



OPEN MEETING NOTICE

Goods Movement Committee

Beth Linn- Kansas Co-Chair
Mike Duffy, Missouri Co-Chair

There will be a meeting of MARC's Goods Movement Committee on **Tuesday, February 4, 2025, at 10:00 a.m.** in the Westview Room at the MARC office. Those who are unable to attend in person may attend virtually join us via MARCZoom09 Address: <https://marc-kc.zoom.us/j/6576214834?pwd=U0ptVVArAGVIU3psNIU4UXh2czRvZz09>

Meeting ID: [657-621-4834](#)

Passcode: [075821](#)

AGENDA

- I. Introduction and welcome

- II. Freight Study update – CDM Smith
 - Economic Impact
 - What's left to complete

- III. 2025 Work Plan – Cy Splichal, MARC
 - Committee discussion

- IV. Other Business
 - KDOT
 - MoDOT

**Action Item*

Meeting Attendance Audio:

Audio:

- We encourage the use of computer audio especially if you are viewing a webcam or sharing your webcam.

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- Please use cell phones only as a last resort.

Getting to MARC: Information on transportation options to the MARC offices, including directions, parking, transit, carpooling, and bicycling, can be found [online](#). If driving, visitors and guests should enter the Rivergate Center parking lot from Broadway and park on the upper level of the garage. An entrance directly into the conference area is available from this level.

Parking: Free parking is available when visiting MARC. Visitors and guests should park on the upper level of the garage. To enter this level from Broadway, turn west into the Rivergate Center parking lot. Please use any of the available spaces on the upper level at the top of the ramp.

Special Accommodations: Please notify MARC at (816) 474-4240 at least 48 hours in advance if you require special accommodations to attend this meeting (i.e., qualified interpreter, large print, reader, hearing assistance). MARC programs are non-discriminatory as stated by Title VI of the Civil Rights Act of 1964. For more information or to obtain a Title VI Complaint Form, call 816-474-4240 or visit our webpage.

Goods Movement Committee December 2024, Meeting Summary

Members/Alternates Present-Representing

Mike Duffy, Riverside
Davonna Moore-Edeh, CDM Smith
Janet McRae, Miami Cnty
Cheryl Lambrecht, Olathe
Stacey Fowler, MoDOT
Citlali Samano, MO-KAN RPC
Gunnar Hand, UG
Kipp Strauss, HNTB
Michael Espinosa, KDOT
Juan Yin, MoDOT
Stephen Mason, Lawrence- Douglas County MPO
Sam Kaiser, CDM Smith

MARC Staff Present

Ron Achelpohl
Darryl Fields
Cy Splichal

1) Introductions and Approval of Meeting Summary

Mr. Duffy called the meeting to order and welcomed attendees. Mr. Duffy presided over the meeting after the Zoom roll call - minutes were approved.

2) Regional Freight Update (Connected KC 2050) – CDM Smith

Davonna Moore-Edeh provided an update/overview about the regional freight study. The Study has completed phase one -- “Freight Picture”. Phase One focused on identifying existing freight infrastructure, clusters (locations of concentrated freight activity) and mapped these locations. The Consultant Team is working to complete Phase 2 socioeconomic and freight trends. This includes understanding land use impacts and freight corridors.

The Team is reaching out to economic development groups such as Economic Development Councils and Chambers of Commerce to get opinions about how freight related activities impact/support their communities. Mrs. Moore-Edeh provided a presentation (included) requesting Committee input regarding the developed freight profile. The Study Team has interviewed organizations for freight related needs and activities such as KC SmartPort, Douglas County Food Council, Lawrence Douglas County business and industry representatives, Kansas City Industrial Council, Canadian Pacific Kansas City Railroad (CPKC), MARC’s Sustainable Places Policy Committee (SPPC), KCI Airport, Hunt Midwest, and the Owner Operators Independent Drivers Association (OOIDA).

