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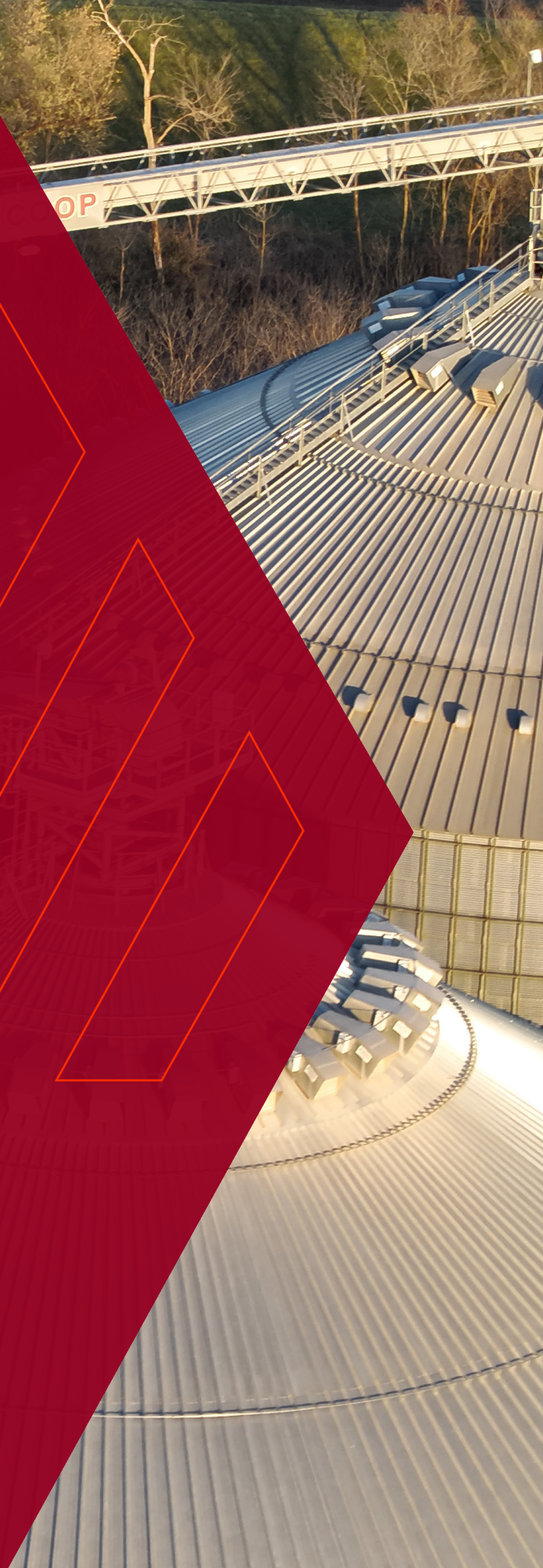
SFRP

State Freight & Rail Plan

Missouri Public Ports Economic Impact Study



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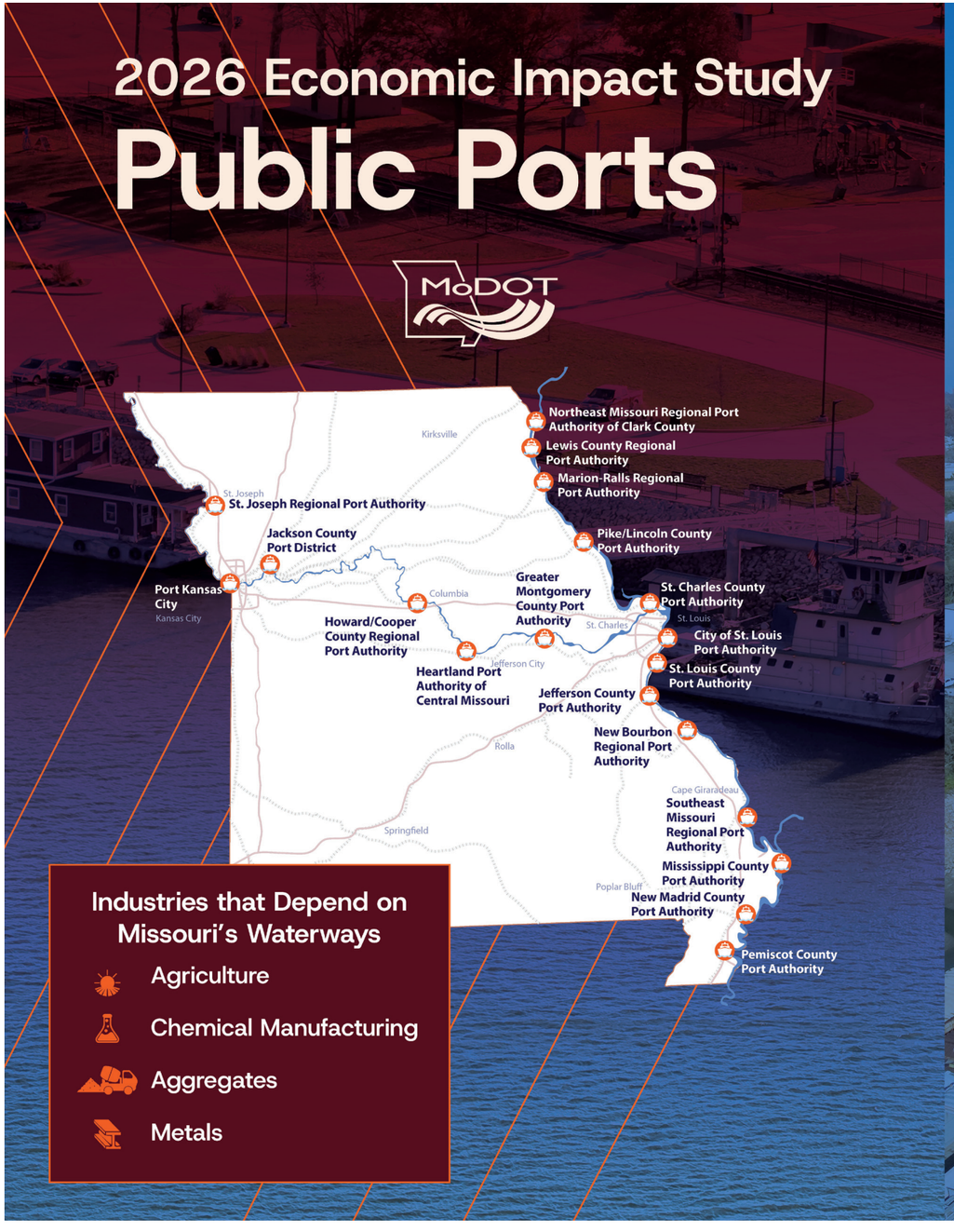


Statewide Economic Impacts

Total annual economic impacts generated by Missouri Public Ports:

Every Invested **$1** equals **$74** ROI

Return on Investment

The Public Ports produce $74 in economic output for every $1 of capital investment.

Generates **$5.6B** Economic Output

Provides **$1.5B** Income

Generates **$475.9M** Tax Revenue

Supports **31K** Jobs

Cargo Activity

Beyond at-port transport and warehousing services, Missouri's ports facilitate the movement of inbound materials and outbound shipments. This is particularly crucial for agricultural exports, which rely on port transport to reach their intended markets due to the cost-effectiveness and logistical efficiency of port transport.

6.4M Tons of Freight

As of 2025, an annual average of 6.4 million tons of freight is moved through Missouri Public Ports. This freight is valued at over $2.7 billion.

Exports account for 82% of the total tonnage and 74% of the total freight value, showing the dependence of public ports for exporting bulk goods.

$2.7B Total Freight Value

Top Export Commodities	Tonnage	Value
Grains	1.9M	$362M
Earth Material	976K	$798M
Soybeans	961K	$563M

Top Import Commodities	Tonnage	Value
Fertilizer	975K	$493M
Crude Petroleum	76K	$31M
Earth Material	46K	$37M

1.0 Introduction

Missouri's network of public ports is a cornerstone of the state's transportation system and a driver of economic competitiveness. Situated along more than 1,000 miles of navigable inland waterways, Missouri's public ports provide cost-efficient and sustainable connections between local industries and national and international markets. Barges moving on the Mississippi and Missouri Rivers give producers and manufacturers access to Gulf Coast export gateways and international trade routes, while also linking seamlessly to railroads, highways and pipelines.

Missouri's public ports encompass both the facilities where freight is physically handled and the broader boundaries established under port authority jurisdiction. Facilities include terminals, docks, warehouses and other infrastructure that directly support waterborne commerce, along with the tenants that operate within them. Boundaries extend beyond these facilities to cover larger areas where port authorities can guide industrial development, manage property and apply economic incentives. Within these boundaries, privately owned river terminals also operate and contribute to the state's freight movement. However, for consistency, this study focuses exclusively on activity occurring at public port facilities—including their tenants—as reported directly by the port authorities and the Missouri Department of Transportation (MoDOT).

Recognizing the growing role of ports in Missouri's economy, MoDOT commissioned this study to quantify the economic impacts of public ports. The analysis integrates multiple data sources—data obtained directly from public port authorities, data reported to MoDOT by the public port authorities, literature reviews, commodity statistics and economic modeling—to measure how public port activity translates into jobs, labor income, value-added, economic output and tax revenue. It also highlights the industries directly reliant on waterborne freight and documents the broader economic benefits provided by Missouri's ports. The results of this study provide insight to MoDOT and other stakeholders to inform future investment decisions for Missouri's ports and waterways.

Source: MoDOT

1.1 Key Findings

Key findings of the study include:

- **Freight Volume and Value:** From 2022 to 2024, Missouri's public ports handled an annual average of nearly 6.40 million tons of freight transported by barge, truck and rail. The diverse range of commodities moved through these ports is valued at over $2.70 billion, highlighting their critical role in the state's economy and supply chain.
- **Industry Reliance on Public Ports**: Missouri is home to several key industries that rely on waterborne transportation via public ports for the efficient movement of goods to and from the market. The state's extensive navigable waterways, including the Missouri and Mississippi Rivers, serve as vital commercial arteries, facilitating the bulk transport of agricultural products, manufactured goods and raw materials. Industries such as agriculture greatly benefit from this mode of transportation, particularly in the export of commodities like grains and soybeans. Additionally, manufacturing sectors utilize barge transport via the public ports for material and supply shipments, lowering transportation costs and reducing road congestion. Consequently, waterborne transportation via the public ports plays a crucial role in boosting Missouri's economy and allowing the seamless supply chain of various goods. Industries reliant on the public ports include:
  - **Outbound Shipments**: crop production, mining, nonmetallic mineral product manufacturing and transportation equipment manufacturing
  - **Inbound Shipments**: chemical manufacturing, crop production and primary metal manufacturing, which depend on waterborne transportation to receive raw materials for processing
- **Employment and Economic Contribution**: Missouri's public ports support nearly 31,000 jobs annually, generating approximately $1.50 billion in labor income and contributing $5.60 billion to statewide economic output.
- **Tax Revenue Impact**: The economic activity associated with Missouri's public ports contributes significantly to the state and local tax base, generating more than $475 million in annual tax revenue.

1.2 Organization of the Report

The remainder of this report is organized as follows:

- **Section 2** highlights the economic role of Missouri's public ports, describing how they function as multimodal gateways, local economic hubs and enablers of key industries.
- **Section 3** provides an overview of the public port system, defines the functions of the public port authorities, details the cargo activity for ports in which there is measurable economic activity and discusses impacts due to recent low-water events.
- **Section 4** details the methodology of the study, including data collection, valuation of port activity and the modeling approach used to estimate statewide and port-level economic impacts.
- **Section 5** presents the findings from the economic impact analysis, including statewide and port-level economic impacts.

Source: MoDOT

2.0 Economic Role of Public Ports in Missouri

Missouri's public ports play a critical role in the state's freight transportation system and its broader economy. Strategically located along the Missouri and Mississippi Rivers, these facilities serve as multimodal hubs where waterborne transportation connects seamlessly with railroads, highways and, in some cases, pipelines. By providing cost-efficient access to national and international markets, Missouri's public ports expand the competitiveness of the state's industries, attract private investment and support thousands of jobs across multiple sectors.

2.1 Gateways for Freight and Commerce

At their core, Missouri's public ports serve as crucial gateways for commerce, facilitating the efficient movement of goods in and out of the state through a network of inland waterways. The Mississippi River connects Missouri shippers to Gulf Coast export terminals and numerous international trade routes. At the same time, the Missouri River acts as a vital conduit for producers in central and western Missouri, linking them to expansive national markets via the Mississippi River. Barges navigating these waterways transport bulk commodities efficiently and cost-effectively, with superior fuel efficiency compared to traditional trucks or trains. This makes the public ports particularly indispensable for industries that rely on high-volume, low-margin shipments, allowing essential goods to be moved economically.

However, the ports' significance extends well beyond mere barge traffic. Public port facilities in Missouri typically serve as multimodal hubs, where waterborne freight seamlessly integrates with rail and highway systems. With strategically placed rail spurs, intermodal yards, dedicated truck access roads and comprehensive warehousing facilities, these ports enable a fluid transfer of commodities across various transportation modes. This enhanced connectivity not only diminishes transportation costs for Missouri businesses but also broadens their market reach and fortifies the resilience of the state's supply chains, paving the way for sustainable economic growth.

2.2 Economic Hubs in Local Communities

Public ports serve as economic hubs within their host communities. Acting as public agencies or port authorities, they invest in essential infrastructure, such as docks, yards, cranes and terminals, which facilitate private-sector activities. The presence of a port effectively attracts shippers, logistics providers, warehouses and manufacturers, creating clusters of economic activity that generate local jobs and income.

The economic contributions of Missouri's public ports stem from both the provision of port services and the use of those services by shippers and receivers of commodities. Port authorities, terminal operators and port tenants generate employment and payroll through their day-to-day operations, while businesses that depend on port access, such as manufacturers, farmers and distributors, benefit from efficient cargo movement. These activities also create demand for a wide range of local suppliers, including construction firms, fuel distributors, equipment vendors and professional service providers. In turn, the wages earned by workers in these industries circulate through the broader economy, supporting spending on retail, housing, healthcare and other community services.

