

Missouri advantages for the food processing industry



Located in the heart of the nation's agricultural production—and with a transportation network that can get product to market quickly—Missouri has the right ingredients for success in the food processing industry. While several major food-related businesses have already made Missouri their home, the state has the resources to support many more.

5 reasons to locate a food processing company in Missouri:

“The State of Missouri and the local communities in which we operate have been very supportive of Gilster-Mary Lee for over 40 years. Our sites there have access to a capable workforce, close proximity to many of our key raw materials, many of which are grown in Missouri including rice, popcorn and corn-meal, and good transportation access to serve our customers throughout the U.S. and other parts of the world. The State has also helped us identify and explore new international markets for our products. We appreciate the support that Missouri gives its existing agribusiness partners.”

TOM WELGE, VICE PRESIDENT, TECHNICAL SALES, GILSTER-MARY LEE

1. **Thriving industry:** Missouri has a robust food manufacturing sector. (page 3)

Already home to over 130 food processing companies, Missouri has the resources to support many more.

2. **Central location:** Missouri’s proximity to markets and agricultural output ensures quick access to customers and suppliers. (page 13)

Located in the heart of America’s agricultural region, Missouri has the 2nd highest number of farms in the country (*USDA*).

3. **Solid infrastructure:** Missouri’s top-ranked transportation network is a dependable delivery system for perishable goods. (page 18)

With its centralized Midwest location, Missouri lies at the heart of a vast transportation network with direct connections to domestic and foreign markets.

4. **Quality workforce:** Missouri has the talent to sustain food processing companies. (page 20)

Food manufacturing makes up over 15 percent of all manufacturing employment in Missouri (*BLS, 2013*).

5. **Favorable environment:** Missouri’s business environment is suited for companies looking to lead the industry. (page 24)

With its vast water resources, along with some of the lowest taxes, energy rates and gas prices in the country, Missouri is positioned to shape the future of the food processing industry.

REASON #1: Missouri has a robust food manufacturing sector with over 130 companies and the resources to support many more.

- Food processing companies that have recently made investments in Missouri include: AB Mauri, Brew Hub, Kraft Foods, Market Fresh Produce, Piney River Brewing, Uncle Ray's and Unilever.
- Major food and beverage companies headquartered in Missouri include: Anheuser-Busch, Boulevard Brewing, Bunge, Farmland Foods, Hostess Brands, National Beef Packing Company, Post Holdings, Russell Stover and Triumph Foods.
- Major food brands with facilities in Missouri include Coca-Cola, ConAgra, Kraft Foods, Gilster-Mary Lee Corp, Hillshire Brands, Pepsi Beverages, Quaker Oats, Schreiber Foods and Tyson.
- Major restaurant chains headquartered in Missouri include: Applebee's, Hardee's Restaurants and Panera Bread Company.

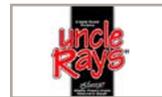
Recent food processing projects in Missouri

Click on the *orange text* for more information.

- **AB Mauri** (HQ St. Louis), a global company that supplies the food and baking industries with high-quality yeast and bakery ingredients, announced plans to move its North American headquarters into St. Louis Cortex Innovation Community, making an \$8.2 million investment.
- **Anheuser-Busch** (HQ St. Louis), a wholly owned subsidiary of Anheuser-Busch InBev, is the nation's leading brewer, controlling 47.7 percent of the U.S. beer market. The company brews the world's best-selling beers—Budweiser and Bud Light—and distributes these, and other popular brands, through a network of more than 600 independent wholesalers. The company recently announced plans to invest \$150 million to expand its metal container facility in Arnold, Mo., adding 70 jobs.
- **Bissinger's** (HQ St. Louis) is a gourmet chocolate and confection company. Originally founded in Europe in the 1600s, the company moved to St. Louis in 1927. In 2014, the company completed a \$15 million expansion at their facility in downtown St. Louis.
- **Boulevard Brewing Company** (HQ Kansas City), a subsidiary of Duvel Moortgat, recently launched a \$12 million expansion project that will boost the capacity of their Kansas City-based brewery by 40 percent, increasing production to over 300,000 barrels a year.
- **Brew Hub** (HQ St. Louis) announced plans to open a second brewing location in Chesterfield, which will also serve as their corporate headquarters. The company's \$16.8 million capital investment is expected to create 55 jobs at the new facility, which will include a tasting room, biergarten and a brewing capacity of 75,000 barrels. Brew Hub, which was founded in 2012 by a team of beer industry executives and craft brewing experts, provides partnerships for craft breweries to brew, package and distribute their brews.



- **Daily's Premium Meats** (St. Joseph), which is jointly owned by St. Joseph-based Triumph Foods and Seaboard Foods of Merriam, Kan., announced plans to build a new 100,000 square-foot facility in St. Joseph. The company will hire 212 employees during the first five years of operation, making a capital investment of \$41.5 million.
- **Kraft Foods Group** (Columbia, Kirksville, Springfield) produces a variety of products at its Missouri facilities, including Kraft Macaroni and Cheese, Oscar Meyer hot dogs, Velveeta, and Kraft and Cracker Barrel cheeses. The company recently announced plans to invest \$100 million to upgrade its Springfield facility.
- **Piney River Brewing** (Bucyrus) recently began a \$1.2 million expansion, which includes a 12,000 square foot barn located near the current "BARn" production facility and taproom.
- **Uncle Ray's, LLC** (Montgomery City), a leading producer of potato chips and snacks, recently selected Montgomery City for a new \$13 million production facility which will create 110 new full-time jobs over the next few years. The company is a wholly owned subsidiary of The H.T. Hackney Co., one of the largest wholesale distributors in the United States, serving over 20,000 retail customers with over 25,000 products including grocery, confections, snacks and beverages.
- **Unilever** (Independence and Sikeston) recently announced a dedicated dry mix facility producing a variety of sides, soups, sauces and gravies under the Knorr and Lipton brand names, adding 70 jobs. Unilever also has an ice cream plant in Sikeston.
- **Urban Chestnut** (HQ St. Louis) opened a new 70,000 square-foot brewhouse in 2014 that houses the hardware to produce 15,000 barrels a year.



Beverage manufacturing companies

- **McCormik Distilling** (HQ Weston) is the oldest continuously operating distillery in the U.S., producing vodka, tequila, blended whisky, gin, rum, liqueur, brandy and Scotch whisky.



Sugar and confectionery product manufacturing companies

- **Askinosie** (HQ Springfield) is a small batch chocolate manufacturer. The company was recently chosen by Target to be part of the retailer's 2015 "Made to Matter" collection of natural, organic and sustainable brands. The company will be making three new varieties of chocolate to be sold exclusively at select Target stores later this year.
- **Russell Stover Candies** (HQ Kansas City) is the nation's leading manufacturer of boxed chocolates. The company's three brands—Russell Stover, Whitman's and Pangburn's—are sold by nearly 40 company-owned retail stores and through 70,000 wholesale accounts in more than 20 countries.



Dairy product companies

- **Hiland Dairy** (HQ Springfield) is a joint venture between Prairie Farms and Dairy Farmers of America, offering butter, creams, half-and-half, cheese, cottage cheese, dip, eggnog, egg substitute, fruit flavored drinks, lactose-free milk, ice cream, juice, lemonade, milk, water, shredded cheese, sour cream and yogurt, as well as specialty items.



- **Ice Cream Specialties** (HQ St. Louis), a subsidiary of Prairie Farms, manufactures and distributes frozen treats, ranging from ice cream bars and sandwiches to fudge bars and pops for the popular North Star brand, as well as many leading national brands.
- **Schreiber Foods** (Carthage, Monett, Mt. Vernon), one of the largest dairy companies in the world, produces and distributes cheese, processed cheese, cream cheese and yogurt. The company recently announced an expansion of their Carthage facility, adding 160 jobs.



