%	1.1%	2	Farm Products	23%	1.0%
3	Food or Kindred Products	30%	1.3%	3	Secondary Traffic	21%	1.0%
4	Petroleum or Coal Products	-15%	-0.8%	4	Chemicals or Allied Products	80%	3.0%
5	Secondary Traffic	22%	1.0%	5	Transportation Equipment	43%	1.8%

Source: GFT Analysis of Transearch Data, 2023.

**Table 4 – Kansas City District All Modes Freight Data; Top Commodities Ranked by 2023 Tonnage and Value with Projected 2043 Growth**

Tonnage				Value			
Rank	Commodity	% Change	CAGR	Rank	Commodity	% Change	CAGR
1	Nonmetallic Minerals	22%	1.0%	1	Secondary Traffic	17%	0.8%
2	Coal	-80%	-7.7%	2	Transportation Equipment	36%	1.5%
3	Secondary Traffic	21%	1.0%	3	Food or Kindred Products	37%	1.6%
4	Food or Kindred Products	37%	1.6%	4	Misc. Mixed Shipments	32%	1.4%
5	Farm Products	25%	1.1%	5	Chemicals or Allied Products	41%	1.7%

Source: GFT Analysis of Transearch Data, 2023.

**Table 5 – Northeast District All Modes Freight Data; Top Commodities Ranked by 2023 Tonnage and Value with Projected 2043 Growth**

Tonnage				Value			
Rank	Commodity	% Change	CAGR	Rank	Commodity	% Change	CAGR
1	Nonmetallic Minerals	17%	0.8%	1	Farm Products	38%	1.6%
2	Farm Products	36%	1.5%	2	Petroleum or Coal Products	-17%	-0.9%
3	Petroleum or Coal Products	-18%	-1.0%	3	Food or Kindred Products	35%	1.5%
4	Coal	-79%	-7.4%	4	Chemicals or Allied Products	56%	2.2%
5	Food or Kindred Products	43%	1.8%	5	Primary Metal Products	46%	1.9%

Source: GFT Analysis of Transearch Data, 2023.

**Table 6 – Northwest District All Modes Freight Data; Top Commodities Ranked by 2023 Tonnage and Value with Projected 2043 Growth**

Tonnage				Value			
Rank	Commodity	% Change	CAGR	Rank	Commodity	% Change	CAGR
1	Farm Products	34%	1.5%	1	Farm Products	38%	1.6%
2	Nonmetallic Minerals	27%	1.2%	2	Petroleum or Coal Products	-17%	-0.9%
3	Food or Kindred Products	40%	1.7%	3	Food or Kindred Products	35%	1.5%
4	Chemicals or Allied Products	49%	2.0%	4	Chemicals or Allied Products	56%	2.2%
5	Secondary Traffic	31%	1.4%	5	Primary Metal Products	46%	1.9%

Source: GFT Analysis of Transearch Data, 2023.

**Table 7 – Southeast District All Modes Freight Data; Top Commodities Ranked by 2023 Tonnage and Value with Projected 2043 Growth**

Tonnage				Value			
Rank	Commodity	% Change	CAGR	Rank	Commodity	% Change	CAGR
1	Crude Petrol or Natural Gas	1%	0.0%	1	Crude Petrol or Natural Gas	1%	0.0%
2	Nonmetallic Minerals	15%	0.7%	2	Secondary Traffic	20%	0.9%
3	Farm Products	23%	1.0%	3	Farm Products	21%	1.0%
4	Petroleum or Coal Products	-21%	-1.2%	4	Petroleum or Coal Products	-24%	-1.4%
5	Clay, Concrete, Glass or Stone	0%	0.0%	5	Primary Metal Products	51%	2.1%

Source: GFT Analysis of Transearch Data, 2023.