2.3 Enabling Missouri's Industries

The public ports of Missouri play a crucial role in supporting the state's key industries. They serve as vital links for agricultural producers who rely on these ports to transport grain, soybeans and other crops to international markets. Similarly, crop-producing industries and manufacturers utilize the ports to obtain essential materials, such as fertilizer, steel products, plastics and other intermediate goods, which they convert into higher-value products. Additionally, mining and construction-materials companies depend on the ports for the efficient movement of aggregates, minerals and bulk inputs to out-of-state markets.

These ports function not merely as freight-handling facilities but as integral components of Missouri's industrial ecosystem. Through facilitating connections between local production and national and international markets, they enhance the competitiveness of businesses in Missouri. This connectivity leads to reduced transportation costs and promotes sustainable long-term growth. Without the benefits provided by public ports, many industries would likely encounter higher expenses and diminished competitiveness, potentially even shifting operations to facilities located outside the state.

2.4 Tax Revenues and Public Benefits

Activity at Missouri's public ports generates significant financial benefits. Businesses operating at the public ports contribute through state and local taxes, while employees in port-related jobs contribute via payroll and household spending. Additionally, industries that rely on the public ports, such as agriculture, manufacturing and construction materials, generate further tax revenues through their production and sales. These revenues help fund transportation infrastructure, schools and other essential public services throughout Missouri.

In addition to these financial contributions, the ports provide broader public benefits by enabling shippers to use the inland waterway system. The sheer volume and capacity of barges is incredible, with one 15-barge river tow equaling 1,050 trucks or 216 rail cars pulled by six locomotives.[1] This efficiency reduces highway maintenance costs, alleviates congestion, decreases emissions and lowers crash risks all while reducing logistics expenses for Missouri businesses. In summary, Missouri's public ports not only generate direct tax revenues but also create systemic efficiencies and environmental benefits that enhance the state's economy and quality of life.

2.5 Strategic Importance for Missouri's Future

As demands on the freight system evolve, the importance of Missouri's ports will only grow. Rising pressures from global trade volatility, energy transition policies and the push toward domestic manufacturing reshoring are reshaping supply chains. Inland waterway access gives Missouri businesses a competitive advantage in this environment by offering the most fuel-efficient and scalable mode of bulk freight movement. By reducing reliance on trucking and rail for long-haul shipments, public ports lower logistics costs and strengthen the resiliency of supply chains in ways that directly benefit producers and consumers across the state.

At the same time, Missouri's public ports are increasingly central to achieving sustainability and environmental goals. Barge transportation emits vastly fewer emissions per ton-mile than trucks or trains, making port investments an important tool for reducing freight-related emissions. Coupled with potential adoption of shore power, electric yard equipment, and other green technologies, Missouri's public ports are positioned to align with state, federal and global efforts to reduce freight emissions. Their ongoing development is critical for the state to remain competitive, resilient and well-connected in a rapidly changing economic landscape.

1 The Maritime Executive, "Barge Transport Wins on Fuel Efficiency," March 29, 2017, https://maritime-executive.com/article/barge-transport-wins-on-fuel-efficiency.

3.0 Overview of Missouri Public Ports

Missouri is uniquely positioned with two significant rivers that play a crucial role in supporting freight movement across the state. The Missouri River not only forms the northwest border but also extends 550 miles through the heart of the state, offering vital connectivity for cargo transport. In contrast, the Mississippi River delineates the eastern border of Missouri, stretching 500 miles alongside Illinois, Kentucky and Tennessee, serving as a major artery for commercial navigation.

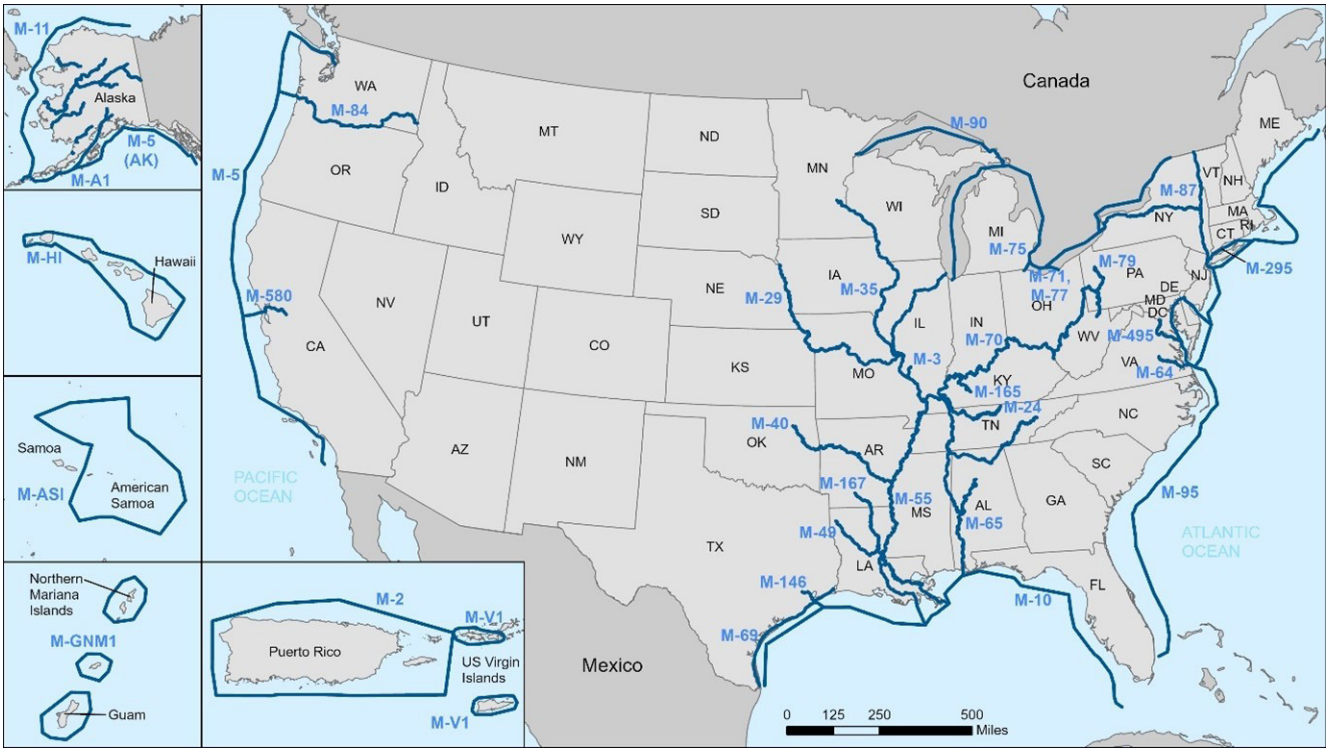
To facilitate efficient cargo transportation on these waterways, the U.S. Department of Transportation (USDOT) has designated several marine highways. These designated routes, as illustrated in **Figure 1**, enhance the state's logistical capabilities and promote economic growth, allowing Missouri to remain a pivotal hub for waterborne freight movement. Missouri provides access to the following marine highways:

Missouri's public ports play a critical role in the state's freight transportation system and its broader economy.

- **M-29** connecting the Missouri River from Kansas City to Sioux City, Iowa
- **M-70** covering the Missouri River from Kansas City to St. Louis
- **M-35** covering the Mississippi River from St. Louis to the Twin Cities in Minnesota
- **M-55** connecting the Illinois River from St. Louis to Chicago and the Mississippi River from St. Louis to the Gulf of Mexico

The flow of the Missouri River is managed by the U.S. Army Corps of Engineers (USACE) and controlled by dams upstream of Missouri, with Gavin's Point being the nearest dam, located near Yankton, South Dakota. At the confluence with the Mississippi River near St. Louis, the Missouri River officially has eight months of navigation flow support from April 1 to December 1 each year, though it is often navigable during other times of the year, depending on water levels. The Upper Mississippi River flow is controlled by locks and dams north/upriver of St. Louis. The section of the river south of St. Louis is free of locks and dams and rarely closed by ice, allowing port facilities to operate year-round

Figure 1 – U.S. Marine Highway Routes



Source: USDOT Maritime Administration, "U.S. Marine Highway Program Routes Map," June 27, 2025, https://www.maritime.dot.gov/grants-finances/marine-highways/us-marine-highway-program-routes-map.

Missouri's port system gives the state's businesses a logistical advantage over other states without port access. The public ports in Missouri with measurable economic impacts are shown in **Figure 2** and include:

Source: MoDOT

- **Missouri River ports**: St. Joseph Regional Port, Port of Kansas City and Howard/Cooper County Regional Port
- **Upper Mississippi River ports**: Lewis County Regional Port, Pike Lincoln County Port, City of St. Louis Port, Jefferson County Port, New Bourbon Regional Port and Southeast Missouri Regional Port
- **Lower Mississippi River ports**: Mississippi County Port, New Madrid County Port and Pemiscot County Port.

Figure 2 – Missouri Public Ports Included in this Study

Source: Data from MoDOT, "Port Authority Contacts," accessed December 10, 2025, https://www.modot.org/port-authority-contacts; map developed by Hg Consult Inc.

3.1 Functions of Missouri's Public Ports

Missouri's public port authorities fulfill multiple roles that extend beyond their most visible function of moving freight. They operate as multimodal freight hubs, property managers, and economic development engines, all within jurisdictions that often cover more ground than the facilities they own. Understanding the distinction between the facilities they own and the broader port authority boundaries is critical to accurately capturing their role in the state's economy.

Cargo Movement and Infrastructure Stewardship

At their core, public ports typically provide and maintain the infrastructure needed to move commodities between barge, truck and rail. This includes docks, barge fleeting areas, road and rail access, material handling systems and related utilities. By maintaining this infrastructure, ports support the efficient movement of agricultural products, bulk commodities, construction materials and manufactured goods to domestic and international markets.

Landlord

Public ports also function as landlords by leasing land or facilities to private operators, tenants and industrial users. These private businesses handle much of the day-to-day cargo activity, while the port authority provides the real estate, infrastructure, utilities and connections that make operations viable. Lease revenues help sustain the port authority's operations and maintenance while encouraging long-term investment and job creation from private businesses.

Land Development and Business Growth

Beyond traditional freight operations, nearly all Missouri public ports own industrial development sites ranging from 5 to 250 acres. These properties are strategically located with access to highways, rail and/or river terminals. By offering ready-to-build sites with basic infrastructure and standard utilities in place and aligning with state and local incentive programs, ports serve as active partners in business and economic development. Companies seeking to locate at or near a public port may qualify for benefits such as new job tax credits, property tax abatements, Community Development Block Grants and financing tools, such as revenue bonds or tax increment financing. Many port sites are also located within Missouri's Enhanced Enterprise Zones, where additional tax credits can be earned based on investment and job creation.

Facilities versus Boundaries

It is important to distinguish between the public port facility and the broader port authority boundary. The facility refers to the land, docks and infrastructure directly owned by the port authority. This pertains to public ports' direct control, including freight handling, tenant activities and industrial development.

The port authority boundary, by contrast, defines the legal jurisdiction of the port authority and may encompass a much larger swath of riverfront or industrial land. For example, most Missouri port authorities have boundaries that encompass entire counties or more. Within these boundaries, there are often numerous private river terminals, warehouses and businesses that operate independently of the public port. While located inside the authority's jurisdiction and engaged in freight movement, these facilities are not managed by the port authority and should not be conflated with the public port's own operations.

3.2 Cargo Activity

Missouri's public ports handle a diverse mix of commodities that support agriculture, manufacturing, energy and consumer markets across the state and beyond. **Table 1** summarizes the average annual cargo throughput and estimated value of goods moving through each port, disaggregated by inbound and outbound flows. This provides a snapshot of the volume and value of commodities facilitated by Missouri's port system. Between 2022 and 2024, Missouri's public ports handled an annual average of 6.40 million tons of freight via barge, rail and truck.

Source: MoDOT

Table 1 – Cargo Tonnage and Value by Port

Port	Total Tonnage			Total Value		
	Imports	Exports	Total	Imports	Exports	Total
Howard/Cooper	0	152,033	152,033	$0	$2,024,187	$2,024,187
Jefferson	0	958,611	958,611	$947,153	$362,361,274	$363,308,427
Lewis	0	872,246	872,246	$1,981,715	$563,086,271	$565,067,986
Mississippi	0	0	0	$0	$20,004,201	$20,004,201
New Bourbon	0	4,542	4,542	$493,442,159	$241,866	$493,684,025
New Madrid	519,329	196,229	715,557	$30,555,246	$1,045,885	$31,601,130
Pemiscot	184,246	581,184	765,430	$0	$114,998,400	$114,998,400
Pike Lincoln	0	0	0	$45,019,752	$0	$45,019,752
Kansas City	57,683	3,341	61,024	$693,318	$4,520,042	$5,213,360
Southeast Missouri	231,338	1,831,586	2,062,924	$0	$496,867	$496,867
St. Joseph	71,478	1,019	72,497	$1,373,610	$2,456,790	$3,830,400
City of St. Louis	110,795	612,582	723,377	$23,970,595	$35,776,885	$59,747,481
Total	**1,174,869**	**5,213,373**	**6,388,241**	**$37,298,412**	**$797,814,058**	**$835,112,470**

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, MoDOT, Missouri Public Ports, Transearch, calculations by GFT (2025).

The value of Missouri's waterborne freight was estimated using 2023 Transearch data, a commodity flow database acquired by MoDOT from S&P Global and applied directly to reported tonnage data from individual public ports. Based on this analysis, the total value of commodities transported through Missouri's public ports exceeded an annual average of $2.70 billion.

Overall, Missouri's waterborne freight reflects the state's strengths in agriculture, construction and energy-related industries. The tonnage and value handled by public ports highlight their strategic role in supporting regional economies and connecting Missouri producers to national and global markets.

The commodity profiles of Missouri's public ports are summarized below and illustrate both common themes and unique characteristics of each port. Based on data for 2022 through 2024 , several ports are heavily agriculture-oriented, with grain, soybeans and fertilizer dominating throughput. Others are tied to construction and industrial markets, moving commodities such as cement, rock, coal and steel. A few ports remain in transition, with limited or no recent movements but strong potential for future development. Additional information on each port's facilities, operations and planned developments is provided in **Appendix A**.