Grain and oilseed processing and product companies

- **Beyond Meat** (HQ Columbia) produces a soy-based chicken substitute that mimics the taste and texture of chicken. Developed by the University of Missouri, Beyond Meat's first manufacturing facility is in Columbia.
- **Bunge North America** (HQ St. Louis) is a leading exporter and domestic supplier of soybeans, corn, wheat, sorghum, canola and rice in the U.S. The company has also expanded into oilseed processing, edible oils/shortenings and dry corn milling, with a product line that includes animal feed, breakfast cereals, snack foods and breads.
- **Gilster-Mary Lee** (McBride, Jasper, Joplin, Perryville), a leading private label food manufacturer with multiple Missouri plants, produces microwave popcorn, breakfast cereal, baking mix and potato products.
- **Hostess Brands** (HQ Kansas City) is a baking company that produces snack cakes under the Hostess and Dolly Madison brand names. In 2013, the company relocated their headquarters to Kansas City from Texas.
- **Jasper Products** (HQ Joplin) manufactures soy beverages for private label, retail grocery chains, wholesale food distributors, mass merchandisers, drug store chains, food service, vending distributors, exporters and health food distributors. Stremick's Heritage Foods purchased the company in 2007.
- **Lifeline Foods** (HQ St. Joseph) produces corn-based food ingredients, including corn and snack meal, dry milled corn, masa flour and extruded corn products, as well as retail and foodservice packaging solutions. The company operates as a subsidiary of AgraMarke Quality Grains, Inc., a Missouri, non-stock cooperative. The company has partnered with ICM to utilize the by-products of corn processing to create ethanol at their on-site facility. ICM also has an R&D center in the Lifeline Foods building.
- **Martin Rice Company** (HQ Bernie) produces Long Grain and Jasmine rice in Southeast Missouri. The company dedicates thousands of acres to growing and processing rice at the same location.
- **Post Holdings** (HQ St. Louis) is best known for its cereal products, including Honey Bunches of Oats, Pebbles, Great Grains, Post Shredded Wheat, Post Raisin Bran, Grape-Nuts and Honeycomb. Post also manufactures private label products for the retail, food-service and ingredient channels, including cereal, granola, dry pasta, peanut butter and other nut butters, dried fruits and baking and snacking nuts. Post recently announced plans to acquire MOM brands, the maker of Malt-O-Meal, for \$1.15 billion.
- **Danisco Food Ingredient Solutions** (St. Louis) formerly known as Solae, the company manufactures soy protein for beverages and meatless foods, as well as soy-based polymers used in the paper industry. It was formed as a joint venture between DuPont and Bunge in 2003 until DuPont took full ownership in 2012. Today the company serves more than 3,500 customers in 80 countries.



Ingredient companies

- **ICL Performance Products** (HQ St. Louis) manufactures and markets fertilizers, industrial products, metallurgy and performance products. They are a major contributor to ICL's global leadership position in phosphate salts and phosphoric acid for a variety of food and technical applications. ICL is a wholly owned subsidiary of Israel Chemicals Limited (ICL), based in Tel Aviv, Israel.
- **International Food Products Corporation** (HQ St. Louis) distributes a wide range of food ingredients to food manufacturers and foodservice companies in the U.S.
- **Red Monkey Foods** (HQ Republic) produces organic spices, seasonings, dips and rubs, as well as smokers, grills, apparel and gift sets. The company recently announced plans to add 40 new jobs over the next two years.
- **Reliv** (HQ St. Louis) develops, manufactures, and markets proprietary nutritional supplements for basic nutrition needs, specific wellness needs, weight management and sports nutrition.



Meat processing companies

- **Farmland Foods** (HQ Kansas City), a subsidiary of Virginia-based Smithfield Foods, produces fresh pork, smoked hams, bacon, breakfast sausages, hot dogs, smoked sausages, deli hams, sandwich meats, beef, lunch meat and Italian specialty meats.
- **Frick's Meat Products** (HQ Washington) has been producing smoked meats and sausages in Washington, Mo., for four generations.
- **International Dehydrated Foods** (HQ Springfield) manufactures processed meat and poultry ingredients in fresh, frozen, concentrated and powdered forms.
- **John Volpi & Co** (HQ St. Louis) is America's oldest manufacturer of handcrafted, authentic Italian meat products.
- **National Beef Packing Company** (HQ Kansas City), a subsidiary of Leucadia National Corp., processes and packages fresh and frozen beef and beef by-products for U.S. and international markets. Products, which include ground beef, hides, tallow, and other beef and beef by-products, are marketed under the labels Black Canyon Angus Beef, Black Canyon Premium Reserve, Certified Premium Beef, Naturewell, Naturesource, Vintage Natural Beef and Imperial Valley.
- **Triumph Foods** (HQ St. Joseph) is a top exporter of premium pork products worldwide and one of the leading, producer-owned pork processors in the U.S. The state-of-the-art St. Joseph facility processes 5.5 million hogs each year, and is the newest such facility in the United States.
- **Tyson Foods** (Aurora, Concordia, Bloomfield, Dexter, Monett, Noel, Perryville, Sedalia, St. Joseph) operates several poultry processing plants and other facilities across Missouri, employing over 5,000 people.



Bakeries

- **Daddy Ray's** (HQ St. Louis) produces and sells fig and fruit bars, as well as cereal bars. The company is a subsidiary of J&J Snack Foods Corp.



Other food processing companies

- **ConAgra** (Excelsior Springs, Macon, Marshall, St. Louis, Trenton), an American packaged foods company, manufactures pasta, Banquet potpies and Libby's Vienna sausages at its Missouri plants. In 2013, the company purchased Missouri-based Ralcorp Holdings.