Mr. Hand provided information to the Study Team regarding Wyandotte County’s economic analysis to assist in developing the economic picture.

Questions related to the presentation:

- ❖ Committee identified significant increase in truck tonnage and wondered if there are strategies to spread the increase over other modes
 - Final Study recommendation will work to address these issues.

- ❖ As we talk about the number of freight related jobs, is there information on the value of combined wages? The general assumption is that freight jobs are low paying and associated with warehousing. Will the Study provide supporting information to confirm or dispel this assumption?
 - This is expected to be addressed in the Study's next phase as we research and identify workforce.
- ❖ The Study Team is encouraged to look at how data is displayed over time, especially comparing future values. Example: data shows a tonnage increase in air freight, but dollar values remain at their current value. Intuitively this does not make sense.
- ❖ Is there a method to predict growth along periods of years or bands versus 2020 and the out year? Showing intermediate years will be helpful for the MTP.
 - The final Study will show intermediate years
- ❖ Odd that coal is still showing as a major commodity in 2045 when that is one of the commodities that we are being governed away from for cleaner energy?
 - Will examine
- ❖ On this makes freight advantages to the KC area list there are many items are not in control by local government. Can the list be expanded to include local government-controlled items/examples that make freight movement efficient and advantageous?

Other Business

KDOT update:

Michael Espinosa, KDOT is currently working on extending the Heartland Flyer Amtrak rail service, from Oklahoma City, Newton, KS to connect with the Southwest Chief from LA and Chicago. KDOT will hold a public meeting December 11th at 1:00 PM.

MoDOT update:

Stacey Fowler, MoDOT nothing to report but the Multimodal Selection is working through the study process to examine extended passage rail service from KC to St. Joseph, MO.

A Plan in Action

What draws the freight industry to the region?

Resource: KC Region, State, and Peer Region Freight Economic Overview and Policies Report