Howard/Cooper County Regional Port Authority

Throughput at the Howard/Cooper County Regional Port is dominated by construction rock (64 percent), reflecting its role in supplying regional infrastructure projects. Agriculture remains central, with soybeans and other grains each accounting for 18 percent of tonnage. This balanced mix highlights the port's importance to both construction and farm-to-market supply chains.

From 2022 to 2024, Missouri's public ports handled an annual average of nearly 6.40 million tons of freight transported by barge, truck and rail, valued at over $2.70 billion.

Jefferson County Port Authority

Current volumes at the Jefferson County Port are modest, but throughput has been primarily frac sand in recent years, supporting energy sector supply chains. The port is actively planning facility expansions to diversify into salt, grain, soybeans and other bulk commodities. This positions the port for future growth in construction, agriculture and manufacturing markets.

Port of Kansas City

The Port of Kansas City (Port KC) primarily moves fertilizer (56 percent) and coal (38 percent) , reinforcing its role in supporting regional agriculture and energy industries. Fertilizer serves as a vital farm input across Missouri, Kansas and surrounding states, while coal highlights the port's capacity for bulk industrial commodities. Smaller shipments of steel and recyclables link the port to metals and manufacturing supply chains.

Lewis County Regional Port Authority

The Lewis County Regional Port almost exclusively moves grain (76 percent) and soybeans (24 percent), serving as a critical gateway for northeast Missouri farmers. Its focus on agricultural exports distinguishes it from other Missouri ports that handle broader commodity mixes. The port connects local producers to both domestic processors and Gulf export markets.

Mississippi County Port Authority

The Mississippi County Port reported no commodity movements during the study period. However, the port is well-positioned for future growth, with barge fleeting capacity, levee-protected land and close proximity to the confluence of the Mississippi and Ohio Rivers.

New Bourbon Regional Port Authority

The broader New Bourbon Regional Port district is one of the nation's busiest, ranking 40th in U.S. tonnage. However, within the New Bourbon Regional Port facility, sand represented 100 percent of reported throughput between 2022 and 2024. This likely reflects the port's ties to Ste. Genevieve's cement production and construction industries.

New Madrid County Port Authority

Throughput at the New Madrid County Port is concentrated in fertilizer (73 percent) and grain (27 percent) . Fertilizer shipments supply regional farms, while outbound grain connects local harvests to global markets. This balance reinforces the port's dual role in supporting both agricultural inputs and outputs.

Pemiscot County Port Authority

The Pemiscot County Port has one of the most diverse commodity mixes in Missouri, moving agricultural, industrial, petroleum and energy products. The commodity mix is led by grain and oilseeds (68 percent) and fertilizer (15 percent). The port also moves high-value commodities and manufactured products, such as plate steel and barge lids, while handling petroleum products for energy supply chains. Its unique diversity distinguishes it from ports more narrowly focused on agriculture or construction.

Pike Lincoln County Port Authority

While no tonnage was reported during the study period, the Pike Lincoln County Port is actively preparing for operations. Planned investments include multimodal transfer facilities and expanded bulk storage, enabling it to handle a wide range of agricultural, industrial and construction commodities in the future.

St. Joseph Regional Port Authority

The St. Joseph Regional Port is dominated by fertilizer shipments (99 percent), reflecting its essential role in supplying northwest Missouri agriculture. These inbound flows reduce trucking reliance and support the timely delivery of farm inputs. A small share of soybean oil shipments highlights the potential for value-added agricultural markets.

Southeast Missouri Regional Port Authority

The Southeast Missouri Regional Port (SEMO Port) is Missouri's largest public port facility by volume, serving agriculture, energy, construction and manufacturing sectors. Its largest flows are miscellaneous earth material (50 percent), grain (23 percent) and soybeans (13 percent), supplemented by inbound fertilizer and other industrial products. With multimodal transfer capabilities, the port provides flexibility and resilience across multiple markets, reducing reliance on any single sector.

City of St. Louis Port Authority

The City of St. Louis Port (St. Louis Port) is a leading agricultural gateway, with grain (32 percent) and soybeans (23 percent) comprising more than half of throughput. Fertilizer (15 percent) moves inbound to supply regional agricultural producers, underscoring the port's two-way role in agricultural logistics and reinforcing the port's central role within the "Ag Coast of America."[2] Flows of cement (9 percent) and coal (21 percent) support construction and energy markets, respectively.

3.3 Low-Water Impacts on the Missouri Port Industry

The last three years saw an extraordinary sequence of low-water events on the Mississippi River, and Missouri's public ports have been at the forefront of their impact. Starting in the fall of 2022, water levels decreased to some of the lowest on record since 1988.[3] The decline coincided with the harvest season, creating severe bottlenecks as Midwestern grain was being transported south to the Gulf for export. More than two thousand barges were reported queued or grounded, and some reaches of the Lower Mississippi River were reduced to one-way traffic.[4] Barges had to be light-loaded by as much as a quarter of their normal capacity, and entire tows were shortened by a third to reduce .[5] The result was not just congestion on the river but cascading delays at fleeting areas and terminals in Missouri, where operators struggled to keep cargo moving under unprecedented constraints.

2 St. Louis Regional Freightway, "Ag Coast of America," accessed December 10, 2025, https://www.thefreightway.com/real-estate/featured-corridors/ag-coast-of-america/.

3 U.S. Army Corps of Engineers; Bureau of Transportation Statistics, Low Water on the Mississippi and Ohio Rivers, Data Spotlight, 2022.

4 Bureau of Transportation Statistics, "Low Water on the Mississippi Slows Critical Freight Flows," October 2022.

5 ProAg, "Low Mississippi River Levels Driving Up Shipping Cost," October 2022; U.S. Coast Guard Navigation Notices; WorkBoat, "Low Water Hurting Cargo Movement on the Mississippi River," October 2022.

Those disruptions had enormous economic consequences. Spot rates for barge service out of St. Louis soared to over $100 per ton in October 2022—nearly four times the long-term average.[6] U.S. Department of Agriculture (USDA) data show that grain barge volumes leaving the Upper Mississippi River fell by almost a third compared to the prior quarter, and unloads at Gulf elevators dropped more than 20 percent.[7] For Missouri shippers, the cost increases translated into weaker farmgate prices, tighter margins and, in some cases, a forced pivot to rail or truck.

The expectation among many operators was that the 2022 drought was an anomaly, yet the following year proved otherwise. By the fall of 2023, the river had once again dropped to critically low levels. restrictions and tow-size limits reappeared, barges were again light-loaded, and the harvest was again slowed.[8] Shippers in Missouri were again faced with moving less product per barge or paying higher premiums to shift loads to rail and truck.

In 2024, for the third year in a row, the Mississippi River entered harvest season at incredibly low levels. Barge traffic slowed by as much as two days per trip, tow sizes had to be cut back and freight costs rose sharply.[9] Farmers in Missouri watched their transportation costs increase by more than a third compared to the previous year, eroding already thin margins. For ports, the effects were felt in longer vessel turnaround times, more congested fleeting areas and reduced efficiency in bulk material handling.

These conditions are particularly impactful because they directly influence cargo flows that are essential to this study's economic impact assessment. Data from Missouri's public port authorities indicate that consistent volumes of bulk grain, fertilizer, coal and aggregates move through the system under normal conditions. However, when river levels drop, these cargo flows are restricted—grain shipments are light-loaded, fertilizer deliveries are delayed and occasionally cargo is redirected to rail or truck transportation. For this reason, several public port authorities chose to exclude data from years when cargo activity was impacted by low-water events. The data used to capture the economic role of Missouri's ports, therefore, better captures the "baseline" conditions.

As Missouri continues to invest in its port infrastructure, these events highlight the importance of adaptive strategies—such as improved forecasting, infrastructure upgrades and intermodal coordination—in keeping the state's ports operational and competitive in the face of environmental challenges.

6 USDA Agricultural Marketing Service, Grain Transportation Report, October 27, 2022.

7 USDA Agricultural Marketing Service, Grain Transportation Report, March 16, 2023.

8 Governing, "Another Midwest Drought Is Causing Transit Headaches on the Mississippi River," October 2023.

9 STL Public Radio, "Mississippi River Low Levels Again Disrupt Barge Traffic," September 20, 2024.

4.0 Economic Impact Methodology

This section outlines the methodology used to estimate the statewide economic contributions of Missouri's public ports. It explains how port operations and cargo activity are translated into measurable outcomes, such as jobs, labor income, value-added, economic output and tax revenues. The framework links both on-site port activities and port-dependent industries to Missouri's broader economy, providing a transparent view of their statewide economic impacts.

4.1 Economic Impact Categories

The economic impacts of Missouri's public ports are best understood by separating them into two distinct but interconnected categories: port operator impacts and port user impacts. This distinction enables the analysis to reflect both the activity generated directly at the ports and the wider production activity in Missouri that relies on them.

Port Operators

The impacts of port operators derive from the daily operations and capital improvements of Missouri's public port authorities and their associated tenants. These entities encompass a diverse range of stakeholders, including administrative staff, terminal operators, warehousing companies, stevedores, towing services and maintenance providers, all of which play crucial roles in the functionality and efficiency of port facilities. Their collective activities generate two key forms of economic contributions, both of which are vital to understanding the broader impact on Missouri's economy: employment and payroll and capital investment.

Employment and Payroll

Freight operators employ a wide array of workers across various roles at a port, from high-level port administrators to dock laborers and logistics specialists. The wages paid to these employees circulate through local economies, supporting household expenditures on essential services, such as food, housing, transportation and healthcare. Categories of employment include:

- **Administration**: Staff members within public port authorities are tasked with critical governance responsibilities, including strategic planning, regulatory compliance and overall facility management.
- **Port Operations**: This includes terminal operators, stevedores, dockworkers and support personnel directly involved in the loading and unloading of cargo, cargo handling and day-to-day operational tasks within the port.

- **Tenants**: These are the businesses that lease space within the port facilities. They include warehouse operators and logistics providers, as well as shippers and receivers who conduct direct business operations at a port.
- **Carriers**: These are transportation service providers, including barge operators and rail carriers, that are responsible for moving freight to and from the port.

In certain cases, public port activity may also support certain off-site positions not captured in this analysis. For example, carriers may employ dispatchers or logistics coordinators located away from the port, while shippers and receivers may rely on corporate staff in sales, procurement or commodity marketing. These roles are connected to port-related activity but are excluded here for two reasons: 1) not all public ports support such offsite functions, and 2) their exclusion maintains consistency and comparability in how economic impacts are measured across Missouri's public ports.

Source: MoDOT

Capital Investment

In addition to employment and payroll, ongoing capital investments in infrastructure are a critical component of the economic impacts of public ports. These investments encompass the development and enhancement of docks, storage yards, cranes and intermodal connections. Each project not only creates immediate job opportunities in construction and engineering but also fosters long-term improvements in the efficiency and competitiveness of Missouri's freight network. By modernizing facilities and expanding capacity, these investments allow Missouri's ports to remain a vital hub for commerce, capable of meeting the demands of an evolving marketplace.

Port User

The flow of cargo through the public ports plays a crucial role in supporting exporters and importers throughout the state. These impacts are known as port user impacts, highlighting the activities of businesses that depend on ports to transport commodities and goods. While these businesses currently utilize the public ports, they have the option to reroute their shipments through alternative gateways if necessary. For example, an agricultural exporter might typically ship grain through a Missouri port, but if faced with operational challenges, they could redirect that shipment to a port located in another state.

Port user impacts, therefore, reflect the economic impacts directly associated with the value and tonnage of the cargo processed through Missouri's public ports. It's important to note that these impacts do not encompass the full scope of employment, payroll or overall output of the exporting and importing firms. Instead, they focus specifically on the segment of each firm's activities that pertains only to the cargo moving through Missouri's public port system.

This perspective recognizes that port user impacts provide a snapshot of the significance of Missouri's ports at any given time. If these public ports were to become inaccessible, the exporters and importers would not vanish entirely; much of their cargo would simply be redirected to other facilities outside of Missouri. In this scenario, the associated economic activity would not disappear from the broader economy; however, it would no longer contribute to the economic metrics influenced by Missouri's public ports.

In contrast to the direct, indirect and induced impacts linked to port operators—such as the jobs and income that would be disrupted if port operations were halted—port user impacts are fundamentally tied to existing cargo routing patterns. They underscore the competitive edge that Missouri's public ports provide for the state's industries.

- **Exports**: Public ports allow Missouri producers to reach global markets more cost-effectively. Grain and soybean exports, for example, move in high volumes through the port system, directly linking farm production and processing facilities to international buyers. Other exported goods include earth materials, minerals and manufactured products. These exports stimulate upstream activity in Missouri's farms, mines and factories, creating employment and generating labor income across the state.
- **Imports**: Public ports also handle inbound commodities that feed directly into Missouri's production base. Fertilizer, steel, plastics and similar materials are essential inputs for agriculture, construction and manufacturing. While the production value of these imports originates outside Missouri, the use of these goods by Missouri industries generates downstream impacts, as local producers convert inputs into higher-value products that circulate within the economy or are exported outward.

In both cases, port user activity represents the enabling role of ports. Without cost-effective waterborne access, many industries would face higher logistics costs, reduced competitiveness and limited access to markets.

4.2 Economic Impact Types

Economic impacts generated by Missouri's public ports emerge through several layers of activity that extend outward from the docks and cargo yards into the broader state economy. These impacts are conventionally described as direct, indirect and induced effects, and together they illustrate how both port operators and port users contribute to Missouri's economic base.

Direct Effects captures the immediate activity tied to port operations and the industries that move freight through the ports (e.g., users). On the port operator side, this includes employment, wages and business revenues associated with port authorities, terminal operators, barge and rail carriers and tenants engaged in warehousing and logistics. On the port user side, direct effects reflect the agricultural producers, manufacturers and other Missouri industries whose goods are shipped through the public port system. These activities are directly linked to port availability and would be among the first to be disrupted if Missouri's public ports were no longer in service.

Indirect Effects represent the supply chain connections that extend beyond the port itself. Port operators and users rely on a diverse range of Missouri-based suppliers, including construction and engineering firms that upgrade port facilities, fuel distributors, equipment manufacturers and professional service providers. These business-to-business transactions extend the footprint of port activity into various other sectors of the economy, underscoring how the presence of a port stimulates broader industrial activity.