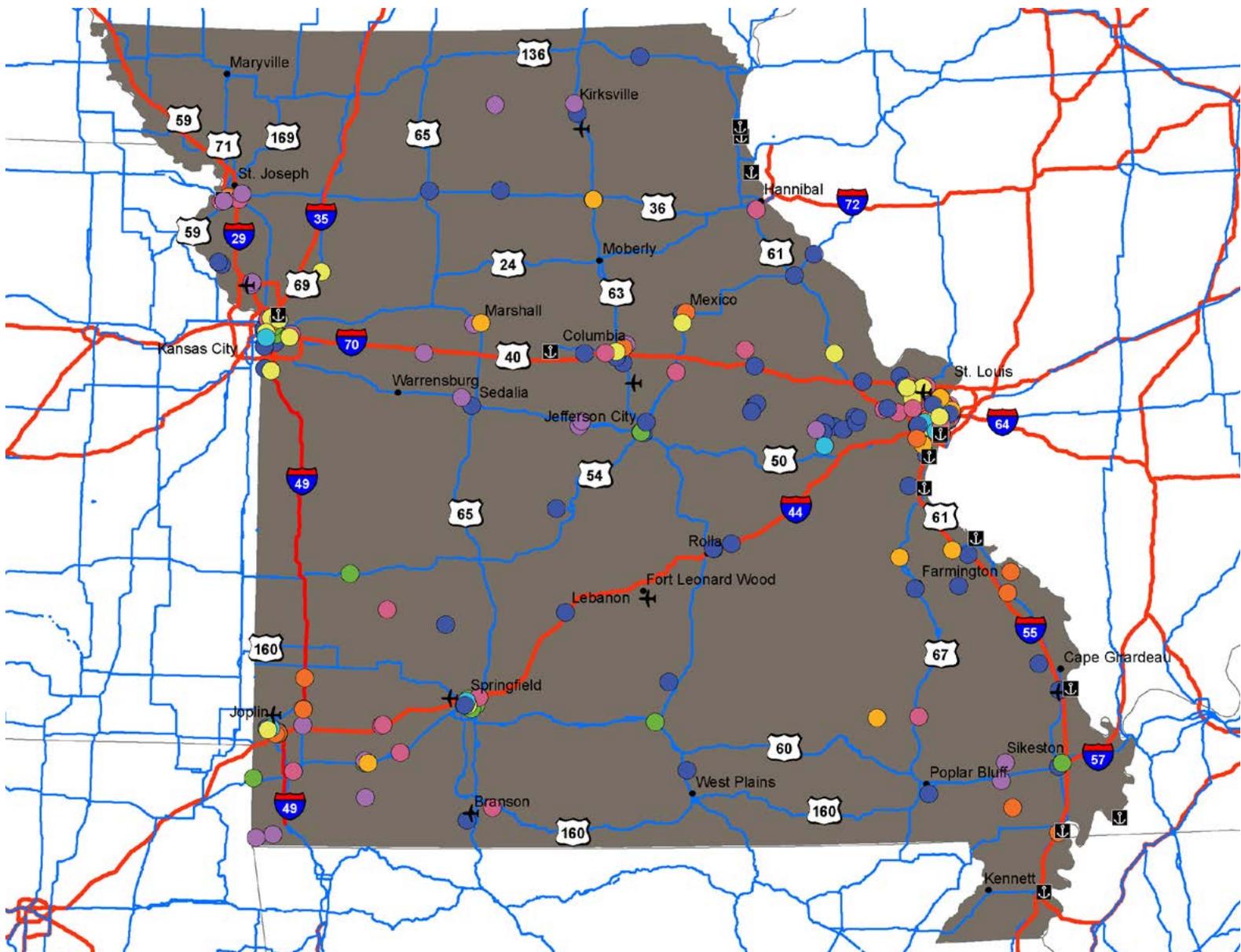
Wineries

- Missouri has **over 150 wineries** and is home to the country's first designated American Viticultural Area (AVA), in Augusta. The Augusta AVA dates back to the mid-1800's, making it one of America's oldest grape and wine districts. Missouri is also home to three other AVAs: The Ozark Mountain AVA, the Hermann AVA and the Ozark Highlands AVA. The Ozark Mountain AVA is the 6th largest in the United States.



Missouri's major food processing companies

- Sugar and confectionery product manufacturing
- Fruit and vegetable preserving and manufacturing
- Bakeries and tortilla manufacturing
- Grain and oilseed milling
- Other food manufacturing
- Animal slaughtering and processing
- Dairy product manufacturing
- Beverage manufacturing
- ✈ Port authority
- ✈ Major airport



Major food processing companies in Missouri (over 10 employees)

3112: Grain and oilseed milling

Company name	City	Employees
ADM Milling Co	Carthage	28
ADM Milling Co	St Louis	76
ADM Soybean Meal Plant	Mexico	69
Ag Processing Inc	St Joseph	190
Bunge Oilseed Processing Div	St Louis	450
General Mills Inc	Kansas City	200
General Mills Inc	Joplin	550
Gilster-Mary Lee Corp	Jasper	100
Gilster-Mary Lee Corp	Joplin	165
Gilster-Mary Lee Corp	McBride	500
Gilster-Mary Lee Corp	Perryville	500
Gilster-Mary Lee Corp	Perryville	615
Ingredion	N Kansas City	71
Italgrani U.S.A., Inc.	St Louis	60
Jasper Products Corp	Joplin	350
Life Line Foods LLC	St Joseph	145
Martin Rice	Bernie	NA
Par-Way Group, Inc.	Saint Clair	35
Post Holdings	St Louis	40
Quaker Oats Co	Columbia	219
Riceland Foods Inc	Marston	90
US Durum Milling Inc	St Louis	70

3113: Sugar and confectionery product manufacturing

Company name	City	Employees
Askinosie Chocolate	Springfield	15
Bissinger Karl Inc	St Louis	100
Candy House Chocolate Factory	Joplin	30
Chase & Poe Candy Co	St Joseph	25
Dye Candy Co	St Joseph	25
Happy Apple	Union	15
Kipp's Candies Inc	St Louis	10
Merb's Candies	St Louis	12
Russell Stover	Kansas City	200
Switzer Candy Company	St Louis	10

3114: Fruit and vegetable preserving and specialty food manufacturing

Company name	City	Employees
ConAgra Foods Inc	Macon	400
ConAgra Foods Inc	Marshall	700
ConAgra Foods Inc	Trenton	500
ConAgra Foods Inc	St Louis	84
Edmonds Chili Co Inc	St Louis	10
Estelle Foods	St Louis	30
International Dehydrated Foods	Monett	125
Louis Maull Company	St Louis	17
Louisa Food Products, Inc.	St Louis	90
Lucias Pizza Co.	St Louis	30
Monterey Mushrooms Inc	Bonne Terre	50
Ocean Spray Cranberries Inc	Ste Genevieve	112
Windsor Foods	Piedmont	200

3115: Dairy product manufacturing

Company name	City	Employees
Belfonte Ice Cream & Dairy	Kansas City	80
Central Dairy	Jefferson City	98
Dairy Farmers Of America	El Dorado Spgs	100
Dairy Farmers Of America	Springfield	150
Dairy Farmers Of America	Cabool	250
Edy's Grand Ice Cream	Earth City	74
Hiland Dairy Foods Co	Springfield	250
Ice Cream Specialties Inc	St Louis	150
Kraft Foods	Springfield	800
Madison Farms Butter Co	St Louis	20
Milnot Co	Seneca	90
Roberts Dairy	Kansas City	275
Schreiber Foods	Monett	180
Schreiber Foods	Carthage	600
Unilever Ice Cream	Sikeston	500

3116: Animal slaughtering and processing

Company name	City	Employees
Burgers' Smokehouse	California	230
Butterball LLC	Carthage	800
Cargill Foods	Monett	100
Cargill Meat Solutions	Marshall	400
Cargill Meat Solutions	California	430
Daily's Premium Meats	St. Joseph	NA
Farmland Foods Inc	Kansas City	475
Farmland Foods Inc	Kansas City	360
Farmland Foods Inc	Milan	950
Frick's Quality Meats	Washington	75
George's Poultry Processing	Cassville	850
Hillshire Brands	St Joseph	700
John Volpi & Co	St Louis	140
Kraft Foods	Kirksville	140
Kraft Foods	Columbia	500
National Beef Packing Co LLC	Kansas City	85
Simmons Foods Inc	South West City	650
Triumph Foods	St Joseph	2,700
Tyson Foods Inc	Bloomfield	10
Tyson Foods Inc	Concordia	225
Tyson Foods Inc	Dexter	650
Tyson Foods Inc	Monett	750
Tyson Foods Inc	Sedalia	1,525
Tyson Foods Inc	Noel	1,600
Windsor Foods	Carthage	150

3118: Bakeries and tortilla manufacturing

Company name	City	Employees
Annie's Inc	Joplin	150
Bimbo Bakeries USA	Columbia	58
Bimbo Bakeries USA	Hazelwood	58
Bimbo Bakeries USA	Independence	58
Bimbo Bakeries USA	Kansas City	58
Bimbo Bakeries USA	Springfield	296
Caravan Ingredients	Grandview	90
Companion Wholesale Bakery	St Louis	51
ConAgra Foods (formerly Aipc)	Excelsior Spgs	250
Daddy Ray's Inc	Moscow Mills	135
Dakota Blenders, LLC	St Louis	29
Dawn Food Products Inc	Mexico	200
Fazio's Bakery	St Louis	100
Hostess Brands LLC	Kansas City	75
Keebler Co	Kansas City	40
Knodel Bakeries Inc	St Louis	15
Lubeley's Bakery and Deli Inc	St Louis	15
Missouri Baking Company	St Louis	18
Mondelez International	Earth City	20
Pizza Blends Inc	Kansas City	60
Theodoro Baking Co	Hazelwood	50

