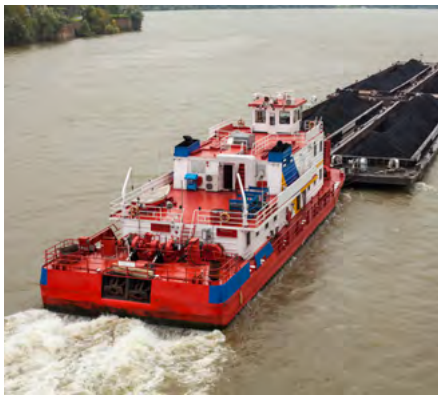
Distribution and Logistics in Missouri

MISSOURI

What Can We Move For You? ®



North America's Logistics Center

Missouri knows logistics, and can get your product to the global market quickly and efficiently. We are the nations rail, river and road crossroads, and a booming epicenter of commerce. We can get your goods anywhere in the world via our international airports, extensive river barge infrastructure, or any of the US Class 1 railroads. Missouri is home to the confluence of the two largest rivers in North America, the Missouri and Mississippi, and is home to the most northern ice free port on the Mississippi with unrestricted access to the Gulf of Mexico.

Missouri's central location allows companies to reach more than 50% of the continental U.S. within one-day's drive, and most of the rest within two. 96% of Missouri's population lives within 15 miles of a 4-lane divided highway.

CNBC ranked Missouri's infrastructure 9th best in the US in 2016.

Rail

Missouri is served by every Class 1 railroad in the nation.

Road

Missouri's central location allows you to reach more than 50% of the continental US in less than one-day's drive, and most of the rest within two. 96% of the population lives within 15 miles of an interstate or 4-lane divided highway.

River

Missouri is home to the most northern ice-free port on the Mississippi, with unrestricted access to the Gulf of Mexico. Missouri is home to the confluence of the two largest rivers in North America: the Mississippi and the Missouri. Missouri waterways move over $8 billion in cargo annually.[1] More than 680 million tons of product are moved on the Mississippi River each year on average.[2]

Pipeline

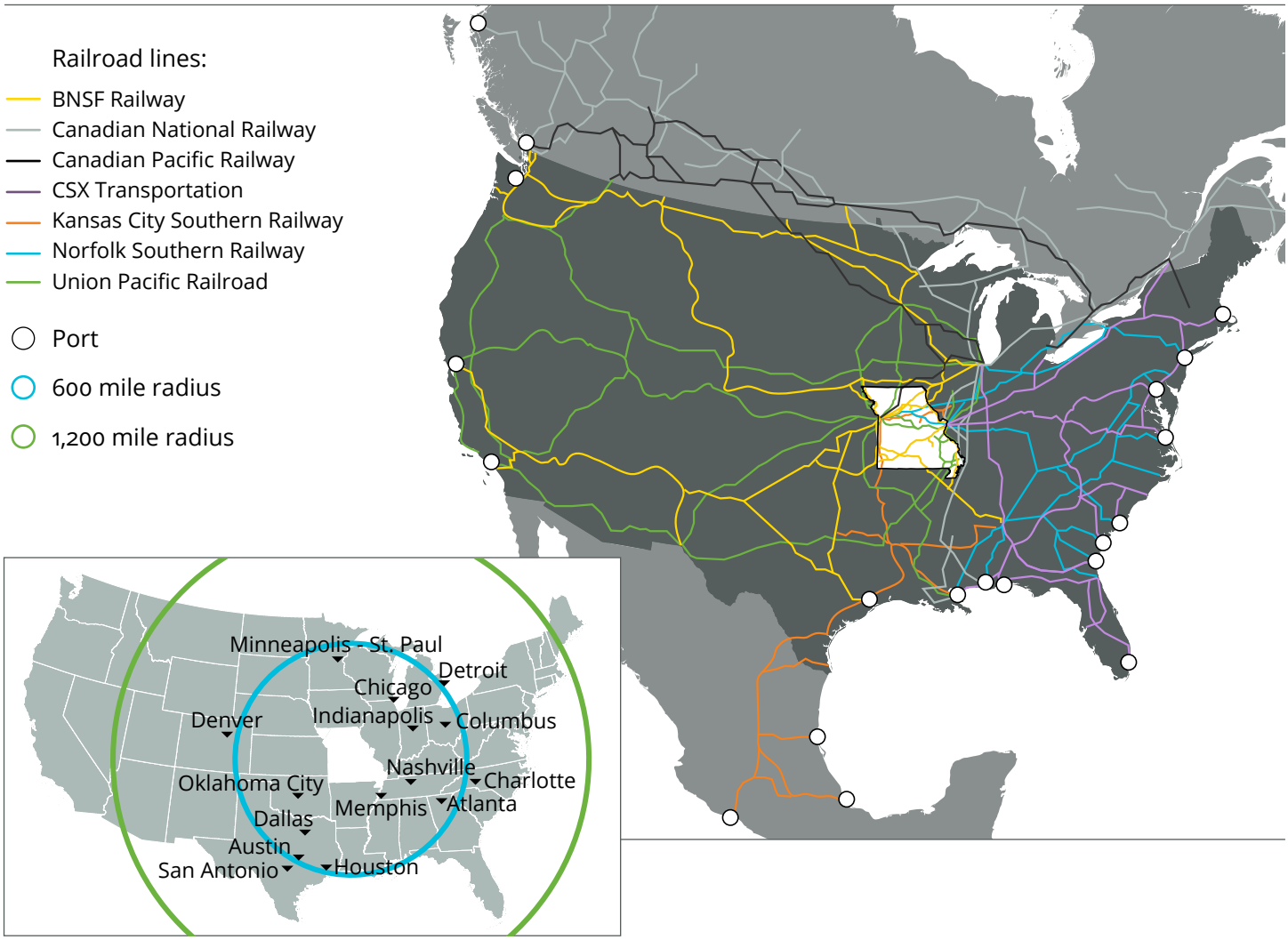
Missouri's 10,700 miles of pipelines carry nine different commodities, a major asset for area manufacturers and energy companies.[3]