Induced Effects arise when workers employed directly at the ports, within port-using industries or in their supply chains spend their earnings in Missouri. Household spending on groceries, housing, healthcare, retail and other goods and services supports additional jobs across the state. These consumer-driven impacts illustrate how port activity not only generates industrial output but also sustains local communities through household incomes and expenditures.

Total Effects include the direct, indirect, and induced impacts.

4.3 Economic Impact Measures

Economic impacts are reported across several standard measures of economic activity. Each measure captures a different dimension of how Missouri's public ports contribute to the state economy. In this study, impacts are reported for the following categories:

Employment is measured as headcount jobs, not stratified by full-time versus part-time status. Employment impacts include direct jobs at the ports and port-user industries, as well as indirect supplier and induced household-spending jobs supported through ripple effects.

Labor Income refers to total employee compensation, including salaries and wages.

Value-Added measures the contribution of an industry or activity to the state's gross state product (GSP). It is calculated as business revenues minus the cost of goods and services purchased from other businesses, and it includes labor income, taxes on production and property-type income (e.g., rents, royalties, corporate profits).

Output represents total business revenues, also referred to as "sales" or "economic output." It encompasses the value of all goods and services produced, including intermediate inputs (such as fuel, utilities and materials), payroll, taxes and profits. Output is the broadest measure of economic activity and contains both value-added and labor income as components.

State and Local Taxes reflect revenues generated for Missouri state and local governments as a result of port-related activity. These include property taxes, sales taxes, income taxes, motor fuel taxes and other production-based levies tied to business and household activity supported by port operations and users.

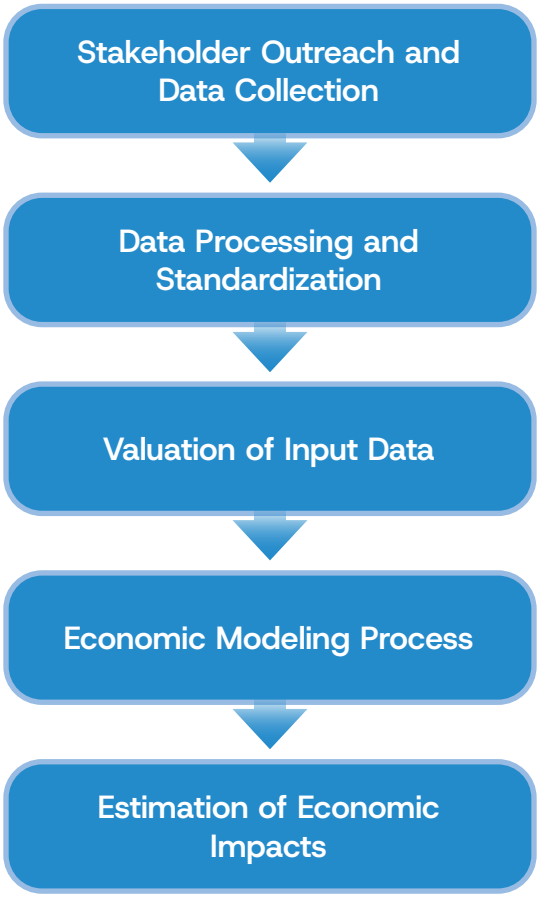
It is important to note that these measures are non-additive. Labor income is a component of value-added, and value-added is itself a component of output. Adding the categories would therefore result in double-counting. Instead, each measure provides a distinct lens through which to understand the magnitude of Missouri's public port impacts.

4.4 Methodological Overview

This section provides an overview of the methodology deployed to measure the economic impacts of Missouri's public ports. As previously discussed, the analysis is structured around the at-port activities of operators (such as their direct employment and capital investments) and the economic activity of port users (the industries that depend on ports for shipping and receiving goods). By separating these categories, the analysis makes clear that both the contributions of the ports themselves and the industries they enable are represented. This study applies a structured approach that combines primary data collection, secondary data sources, data processing and valuation and economic modeling using IMPLAN. The methodology maintains consistency across all captured public ports and provides a transparent framework for quantifying impacts on jobs, labor income, value-added, economic output and tax revenues.

The methodology follows a structured, multi-step process, as outlined and further described in **Figure 3**.

Figure 3 – Methodological Framework for Port Economic Impact Analysis



Source: GFT (2025).

1. **Stakeholder Outreach and Data Collection**: engaging port authorities and tenants to gather consistent information on employment, payroll, capital expenditures and cargo throughput.

2. **Data Processing and Standardization**: converting, classifying and reconciling data for consistency across ports and to prevent double-counting of cargo activity.

3. **Valuation of Input Data**: incorporating supplemental datasets, such as IMPLAN wage data and Transearch commodity values, to translate job counts into payroll estimates and convert tonnage into dollar values using commodity-specific coefficients, with adjustments to reflect the true contribution of imports and exports.

4. **Economic Modeling Process**: structuring the processed data into operator and user events within the IMPLAN input–output framework, with imports treated as intermediate inputs and exports modeled as final demand.

5. **Economic Impact Estimation**: tracing the direct, indirect and induced effects of port-related activity on employment, labor income, value-added, output and tax revenues.

Data Collection

Stakeholder Outreach

The foundation of this study was built on direct engagement with Missouri ports. Because no single data source captures the breadth of information required for this analysis, primary outreach was essential. Each port authority was contacted through a structured process designed not only to collect consistent information but also to establish a shared understanding of the data being requested and how it would be used in the study.

A standardized data collection survey template was distributed to all ports, so that data was gathered in a comparable format. The template requested information on two core categories of activity: 1*) employment and payroll, disaggregated by functional area*, and *2) cargo throughput, by commodity, direction and mode*.

Not all ports provided complete responses. In cases where data submissions were partial, particularly with respect to employment figures, additional information was gathered directly from MoDOT to fill gaps. Where ports did not respond at all, MoDOT provided supplemental tonnage and employment estimates so that every port for which there was measurable economic activity was represented in the analysis. In addition, MoDOT supplied capital expenditure estimates for each port in the analysis so that infrastructure investments were measured consistently across facilities. These expenditures include federal, state, local and private funding sources.

Data Collection Survey

To gather a consistent and comparable dataset, each port was provided with an Excel-based data collection template. This template was structured in tabular form to simplify reporting and allow for uniformity across ports of different sizes and capacities. As mentioned, the request covered two core areas of information: employment and cargo volumes.

Average Annual Port Employment by Activity – The employment section focused primarily on at-port (on-site) activity, broken down by function, to reflect the distinct roles within port operations:

- **Administration**: port authority staff responsible for governance, planning and management
- **Tenants**: warehousing, logistics and shipper/receiver firms operating directly on port property
- **Carriers**: barge and rail operators providing transportation services from the port

A second input area allowed ports to report off-site employment associated with their activities, including trucking, barge or rail carriers located away from port property, as well as shippers/receivers whose jobs are tied to port cargo but whose facilities are off-site. While off-site employment is not consistently present across all ports, the inclusion of this optional field provided the opportunity to capture broader freight-related activity.

This distinction allowed employment to be captured comprehensively while maintaining transparency about which jobs were anchored at the port itself versus those supported off-site through port-related freight activity.

Average Annual Port Tonnage and Value by Commodity Group and By Direction and Mode – The template also tabularized port volume data, with ports asked to report both tons and the value of cargo. Recognizing year-to-year fluctuations, the survey requested average annual values over a three-year period. Specifically, ports were asked to provide throughput for 2022, 2023 and 2024.

Cargo data was requested by major commodity groups and by direction of movement as follows:

- Inbound receiving (imports)
- Outbound shipping (exports)
- Associated ton value

Commodity categories followed broad-based USACE groupings, including coal, petroleum products, fertilizers and chemicals, forest products, earth materials, food and farm products, manufactured equipment, waste materials and an "other" category to specify commodities not otherwise classified.

In cases where ports did not respond or provided incomplete submissions, particularly for employment or tonnage, MoDOT supplied supplemental information. MoDOT also provided capital expenditure estimates for all ports, so that infrastructure investments were consistently represented across facilities.

Data Processing and Standardization

Once data was collected from stakeholders and validated, the next step was to prepare all information in a consistent, comparable and analytically-sound format. This stage was essential to creating inputs that could be integrated into the IMPLAN model without overstating or misrepresenting the role of the ports. Through these steps, the dataset was transformed into a uniform, validated and conservative representation of port-related employment, payroll, capital spending and cargo activity. This standardized dataset served as the foundation for the subsequent valuation and economic modeling stages.

For accuracy and completeness, the study team conducted follow-up phone calls and email correspondence with port representatives. This engagement allowed for clarification of reporting requirements, refinement of the requested information and the collection of more detailed data on the types and/or volumes of cargo moving through each facility. They also enabled the distinction between intrastate and interstate/international tonnage and the reconciliation of discrepancies to maintain consistency across all ports.

Several key procedures were applied:

- **Adjustments for Low Water Impacts**: As previously documented, prolonged low-water conditions on the Mississippi River in recent years have significantly disrupted normal port operations across Missouri, constraining barge movements and depressing throughput at several facilities. To prevent these temporary disruptions from distorting the statewide analysis, port representatives were allowed to make targeted adjustments to reported tonnage. In some cases, ports chose to exclude 2024 estimates when they were judged to be unreliable. In other cases where 2022 volumes were abnormally low due to navigation restrictions, 2021 figures were substituted to establish a more representative baseline. These adjustments provided a balanced way to smooth out short-term anomalies while preserving the conservative orientation of the study; subsequently, results reflect the typical operating environment of Missouri's public ports rather than the exceptional conditions of a single low-water year.

- **Temporal Averaging**: Because some ports experience annual volatility in throughput volumes, employment or capital spending, multi-year averages were used to produce a stable baseline for measuring impacts. In most cases, data (for each respective input: employment, capital expenditures and cargo flows) was averaged across calendar years 2022, 2023 and 2024. In cases where a port provided only two years of data, results were averaged over those two years. This approach provided a consistent representation of all ports while smoothing short-term fluctuations.

- **Commodity Classifications**: Tonnage was mapped to Transearch four-digit Standard Transportation Commodity Code (STCC) categories. This mapping allowed for comparability across ports while also enabling detailed, commodity-specific valuation in subsequent stages.

- **Directional Treatment of Cargo Flows**: Tonnage was separated into three directional categories:
  - *Inbound receiving (imports)*
  - *Outbound shipping (exports)*
  - *Intrastate shipment*s

  Intrastate movements were closely reviewed, as identified through follow-up discussions with the public ports. These flows were excluded from statewide totals to prevent double-counting, since they would otherwise be registered once as outbound at the origin port and again as inbound at the receiving port.

- **Mode-Switch Adjustments**: To avoid double-counting, cargo that entered a port by barge, truck or rail and was subsequently shipped outbound via another mode was not counted twice. Inbound shipments that were later re-exported by another mode were identified and removed from the outbound totals. This allowed for each ton of cargo to be captured only once in the statewide dataset, accurately reflecting the net flow of goods handled by the ports.

- **Treatment of MoDOT-Provided Tonnage Data**: While several ports were able to report tonnage by barge, truck and rail, the supplemental estimates provided by MoDOT captured only barge activity. Port authorities submit to MoDOT only aggregate barge tonnage totals, without commodity-level detail or directional splits. To avoid double-counting, ports are instructed to record each barge movement only once—either inbound or outbound—so that a shipment arriving by barge and departing by truck (or vice versa) is not reported twice. While this protocol prevents duplication, it also means the data does not capture additional truck or rail flows that move through the public ports.

  For ports that did not respond to the data request, only their barge movements could be incorporated directly from MoDOT's records. To generate the commodity-level detail required for valuation, the analysis applied commodity mixes from the USACE for each respective year of available MoDOT data. This allowed the aggregate barge totals to be disaggregated

by commodity and direction. This methodological choice allowed all public ports with measurable economic activity to be represented in the statewide analysis while maintaining a conservative bias. In cases where only barge tonnage was available, results likely understate the full range of activity rather than risk overstating impacts.

- **Prevention of Double Counting**: A specific adjustment was required in this analysis to prevent double-counting impacts where imported commodities were later embodied in exported products. The clearest instance of this occurs with fertilizer imports and Missouri's grain and soybean exports. Fertilizer brought into the state through public ports is a critical input to crop production, and those same crops are subsequently exported in large volumes through the port system. Without correction, the value of fertilizer would be counted once imported and again when included in the exported agricultural commodities, overstating the true economic contribution of the ports.

  To address this, a probabilistic adjustment framework was applied. **Table 2** summarizes key intermediate input and output statistics used to develop probabilistic adjustment factors for Missouri's port-related economic impact modeling. The fertilizer section provides estimates of total nitrogenous and phosphatic fertilizer demand, disaggregated by industry and institutional use, and compares this to the estimated value of fertilizer imports, yielding an import share of 39 percent. The grain and soybean export sections report total statewide output and exports, with corresponding export-to-output probabilities of 12 percent and 18 percent, respectively. These ratios inform adjustment factors applied to avoid double-counting when imported inputs are embedded in exported commodities. The final section presents the resulting adjustment factors used in the analysis: 95 percent for grain and 93 percent for soybeans.

  As a result, the model reduced export values for these commodities accordingly:

  - **Grains**: total grain exports were discounted by 5 percent
  - **Soybeans**: total soybean exports were discounted by 7 percent

  This targeted adjustment eliminated double-counting only where it occurred—between fertilizer imports and soybean and grain exports—while leaving all other commodities unchanged.

Table 2 – Probability of Fertilizer Imports and Agricultural Export Shares

Category	Item	Value
Fertilizer Inputs	Total Fertilizer Demand	$1,252,221,200
	Total Value of Fertilizer Imports	$493,442,159
	Estimated Import Share of Total Demand	39%
Grain Exports	Statewide Grain Output	$3,211,921,606
	Total Value of Grain Exports	$379,647,626
	Probability of Exports to Output	12%
Soybean Exports	Statewide Soybean Output	$3,339,208,374
	Total Value of Soybean Exports	$606,493,724
	Probability of Exports to Output	18%
Adjustment Factors	Grain Adjustment Factor	95%
	Soybean Adjustment Factor	93%

Source: Data adapted from IMPLAN, commodity demand and industry output databases, calculations by GFT (2025).