Scope of Work: Task 4.1

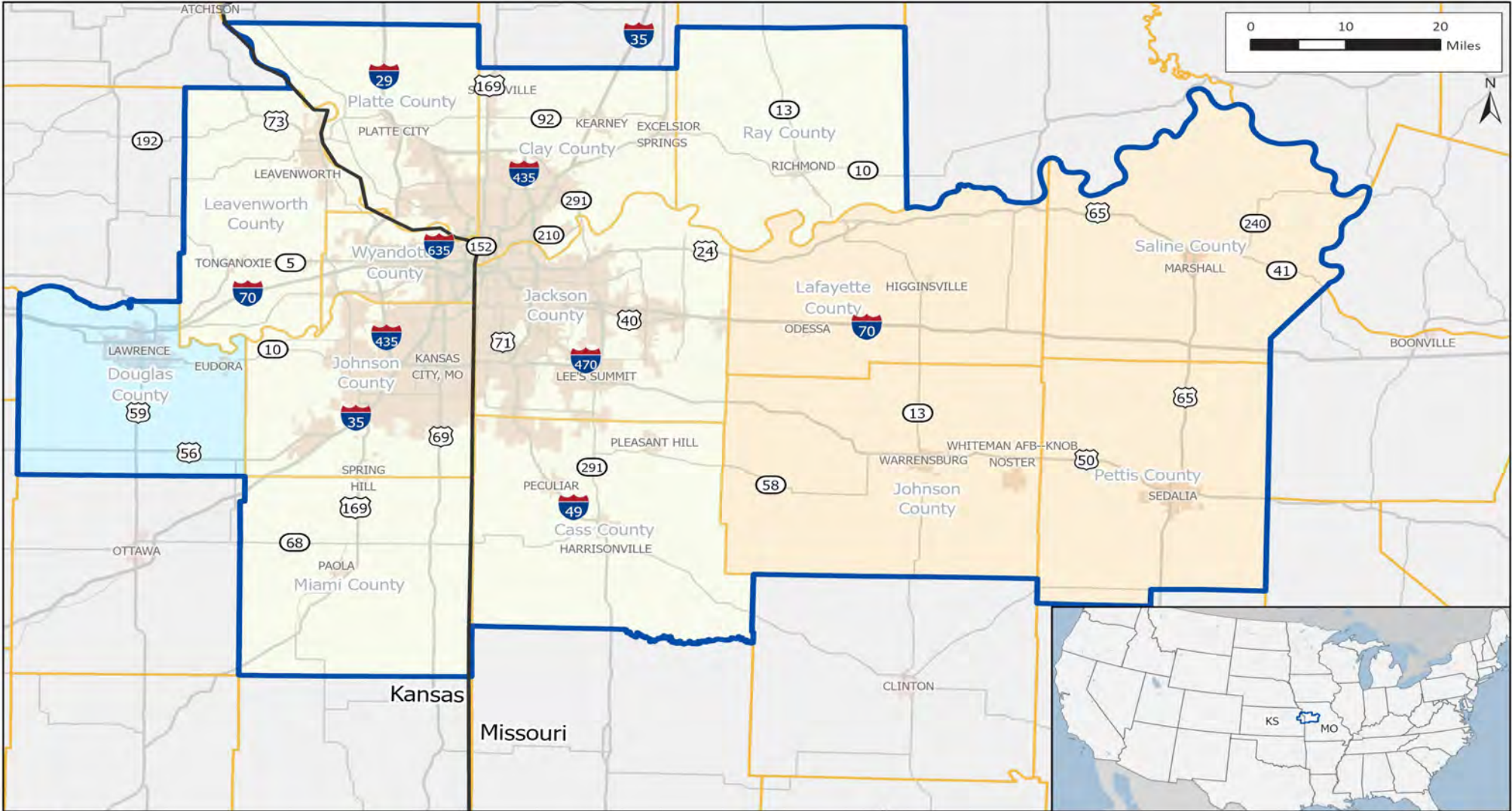


MARC
MID-AMERICA REGIONAL COUNCIL

LAWRENCE - DOUGLAS COUNTY
MPO
METROPOLITAN PLANNING ORGANIZATION



Study Region



Legend

-  County Boundaries
-  USA Census Urban Areas
-  Interstate
-  US Route
-  State Route
-  Other Roadway
-  KC Connected Freight Study Region
-  MPO Boundaries
-  LCDCMPO
-  PTRC
-  MARC

KC Connected Freight Study Region Map



Missouri Statewide Data Findings

- 2019 Missouri economy produced more than \$41 billion in gross state product (GSP), a measurement of a state's economic output. That translates into more than \$6.9 billion in total tax revenue.
- Economic activity in Missouri resulting from freight transportation in 2019 created a total of 476,700 jobs valued at more than \$25.5 billion in wages.
- Wholesale industry is the leader, with about 130,900 employees and 7,400 establishments, reflecting 35.5% of employees and more than half of establishments in freight-intensive industries across the state.



Kansas City District Findings

- Kansas City is the second busiest and largest rail hub in the nation in terms of tonnage, following Chicago.
- Kansas City is the second largest freight hub in Missouri. In terms of footprint, wholesale is the leading industry, followed by advanced manufacturing and transportation and logistics.
- The Kansas City District has roughly 23.5%, or 86,840, of the statewide freight Industry jobs



Kansas Data Findings

- Freight-reliant industries in Kansas contributed 40.8 percent (\$72 billion) of the state's \$176.5 billion GDP in 2019.
- Among freight-reliant industries, manufacturing is the largest, reaching over \$27.4 billion in GDP and contributing to 15.6 percent of the state's GDP.
- Manufacturing is the state's second largest industry by GDP, across all industries – freight- and non-freight-related. In Kansas, freight-reliant industries contributed 40.8 percent of the state's \$176.5 billion GDP in 2019.



Freight Industrial Regional Economic Impacts

- The freight industry itself supports more than 100,000 regional jobs. Transportation and warehousing in 2019 accounted for approximately 65,000 jobs and attributed to \$6 billion in regional gross domestic product (GDP). Tonnage is increasing.