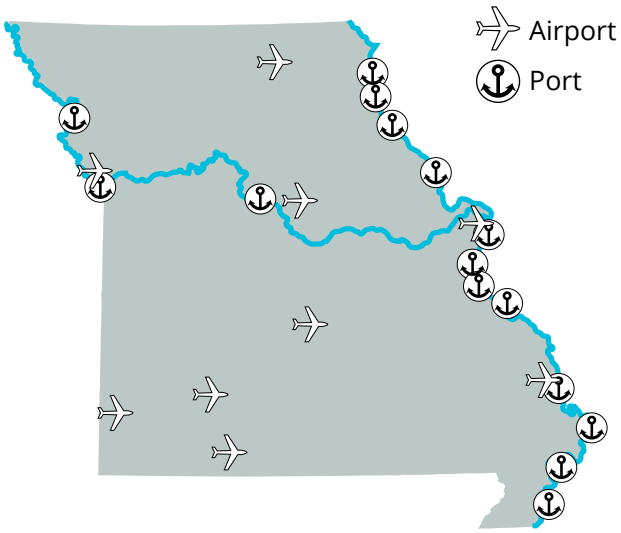
Air

From Missouri, you can fly nonstop to more than 70 destinations across North America.

[1]http://waterwayscouncil.org/wp-content/uploads/2012/11/Missouri.pdf
[2]US Army Corps of Engineers, Navigation Data Center, 2014 WCUS sheets 87 and 88
[3]MODOT Freight Plan