Monetizing Employment and Cargo Flows

After the requisite data was collected, validated and standardized, the next step was to assign monetary values to both the employment supported by Missouri's public ports and the freight activity flowing through them. This process translated raw counts of jobs and tons into economic measures compatible with the IMPLAN modeling framework.

Payroll Value

Since Missouri's public ports did not provide wage or salary data, payroll was estimated using raw labor counts supplied by the ports (or, in cases of non-response, provided by MoDOT). These labor counts were converted into payroll values through the application of a weighted average wage rate derived from detailed occupational data.

The applied wage data was obtained from the IMPLAN Data Library, which includes state-level employment and wage data as part of its economic impact analysis software and services. The IMPLAN Data Library integrates historical and current information from multiple sources, including the U.S. Bureau of Labor Statistics (BLS) Census of Employment and Wages, to provide detailed measures of wages by industry and occupation at the state and county level.

For this study, the occupational dataset utilized covered employment levels and average annual wages across the water transportation, rail transportation and warehousing and storage sectors. Occupations ranged from captains and mates of vessels to railroad conductors and yardmasters to warehouse clerks and material movers. To calculate the weighted average, employment counts for each occupation were multiplied by its average annual wage, and the results were aggregated across all occupations. This process produced a weighted average annual wage of approximately $60,158 per job, reflecting the blended earnings profile of the transportation and warehousing workforce most relevant to port-related activity. **Table 3** presents employment levels and average annual wage income for key occupations across water transportation, rail transportation and warehousing sectors, which form the basis for estimating direct labor income impacts.

This weighted wage was applied uniformly to the reported (or MoDOT-supplied) job counts for each port to generate payroll estimates. For conservatism, fringe benefits were not included in the overall annual wage. This decision reflects both a conservative approach to estimating payroll and the methodological challenges of linking benefits to broader economic impacts. While wages and salaries are directly spent by households and circulate through the regional economy, many benefits—such as health insurance contributions or retirement allocations—do not consistently generate local spending impacts that can be captured in input-output modeling. Excluding them avoids the risk of overstating labor income while maintaining comparability across ports. This treatment is consistent with common practice in economic impact analyses, where wages and salaries are emphasized as the most reliable measure of labor income.

All payroll estimates were expressed in 2023 dollars for consistency with the Transearch-based freight values and MoDOT-provided capital expenditure estimates, which were also adjusted to 2023 dollars.

Port Capital Expenditures

MoDOT supplied capital expenditure estimates for all ports included in the analysis. These estimates, reported for the 2022 to 2024 period, were averaged to create a stable annualized figure and were then adjusted into 2023 dollars using the U.S. Gross Domestic Product (GDP) Index for consistency with other valuation components.

Source: MoDOT

Table 3 – Employment and Average Wage and Salary Income by Occupation

Sector	Occupation	Total Employment	Average Annual Salary
Water Transportation	Captains, Mates and Pilots of Water Vessels	89	$142,147
	Sailors and Marine Oilers	82	$66,569
	Laborers and Freight, Stock and Mat. Movers, Hand Laborers	19	$63,540
	First-Line Supervisors of Transportation and Material Moving Workers	11	$98,354
	Transportation, Storage and Distribution Managers	8	$166,631
	Cargo and Freight Agents	6	$92,351
	Shipping, Receiving and Inventory Clerks	3	$61,682
	Transportation Workers, All Other	2	$48,574
	Light Truck Drivers	1	$93,563
	Crane and Tower Operators	48	$192,078
Rail Transportation	Transportation, Storage and Distribution Managers	4	$80,844
	Cargo and Freight Agents	4	$102,356
	Shipping, Receiving and Inventory Clerks	104	$147,466
	First-Line Supervisors of Transportation and Material Moving Workers	881	$110,264
	Railroad Conductors and Yardmasters	5	$112,193
	Rail Transportation Workers, All Other	40	$87,193
	Crane and Tower Operators	288	$114,328
	Laborers and Freight, Stock and Mat. Movers, Hand Laborers	20	$52,410
Warehousing and Storage	Transportation, Storage and Distribution Managers	1000	$47,975
	Cargo and Freight Agents	790	$74,553
	Shipping, Receiving and Inventory Clerks	213	$55,750
	First-Line Supervisors of Transportation and Material Moving Workers	1	$62,892
	Light Truck Drivers	2	$79,588
	Transportation Workers, All Other	6159	$46,514
	Crane and Tower Operators	20	$51,518
	Laborers and Freight, Stock and Mat. Movers, Hand Laborers	89	$142,147
	Material Moving Workers, All Other	82	$66,569

Source: Data from IMPLAN, occupation database (2025).

Freight Value

Transearch, which provides statewide totals of freight tonnage and value by four-digit STCC, was utilized to estimate the value of the tonnage. For each commodity group, a value-per-ton estimate was derived by dividing the reported total value by the reported total tonnage. These commodity-specific coefficients, expressed in 2023 dollars, were then applied to the tonnage data provided by the ports. Where ports supplied their own commodity-specific valuations (for example, Pemiscot County Port Authority provided product-specific values for steel plate, plastics and barge lids), those figures were applied instead of Transearch averages.

Table 4 summarizes the unit value (in 2023 dollars per ton) by four-digit STCC commodity used to quantify commodity flows for which no value was provided by the ports.

Table 4 – Value per Ton Units from Transearch Four-Digit STCC Data

4-Digit STCC Commodity Description	Value per ton
4-Digit STCC Commodity Description	Value per ton
Cement	$143
Coal	$30
Petroleum products	$403
Fertilizer	$506
Frack sand	$21
Grain	$203
Misc waste or scrap	$327
Miscellaneous earth material	$817
Miscellaneous steel product	$1,827
Plastics	$5,133
Rock	$21
Soybean	$631
Soybean oil or by-product	$475
Steel product	$1,827
Wood product, NEC	$882

Source: Data adapted from Transearch, Missouri Database, calculations by GFT (2025).

Economic Modeling Process

The IMPLAN economic modeling system was employed to analyze each port's contributions to the Missouri economy. IMPLAN is one of the most widely used input-output (I/O) models in the United States, built from data provided by the Bureau of Economic Analysis (BEA), BLS, U.S. Census Bureau and the U.S. Department of Commerce. The model contains current economic metrics—jobs, payroll, value-added and business revenues—across more than 500 industry classifications, which generally align with two- to six-digit groups in the North American Industry Classification System (NAICS).

For this study, the IMPLAN model was calibrated at the statewide level using direct inputs specific to each port. This statewide calibration captures the differences in direct payroll, value-added and business revenues across industries, while applying a uniform set of multipliers to capture supplier sales and income re-spending effects. Modeling at the statewide level recognizes the interconnected nature of the economy and reflects how port activity in one region generates ripple effects throughout the state. As such, the reported impacts represent the total statewide contribution of each port.

Missouri's public ports support more than 30,600 jobs and generate over $5.64 billion in total economic output annually

Classifying Cargo Flows in IMPLAN

A critical step in the modeling process was distinguishing between imports and exports, since these flows behave very differently in Missouri's economy. IMPLAN's framework allows each to be modeled in a way that avoids overstating impacts while still capturing the value created when goods are produced or transformed within the state.

Intermediate inputs are goods that are not consumed in their current form but are used by Missouri industries to produce other goods and services, with their economic contribution realized only after they are transformed into new output within the state. For example, fertilizer imported through Missouri's public ports is not counted as Missouri production at the point of entry; its contribution is recognized when Missouri farmers use it to grow crops that are later sold domestically or exported.

In contrast, final demands are goods in their finished form that are sold directly to end users, such as households, businesses or external markets. Their production embodies Missouri-based activity and exporting them represents the culmination of in-state value creation. For instance, soybeans grown in Missouri and shipped overseas are considered final products, with the full value of their production credited to the state. This distinction was critical to avoid overstating Missouri's economic role—imports were only credited when they became inputs to Missouri industries, while exports were fully credited as Missouri-produced output.

Imports

Imports represent goods produced outside Missouri but arrive through the state's public ports for use by Missouri industries. Because their production value accrues elsewhere, simply recording their arrival would misstate Missouri's contribution.

- **Modeling Treatment**: Imports were entered into IMPLAN as intermediate inputs with a Local Purchase Percentage (LPP) of 0 percent, meaning none of the production value of the imported commodity was assigned to Missouri industries.
- **Effect in the Model**: By setting LPP to 0 percent, IMPLAN did not attribute the origin production to Missouri. However, once those imports were used by Missouri firms, the model traced their contribution to new Missouri-based output.

Examples:

- Imported fertilizer was modeled as an intermediate input to Missouri crop production. IMPLAN captured the downstream effects only when that fertilizer enabled grain and soybean farming within the state.
- Imported steel plate was treated as an input to fabricated metal manufacturing. Missouri received credit only for the manufacturing value-added, not for the steel itself.

Exports

Exports represent goods produced in Missouri and shipped out of the state through the public ports. Unlike imports, these flows directly embody Missouri's own production and, therefore, warrant full attribution.

- **Modeling Treatment**: Exports were entered into IMPLAN as final demand changes in output to the producing industries (e.g., agriculture, mining or manufacturing).
- **Effect in the Model**: IMPLAN traces the upstream supply chain (indirect effects) and household spending (induced effects) associated with meeting demand from external markets.

Examples:

- Missouri-grown soybeans exported via SEMO Port were modeled as final demand for the crop production sector. IMPLAN then captured supplier activity (seed, fertilizer, equipment) and household spending linked to farm employment.
- Manufactured equipment exported through the City of St. Louis Port was modeled as final demand for fabricated machinery. IMPLAN traced both direct factory jobs and indirect effects in input sectors, such as metals, logistics and energy.

Aligning Inputs with IMPLAN Sectors

After classifying cargo flows, the next step was to map all reported data—employment, capital expenditures and freight values—into IMPLAN's industry structure. This translation aligned raw inputs with the sectors best suited to represent their economic function, so that all impacts were measured consistently across the model.

- **Employment**: All port-related jobs reported by ports (or provided by MoDOT) were traced to an aggregated industry grouping that combined water transportation, rail transportation and warehousing employment types. This approach mirrored the categories used to develop the weighted average wage, providing consistency between wage estimation and IMPLAN modeling.
- **Capital Expenditures**: Infrastructure investments, including docks, storage yards, cranes and intermodal connections, were modeled in IMPLAN as nonresidential construction. This treatment reflects the one-time economic activity generated by port infrastructure projects.
- **Freight Values**: Cargo flows were tied to the production industries responsible for generating or consuming those commodities in Missouri. For example, grain exports were linked to crop production, fertilizer imports to chemical manufacturing and aggregates to mining. This mapping attributed each ton of cargo to the industry where its economic value originated, allowing the model to trace both upstream and downstream effects accurately.

Source: MoDOT

Economic Impact Review & Validation

All economic impact results underwent a structured quality-assurance process to confirm consistency and credibility. Checks included verifying that port-level results aggregated properly, reviewing impact shares for proportionality, testing multipliers and per-unit ratios against industry norms and ensuring measures were reported without double-counting. This process provided confidence that the estimates are conservative, transparent and aligned with accepted economic modeling practices. The validation process included:

- **Totals Reconciliation**: confirming that port-level results aggregated correctly to statewide totals for jobs, labor income, value-added, output and taxes
- **Impact Composition Checks**: reviewing the balance of impacts across operators and users for consistency with reported employment and cargo activity
- **Multiplier Reasonableness**: calculating effective Social Accounting Matrix (SAM) multipliers to verify that the ratio of total-to-direct impacts fell within plausible ranges
- **Per-Unit Benchmarks**: testing labor income per job, jobs per $1 million of output and tax yields against reference values to identify anomalies or inconsistencies
- **Cross-Port Comparisons**: comparing results across ports to confirm proportionality between activity levels and estimated impacts

These checks provided a reasonableness test to confirm that the final estimates represent conservative, defensible measures of the economic contributions supported by Missouri's public ports.

Source: MoDOT

5.0 Findings

This section presents the results of the economic impact analysis of Missouri's public ports. The analysis draws on three primary inputs: *1) payroll and employment reported by port tenants, 2) recent capital expenditures on port infrastructure and 3) the estimated value of cargo by commodity type*. These inputs were integrated into the IMPLAN model to estimate the direct effects of port activities, along with the indirect and induced effects generated through supply chains and household spending. The results are reported at both the statewide and individual port levels.

The findings are organized into two primary parts:

1. **Inputs to the IMPLAN Model**: a summary of the data sources and categories of inputs used in the analysis
2. **Economic Impacts**: the aggregated and disaggregated economic contribution of Missouri's public port system

5.1 Inputs to the IMPLAN Model

Three sets of inputs formed the basis of the analysis. These were structured to align with IMPLAN sector definitions and to capture operational and investment activity and cargo flows at Missouri's public ports.

Port Operator Inputs

Payroll

Direct employment and payroll at Missouri's public ports were compiled from tenant, carrier and port administration data. Together, the ports support 625 on-site jobs with a combined payroll of approximately $37.60 million, as summarized in **Table 5**. These figures represent the direct labor income inputs to IMPLAN and capture only on-site activities.

Table 5 – Total Port Employment & Income by Type

Employment Type	Jobs	Income
Administration (Port Operations)	39	$2,346,144
Tenants (Warehousing, Shipping/Receiving)	462	$27,792,781
Carriers (Barge, Rail)	124	$7,459,534
Total	**625**	**$37,598,459**

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, Missouri Department of Transportation, Missouri Public Ports, calculations by GFT (2025).

Employment is concentrated among port tenants who account for nearly three-quarters of all jobs (462 positions) and nearly $27.80 million in payroll. Carriers contribute 124 jobs and about $7.46 million in payroll, while port administration supports 39 jobs and about $2.35 million in payroll.

To illustrate regional variation, **Table 6** presents the distribution of jobs and payroll by port. Impacts range from smaller facilities like Pike Lincoln (a total of 2 jobs and $120,315 in payroll) to comparatively major employment centers like New Madrid (a total of 182 jobs and $10.95 million in payroll) and Southeast Missouri (a total of 179 jobs and $10.77 million in payroll). Overall, the majority of payroll is concentrated at New Madrid and Southeast Missouri, which together account for nearly 58 percent of total statewide payroll, underscoring their role as the state's largest port employment centers.