2020 and 2045 Tonnage and Value of All KC Region Freight

All Modes & Commodities (1)

Origin from region	Tons		Value	
	2020	2045	2020	2045
Kansas	45,012,000	72,901,000	\$75,659,000,000	\$106,881,000,000
Missouri	50,495,000	60,975,000	\$68,647,000,000	\$96,059,000,000
TOTAL	95,507,000	133,876,000	\$144,306,000,000	\$202,940,000,000

Destined to the region	Tons		Value	
	2020	2045	2020	2045
Kansas	53,047,000	75,792,000	\$65,353,000,000	\$103,654,000,000
Missouri	55,274,000	77,991,000	\$82,875,000,000	\$132,958,000,000
TOTAL	108,321,000	153,783,000	\$148,228,000,000	\$236,612,000,000



Freight Industrial Regional Economic Impacts

- The Kansas City region is one of the nation’s leading transportation hubs, with transportation infrastructure that supports freight movement by truck, rail, air and water in both domestic and international trade lanes. Tonnage and value are projected to increase.

2019 Tonnage and Value by Mode

2019 Freight System Totals (3)

Mode	Tons	Value
Air	100,000	\$21,525,000,000
Multimodal	6,418,000	\$60,522,000,000
Pipeline	23,265,000	\$5,373,000,000
Rail	34,237,000	\$13,487,000,000
Truck	149,814,000	\$197,430,000,000
Water	101,836	\$57,950,077
TOTAL	213,940,000	298,394,950,000

2045 Tonnage and Value by Mode

2045 Freight System Totals

Mode	Tons	Value
Air	231,000	\$23,287,000,000
Multimodal	11,219,000	\$68,138,000,000
Pipeline	28,832,000	\$7,635,000,000
Rail	38,089,000	\$26,674,000,000
Truck	217,184,000	\$322,116,000,000
Water	124,865	\$71,513,445
TOTAL	295,680,000	\$447,921,510,000



Freight Industrial Regional Economic Impacts

- In both the Kansas and Missouri portions of the region, all **inbound** commodities are anticipated to increase in value between 2020 and 2045.

KC Region 2020 and 2045 Inbound Commodities by Value

Kansas		2020*		2045*	
1	Motorized vehicles	\$8.30	Electronics	\$12.00	
2	Mixed freight	\$6.90	Mixed freight	\$9.90	
3	Coal	\$6.00	Machinery	\$9.60	
4	Electronics	\$5.40	Motorized vehicles	\$9.30	
5	Machinery	\$4.70	Coal	\$8.90	
6	Pharmaceuticals	\$4.10	Pharmaceuticals	\$8.90	
7	Other foodstuffs	\$3.50	Other foodstuffs	\$5.40	
8	Textiles/leathers	\$3.10	Precision instruments	\$4.40	
9	Meat/seafood	\$3.00	Meat/seafood	\$4.10	
10	Coal-n.e.c.**	\$2.40	Textiles/leathers	\$3.90	
Missouri		2020*		2045*	
1	Motorized vehicles	\$17.00	Motorized vehicles	\$24.00	
2	Electronics	\$7.70	Electronics	\$16.00	
3	Mixed freight	\$5.80	Mixed freight	\$8.50	
4	Other foodstuffs	\$4.95	Other foodstuffs	\$7.25	
5	Machinery	\$4.53	Machinery	\$6.72	
6	Coal-n.e.c.**	\$4.10	Coal-n.e.c.**	\$5.95	
7	Plastic/Rubbers	\$3.69	Plastic/Rubbers	\$5.75	
8	Chemical prods.	\$3.49	Chemical prods.	\$4.86	
9	Base metals	\$2.28	Precision instruments	\$4.02	
10	Articles-base metal	\$2.10	Nonmetal min. prods.	\$3.78	

*\$\$\$ Billions

** "not elsewhere classified" i.e. fuel briquettes



Freight Industrial Regional Economic Impacts

- In both the Kansas and Missouri portions of the region, all **outbound** commodities are anticipated to increase in value between 2020 and 2045.