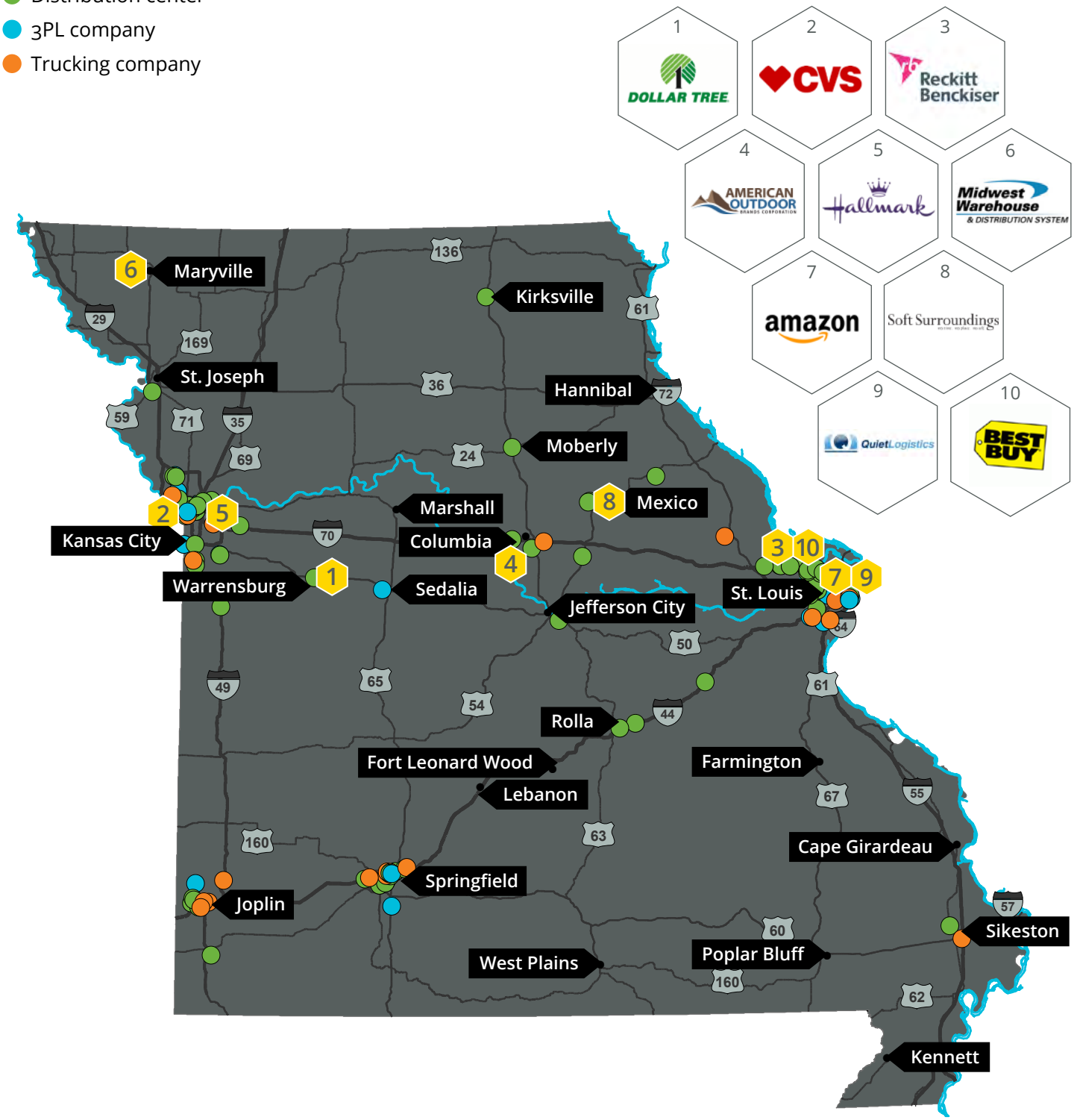
Missouri's Central and Connected Location





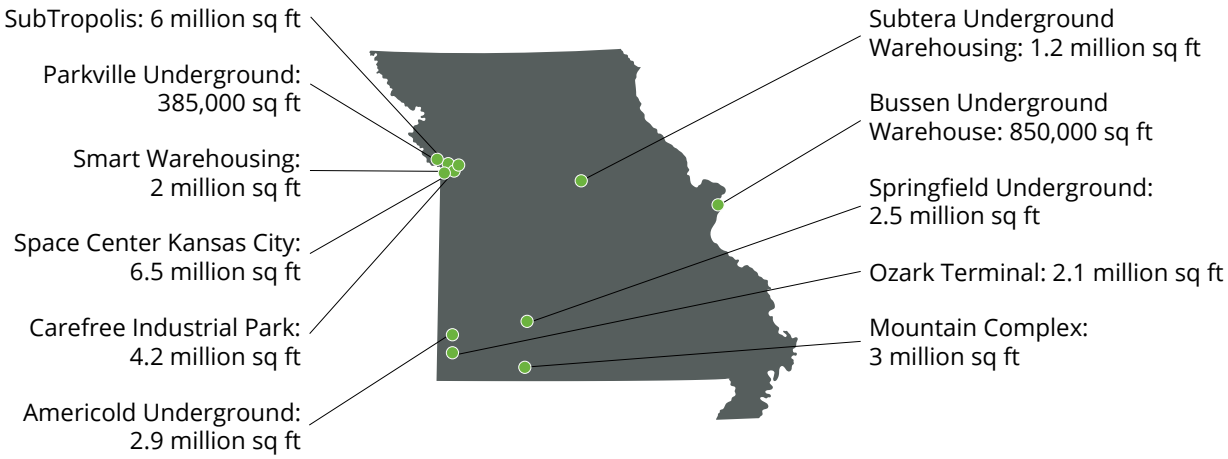
Missouri's Logistics and Distribution Companies