Table 6 – Direct On-Site Employment and Payroll by Port

Port Name	Administration Jobs	Tenant Jobs	Carrier Jobs	Payroll ($)
Howard/Cooper	0	8	0	$481,260
Jefferson	0	12	0	$721,890
Lewis	2	10	70	$4,932,918
Mississippi	17	0	0	$1,022,678
New Bourbon	3	0	0	$180,473
New Madrid	1	148	33	$10,948,671
Pemiscot	2	67	10	$4,752,445
Pike Lincoln	2	0	0	$120,315
Kansas City	6	0	0	$360,945
Southeast Missouri	6	162	11	$10,768,199
St. Joseph	0	32	0	$1,925,041
St. Louis City	0	23	0	$1,383,623
Total	**39**	**462**	**124**	**$37,598,459**

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, Missouri Department of Transportation, Missouri Public Ports, calculations by GFT (2025).

Capital Expenditures

Reported capital expenditures were compiled from port data records, as provided by MoDOT, covering recent construction, rehabilitation and equipment purchases. These expenditures represent one-time injections of spending that support construction employment, materials supply and related services across the state.

As shown in **Table 7**, capital spending varied significantly across ports. Southeast Missouri reported the largest average investment at more than $10.82 million annually, followed by Pike/Lincoln at approximately $6.1 million. New Madrid also showed notable activity, averaging over $4.0 million annually. In contrast, some ports reported under $1 million per year in average spending, reflecting smaller-scale improvements or project cycles. These capital expenditures represent temporary but significant sources of construction-related employment and supplier demand, complementing the recurring impacts of ongoing port operations.

Table 7 – Reported Capital Expenditures by Port (Annual Average, 2022–2024)

Port Name	Expenditures
Mississippi	$333,333
New Madrid	$4,095,094
Pemiscot	$2,576,081
Southeast Missouri (SEMO)	$10,827,438
St. Louis City	$1,451,192
Howard/Cooper	$1,792,773
Lewis	$930,122
Kansas City	$878,688
New Bourbon	$967,143
St. Joseph	$690,517
Jefferson County	$80,323
Pike Lincoln	$6,108,292
All Ports	$30,730,996

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data from Missouri Department of Transportation, calculations by GFT (2025).

Port User Inputs

Cargo Flows

As shown in **Table 8**, Missouri's public ports collectively handled an annual average of nearly 6.40 million tons of cargo valued at almost $2.72 billion between 2022 and 2024, based on information provided directly by ports or supplemented by reporting to MoDOT. Imports totaled almost 1.18 million tons valued at almost $713 million, led by fertilizer, petroleum products and other industrial inputs that support agricultural producers and manufacturers across the state. Exports reached over 5.21 million tons valued at over $2.00 billion, driven primarily by grain and soybean shipments representing Missouri-produced commodities entering domestic and global markets. Together, fertilizer, grain and soybeans account for nearly half of total cargo value, underscoring the critical role ports play in both supplying inputs for in-state production and enabling access to markets for Missouri's leading exports.

Table 8 – Table 8 – Commodity by Direction, Tonnage and Value

Commodity Description	Total Tons			Total Value		
	Imports	Exports	Total	Imports	Exports	Total
Rock	0	97,000	97,000	$0	$2,024,187	$2,024,187
Grain	4,663	1,871,280	1,875,943	$947,153	$362,361,274	$363,308,427
Soybean	3,140	960,898	964,038	$1,981,715	$563,086,271	$565,067,986
Frack sand	0	958,611	958,611	$0	$20,004,201	$20,004,201
Fertilizer	975,190	478	975,668	$493,442,159	$241,866	$493,684,025
Petroleum Products	75,900	2,598	78,498	$30,555,246	$1,045,885	$31,601,130
Barge Lids	0	1,198	1,198	$0	$114,998,400	$114,998,400
Plate Steel for Cars	17,953	0	17,953	$45,019,752	$0	$45,019,752
Coal	23,389	152,483	175,872	$693,318	$4,520,042	$5,213,360
Misc Waste or Scrap	0	1,518	1,518	$0	$496,867	$496,867
Misc. Steel Product	752	1,345	2,097	$1,373,610	$2,456,790	$3,830,400
Steel Product	13,123	19,587	32,710	$23,970,595	$35,776,885	$59,747,481
Miscellaneous Earth Mat.	45,625	975,920	1,021,545	$37,298,412	$797,814,058	$835,112,470

Commodity Description	Total Tons			Total Value		
	Imports	Exports	Total	Imports	Exports	Total
Wood Product, NEC	0	100,018	100,018	$0	$88,240,923	$88,240,923
Plastics	15,134	0	15,134	$77,683,468	$0	$77,683,468
Soybean Oil or By-product	0	1,019	1,019	$0	$483,871	$483,871
Cement	0	69,421	69,421	$0	$9,955,648	$9,955,648
Total	1,174,869	5,213,374	6,388,243	$712,965,429	$2,003,507,169	$2,716,472,598

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, Missouri Department of Transportation, Missouri Public Ports, Transearch, calculations by GFT (2025).

The commodity mix reflects both inbound supply chains and outbound production. Fertilizer imports are critical to Missouri's agricultural sector, while grain and soybean exports highlight the state's role in supplying domestic and international food markets. Other flows, including petroleum products, plastics, steel, wood and cement, demonstrate the diversity of cargo types supported by the ports.

The distribution shown in Table 8 highlights the variety of roles played by individual ports within the system. Several facilities recorded large volumes of export activity, reflecting their connections to Missouri's agricultural base and the movement of grain, soybeans and related commodities into domestic and international markets. Other ports primarily handle imports, including fertilizer, petroleum products and manufactured goods that provide essential inputs to the state's farms, industries and construction sectors.

The data in **Table 8** also points to the presence of more specialized movements, such as steel products, plastics, wood and other materials that support distinct industry needs. At the same time, some ports reported limited or no activity during the period, underscoring the cyclical nature of port use, investment and commodity demand.

Source: MoDOT

5.2 Economic Impacts

The following section presents the estimated economic impacts of Missouri's public ports, derived from the inputs described above. Impacts are reported for three categories: 1) total combined impacts of all port-related activity, 2) port operations (payroll and capital expenditures) and 3) port users (shippers). Each reflects direct activity at the ports, as well as the indirect and induced effects that occur through supply chains and household spending.

Total Economic Impacts

The combined activity of Missouri's public ports generates substantial statewide economic benefits, as summarized in **Table 9**. Overall, Missouri's public ports generate an estimated $5.64 billion in total economic output annually, along with $2.72 billion in value-added, $1.54 billion in labor income and nearly $476 million in tax revenues. These impacts illustrate the critical role of ports, not only as freight gateways, but also as engines of employment, income and fiscal resources across the state economy.

Table 9 – Total Economic Impacts of Missouri's Public Ports

Impact Type	Employment	Labor Income	Value-added	Output	Taxes
Direct	20,156	$892,446,379	$1,558,478,680	$3,569,565,510	$234,901,133
Indirect	$5,152	$343,846,256	$595,900,031	$1,140,434,904	$118,926,272
Induced	5,345	$302,066,718	$563,755,761	$932,353,804	$122,105,656
Total	**30,653**	**$1,538,359,352**	**$2,718,134,471**	**$5,642,354,218**	**$475,933,061**

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, calculations by GFT (2025).

The economic output of public ports, at $5.64 billion in 2023 dollars, equates to 1.60 percent of Missouri's total real GDP for 2023, which was $348.50 billion.

Port Operations Economic Impacts

The economic impacts of port operations are based on reported payroll, employment and expenditure data provided directly by ports or supplemented by MoDOT records. The data on direct employment and spending was used as inputs to the IMPLAN model to estimate the associated indirect and induced effects. As a result, the estimates presented herein represent a conservative but consistent measure of the statewide economic impact of public port operations.

Overall, port operations support an estimated 1,761 jobs, generating more than $422 million in total economic output annually, as summarized in **Table 10**. This includes nearly $211 million in value-added, over $115 million in labor income and over $49 million in tax revenues. While smaller in scale than the impacts generated by port users, port operations provide the essential administrative and infrastructure foundation that enables Missouri's public ports to function as gateways for trade and investment.

Table 10 – Economic Impacts of Port Operations

Impact Type	Employment	Labor Income	Value-added	Output	Taxes
Direct	783	$48,696,257	$101,353,613	$234,884,559	$24,377,029
Indirect	582	$44,396,935	$67,830,112	$118,476,498	$15,721,589
Induced	396	$22,388,020	$41,790,191	$69,121,788	$9,052,202
Total	1,761	$115,481,213	$210,973,916	$422,482,845	$49,150,819

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, calculations by GFT (2025).

Port User Economic Impacts

Port user impacts are derived from the activity of shippers and receivers moving cargo through Missouri's public ports. These impacts reflect the scale and value of commodities handled by the system and capture how port users depend on the ports for access to critical inputs and markets. Data on cargo volumes and values were compiled directly from ports or supplemented by MoDOT records, then converted into IMPLAN inputs to estimate the associated direct, indirect and induced effects.

Altogether, port users support nearly 28,900 jobs statewide and generate more than $5.22 billion in total output annually, as summarized in **Table 11**. This activity contributes almost $2.51 billion in value-added, over $1.42 billion in labor income and nearly $427 million in tax revenues. Most of these impacts stem from direct activity, as shippers and receivers handle Missouri's agricultural exports, industrial inputs and manufactured goods. Additional supply chain purchases and household spending amplify these effects across the state economy.

Table 11 – Economic Impacts of Port Users

Impact Type	Employment	Labor Income	Value-added	Output	Taxes
Direct	19,372	$843,750,121	$1,457,125,067	$3,334,680,951	$210,524,104
Indirect	4,570	$299,449,320	$528,069,919	$1,021,958,406	$103,204,684
Induced	4,949	$279,678,697	$521,965,569	$863,232,015	$113,053,454
Total	28,892	$1,422,878,139	$2,507,160,555	$5,219,871,372	$426,782,242

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, calculations by GFT (2025).

Economic Impacts by Port

The combined impacts of port operations and users at each facility reflect variations in port size, the types of commodities handled and the extent of capital investment and administrative activities. **Table 12** summarizes employment, labor income, value-added, output and tax revenues attributable to each public port by economic impact category (port operations and port users). All dollar figures are stated in millions.

Table 12 – Economic Impacts by Port

Port	Jobs			Labor Income ($M)			Value-Added ($M)			Output ($M)			Taxes ($M)		
	Port Opr	Port Users	Total	Port Opr	Port Users	Total	Port Opr	Port Users	Total	Port Opr	Port Users	Total	Port Opr	Port Users	Total
Howard/ Cooper	34	145	179	$2.3	$8.5	$10.7	$4.0	$19.9	$23.8	$7.8	$37.0	$44.8	$0.9	$2.8	$3.7
Jefferson	29	140	170	$1.9	$15.0	$16.9	$3.5	$21.1	$24.6	$7.2	$37.4	$44.6	$0.8	$5.0	$5.8
Kansas City	26	598	624	$1.7	$22.8	$24.5	$3.0	$33.0	$36.0	$5.8	$60.1	$65.9	$0.7	$6.0	$6.7
Lewis	207	1,783	1,990	$13.5	$86.6	$100.1	$25.0	$190.5	$215.5	$50.4	$418.4	$468.8	$5.9	$26.9	$32.8
Mississippi	49	0	49	$3.2	$0.0	$3.2	$5.9	$0.0	$5.9	$11.7	$0.0	$11.7	$1.4	$0.0	$1.4
New Bourbon	15	0	15	$1.0	$0.0	$1.0	$1.8	$0.0	$1.8	$3.5	$0.0	$3.5	$0.4	$0.0	$0.4
New Madrid	467	9,304	9,771	$30.5	$344.5	$375.1	$56.5	$489.5	$546.0	$113.7	$878.8	$992.5	$13.3	$87.8	$101.2
Pemiscot	210	3,593	3,803	$13.7	$184.5	$198.2	$25.3	$359.5	$384.7	$50.8	$770.6	$821.3	$5.9	$56.0	$61.9
Pike Lincoln	58	0	58	$3.9	$0.0	$3.9	$6.3	$0.0	$6.3	$11.9	$0.0	$11.9	$1.3	$0.0	$1.3
Southeast Missouri	518	10,732	11,250	$34.0	$645.0	$679.0	$61.9	$1,180.4	$1,243.3	$123.8	$2,622.8	$2,746.6	$14.4	$209.8	$224.2
St. Joseph	82	1,235	1,317	$5.4	$45.5	$50.9	$9.9	$64.3	$74.2	$19.9	$112.0	$131.9	$2.3	$11.6	$13.9
City of St. Louis	67	1,360	1,427	$4.4	$70.4	$74.8	$8.0	$149.0	$157.1	$16.0	$282.9	$298.9	$1.9	$20.9	$22.7
Total	1,761	28,892	30,653	$115.5	$1,422.9	$1,538.4	$211.0	$2,507.2	$2,718.1	$422.5	$5,219.9	$5,642.3	$49.2	$426.8	$475.9

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, calculations by GFT (2025).

The distribution of economic impacts across Missouri's public ports highlights the difference between the activity generated by port operations and the much larger effects driven by port users. As shown in Table 13, only a modest share of total statewide impacts—ranging from 6 to 10 percent across measures—is tied to the operation of the ports themselves, including administrative functions, terminal management and on-site tenant activity. The vast majority—over 90 percent of impacts—comes from port users, such as shippers and receivers of commodities that rely on Missouri's ports to move goods efficiently.

Table 13 – Impact Share by Activity and Type, All Ports

Activity and Type	Jobs	Income	Value-Added	Output	Taxes
Port Operations					
Direct	3%	3%	4%	4%	5%
Indirect	2%	3%	2%	2%	3%
Induced	1%	1%	2%	1%	2%
Subtotal Port Oper.	**6%**	**8%**	**8%**	**7%**	**10%**
Port Users					
Direct	63%	55%	54%	59%	44%
Indirect	15%	19%	19%	18%	22%
Induced	16%	18%	19%	15%	24%
Subtotal Port Users	**94%**	**92%**	**92%**	**93%**	**90%**
Total Activities					
Direct	66%	58%	57%	63%	49%
Indirect	17%	22%	22%	20%	25%
Induced	17%	20%	21%	17%	26%
Total Port	**100%**	**100%**	**100%**	**100%**	**100%**

** Summation of individual values may differ from totals shown due to rounding.*

Source: Data adapted from IMPLAN, calculations by GFT (2025).