KC Region 2020 and 2045 Outbound Commodities by Value

KANSAS

2020			2045	
	Commodity	Value	Commodity	Value
1	Electronics	\$10.40	Electronics	\$25.08
2	Mixed freight	\$10.31	Mixed freight	\$15.80
3	Plastic/Rubbers	\$7.78	Machinery	\$15.23
4	Printed prods.	\$7.78	Printed prods.	\$8.64
5	Machinery	\$7.20	Plastic/Rubbers	\$8.08
6	Textiles/leathers	\$4.89	Articles-base metal	\$5.11
7	Articles-base metal	\$3.15	Misc. mfg. prods.	\$5.03
8	Misc. mfg. prods.	\$2.99	Pharmaceuticals	\$4.86
9	Pharmaceuticals	\$2.54	Textiles/leathers	\$4.23
10	Transport equip.	\$1.89	Chemical prods.	\$3.38

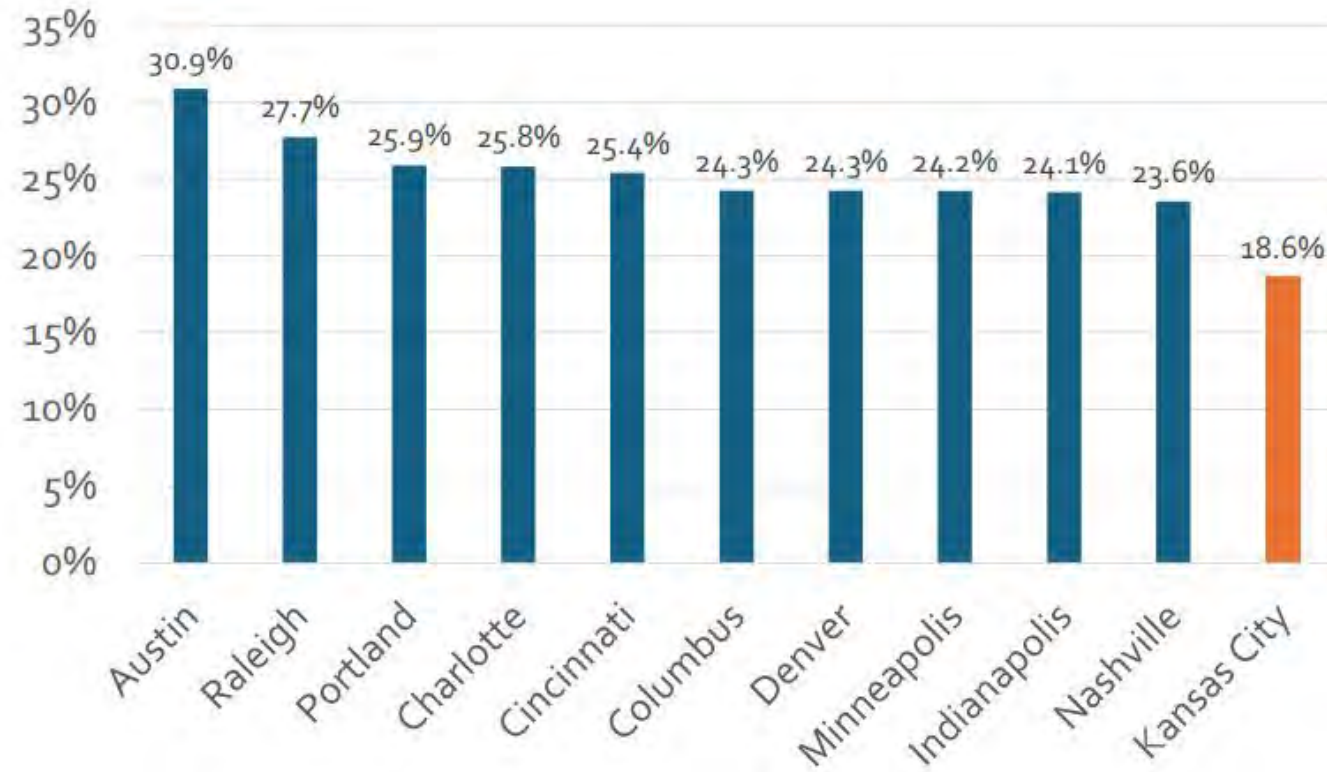
MISSOURI

2020			2045	
	Commodity	Value	Commodity	Value
1	Machinery	\$ 6.60	Machinery	\$11.26
2	Pharmaceuticals	\$ 5.29	Pharmaceuticals	\$9.66
3	Chemical prods.	\$ 5.01	Electronics	\$8.74
4	Electronics	\$ 4.60	Meat/seafood	\$5.08
5	Other foodstuffs	\$ 3.12	Chemical prods.	\$4.87
6	Milled grain prods.	\$ 3.05	Milled grain prods.	\$4.82
7	Meat/seafood	\$ 2.90	Other foodstuffs	\$3.52
8	Printed prods.	\$ 2.22	Misc. mfg. prods.	\$3.33
9	Coal-n.e.c.	\$ 2.02	Mixed freight	\$3.05
10	Plastic/Rubbers	\$ 1.92	Printed prods.	\$2.98



Peer Communities with Export Industries

Export Industry Employment as a Share of All Employment



Needs for Identifying and Prioritizing Freight

Connected KC 2050 Long-Range Transportation Plan

- Access to opportunity
- Public health and safety
- Healthy environment
- Transportation choices
- Economic vitality
- Focusing on centers and corridors
- Climate protection and resilience
- New funding sources
- Prioritize investments
- Data and technology
- Top criteria for businesses looking for suitable locations for freight-related development
 - Transportation costs
 - Retail facilities
 - Availability of labor
 - Low-cost living
- Partnerships, e.g. KC Smartport for transportation and logistics development



Needs for Identifying and Prioritizing Freight

Lawrence-Douglas County Transportation 2050 Metropolitan Transportation Plan

- Integrating multimodal elements in project planning, design, construction and maintenance