**Table 8 – Southwest District All Modes Freight Data; Top Commodities Ranked by 2023 Tonnage and Value with Projected 2043 Growth**

Tonnage				Value			
Rank	Commodity	% Change	CAGR	Rank	Commodity	% Change	CAGR
1	Nonmetallic Minerals	8%	0.4%	1	Secondary Traffic	18%	0.8%
2	Farm Products	13%	0.6%	2	Transportation Equipment	51%	2.1%
3	Food or Kindred Products	42%	1.8%	3	Food or Kindred Products	40%	1.7%
4	Secondary Traffic	24%	1.1%	4	Farm Products	19%	0.9%
5	Chemicals or Allied Products	50%	2.0%	5	Chemicals or Allied Products	49%	2.0%

Source: GFT Analysis of Transearch Data, 2023.

**Table 9 – St. Louis District All Modes Freight Data; Top Commodities Ranked by 2023 Tonnage and Value with Projected 2043 Growth**

Tonnage				Value			
Rank	Commodity	% Change	CAGR	Rank	Commodity	% Change	CAGR
1	Nonmetallic Minerals	13%	0.6%	1	Secondary Traffic	30%	1.3%
2	Petroleum or Coal Products	-13%	-0.7%	2	Chemicals or Allied Products	40%	1.7%
3	Coal	-73%	-6.3%	3	Transportation Equipment	39%	1.7%
4	Farm Products	19%	0.9%	4	Petroleum or Coal Products	-14%	-0.8%
5	Secondary Traffic	41%	1.7%	5	Food or Kindred Products	29%	1.3%

Source: GFT Analysis of Transearch Data, 2023.

Across the seven MoDOT districts, the commodity flow data reveals both commonalities and regional distinctions in freight demand. Several trends are evident:

- **Consistent Top Commodities by Tonnage:** Farm products, food and kindred products and nonmetallic minerals dominate, reflecting Missouri’s continued strength in agriculture and construction-related industries.
- **Value-Driven Growth:** Districts with strong manufacturing and distribution activity, including Kansas City, St. Louis and Southwest, show significant growth in chemicals, transportation equipment and secondary traffic, underscoring the role of these regions as industrial and logistics hubs.
- **Declining Sectors:** Petroleum and coal products decline across multiple districts, aligning with broader national energy transitions and shifts in regional consumption patterns.
- **Origin and Destination Flows:** These data highlight not only commodities produced within each district but also goods moving through the state to serve regional, national and international markets, providing insight into Missouri’s strategic freight corridors.

Together, these findings indicate that while Missouri’s freight network will continue to support its traditional strengths in agriculture and natural resources, future growth will be increasingly concentrated in higher-value manufacturing and distribution commodities. This underscores the importance of a freight system that balances bulk commodity movements with the infrastructure, multimodal connectivity and operational capacity required to support expanding value-added industries.

By linking district-level flows to supply chain priorities and business generators, these results inform corridor planning, multimodal investment strategies and targeted economic development initiatives. They provide a foundation for identifying Critical Urban and Rural Freight Corridors, prioritizing infrastructure improvements and aligning Missouri’s multimodal network with anticipated changes in freight demand through 2043.