- Missouri's largest projects by square feet announced from July 2015–July 2017
- Distribution center
- 3PL company
- Trucking company



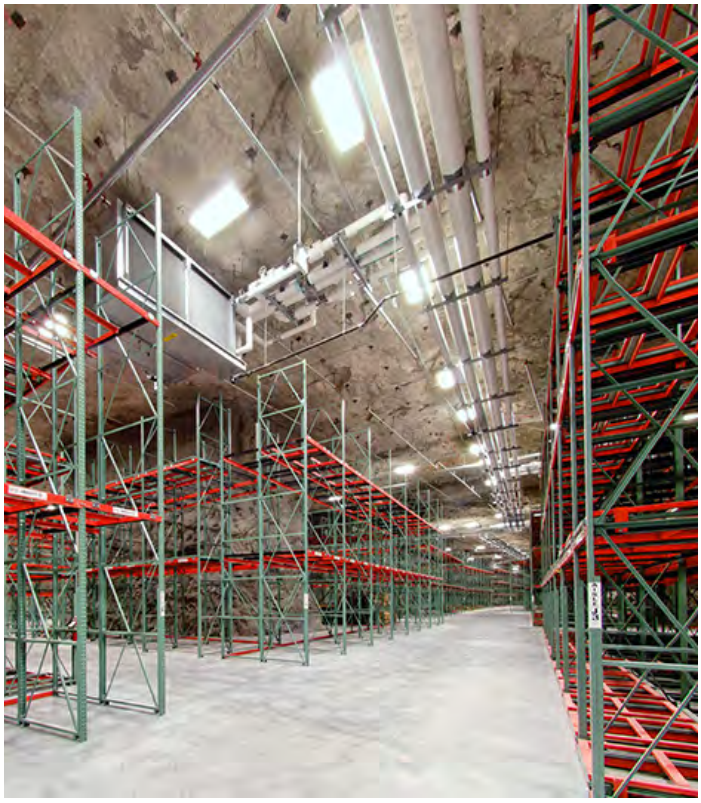
Missouri's Underground Facilities

Missouri's underground facilities



Missouri's unique underground facilities, former limestone mines, total more than 31 million square-feet and offer natural climate control (60–70 degrees year-round), enhanced security, and ceiling heights from 12–45 feet. Limestone, which is three-times stronger than concrete, also reduces tenants vulnerability to natural disasters.

Springfield Underground



Springfield Underground

Missouri's Logistics and Distribution Companies

More than 19,000 companies in the logistics sector are already taking advantage of Missouri's logistics infrastructure, competitive business costs, low cost of living and vibrant culture.

Walmart, Dollar General, General Mills, Toys "R" Us, Kraft Foods, and Rawlings all have distribution centers in Missouri.

Kansas City and St. Louis were top metro areas for new distribution and warehouse construction in 2016 according to the Site Selection Group.

Companies with major distribution centers in Missouri include:

Aldi (St. Peters)
Amazon (St. Louis) NEW
American Outdoor Brands (Columbia) NEW
American Red Cross (St. Louis)
Arrowhead (Springfield)
Associated Wholesale Grocers (Springfield)
Bass Pro Shops (HQ Springfield)
Berlin Packaging (Kansas City) RECENT EXPANSION
Best Buy (St. Louis) RECENT EXPANSION
Blount International, Inc. (Kansas City)
Blue Buffalo (Joplin)
Boulevard (Kansas City) RECENT EXPANSION
Brookstone (Mexico)
Bunzl (St. Louis) RECENT EXPANSION
Ceva Animal Health (Kansas City)
Coca-Cola (Joplin and St. Louis)
Community Wholesale Tire (Springfield)
CVS (Kansas City) NEW
Dawn Foods (Kansas City)
Don's Cold Storage (Joplin)
Dollar General (Fulton)
Dollar Tree (Warrensburg) NEW
FedEx (Kansas City, Rolla, Springfield, St. Joseph, and St. Louis) RECENT EXPANSION
Flex-N-Gate (Kansas City)
General Mills (Joplin)
Green Supply (Vandalia) EXPANSION
Hallmark (Kansas City) RECENT EXPANSION
Hartzell Hardwoods (Kirksville)
Home Depot (Mexico)
Johnson Controls, Inc. (Kansas City)
John Deere Reman (Springfield)
Kohl's (Kansas City)
Kraft-Heinz (Springfield)
La-Z-Boy (Neosho)
Luxco (St. Louis) RECENT EXPANSION
Macy's (St. Louis)
McLane (Republic)
Menards (Sullivan) NEW
MidwayUSA (HQ Columbia)
Midwest Warehousing (HQ St. Joseph) RECENT EXPANSION
Musician's Friend (Kansas City)
New Balance (St. Louis) RECENT EXPANSION
O'Reilly Auto Parts (Kansas City, HQ Springfield)
Orgill (Sikeston)
Quiet Logistics (St. Louis) NEW
QuikTrip (Kansas City)
Rawlings Sporting Goods (St. Louis)
ReallyGoodStuff (Kansas City) NEW
Reckitt Benckiser (St. Peters) RECENT EXPANSION
Schnuck Markets Inc. (HQ St. Louis) EXPANSION
Scholastic (Jefferson City)
Soft Surroundings (Mexico) RECENT EXPANSION
Spectrum Brands (Earth City)
Spirit of '76 (Boonville) RECENT EXPANSION
Sunfarm Food Services (St. Louis) RECENT EXPANSION
Seattle Fish Co. (Kansas City) RECENT EXPANSION
SuperValu (St. Louis)
SYSCO Corporation (St. Louis)
Trane (St. Louis)
Toys "R" Us (Kansas City)

Universal Group of Companies (St. Louis)
UPS (St. Louis)
Vijon (St. Louis)
Virbac (Kansas City) NEW
Vistar (Kansas City)
Walmart (Harrisonville, Moberly, St. James) RECENT EXPANSION
Whirlpool (St. Louis)
Yogabed (St. Louis) NEW

Major third party logistics (3PL) companies in Missouri

C.H. Robinson (Kansas City, St. Louis, Springfield)
Cheyenne Logistics (HQ St. Louis)
Commonwealth Inc. (Kansas City)
Data Systems International (DSI) (Kansas City)
Davidson Surface/Air (St. Louis)
DHL Supply Chain (Kansas City, Springfield, and St. Louis)
Ditzfeld Transfer (HQ Sedalia)
Freightquote (Kansas City)
Fastrans Logistics (HQ St. Louis)
Geodis (Kansas City)
Graybar (HQ St. Louis)
The Hub Group (St. Louis) RECENT EXPANSION
Materialogic (HQ St. Louis)
Mid America Logistics (HQ St. Louis) RECENT EXPANSION
Murphy Warehouse Co (Kansas City)
PLS Logistics Services (St. Louis)
SRC Logistics (HQ Springfield)
Standard Transportation (HQ Joplin)
Total Quality Logistics (St. Louis, Kansas City)
Transplace (St. Louis)
Wagner Logistics (Kansas City)
World Wide Technology (HQ St. Louis)
XPO Logistics (Kansas City, St. Louis) NEW

Major trucking companies

Artur Express (St. Louis)
Bridgetown Trucking (St. Louis) RECENT EXPANSION
Central Trucking Inc. (HQ Springfield)
Contract Freighters, Inc. (HQ Joplin)
D & D Sexton, Inc. (HQ Carthage)
Dayton Freight Lines (Columbia, Sikeston, Springfield, and St. Louis) RECENT EXPANSION
Dynamic Transit (St. Louis) RECENT EXPANSION
Hogan (HQ St. Louis)
IWX Motor Freight (HQ Springfield)
Jack Cooper Transport (HQ Kansas City)
Neovia Logistics (Kansas City)
OrTran Inc. (HQ Independence)
Prime, Inc. (HQ Springfield)
Roll On Transportation (Parkville) RECENT EXPANSION
Slay Industries (HQ St. Louis)
Trailiner (HQ Springfield)
TransLand (HQ Springfield)
Transport Distribution Company (HQ Joplin)
Tri-State Motor Transit (HQ Joplin)
UniGroup Inc (HQ St. Louis)
Witte Brothers Exchange Inc. (HQ St. Louis)

Organizations

KC SmartPort: a non-profit economic development organization comprised of investors representing every link of the supply chain. Its mission is to attract freight based economic development projects to the greater Kansas City region.