3119: Other food manufacturing

Company name	City	Employees
AB Mauri Fleischmann's	Chesterfield	55
Arcobasso Foods, Inc.	Hazelwood	30
B & M Inc/Red Monkey Foods	Mt Vernon	50
Backer's Potato Chip Co	Fulton	75
Beyond Meat	Columbia	NA
ConAgra Foods (formerly Ralcorp)	St Louis	500
Danisco Food Ingredient Solutions	St Louis	350
Dupont Danisco	St Joseph	70
Farmer Bros. Co.	Bridgeton	20
Firmenich	St Louis	100
General Mills Inc	Hannibal	150
Golden Phoenix International Food, Inc.	St Louis	20
Hammons Products Co	Stockton	100
Hudson-Leramo Coffee Corporation	St Louis	14
ICL Performance Prod LLP	St Louis	92
Kent Precision Foods Inc	St Louis	27
Kerry Ingredients & Flavours	Greenville	23
Lasco Foods, Inc.	St Louis	40
National Enzyme Co	Forsyth	80
National Vinegar Co.	St Louis	40
New World Pasta Co	St Louis	175
Newly Weds Foods Inc	Gerald	55
Reckett Benkiser	Springfield	240
Reliv Independent Inc	Chesterfield	170
Schreiber Foods	Mt Vernon	185
Sensient Colors Inc	St Louis	350
Sensory Effects Flavor Systems (acquired by Balchem)	Hazelwood	100
Thomas Coffee Company	St Louis	15
Twin River Foods Inc	Neosho	400
Tyson Foods Inc	Aurora	25
Uncle Ray's Inc	Montgomery City	NA
Unilever	Independence	230
Ventura Foods LLC	St Joseph	130
Walker Food Products Co	Kansas City	60

3121: Beverage manufacturing

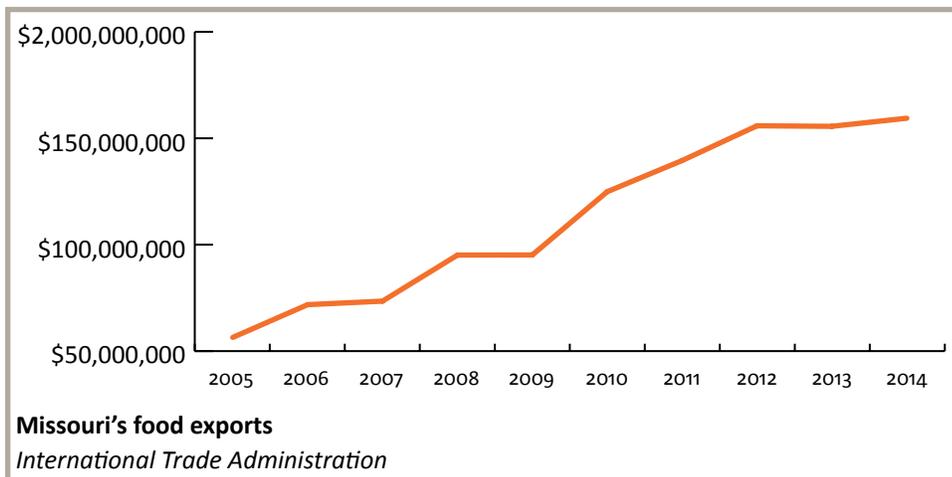
Company name	City	Employees
75th Street Brewery	Kansas City	60
Adam Puchta Winery	Hermann	10
Alpha Brewery Co	St Louis	12
Anheuser-Busch Beverage	Kirkwood	315
Anheuser-Busch Co Inc	St Louis	5,000
August Brewing Co	Washington	12
Augusta Brewing Co	Augusta	12
Blumenhof Vineyards-Winery	Dutzow	14
Boulevard Brewing Co	Kansas City	74
Brew Hub LLC	Chesterfield	3
Broadway Brewery	Columbia	25
Canterbury Hill Winery	Holts Summit	40
Chandler Hill Vineyards	Defiance	20
Chaumette Vineyard & Winery	Ste Genevieve	30
Coca-Cola Bottling Co	Mexico	14
Coca-Cola Bottling Co	Bolivar	20
Coca-Cola Bottling Co	St Joseph	20
Coca-Cola Bottling Co	Macon	21
Coca-Cola Bottling Co	Lebanon	30
Coca-Cola Bottling Co	Columbia	32
Coca-Cola Bottling Co	Rolla	40
Coca-Cola Bottling Co	Jefferson City	50
Coca-Cola Bottling Co	Jackson	55
Coca-Cola Bottling Co	Joplin	60
Coca-Cola Bottling Co	Springfield	201
Coca-Cola Bottling Co	St Charles	400
Cott Beverages Inc.	St Louis	30
Cott Beverages USA	Sikeston	120
Crown Valley Brewery	Ste Genevieve	12
Dr Pepper Snapple Group	Joplin	75
Dr Pepper Snapple Group	Overland	165
Eagle's Nest Winery	Louisiana	18
Ferguson Brewing Co	St Louis	12
Flat Branch Pub & Brewing	Columbia	100
Four Hands Brewing Co	St Louis	25
Hermannhof Vineyards	Hermann	25
Horseshoe Bend Brewing Co	Lake Ozark	25
Kirkwood Station Brewing	St Louis	50

(continued) 3121: Beverage manufacturing

Company name	City	Employees
Les Bourgeois Vineyards	Rocheport	60
Little Hills Winery	St Charles	50
Louis P Balducci Vineyards	Augusta	25
Luxco	St Louis	100
Martin City Brewing Co	Kansas City	25
Mc Cormick Distilling Co	Weston	150
Metal Container Corp	Arnold	175
Morgan Street Brewery	St Louis	50
Mother's Brewing Co	Springfield	19
Mt Pleasant Estates	Augusta	25
O'Fallon Brewery	O Fallon	14
Pepsi Beverages Co	Poplar Bluff	10
Pepsi Beverages Co	Kirksville	12
Pepsi Beverages Co	Pomona	25
Pepsi Beverages Co	St Louis	30
Pepsi Beverages Co	Memphis	30
Pepsi Beverages Co	Farmington	36
Pepsi Beverages Co	Joplin	40
Pepsi Beverages Co	Sedalia	60
Pepsi Beverages Co	St Joseph	465
Pepsi Beverages Co	Columbia	70
Pepsi Beverages Co	Kansas City	465
Pepsi Beverages Co	Springfield	100
Pepsi Bottling Group	Brookfield	20
Pepsi Bottling Group	Chillicothe	20
Pepsi Bottling Group	Bowling Green	30
Pepsi Bottling Group	Rolla	30
Piney River Brewing Co	Bucyrus	6
Prison Brews	Jefferson City	25
Raglan Road Irish Pub & Rstrnt	Kansas City	25
Royal Crown Cola-Cape Girardea	Scott City	15
Springfield Brewing Co	Springfield	80
Square One Brewery	St Louis	40
St James Winery	St James	25
St Louis Brewery Inc	St Louis	25
St Louis Brewery Inc	St Louis	75
Stone Hill Wine Co	New Florence	12
Stone Hill Winery	Branson	30
Stone Hill Winery	Hermann	100
Sugar Creek Winery	Defiance	25
Trailhead Brewing Co	St Charles	75
Urban Chestnut Brewing Co	St Louis	12
Villa Antonio Winery	Hillsboro	10
Weston Brewing Co	Weston	25
Yellow Farmhouse Vinyard & Winery	Defiance	10

REASON #2: Missouri's proximity to markets and agricultural output ensures quick access to customers and suppliers.

- Missouri is located in the heart of America's agricultural region and is a top 10 producer of hay, rice, soybeans, corn, cotton, sorghum, ice cream, cattle, turkeys and hogs (*USDA*).
- Missouri has the 2nd highest number of farms (*USDA*).
- Missouri ranks 2nd in the U.S. for both beef cow and cattle operations (*USDA*).
- Missouri food and food ingredient exports have increased by 185 percent since 2005 (*International Trade Administration*).