- Implementing regional Intelligent Transportation system strategies
- Participating in state and regional freight planning
- Exploring emerging technologies and new market-driven options
- Centering equity in the decision-making process
- Using planning to assess benefits/burdens of transportation projects
- Reasonable travel speeds
- Improve resiliency of the transportation system
- Consider transportation needs along with others, e.g. environmental, regional, etc.





Discussion

The recommended needs for the identification and prioritization of freight could be viewed as incentives. Which ones draw the freight industry to our region most? Least?

Why?

What's missing?

Long-term Needs for Transportation

PTRPC 2024 Transportation Plan

- Safe transportation system
- Existing transportation system maintenance
- Economic development support
- Reduced number and severity of crashes
- Reduced travel hazards
- Responding to regional emerging needs
- Access to opportunities for all residents
- Providing for the efficient movement of goods and people through the region
- Promoting use of all transportation modes





Discussion

The long-term transportation needs could also be viewed as incentives. Which ones draw the freight industry to the region most? Least? Why?

What's missing?

Economic Development and/or Competitiveness Objectives for Freight

(Peer Communities)

- Enable mode choice and system management to keep people and goods moving and reduce lost hours of productivity
- Develop, integrate, and support a freight system supporting the region's position as a major freight hub via a network of highways, railroads, and airports
- Encourage regional efforts to maximize the region's competitiveness in freight and logistics
- Formulate a relationship between the private and public sectors to leverage available public and private revenue resources





Discussion

What elements would increase freight competitiveness in the region? Why?

What key characteristics would a successful freight economy exhibit in our region?