Missouri Transportation Alliance (MoTA): a non-partisan, citizen-led group of transportation stakeholders, first responders, small businesses, cities, counties, and community leaders who are committed to delivering a smart, sustainable long-term statewide transportation plan that will provide greater safety to Missouri's families and spur the economy.

STL Gateway: promotes transportation/distribution and logistics across the St. Louis region, providing information on the region's transportation infrastructure across modes (roadway, railroad, river, runway), regional maps, news reports, resources and significant real estate opportunities.

St. Louis Regional Freightway: the St. Louis region's go-to source for coordinating freight activity, providing site selection and other assistance to manufacturing, logistics, and multimodal transportation companies and their service providers.

Logistics and Distribution Talent

Missouri is a right-to-work state and with more than 200,000 workers in the logistics industry, Missouri's growing, diverse population is a strong point of difference among other Midwest states—and median wages in Missouri are lower than wages in 33 other states.[1]

Missouri's high school graduation rate ranks in the top 10 in the nation at 87.8 percent, higher than the national average of 83.2 percent.[2]

Eight Missouri post-secondary institutions offer programs in truck driver training:

Crowder College (Neosho)
East Central Community College (Union)
Metropolitan Community College (Kansas City)
Mineral Area College (Park Hills)
Ozarks Technical Community College (Springfield)
Ranken Technical College (St. Louis)
St. Louis Community College
State Fair Community College (Sedalia)

Fourteen Missouri colleges and universities offer programs or courses in logistics/supply chain management:

Fontbonne University (St. Louis)
Lindenwood University (St. Louis)
Metropolitan Community College (Kansas City)
Missouri Southern State University (Joplin)
Missouri State University (Springfield)
Missouri University of Science & Technology (Rolla)
Moberly Area Community College
Park University (Parkville)
Saint Louis University
St. Louis Community College
University of Central Missouri (Warrensburg)
University of Missouri-Kansas City
University of Missouri-St. Louis
Washington University in St. Louis

Distribution and logistics related occupations[3]

Code	Occupation title	Missouri employment	Missouri median hourly wage	U.S. median hourly wage
00-0000	All Occupations	2,757,850	$16.46	$17.81
53-0000	Transportation and Material Moving Occupations	184,360	$14.63	$14.78
53-1021	First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	3,430	$22.49	$22.71
53-1031	First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	3,240	$24.29	$27.54
53-3031	Driver/Sales Workers	10,640	$10.12	$10.98
53-3032	Heavy and Tractor-Trailer Truck Drivers	42,400	$19.75	$19.87
53-3033	Light Truck or Delivery Services Drivers	15,380	$14.74	$14.70
53-3099	Motor Vehicle Operators, All Other	1,760	$10.30	$13.05
53-7051	Industrial Truck and Tractor Operators	8,070	$15.46	$15.61
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	47,610	$12.81	$12.49
53-7063	Machine Feeders and Offbearers	1,450	$14.55	$13.66
53-7064	Packers and Packagers, Hand	10,150	$10.22	$10.64
53-7081	Refuse and Recyclable Material Collectors	1,900	$13.51	$16.95
53-7121	Tank Car, Truck, and Ship Loaders	60	$17.01	$17.20
53-7199	Material Moving Workers, All Other	130	$11.00	$13.64

[1]BLS, 2016
[2]U.S. Department of Education, 2015
[3]Bureau of Labor Statistics, May 2016

Missouri Reduces Your Risk and Your Costs

Missouri provides you with a solid business foundation, financial and otherwise. In Missouri, taxes and business costs don't eat up all of your company's profits.

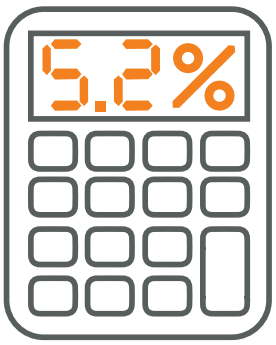
5TH BEST CORPORATE INCOME TAX INDEX IN THE U.S.

Income tax allocation

An important tax advantage for Missouri businesses is the amount of income considered taxable as only income earned in Missouri is taxed. Two allocation options are offered for calculating this income: (1) the three-factor formula, based on sales, property and payroll or (2) the single-factor formula, based only on sales. Missouri is one of only two states to allow companies to annually select the income allocation formula that results in lower corporate income tax liability.

In addition, it is important to note that Missouri has not adopted worldwide or nationwide unitary tax assessment in computing multinational corporate income tax liability.