Missouri's top 10 agriculture exports, estimates, 2013

	Rank among states	Value (in millions)
1. Soybeans and products	7	\$1,299.70
2. Soymeal	7	\$328.60
3. Wheat	12	\$268.50
4. Pork	6	\$265.00
5. Cotton	8	\$231.10
6. Poultry products	10	\$204.30
7. Vegetable oils	7	\$201.80
8. Feeds and fodder	11	\$200.10
9. Corn	12	\$167.90
10. Beef and veal	14	\$133.60
Total exports	13	\$4,053.40

Source: *USDA*

Missouri agricultural production rankings



Missouri is ranked 2nd in production among U.S. states for:



Missouri is in the top ten states in production for:

- 3rd in hay, all (7,100,000 tons*)
- 3rd in calf crop (920,000 head***)
- 4th in rice (14,540,000 cwt*)
- 6th in soybeans (260,400,000 bushels*)
- 6th in turkeys (16,000,000 head*)
- 6th in cattle and calves (4,000,000 head***)
- 6th in milk cow operations (2,451[^])
- 7th in corn, grain (628,680,000 bushels*)
- 7th in hogs and pigs (2,750,000 head^{^^})
- 7th in ice cream, regular mix (11,471,000 gallons^{^^^})
- 8th in cotton (570,000 bales*)
- 10th in sorghum, grain (7,373,000 bushels*)
- 10th in watermelons (837,000 cwt*)
- 10th in hog operations (2,128^{^^})

Source: USDA

*2014 data

**2012 data

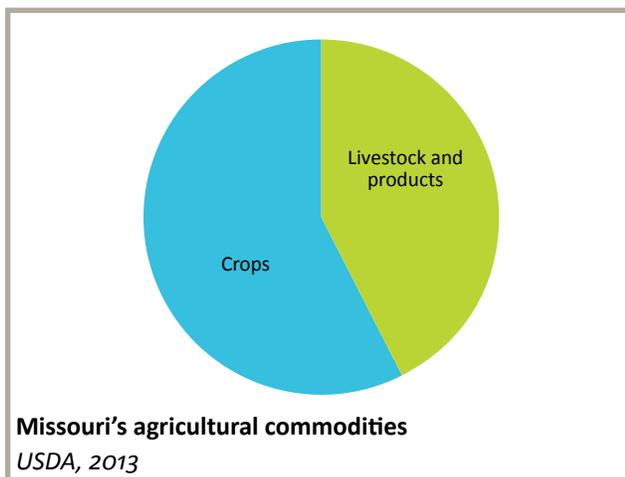
***Inventory on hand January 1, 2015

[^]Inventory on hand end of December, 2012

^{^^}Inventory on hand December 1, 2014

^{^^^}2013 data

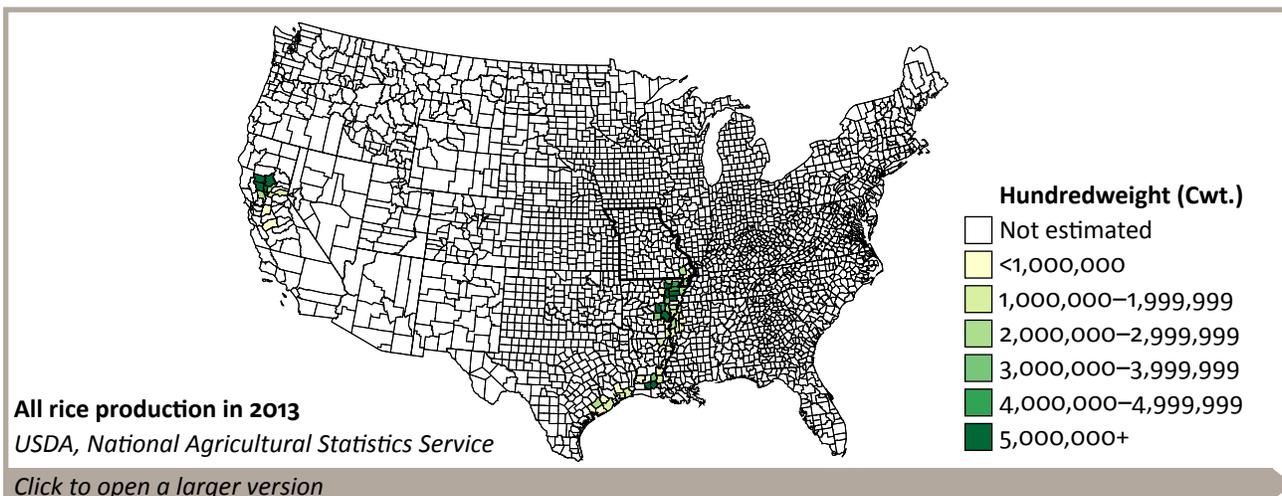
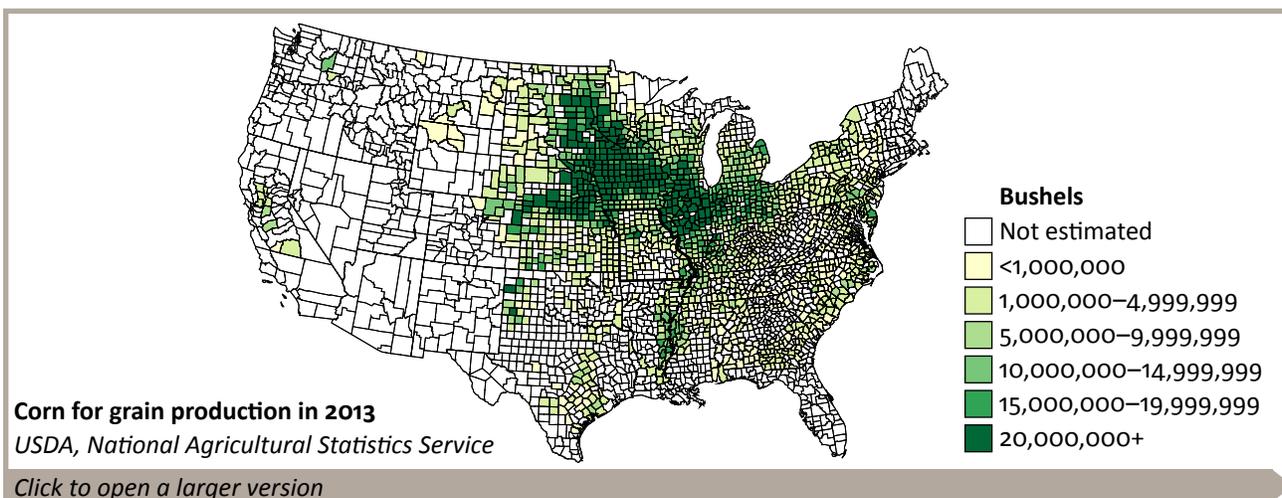
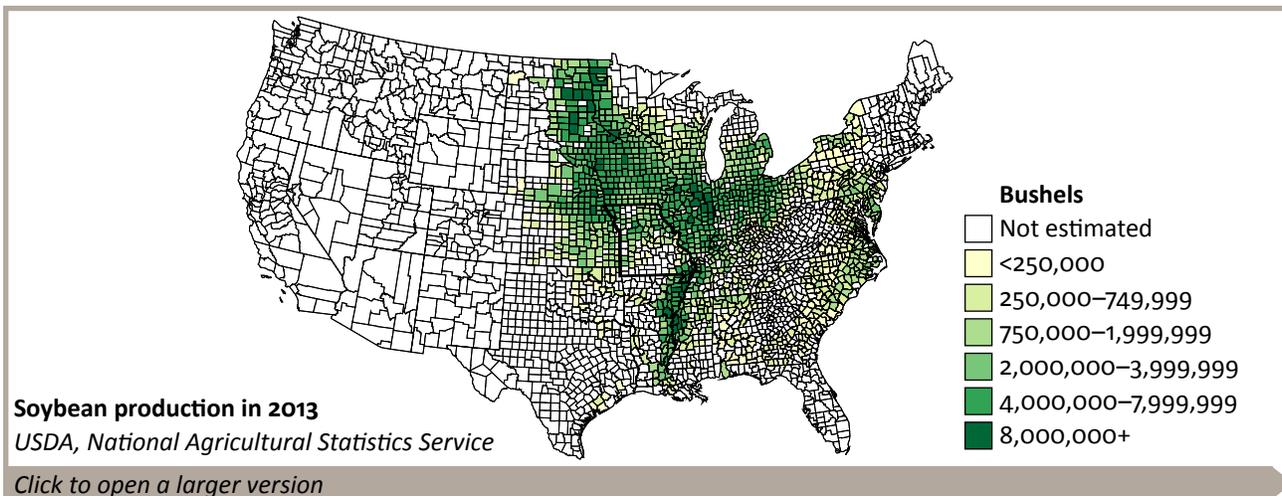
Missouri's top agricultural commodities in 2013