Thank you!

bit.ly/ConnectedFreight-2050

Darryl Fields, MARC Principal Planner
816-474-4240 or dfields@marc.org

Davonna C. Moore-Edeh, CDM Smith Project Manager
816-412-3131 or mooredc@cdmsmith.com

Freight Study Update

Key socioeconomic and freight trends and forecasts that develop associated scenarios and methods for evaluation. The analysis will support identification of socioeconomic and freight industry needs and policies for future multimodal freight transportation systems and economy, but most likely will not support identification of transportation projects. The needs and policies will use causal factors to define scenarios such as locations of growth or decline in population and employment, industry and commodity mix changes, trade corridor flow density changes, freight value addition potential, and truck flow-employment relationships; and will recommend quantitative and qualitative methods to evaluate the effects of these causal factors or defined scenarios on the future multimodal freight transportation system and economy.

Studies next steps:

Connected Freight KC 2050: Future Trends and Technology (Phase 3) Task Outline

5.1 Freight Trends and Resiliency

1. Freight Resiliency Policy

- A. Recognize MARC's Resiliency Improvement Plan project
- B. Define freight system resiliency importance policy statement

2. Identify Freight Resiliency Risks

- 1. Define disruption categories
- 2. Identify Freight system vulnerabilities

3. Freight Resiliency Coordination

- A. Create Responsibility Matrix
 - 1. Identify stakeholders
 - 2. Define Roles and responsibilities to sustain freight movement through reroutes or shutdowns-
- B. Emergency Management Agency Coordination
- C. State DOT coordination
 - 1. Response
 - 2. Project Selection Process

5.2 E-commerce and Freight Challenges

1. "The Amazon Effect" -Develop overview of the impact of increased e-commerce shipments to the network in pre-pandemic, pandemic, post pandemic (aka..2018, 2022, 2050+)

- A. Impact on Freight movement (value, ton, shipments)
- B. Future Trends and Challenges

2. Recommendations

- A. Develop strategies to sustain freight viability in the region
- B. Local /regional freight policy development
 - 1. Link decisions to regional trends (i.e. Project Selection Criteria)
 - 2. Local traffic patterns, land use, development

5.3 Freight Impacts & Workforce

1. Freight Management Resources:

- A. AI developments
- B. Freight data- VIAS, FAF, etc

- C. Resilience (PROTECT)
- D. Carbon reduction
- E. Truck Parking
- F. Project Selection Criteria Process (MO & KS)
- G. OS/OW (MO & KS)
- H. Electrification/ Alt Fuels
- 2. Workforce Action Plan (Refer to full Workforce Outline)**
 - A. Supply Chain Business
 - B. Workforce Strategy
 - C. Strategy Objectives
 - D. Stakeholders
 - E. Workforce Programs
 - a. University
 - b. Community College
 - c. HS/Tech School
 - F. Staffing Targets
 - G. Implementation Plan

5.4 Truck Parking Trends & Briefing Deck

- 1. Truck Parking Briefing**
 - A. Legislation (BIL) and Funding Programs
 - B. Location/Capacity
 - C. Truck Parking Challenges
- 2. Regional Truck Parking Challenges**
 - A. Urban/Rural
 - B. Short term/Long Term
 - C. NIMBY's
- 3. Future Trends**
 - A. 3rd party truck parking developers
 - B. Technologies (i.e. FRATIS, apps)
 - C. Truck parking opportunities
 - a. Eco Devo
 - b. Unused facilities
 - c. Rest Area Modification
- 4. Implementation**
 - A. Define agency roles and responsibilities
 - B. Funding
 - C. Recommendations

Agenda Item III

Committee's 2025 Work Program

Preliminary discussions regarding 2025 work program:

1. Input into the MARC's metropolitan plan update
2. Input into KDOT and MoDOT statewide freight plan development.
3. Completion of the regional freight study
4. Update designations of Critical Rural and Urban Corridors