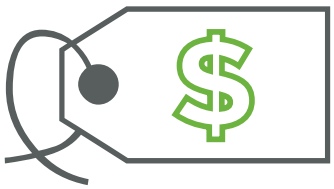
EFFECTIVE CORPORATE INCOME TAX OF **5.2%**



Tax exemptions for manufacturers

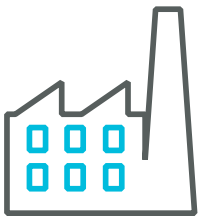
Manufacturers locating in Missouri enjoy numerous tax advantages, including:

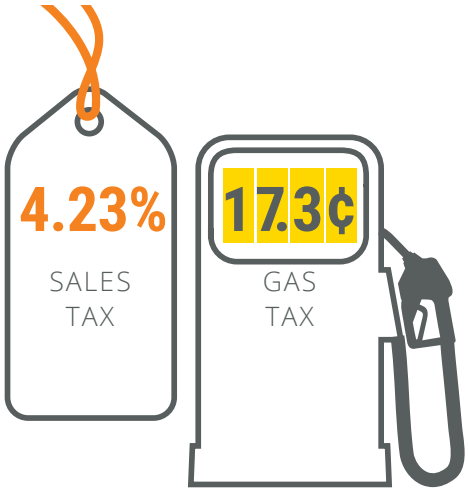
- Sales/use tax exemption on machinery and equipment used to establish a new or expand an existing facility
- Property tax exemption for inventories
- State sales tax & local use tax exemption on energy purchases



SALES/USE TAX EXEMPTIONS

PROPERTY TAX EXEMPTIONS





Our services

Missouri is also committed to your growth. We are ready to work with you, statewide, to make the journey from the initial site search to the day you open for business see reduced risk, no pain, and efficient progress through first-class support and site selection assistance. Our team is ready to work with you and provide a "concierge service" as you consider where your next expansion will be.

Benefits like our low business and labor costs, reliable and inexpensive energy, aggressive and performance-based incentives and a statewide commitment to attracting companies and investment, make Missouri a place where your company can come to grow and thrive. Whether it's in six weeks, six months, or six years, we are an expert resource to support you when the time is right to look at Missouri.

Certified Sites

Missouri's Certified Sites Program also reduces your risk by ensuring there has already been a comprehensive review of items including the availability of utilities, site access, environmental concerns, land use conformance, and potential site development costs. Having a site "certified" reduces the risk associated with development of particular sites by providing up front and consistent information. Additionally, Missouri's 50+ years of a AAA bond rating is representative of our solid financial acumen and stable financial foundations.

Missouri has more than 69 rail served sites of 50+ acres or more and more than 100 industrial facilities with more than 50,000+ square feet.[1]

MISSOURI HAS BEEN NAMED
A **TOP TEN** PRO-BUSINESS STATE FOR
SIX YEARS IN A ROW

[1]*LocationOne as of 5/18/2017*

Steve Johnson, CEO

314-596-6084, steve@missouripartnership.com

Steve joined Missouri Partnership in early 2015, having led regional economic development efforts in both St. Louis and Kansas City over the past 30+ years. Steve directs the Partnership's marketing and business recruitment teams, working in close cooperation with the Missouri Department of Economic Development and the Hawthorn Foundation.

Subash Alias, SVP

314-308-1990, subash@missouripartnership.com

Subash focuses on business recruitment activities including lead generation and project management across multiple industry sectors, with an emphasis on aerospace and financial services, to bring jobs and investment to Missouri. He works primarily out of our St. Louis office.

Deborah Price, VP of Business Recruitment & General Counsel

314-605-1362, deborah@missouripartnership.com

Focusing mostly in domestic markets as well as South America and Israel, Deborah is generating, cultivating and closing opportunities with companies across multiple industry sectors, including agtech and health innovation. As General Counsel, Deborah serves as the Partnership's senior attorney responsible for advising the CEO on legal issues involving organizational operations, contractual and statutory compliance and overall risk management. She is based in our St. Louis office.

Dennis Pruitt, CEcD, VP of International Business Recruitment

314-954-0522, dennis@missouripartnership.com

Based in our St. Louis office, Dennis works across multiple industry sectors, including energy and food solutions. He primarily targets companies in Europe, Asia, and Canada to bring new jobs and investment into Missouri.

MISSOURI PARTNERSHIP®