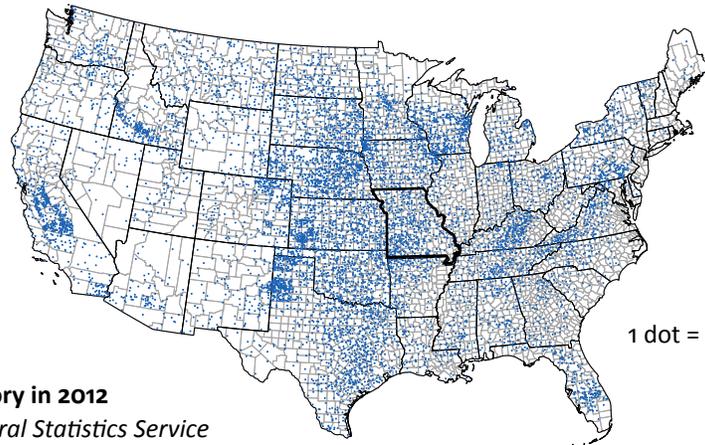


Cash receipts by commodity in thousands	
All commodities	\$9,987,423
Livestock and products	\$4,263,278
Meat animals	\$2,515,642
Cattle and calves	\$1,491,105
Hogs	\$1,024,537
Dairy products, Milk	\$272,240
Poultry and eggs	\$1,420,505
Broilers	\$806,889
Miscellaneous livestock	\$54,891
Crops	\$5,724,145
Food grains	\$535,104
Rice	\$168,907
Wheat	\$366,197
Feed crops	\$1,884,098
Corn	\$1,623,345
Cotton	\$278,727
Oil crops (Soybeans)	\$2,718,717
Vegetables and melons	\$73,293
Fruits and nuts	\$23,628
All other crops	\$210,578

USDA, 2013

Missouri is located in the center of much of U.S. agricultural production

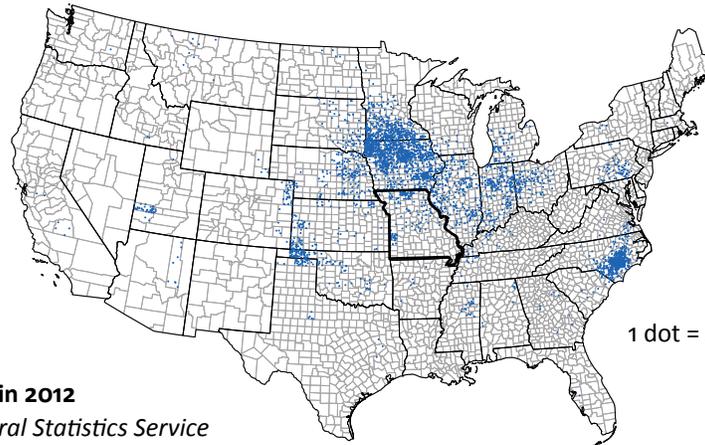




Cattle and calves inventory in 2012

USDA, National Agricultural Statistics Service

[Click to open a larger version](#)

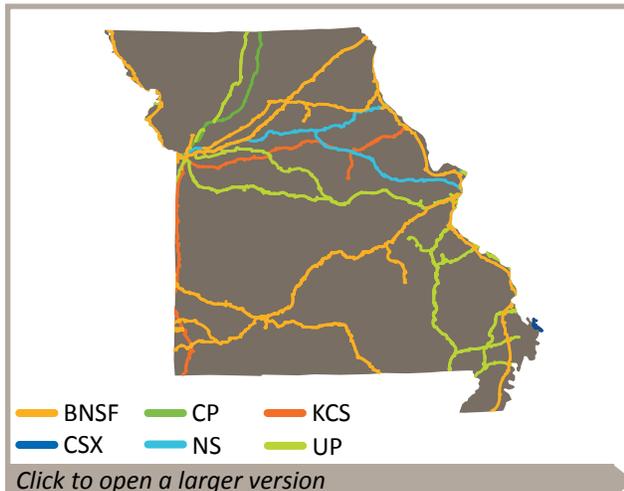


Hogs and pigs inventory in 2012

USDA, National Agricultural Statistics Service

[Click to open a larger version](#)

REASON #3: Missouri's top-ranked transportation network is a dependable delivery system for perishable goods.

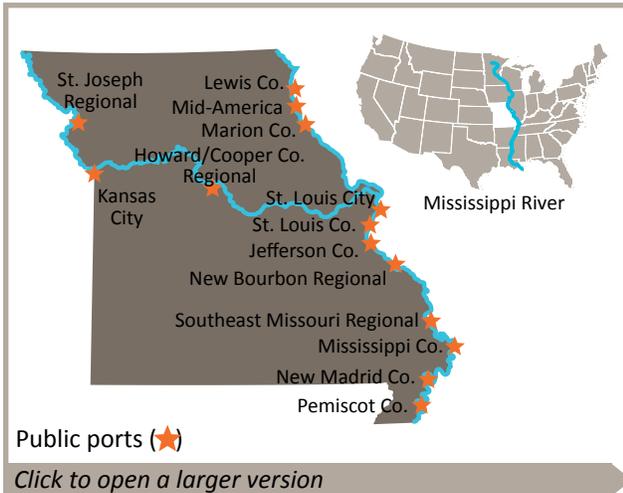


Rail

- Missouri is one of the few states that can provide rail access to both east and west coasts. The Show-Me state also provides efficient, low-cost shipping across the country via all Class I carriers: Burlington Northern Santa Fe (BNSF), Kansas City Southern (KCS), Norfolk Southern (NS), Union Pacific (UP), CSX, Canadian National Railway (CN) and Canadian Pacific (CP).
- Missouri is ranked 4th in tons and 3rd in rail carloads carried by state (*Association of American Railroads*).
- Missouri ranks in the top 10 for U.S. railroad mileage, with two of the largest U.S. rail terminals and nearly 4,000 miles of track throughout the state (*Association of American Railroads*).
- The 1,340 acre CenterPoint KCS Intermodal center includes a 1,000 acre industrial park located directly adjacent to the newly opened Kansas City Southern Intermodal Facility. With infrastructure in place, these sites are build-ready for facilities up to a million square feet. KCS offers direct rail service to points along their north/south network in the U.S. and Mexico, including the natural deepwater Port of Lazaro Cardenas, Mexico.

Roads

- Missouri has one of the least congested transportation networks in the United States and the 6th largest public road and highway system (*Federal Highway Administration, 2012*).
- Major interstates include: I-64, I-44, I-70, I-55, I-35, I-49 and I-29.
- I-70, which bisects Missouri, is over 2,000 miles long and passes through 10 states.
- I-29 and I-35 are located within the NAFTA corridor, providing easy access to Canada and Mexico.