Within this overall contribution, direct impacts are the most significant, making up about two-thirds of jobs and more than half of labor income, value added and output. These direct effects reflect the employment and production activities of industries that depend on port access. Indirect impacts account for another 17 to 22 percent, generated by supply chain purchases that support port operations and port-related industries. Induced impacts contribute an additional 17 to 26 percent, capturing the household spending of workers whose jobs are tied to the ports either directly or through supply chains.

5.3 Conclusion

Missouri's public ports are integral to the state's economy, linking producers, industries and consumers to domestic and global markets. This study shows that ports are catalysts for regional development, anchors for local employment and critical gateways for both inbound production inputs and outbound Missouri-made goods. Collectively, Missouri's public ports support more than 30,600 jobs and generate over $5.64 billion in total economic output annually, underscoring their role as vital economic engines for the state.

Missouri's public ports support $73.60 in economic output for each dollar in capital investment. The analysis demonstrates how port activity, whether through ongoing operations, capital investments or cargo movements, supports a wide array of industries across the state. Fertilizer, petroleum products and other inputs flow through Missouri's ports to sustain agricultural and industrial production, while grain, soybeans and manufactured products are exported to markets beyond the state's borders. These flows illustrate the dual role ports play in both supplying Missouri's economy and enabling its participation in national and international trade.

Missouri's public ports support $73.60 in economic output for each dollar in capital investment.

Importantly, this study also highlights the geographic breadth of Missouri's public port system. While larger facilities handle substantial volumes of exports and investments, smaller ports provide essential access points for local shippers and receivers, supporting the distribution of economic benefits across communities of varying size and scale.

Missouri is uniquely positioned near the geographic center of the nation with extensive river access—advantages that promote economic growth and expand the state's role in national and global trade. Looking ahead, these findings point to several considerations for sustaining and expanding the role of Missouri's ports. Continued investment in infrastructure is vital to maintaining reliability, resilience and competitiveness in evolving supply chains. Coordination across ports, state agencies and private partners will be essential to maximize the efficiency of capital spending and to leverage federal and state funding opportunities. Finally, consistent data collection and monitoring, building on the framework used in this study, will allow Missouri to track trends, demonstrate value and prioritize projects that deliver the greatest long-term benefits.

Appendix A

The following sections provide an overview of each public port facility included in this analysis. Commodity profiles are provided for public ports where tonnage estimates were collected. Public port profiles were developed using a combination of survey responses and follow-up interviews with port representatives, supplemented by publicly available information from port and MoDOT websites.

Public Port Profiles

Howard/Cooper County Regional Port Authority

Located on the Missouri River at Mile 196.5, directly across from Boonville, the port fills a critical access gap for producers and industries in central Missouri. This stretch of the Missouri River provides navigation to the Mississippi River, providing a gateway to Gulf export markets.

The port is uniquely positioned to serve central Missouri's agricultural economy. Its dual function as both a grain export gateway and a potential industrial development site enhances its role as a regional economic catalyst.

The port supports both local farmers and regional cooperatives, providing competitive access to barge transportation that would otherwise require longer trucking distances to St. Louis or Kansas City.

Strategic Location

The port benefits from strong multimodal access, positioned adjacent to US 40 and Missouri Highways 5 and 87, with I-70 just minutes away. Rail access via the Union Pacific Railroad (UP) is within one mile, creating opportunities for efficient rail-to-barge transloading. Its market reach extends across 22 counties within a 50-mile radius, positioning the port as a farm-to-market hub for the state's agricultural heartland.

Facilities & Infrastructure

The port owns and operates a grain handling complex with a total storage capacity of approximately 231,000 bushels, anchored by a 155,000-bushel corrugated steel bin, two 30,000-bushel bins and a 7,000-bushel-per-hour grain leg. Supporting infrastructure includes a dump pit, hopper bins, truck load-out and a conveyor-linked control and power room. A B-TEK steel deck truck scale and office facility support weighing and administration. Recent investments expanded the port's footprint, including the construction of a dock, acquisition of a 0.30-acre parcel, and a lease interest in 1.50 acres of staging area. An adjacent 18-acre tract with utilities is designated as a shovel-ready site for industrial development or expansion.

Jefferson County Port Authority

The Jefferson County Port is an emerging multimodal facility located along the Upper Mississippi River near Herculaneum, Missouri, between river miles 150 and 152. Situated just south of the St. Louis metropolitan area, the port is strategically positioned to capture both regional freight activity and industrial development opportunities, with access to I-55, US 61 and US 67 and nearby links to I-44, I-70 and I-64. The port also owns a passenger boat docking facility in Kimmswick, Missouri, at Upper Mississippi River mile 149.

Strategic Location

With less than an hour drive to downtown St. Louis and direct interstate access, the port offers shippers proximity to the region's industrial base with less congestion and fewer land constraints than other urban terminals. The port's available land, improved connectivity and public–private partnerships with anchor companies, such as the Doe Run Lead Company, provide a strong foundation for future growth. As infrastructure investments are realized, the Jefferson County Port is positioned to evolve into a key regional logistics hub and a complement to the high-volume facilities in the metropolitan St. Louis area.

History and Development

The Jefferson County Port Authority has historically faced two barriers to growth, including limited developable riverfront land and inadequate access to I-55. These constraints were addressed when the City of Herculaneum secured grant funding to construct a bridge directly linking the riverfront to I-55, removing a major bottleneck. Around the same time, Doe Run shifted toward more compact production methods, freeing up valuable riverfront acreage for port expansion. The Jefferson County Port Authority leveraged these changes to acquire 18 acres in partnership with Doe Run, laying the foundation for port infrastructure development.

Current Operations and Planned Expansion

Today, port activity includes barge fleeting services along the Herculaneum riverfront, providing basic river logistics for barge operators. The recently acquired 18-acre port currently facilitates transloading dry bulk commodities between trucks and barges with adjacent covered and open storage. Future expansion is anticipated to include a new port entrance road and a general cargo dock.

Port of Kansas City

Located at Missouri River Mile 367.1, near the confluence of the Missouri and Kansas Rivers, the Port of Kansas City (Port KC) is a revitalized multimodal facility serving the Kansas City metropolitan region. Port KC provides the closest barge terminal access to central and western Kansas, Nebraska and northern Oklahoma, extending its reach far beyond the metro area. Its position on the Missouri River allows for reliable navigation to the Mississippi River and the Gulf.

As a critical link in the state's inland waterway system, Port KC plays a pivotal role in extending the reach of barge transportation into the Kansas City metropolitan economy. Its infrastructure and commodity diversity make it a versatile logistics hub capable of serving both heavy industry and agriculture. With strong multimodal connectivity and development-ready land, the port is positioned not only as a freight gateway but also as a driver of regional redevelopment and job creation.

Strategic Location

The terminal is directly served by the UP, with extensive on-site track for loading and unloading, and benefits from proximity to five Class I railroads serving the Kansas City region, one of the nation's largest freight rail hubs. Port KC also has immediate truck access to I-70, I-35, I-29, and I-49 (US 71), providing shippers with seamless access to both regional and national markets.

Infrastructure & Capabilities

The port occupies 9.5 acres, with more than 2,000 feet of river frontage, and offers true intermodal capabilities through barge, rail and truck integration. The terminal is equipped with a general cargo dock, three 25-ton cranes, eight front-end loaders and portable conveyors enabling efficient handling of both bulk and breakbulk cargo. A modern truck scale supports high-volume throughput, while approximately 60,000 tons of covered and open storage provide flexibility for shippers requiring both short- and long-term options.

Port KC has begun development of a second port location, the Missouri River Terminal. The intermodal facility will encompass 430 acres, with the first phase of development (access road and bridge) anticipated to be complete in 2026.

Economic Development Role

Beyond its terminal operations, Port KC oversees 145 acres of land available for industrial and commercial development along the riverfront. The Port Authority has successfully leveraged its riverfront jurisdiction for diverse initiatives, including industrial recruitment, logistics development and entertainment investments. These broad economic development initiatives set Port KC apart from many other public port authorities in Missouri.

Lewis County Regional Port Authority

Established in 1990, the Lewis County Regional Port Authority aims to foster industrial growth and enhance freight movement along the Mississippi River. Located at River Mile 341.8 in Pool 20, the port is strategically positioned to support agricultural, industrial and energy-related commerce in northeast Missouri and western Illinois. Its mission extends beyond river operations to include industrial recruitment, land development and community growth, making it both a freight gateway and a catalyst for regional economic development.

Strategic Location

The port offers a competitive river terminal option for northeast Missouri by integrating multimodal access, strong agricultural connections and industrial incentives. Its capability to manage both inbound agricultural inputs, like fertilizer, and outbound grain makes it a well-rounded logistics hub within Missouri's inland waterway system, complementing larger ports located downstream.

The port is adjacent to a BNSF mainline, providing an opportunity for rail connectivity. It is also closely linked to the highway system: Missouri Route B/Business 61 lies just 1,300 feet away, US 61 is 1.5 miles west, and the Chicago-Kansas City Expressway is within 30 miles to the south. This connectivity allows the port to serve both regional producers and long-haul markets across the Midwest.

Facilities & Services

The port supports barge operations for a mix of dry bulk commodities, including grain and soybeans, as well as liquid fertilizer. Fleeting services are provided by Canton Marine Towing, allowing reliable barge staging and movement along the river. On-site utilities, including electric power from Ameren and natural gas service from Liberty Utilities, provide capacity for current tenants and future industrial users.

Industrial Landscape

The port is embedded in a diverse environment. Within a 10-mile radius, operations include a large sand and gravel mine, a sanitary landfill and extensive row-crop farming. This clustering of extractive industries, agriculture and logistics activity makes the port a natural hub for bulk commodity aggregation and distribution.

Development Potential

The port area benefits from available land and a Qualified Enhanced Enterprise Zone (EEZ) designation, providing tax abatements and incentives to attract new investment. The Industrial Development Authority of Lewis County partners with the Port Authority to provide real estate, financing tools and business recruitment support, strengthening the site's position as a development-ready logistics hub.

Mississippi County Port Authority

Established in 1979, the Mississippi County Port Authority was created to stimulate river-oriented commerce and drive industrial development in southeastern Missouri. Located at Lower Mississippi River Mile 946 near the confluence of the Ohio and Mississippi Rivers, the port occupies a strategic position as an ice-free port on the Mississippi River. This allows year-round navigability, giving shippers uninterrupted access to global export markets.

Strategic Location

The Mississippi County Port Authority anchors Missouri's presence at the confluence of the Mississippi and Ohio Rivers, complementing upstream ports by providing reliable year-round service and large-scale industrial development opportunities. By combining core agricultural commodity flows with a strong logistics ecosystem and unique community assets, such as the Dorena-Hickman Ferry, the port has the potential to serve as both a gateway to national markets and a driver of local economic development.

The port is well-positioned for multimodal growth, with access to US 62 and several county roads supporting truck movements. Utilities include potable water via the Mississippi County Water District and three-phase electric power to accommodate industrial tenants. The availability of developable land with essential utilities makes the site attractive for warehousing, manufacturing and processing industries.

Facilities & Land Base

The Mississippi County Port Authority manages long-term leases on approximately 200 acres of developable land, with 180 acres protected by a front-line levee system. The core port facility spans 18 acres, with 1,900 feet of river frontage. Extensive support infrastructure in the vicinity includes fleeting for more than 1,000 barges, harbor tug assistance, marine repair facilities and 24-hour dispatch services, as well as midstream fueling and commissary services to further enhance reliability for port users.

Dorena–Hickman Ferry

A unique feature of the port is its ownership and operation of the Dorena-Hickman Ferry, one of the last public river ferries on the Lower Mississippi River. The ferry operates year-round, except during unfavorable river conditions, between Dorena, Missouri, and Hickman, Kentucky, completing the river crossing in about 15 minutes. Capable of transporting up to 12 vehicles, including 18-wheelers and oversized farm equipment, the ferry enhances cross-river connectivity for both commercial and agricultural users while serving as a local community asset

Economic Development Role

Beyond its direct river operations, the Port Authority plays an active role in industrial recruitment and site development. Its large tracts of levee-protected land represent one of the few contiguous industrial development opportunities in southeast Missouri directly fronting the Mississippi River. With existing fleeting, fueling and repair services nearby, the port is well-positioned to attract industries requiring just-in-time barge logistics and multimodal distribution.

New Bourbon Regional Port Authority

Located at Upper Mississippi River Mile 120.5, the New Bourbon Regional Port Authority is a compact but strategically significant public port facility in Ste. Genevieve County. Situated just three miles south of Ste. Genevieve and 54 miles south of the St. Louis metropolitan area, the port benefits from proximity to both regional and long-haul markets. It is directly accessible from US 61, with nearby connections to I-55 and I-270/255 supporting efficient truck transport to major urban centers. Despite its modest size, the port is a highly leveraged logistics node, benefiting from its slack water harbor, multimodal connections and proximity to one of the nation's most productive cement corridors.

Strategic Location

Rail service is supported by a BNSF main line, located just one mile from the port. Combined with highway proximity, this connectivity enables shippers to efficiently link barge, rail and truck flows. From the port, commodities can move by barge north to Chicago and south to Memphis, Gulf ports and international ocean terminals. Trucking offers same-day service to St. Louis, Kansas City and Memphis, as well as next-day service to Chicago, Atlanta and Dallas, making the port a practical hub for both regional and national distribution.

Facilities and Harbor Access

The port features a slack water harbor that reduces exposure to river currents, and its general cargo dock offers 48 feet of frontage. Nearby fleeting capacity for up to 100 barges, combined with switch boat services, supports consistent river-based logistics.

Ste. Genevieve–Modoc Ferry

The Ste. Genevieve-Modoc Ferry provides a quick river crossing between Ste. Genevieve, Missouri, and Modoc, Illinois. It offers direct access for visitors to the shops, restaurants, and French Colonial historic sites of Ste. Genevieve, while from Missouri it provides a short route to Fort de Chartres, Pierre Menard Home and Fort Kaskaskia State Historic Parks in southern Illinois. Beyond tourism, the ferry supports area truckers, farmers and industries, and it serves as a crossing point

for cyclists traveling the Great River Road and Mississippi River Bicycle Trail. Operating year-round except during unfavorable river conditions, the ferry provides both cultural and commercial connectivity that complements the port's role in regional logistics.