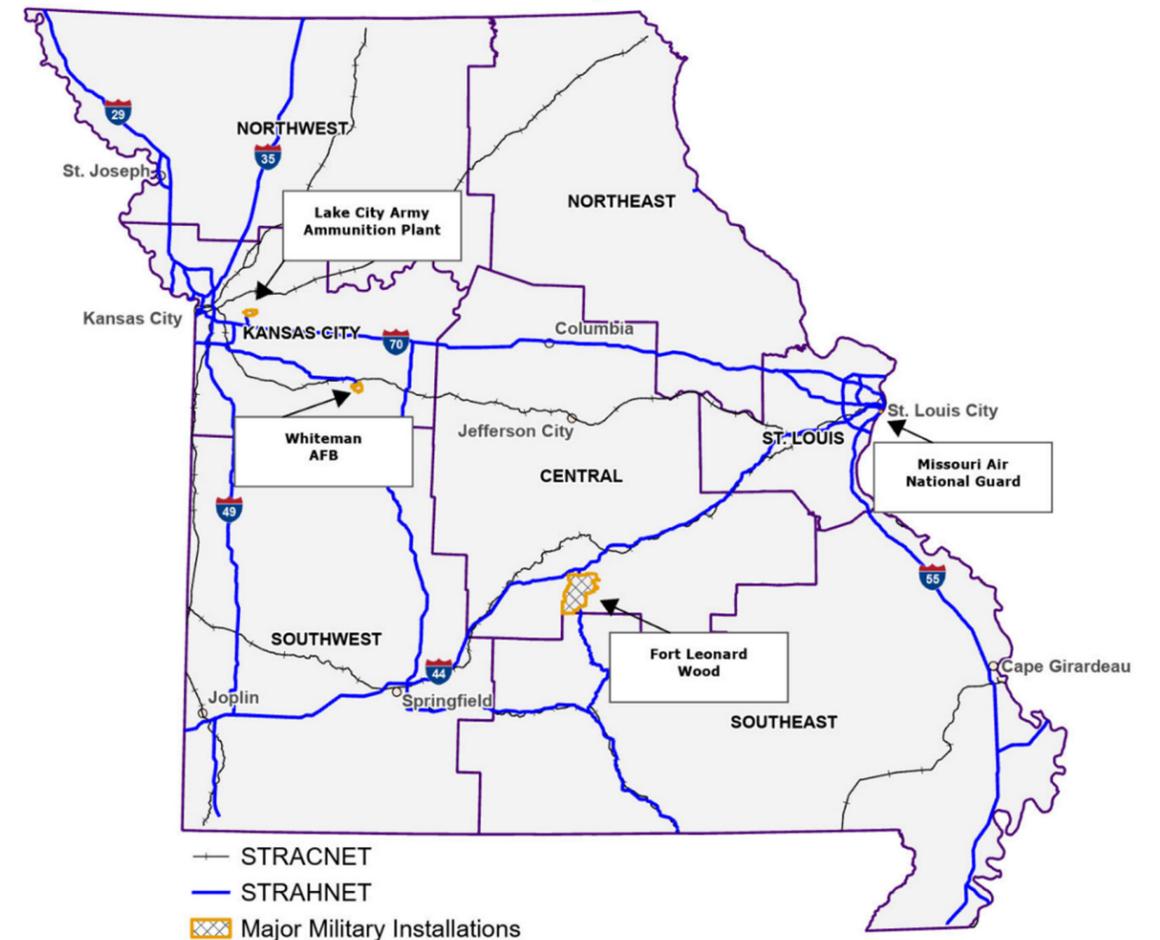
Source: MoDOT

# Key Freight Corridors

While district-level commodity flows highlight regional production and consumption patterns, truck freight activity in Missouri remains concentrated along a limited number of high-volume highway corridors that serve as the backbone of the state’s multimodal freight network and support national defense mobility. I-44 and I-70 are Missouri’s most heavily utilized freight corridors, carrying a significant share of all highway freight

tonnage and value moving across the state. In 2023, each corridor supported more than 85 million tons of freight, a figure projected to grow by roughly 20 to 30 percent by 2043. This increase reflects Missouri’s central position within national supply chains and the continuing importance of these east-west corridors for both regional and long-haul freight movements.

Figure 1 – Missouri Military Facilities



Source: Missouri Spatial Data Information Service.

In terms of freight value, both I-44 and I-70 handle the highest-value shipments in the state, each with 2023 totals exceeding \$145 billion annually and projected to rise by more than 50 percent by 2043. These corridors play a critical role in linking major metropolitan centers, including St. Louis, Columbia, Springfield and Kansas City, to national markets and global gateways. Their strategic alignment along key manufacturing, distribution and logistics hubs underscores their role in supporting Missouri's economic competitiveness.

Other important freight routes, including I-55, I-57 and I-270, complement the function of I-44 and I-70 by facilitating north-south movements and regional connectivity. I-55 and I-57 provide vital access to southern markets and Gulf Coast ports, while I-270 serves as a major circumferential route supporting intermodal transfers and urban freight distribution in the St. Louis region. These corridors are projected to see moderate but steady growth in both tonnage and value, reflecting their importance to regional supply chains and last-mile distribution.