Waterways

- Missouri is ranked 10th for inland waterway mileage with 1,000 miles of navigable waterways, which move an average of \$4.1 billion in cargo annually (*Missouri Port Authorities*).
- 29 industrial centers, with a combined population of 90 million, can be reached from St. Louis by barge. St. Louis is the northern-most point on the Mississippi river that normally remains ice-free and open throughout the year. The city is also the location of the southernmost lock and dam on the Mississippi (*Missouri Port Authorities*).

Airports

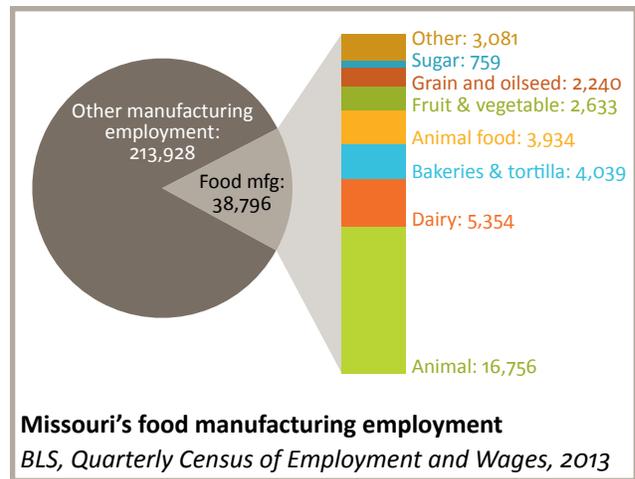
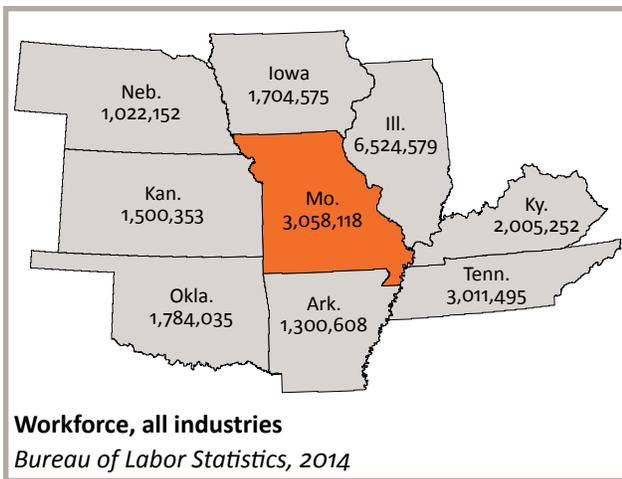
- Missouri travelers can reach most cities in the U.S. and Canada in less than three hours by air.
- The airport system in Missouri consists of approximately 130 public airports, two of which support international traffic: Lambert-St. Louis International and Kansas City International.
- Springfield, Branson, Joplin, Columbia, Cape Girardeau, Kirksville, Waynesville (Fort Leonard Wood), St. Louis and Kansas City also offer commercial service.

Foreign Trade Zones

- Missouri has three foreign trade zones located in St. Louis, Kansas City and Springfield.
- The FTZ at Lambert-St. Louis International Airport was recently expanded to include all of St. Louis City and St. Louis County under the Alternative Site Framework.
- The KCI Intermodal BusinessCentre includes 800 acres of multi-use land for development on the airfield designated FTZ and enhanced enterprise zone.

REASON #4: Missouri has the talent to sustain food processing companies.

- Missouri has over 6,600 manufacturing establishments employing over 256,200 people (*BLS, Quarterly Census of Employment and Wages, 2014*).
- Manufacturing makes up 9.4 percent of all employment in Missouri (*BLS, 2014*).
- Food manufacturing makes up over 15 percent of all manufacturing employment in Missouri (*BLS, 2013*).
- Missouri’s labor force of over three million exceeds the entire populations of 20 states (*BLS, 2013 and US Census Bureau, 2014*).



Food processing occupations

Occupation code	Occupation title	Missouri employment	Missouri median hourly wage	US median hourly wage
00-0000	All Occupations	2,673,640	\$15.76	\$17.09
19-0000	Life, Physical, and Social Science Occupations	15,880	\$26.41	\$29.55
19-1012	Food Scientists and Technologists	480	\$30.89	\$29.56
19-4011	Agricultural and Food Science Technicians	820	\$17.20	\$16.89
51-0000	Production Occupations	190,870	\$14.81	\$15.25
51-3011	Bakers	2,410	\$10.62	\$11.35
51-3021	Butchers and Meat Cutters	3,170	\$12.43	\$13.78
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	3,330	\$12.04	\$11.23
51-3023	Slaughterers and Meat Packers	1,210	\$11.74	\$12.29
51-3091	Food and Tobacco Roasting, Baking, and Drying Machine Operators and Tenders	300	\$11.87	\$13.31
51-3092	Food Batchmakers	4,860	\$15.15	\$12.87
51-3093	Food Cooking Machine Operators and Tenders	1,160	\$15.83	\$13.26
51-9032	Cutting and Slicing Machine Setters, Operators, and Tenders	1,270	\$15.94	\$15.40
51-9111	Packaging and Filling Machine Operators and Tenders	8,920	\$13.62	\$12.70

Source: Bureau of Labor Statistics, May 2014

Missouri's degree programs

Color indicates degree programs offered

Associate's: ■

Bachelor's: ■

Master's: ■

PhD: ■

Missouri granted over 154 degrees in foods, nutrition and related services in 2013

Missouri colleges offering degree programs in foods, nutrition, and related services:

College of the Ozarks: ■

Lincoln University: ■

Saint Louis Community College: ■

Saint Louis University: ■ ■

University of Missouri: ■ ■ ■

Missouri granted over 92 degrees in dietetics in 2013

Missouri colleges offering degree programs in dietetics:

College of the Ozarks: ■

Fontbonne University: ■

Missouri State University: ■

Northwest Missouri State University: ■

University of Central Missouri: ■

Logan University: ■

University of Missouri: ■

Missouri granted over 788 degrees in agriculture in 2013

Missouri colleges offering degree programs in agriculture:

College of the Ozarks: ■

Crowder College: ■

Lincoln University: ■

Linn State Technical College: ■

Metropolitan Community College-Longview: ■

Mineral Area College: ■

Missouri State University-Springfield: ■ ■

Missouri State University-West Plains: ■

North Central Missouri College: ■

Northwest Missouri State University: ■ ■

Ozarks Technical Community College: ■

Park University: ■

Saint Louis Community College: ■

Southeast Missouri State University: ■

State Fair Community College: ■

Stephens College: ■

Three Rivers Community College: ■

Truman State University: ■

University of Central Missouri: ■

University of Missouri at Columbia: ■ ■ ■

Missouri feeding the world

- Missouri researchers at private companies like Monsanto and KWS, as well as public institutions like the University of Missouri, are developing crops to meet the world's growing population. Their challenge is to develop crops that produce higher yields with less water, fertilizer and other inputs.

Missouri crop research centers include:

Click on the *orange text* for more information.

- The [Danforth Plant Science Center](#) in St. Louis
- The [Missouri Botanical Garden](#)
- The [National Center for Soybean Biotechnology](#) in Columbia
- The Missouri State University [Center for Grapevine Biotechnology](#) in Mountain Grove
- The Missouri State University [Fruit Experiment Station](#) in Springfield
- The University of Missouri [Agricultural Experiment Station](#) in Columbia
- The University of Missouri [Christopher S. Bond Life Sciences Center](#) in Columbia
- The University of Missouri [Plant Transformation Core Facility](#) in Columbia
- The [Genome Institute](#) at Washington University in St. Louis

Did you know?

- Dairy Farmers of America in Springfield and Danisco Food Ingredient Solutions in St. Louis have sensory testing labs for testing new consumer products.