Development Opportunities

The New Bourbon Port offers building and storage sites with access to three-phase electric service from Citizens Electric Corporation, and other utilities can be extended as needed to support future tenants. This development capacity positions the port to expand beyond its current sand specialization, attracting industries in aggregates, bulk goods or value-added manufacturing that require efficient river access.

New Madrid County Port Authority

The New Madrid County Port Authority is a multimodal facility on the Lower Mississippi River at Mile 885, positioned just 0.5 miles from I-55. Located 110 miles north of Memphis and 175 miles south of St. Louis, the port provides year-round navigability as an ice-free harbor. Its strategic setting within the 4,200-acre St. Jude Industrial Park offers a strong foundation for industrial growth, with land situated above the 100-year flood stage and a harbor that has never been closed due to high water, low water or ice.

Strategic Location

The port anchors Missouri's Lower Mississippi River presence, complementing upstream facilities by offering reliability, available industrial land and development-ready utilities. With its resilient harbor, multimodal connectivity and economic development incentives, the port is well-positioned to expand agricultural exports, attract new manufacturers and strengthen Missouri's competitiveness in global supply chains.

The port's location near I-55 allows for direct north-south trucking access to national freight corridors, while the New Madrid County Airport, only two miles away, provides additional connectivity. Rail access at the port enhances multimodal integration, allowing for competitive barge-to-rail and truck-to-rail transloading. Together, this infrastructure supports efficient regional and long-haul distribution across multiple industries.

Facilities

The port features a 1,500-foot slack water harbor with a 225-foot bottom width and a 9-foot channel depth, dredged annually by the USACE Memphis District. The general cargo dock is equipped with a crane and lighting for nighttime operations, enabling efficient transfers between barge, truck and rail. Fleeting, staging and industrial service facilities nearby further support continuous operations.

Industrial Setting and Services

The St. Jude Industrial Park hosts a variety of agricultural and manufacturing industries, giving tenants immediate access to a cluster of suppliers, customers and workforce. The port offers 237 acres currently available for leasing, with additional acreage slated for future development. Utility infrastructure is robust, including electrical service, water, sewer, natural gas with line capabilities between 415 and 700 psi and fiber-optic connectivity, providing readiness for modern industrial operations ranging from heavy manufacturing to advanced logistics.

Development Incentives

The port is located within a Designated Enterprise Zone, offering local property tax abatements and state income tax credits. These incentives, combined with above-floodplain land and direct harbor access, create an attractive environment for new tenants seeking multimodal logistics solutions and reliable long-term operations.

Pemiscot County Port Authority

Located at Mississippi River Mile 849.9, near Hayti and Caruthersville, Missouri, the Pemiscot County Port Authority serves as a vital multimodal gateway in the Lower Mississippi River region. Positioned 85 miles north of Memphis and 185 miles south of St. Louis, the port's location and strong transportation links make it a strategic hub for regional, national and international freight flows.

Strategic Location

As Missouri's southernmost public port, the port provides critical access to the Lower Mississippi River system, linking Missouri Bootheel industries to Gulf export markets and international trade routes. Its slack water harbor, rail spur and expansive industrial development capacity make it a growth-ready logistics hub, with opportunities to expand its role in steel, agricultural inputs and other high-value commodities.

The port offers access to surface transportation networks, located just three miles from I-55 and I-155/US 412, with additional connections to US 60, I-57 and I-40 within a 70-mile radius. Air service is available via Caruthersville Municipal Airport (3 miles south) and Blytheville-Gosnell Airport Authority (25 miles).

Harbor and Facilities

The port features a slack water, ice-free harbor measuring 4,680 feet in length with a 300-foot turning basin at its upstream end. Maintained annually by the USACE, the harbor allows for a minimum nine-foot channel depth, with the ability to load barges to 12 feet depending on river stage. A public general cargo dock and dedicated fleeting operator support efficient barge handling, while staging areas and laydown space accommodate a range of cargo types.

A five-mile rail spur connects the port directly to the BNSF, one of the nation's largest Class I railroads. The spur includes a storage yard, four sidings and approximately 6,430 feet of

track, constructed with 115- and 133-pound rail to support heavy industrial use. Numerous greenfield industrial sites are available along the spur, making the facility well-suited for rail-served tenants.

Development Capacity

The port is located within a Designated Enterprise Zone, offering local property tax abatements and state income tax credits to attract new industry. The port owns 400-acre and 25-acre certified sites, 65-acre and 50-acre rail-served sites, and a 50-acre elevated riverfront site, all with virtually unlimited adjacent greenfield space for expansion. Utilities include three-phase electricity, natural gas, public water and sewer and broadband, providing readiness for modern manufacturing and logistics operations.

Pike Lincoln County Port Authority

Located at Upper Mississippi River Mile 274.4, just one mile north of Lock & Dam 24 near Clarksville, Missouri, the Pike Lincoln County Port Authority is a growing multimodal facility. Its strategic location above the confluence of the Illinois and Missouri Rivers positions the port to serve a wide swath of agricultural, industrial and consumer markets across northeast Missouri and western Illinois.

Strategic Role

The port is emerging as a key logistics and industrial hub for northeast Missouri, offering multimodal connectivity and substantial expansion capacity. Its proximity to Lock & Dam 24 provides reliable navigation, while its scalable rail and industrial land base distinguishes it from many other Missouri ports. As infrastructure investments come online, Pike Lincoln is positioned to attract both agricultural and industrial tenants, expanding Missouri's inland waterway capacity in the Upper Mississippi River corridor.

Harbor and Facilities

The port features a slack water harbor measuring more than 3,000 feet in length and 400 feet in width, providing protected and reliable barge operations. Its 27-acre site includes a 425-foot general cargo dock, truck and rail scales and staging areas to support efficient cargo transfer between barge, truck and rail. Planned expansions will add dry and liquid bulk storage, barge loading/unloading infrastructure and direct barge-to-rail transfers, significantly broadening the port's service offerings.

The port benefits from multiple highway connections, including Missouri Highways 54, 61, 72 and 79, with I-70 nearby for long-haul truck distribution. Its location, just 66 miles from St. Louis Lambert International Airport, adds air freight connectivity, an uncommon feature for most Missouri ports.

The port is directly served by BNSF, with 3,425 feet of usable track already onsite. The port has a Coupled-in-Motion rail scale, a key feature for efficiently handling high-volume bulk shipments. These assets position Pike Lincoln as one of the Upper Mississippi River ports with scalable rail integration for river cargo.

Industrial Development Potential

In 2021, the port acquired approximately 1,000 acres of property, including a portion of a former Holcim cement plant site located two miles northwest of Clarksville. Of this, about 100 acres lie east of Missouri Route 79, between the BNSF mainline and the Mississippi River, where redevelopment is actively underway to establish a full-service multimodal river port. The remainder of the property is reserved for future industrial expansion.

St. Joseph Regional Port Authority

Located at Missouri River Mile 448, the St. Joseph Regional Port Authority serves as a key multimodal facility in northwest Missouri. With nearby highway access to I-29, I-229 and US 36, the port is strategically positioned to serve not only the greater Kansas City metro area but also broader Midwestern and Plains markets.

Strategic Location

The port serves as a gateway for commerce and industry in northwest Missouri. Its integration with Kansas City's freight ecosystem, dual Class I rail access, and a nearby industrial park set it apart as both a barge port and a regional economic development engine. The port is less than an hour from downtown Kansas City and two hours from Omaha, Nebraska, making it a natural hub for regional distribution and just-in-time supply chains.

Air transportation further strengthens the port's logistics profile. The St. Joseph Rosecrans Memorial Airport, just over four miles away, accommodates aircraft of all sizes, with two fully Instrument Landing System-equipped runways. The Kansas City International Airport (MCI) is only 35 minutes from the port, providing convenient access to domestic and international air cargo markets.

Facilities and Infrastructure

The port includes a general cargo dock, storage yard, on-site truck scale and a UP rail spur that links directly into both UP and BNSF mainlines. This dual Class I rail service provides a rare competitive advantage for shippers, enabling efficient access to national rail networks. Together with barge and truck capabilities, the port offers full intermodal transfer capacity.

Industrial Development Opportunities

Eastowne Business Park is a nearby state-of-the-art business park offering shovel-ready sites with limited lot sizes ranging from 3 acres to 75 acres. The St. Joseph Economic Development Partnership is aggressive on incentive packages the create quality jobs and new capital investment.

Utilities and Incentives

The port and surrounding development areas are served by electricity, water, steam and sewer infrastructure, with natural gas rates roughly 20 percent below the national average. An economic development rate for gas may lower costs by up to 50 percent, creating significant operational savings for new industrial tenants.

Southeast Missouri Regional Port Authority

The Southeast Missouri Regional Port Authority (SEMO Port) is Missouri's largest public port by throughput and one of the state's most versatile multimodal transportation hubs. Located near Scott City, Missouri, approximately 48 miles upstream from the Ohio River confluence, and midway between St. Louis and Memphis, the port sits at a strategic junction of inland waterways and national freight corridors. Its direct access to river, rail, highway, pipeline and air networks makes SEMO Port unique among Missouri ports for its diversity of transportation modes and resilience against supply chain disruptions.

As Missouri's highest-volume public port, SEMO Port is not only a freight gateway but also an economic engine for southeast Missouri. Its rare multimodal configuration—combining dual Class I rail access, interstate connectivity, river frontage, pipelines and air service—makes it a benchmark facility for resilience and competitiveness. With expansion-ready industrial land, diversified tenants, and strong public-private operating partnerships, SEMO Port is positioned to continue leading Missouri's inland waterway system as both a logistics hub and a driver of long-term industrial development.

Strategic Location

SEMO Port is located at the crossroads of major truck corridors, with direct or nearby access to I-55, I-57, I-24 and I-64. Air connectivity is provided by Cape Girardeau Regional Airport (four miles away), while pipelines operated by Enterprise Products supply petroleum products and natural gas within one mile of the port. This rare convergence of river, rail, highway, pipeline and air access makes SEMO Port one of the most diverse multimodal logistics centers on the inland waterway system.

Harbor and Facilities

SEMO Port features an 1,800-foot slack water harbor designed to accommodate general cargo, bulk commodities and project shipments. The harbor's general cargo dock can service two barges simultaneously, with nearby fleeting services expanding staging capacity. Supporting facilities include truck

and rail scales, warehouses and both covered and open storage areas, enabling efficient multimodal transfers.

Competitive Rail Access

A defining asset of SEMO Port is its switching railroad, Semo Port Railroad, Inc., a common carrier that connects directly to both UP and BNSF. This dual Class I connectivity provides a rare competitive advantage for shippers, lowering rates and expanding routing options. The railroad serves the port's tenants and also supports industries beyond the port district, making it a regional rail logistics asset.

Industrial Development

The port owns 30 acres of development sites, with parcels ranging from 1 to 20 acres, and additional acreage under preparation for future tenants. Approximately 70 acres are already leased to existing industries, anchoring SEMO Port as a regional industrial base. Utilities include electric power from AmerenUE, city water and sewer and natural gas services, with transmission infrastructure from Duke Energy nearby. A 34 kV substation and 161 kV transmission line make the port capable of serving high-demand industrial users, including energy-intensive manufacturers.

City of St. Louis Port Authority

The City of St. Louis Port Authority is a central component of the Port of Metropolitan St. Louis (PMSL), one of the most efficient and strategically located inland port systems in the United States. The City's port district spans 19.4 miles of riverfront between Upper Mississippi River Miles 172.2 and 191.6, encompassing 10,000 acres of industrial and commercial development at the heart of the inland waterway system. While the PMSL covers a 70-mile reach of the river with more than 130 public and private terminals and fleeting areas, the City's port authority directly oversees the Municipal River Terminal (MRT) and manages land development initiatives along the North Riverfront.

Strategic Location

The City's port district lies at the confluence of the Mississippi, Missouri and Illinois Rivers, providing direct access to the Midwest's three major inland waterways. It sits at the intersection of three USDOT Marine Highways (M-70, M-35 and M-55) and provides access to six Class I railroads, regional short lines and multiple interstate highways (I-70, I-64, I-55, and I-44). Two international airports, St. Louis Lambert International Airport and Mid-America Airport, along with proximity to Scott Air Force Base and U.S. TRANSCOM, add further strategic advantage for commercial and defense logistics.

Facilities & Infrastructure

The 40-acre MRT is the core of the City's public port infrastructure. Located just north of downtown St. Louis, the terminal features a modernized 2,000-foot dock, covered and open storage and transloading for bulk and general cargo. In 2015, the City entered a 25-year lease with a private operator responsible for cargo handling, fleeting services and facility management. This public–private partnership supports long-term investment in the facility.

Industrial Development and Foreign Trade Zones

Beyond the MRT, the Port Authority manages the 3,000-acre North Riverfront Commerce Corridor, offering sites for warehousing, distribution and manufacturing. This area connects directly to two Foreign Trade Zones, providing tariff and customs advantages that strengthen the City's role as an international gateway. Active recruitment efforts target agribusiness, metals, recycling and advanced logistics companies seeking multimodal access and urban workforce proximity.

Efficiency and Capacity

As part of the PMSL, the port benefits from the nation's most efficient inland freight system. Based on USACE data, 534,000 tons were moved per river mile within the port district boundaries in 2018, over 2.5 times more efficient than its closest peer. Within the "Ag Coast of America," a 15-mile stretch of river capable of handling 150 barges per day, the facilities play a critical role in connecting regional grain, coal, aggregates and scrap flows to export markets.

Resiliency and Sustainability

The port is advancing flood protection, stormwater improvements and brownfield redevelopment along its riverfront to support more resilient operations. Future plans include expanding rail-served capacity at MRT and exploring sustainable logistics practices, such as electrification and alternative fuel equipment.

Economic and Community Role

The port is uniquely positioned within an urban core, where redevelopment creates jobs and reactivates underutilized land in historically disadvantaged neighborhoods. This reinforces the port's broader mission, to support freight mobility while driving inclusive economic growth for St. Louis residents.