Collectively, Missouri's top highway freight corridors form the structural foundation of the state's multimodal transportation system. Anticipated increases in both tonnage and value by 2043 highlight the importance of maintaining corridor reliability, addressing congestion at key urban interchanges and advancing targeted capacity and safety improvements to continue supporting efficient and resilient freight movement statewide.



## Military Freight

MoDOT coordinates with the U.S. Department of Transportation (USDOT), the Federal Railroad Administration (FRA), the Federal Highway Administration (FHWA) and the U.S. Department of Defense's U.S. Transportation Command (USTRANSCOM) to support key facilities and corridors that support military readiness and deployment operations.



Missouri's multimodal freight system supports multiple military facilities shown in **Figure 1**, including:

- Fort Leonard Wood (United States [U.S.] Army Training and Maneuver Center)
- Whiteman Air Force Base (U.S. Air Force Global Strike Command)
- Lake City Army Ammunition Plant
- Missouri Air National Guard facilities in St. Joseph and St. Louis
- Naval Operational Support Center (NOSC) Kansas City (not shown)
- USTRANSCOM and Air Mobility Command located at Scott Air Force Base, Illinois, which relies on Missouri's transportation infrastructure for deployment support (not shown)

In addition to installations, key transportation assets identified by USTRANSCOM within and adjacent to Missouri include the Strategic Highway Network (STRAHNET), Strategic Rail Corridor Network (STRACNET) and strategic airports and seaports that facilitate defense logistics. These networks, described below, collectively allow Missouri to support both origin and pass-through military cargo movements essential for national readiness.

## Strategic Highway Network

Missouri contains several Strategic Highway Network (STRAHNET) routes that link major military installations to the Interstate system. These include I-44 (connecting Fort Leonard Wood to St. Louis and Tulsa), I-70 (east-west corridor connecting Kansas City, Columbia and St. Louis) and I-49 (north-south corridor providing access from Fort Leonard Wood to western deployment points). These corridors accommodate heavy and oversized military equipment, such as armored vehicles, which require special permitting and route coordination.

## Strategic Railway Corridor Network

Missouri's rail network includes several Strategic Railway Corridor Network (STRACNET) routes that are essential for the rapid deployment of military equipment and supplies. These corridors provide connectivity between military installations and key ports, depots and mobilization centers across the U.S. STRACNET within Missouri includes portions of major Class I railroads, such as UP, BNSF Railway and Canadian Pacific Kansas City. These routes provide critical east-west and north-south linkages for military freight transiting through or originating in Missouri.

Missouri's STRACNET facilities connect directly with military installations, including Fort Leonard Wood and Whiteman Air Force Base. Rail access to these installations facilitates the transport of heavy military vehicles, training equipment and supplies. Additionally, STRACNET routes intersect with key intermodal terminals and freight yards that provide transfer capabilities between modes, enhancing the efficiency of defense logistics operations.

MoDOT has incorporated FRA's guidance into its rail planning process by identifying STRACNET segments on the State Rail Map. Consideration of military freight needs has been integrated into long-range rail investment strategies, so these corridors remain reliable, resilient and capable of handling future defense mobility demands. This includes maintaining weight limits, bridge conditions and clearance restrictions along STRACNET corridors meet federal standards for military loadings.

## Airports and Inland River Ports

Missouri's three major commercial airports – Kansas City International (MCI), St. Louis Lambert International (STL) and Springfield-Branson National Airport (SGF) – provide cargo handling capabilities that may be used in support of defense logistics. Additionally, the Mississippi River port in St. Louis and the Missouri River port in Kansas City are strategically positioned for barge transport of military goods, providing alternative multimodal deployment options.

## Coordination and Planning

Military freight, like other types of freight, may pass through Missouri's transportation network without originating or terminating within the state. Therefore, MoDOT considers both through traffic and local military shipments when planning infrastructure improvements. The agency coordinates regularly with federal partners and neighboring states to support corridors providing defense mobility by providing well-maintained infrastructure and addressing bottlenecks or infrastructure constraints.