Incubators and research parks

- [Bio-Research and Development Growth \(BRDG\) Park](#) (St. Louis) is adjacent to the Donald Danforth Plant Science Center and houses a variety of tenants in the bioscience industry, including companies involved in food related research.
- The [Center for Emerging Technologies](#) (St. Louis) develops startup companies in biotechnology, biomedical engineering, advanced materials, and electronics. Stereotaxis became the first of the center's companies to complete a public offering. In 2014, the Cambridge Innovation Center took over management of the Center for Emerging Technologies, creating their first location outside of Boston with plans to add 87,000 square-feet.
- The [CORTEX Innovation Community](#) (St. Louis) is a cutting edge biotech district located near Washington University in St. Louis, Saint Louis University, and Barnes-Jewish Hospital. Institutions within the district receive more than \$500 million in NIH funding annually.
- [Helix Center Biotech Incubator](#) (St. Louis) is a small business incubator that provides startup companies in the plant and life science industries with affordable office and laboratory space, access to expertise and facilities near the Donald Danforth Plant Science Center and BRDG Park.
- The [Independence Regional Ennovation Center](#) (Independence) is a mixed-use business incubator, which focuses on three core areas for the development of new businesses: biotech, kitchen/culinary and business & technology.

- The **Missouri Plant Science Center** (Mexico) is a biotechnology hub fostering collaboration between scientists and entrepreneurs for the purpose of moving research into functional, real-world business applications and consumable products. MPSC's facilities include state-of-the-art analytical and research instrumentation, shared pilot processing equipment and a small-scale milling plant.
- The **MU Life Science Business Incubator at Monsanto Place** (Columbia) endeavors to build a technology industry cluster in mid-Missouri. This is accomplished through the creation and attraction of new technology ventures, which utilizes a full-cycle, technology commercialization process. Incubator clients include/have included ventures focused on value-added agriculture products and services, plant and crop improvements and food testing services.

Missouri associations for food processing

National

- American Angus Association
- American International Charolais Association
- American Chianina Association
- American Dorper Sheep Breeders Society
- American Hereford Association
- American Karakul Sheep Registry
- American Maine-Anjou Association
- American Soybean Association
- National Corn Growers Association
- Purebred Dexter Cattle Association of North America
- United Soybean Board
- U.S. Soybean Export Council

State

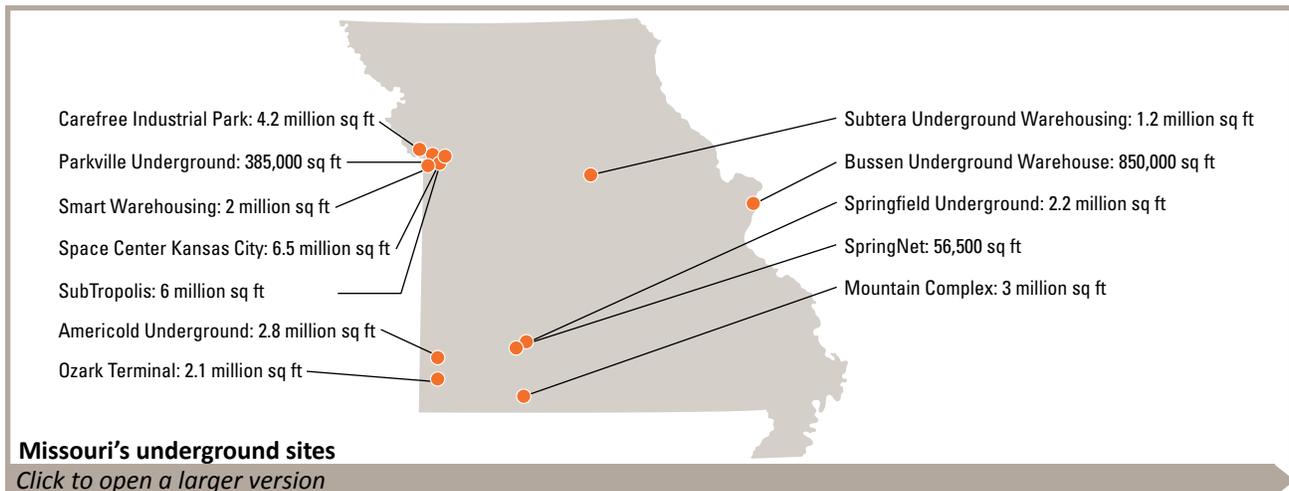
- Missouri Association of Meat Processors
- Missouri Aquaculture Association
- Missouri Beef Council
- Missouri Bison Association
- Missouri Cattlemen's Association
- Missouri Corn Growers Association
- Missouri Dairy Association
- Missouri Meat Goat Producers Association
- Missouri Organic Association
- Missouri Pork Association
- Missouri Rice Council
- Missouri Sheep Producers, Inc.
- Missouri Soybean Association
- Missouri Vegetable Growers Association
- The Poultry Federation

Other organizations

- **AgriMissouri** (Jefferson City) promotes Missouri-grown and Missouri-made items, representing food and non-food products, retailers, farmers' markets, agritourism and agricultural experience destinations through a variety of marketing efforts and promotional events. The program also offers training and educational opportunities to help members grow profitable businesses.
- **The World Agricultural Forum (WAF)** (St. Louis) is focused on sustaining the lives and livelihood of the world's population by meeting the growing needs for food, fuel and fiber. On a global scale, the WAF hosts one of the largest biennial gatherings of leaders implementing positive changes in both developed and developing nations.
- **The World Initiative for Soy in Human Health (WISHH)** (St. Louis), an American Soybean Association program, brings the benefits of U.S. soy protein to developing countries.

REASON #5: Missouri has the right environment for the food industry.

- Missouri has low-cost, reliable energy. In 2014, industrial electricity costs in Missouri were 13 percent below the national average, at only 6.19¢/kWh (*EIA*).
- Missouri has vast water resources, ranking in the top 10 for inland waterway mileage with over 1,000 miles (*U.S. Dept. of Transportation, 2012*). The state receives an average of 44 inches of rainfall a year (*NOAA, Comparative Climatic Data through 2010*), and has not experienced a drought-related Presidential Disaster Declaration since record keeping began in 1957 (*FEMA*).
- Missouri offers a variety of incentive programs to attract new jobs and investment and provide companies greater opportunities for growth. Missouri Works, the state's newest incentive program, offers a mix of automatic and discretionary benefits in the form of 100 percent retention of state withholding tax and refundable, transferable, sellable state tax credits for qualified companies.
- Missouri provides sales tax exemptions on energy, water, machinery equipment, materials and more for qualifying manufacturing companies.
- Missouri ranks in the top 10 for low taxes including property tax and corporate income tax indices (*Tax Foundation, 2015*). Manufacturers' inventories are exempt from property taxes in Missouri.
- Missouri is also ranked among the top 10 states for regulatory environment (*Forbes, 2014*) and was recently named a Top 10 Pro-Business state for the fifth year in a row by Pollina Corporate Real Estate.



Missouri's available sites for food processing

- Missouri's underground sites, located in former limestone mines, total over 30 million square-feet and offer natural climate control (60–70 degrees year-round), enhanced security, and reduced vulnerability to natural disasters. Limestone is three-times stronger than concrete. Food processing related companies utilizing Missouri's underground sites include Kraft, Metabolic Meals, Hiland Dairy and Hammons Products.
- As of March 2015, Missouri had more than 600 available industrial buildings ranging from 1,000 to 1,000,000 square feet, as well as several USDA food grade facilities (*LocationOne*).

The Missouri Partnership focuses on recruiting new business to the state, and is a non-profit organization supported by the Missouri Department of Economic Development and the Hawthorn Foundation.

To find out how the Missouri Partnership can assist at any stage of your project, please contact us by:

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St. Louis, Missouri 63105

■ 12200 NW Ambassador Drive, Suite 234
Kansas City, Missouri 64163

phone: 314.725.0949

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