MoDOT's freight planning process includes consultation with the Department of Defense Surface Deployment and Distribution Command (SDDC), now known as the U.S. Army Transportation Command (ARTRANS) and U.S. Transportation Command (USTRANSCOM), as well as with installation transportation offices. These partnerships help planned infrastructure projects, such as bridge rehabilitations or interchange improvements, consider military load and clearance requirements.



# Network and Corridor Implications

The synthesis of district-level commodity flows, supply chain priorities and stakeholder input highlights several strategic priorities for Missouri's multimodal freight network. Key findings include:



**Critical Corridors:** I-70 and I-44 consistently emerge as vital arteries for both high-tonnage agricultural and construction commodities and high-value manufactured goods. These corridors require ongoing capacity enhancements, modernization and safety improvements to accommodate projected growth.



**Inland Waterways:** The Mississippi and Missouri Rivers remain a comparative advantage for bulk commodity movements, particularly agricultural exports. Stakeholders emphasized the importance of resiliency measures, such as levee maintenance, flood mitigation and innovative tools like digital twins to monitor water levels and optimize cargo flows.



**Rail Connectivity:** Rail access continues to differentiate manufacturing and distribution hubs. Class I congestion, particularly in St. Louis, highlights the need for additional rail spurs, improved dispatching and coordination with private operators to support chemical, automotive and high-value cargo flows.



**Urban and Rural Priorities:** Urban areas require targeted investments to connect major industrial hubs, including Boeing, GM and intermodal terminals, to the broader freight network. In rural areas, infrastructure should support agricultural production, processing facilities and emerging industries, such as EV battery manufacturing near Rolla and in Jefferson County.



**Multimodal Integration:** The District-level commodity data underscores the need for seamless modal transitions among truck, rail, barge, pipeline and air cargo. Investments should prioritize connectivity that supports both high-volume bulk commodities and smaller, high-value goods.



**Military Freight:** Missouri's freight transportation system plays a critical role in supporting national defense and the movement of military freight, personnel and oversized vehicles. The state's location at the geographic center of the nation, combined with its robust highway, rail, air, waterways and military installations makes it vital for military logistics.

By aligning corridor improvements with high-growth supply chains, freight generators and district-level commodity flows, Missouri can enhance network reliability, reduce congestion and maintain competitiveness in national and global markets. Overall, this analysis demonstrates that strategic infrastructure investment, multimodal integration and freight-responsive planning will be essential to accommodate projected shifts in commodity flows and support Missouri's targeted economic growth through 2043.

## Freight Implications

Across Missouri's districts, the commodity flow data reveals both shared patterns and regional distinctions in freight demand. Farm products, food and kindred products and nonmetallic minerals consistently rank among the top commodities by tonnage, highlighting the enduring importance of agriculture and construction-related industries. In contrast, districts with strong manufacturing and distribution activity, such as Kansas City, St. Louis and Southwest, show notable growth in chemicals, transportation equipment and secondary traffic, reflecting their roles as industrial and logistics hubs. Declines in petroleum and coal products are observed across multiple districts, consistent with broader national energy transitions. Stakeholder feedback underscores the importance of multimodal access, reliable power and supportive community infrastructure for site selection and business expansion.

These district-level results capture both origin and destination flows, encompassing commodities produced within Missouri as well as goods moving through the state's corridors to serve regional, national and international markets. While Missouri's freight network will continue to support its traditional strengths in agriculture and natural resources, future growth is expected to concentrate in higher-value manufacturing and distribution commodities. This underscores the need for a freight system that balances bulk commodity movements with multimodal connectivity, infrastructure resilience and operational capacity to support expanding value-added industries.

Missouri also serves oversized and overweight military freight to move equipment, supplies and personnel, providing a system that promotes the movement of interstate commerce and national defense. By integrating targeted business attraction strategies, freight generator analysis, supply chain prioritization and corridor planning, Missouri can position its multimodal network to sustain economic competitiveness, attract new investment and respond effectively to evolving national and global freight demand.