



International Commerce & Mobility Forum

April 2026

ICM Forum #12

Executive Summary

The ICM Forum #12 convened stakeholders across transportation, logistics, economic development, and public policy to address critical freight mobility challenges and opportunities in Minnesota and the broader Upper Midwest. The session centered on a key strategic question: how to quantify and potentially redirect international air freight currently trucked nightly to Chicago O'Hare toward direct wide-body air service from Minneapolis–Saint Paul (MSP).

Participants explored three primary themes: international air freight optimization, development of Great Lakes shipping via the Port of Duluth and the St. Lawrence Seaway, and the emerging inland port and Foreign Trade Zone initiative in International Falls. Across all discussions, a consistent barrier emerged—lack of reliable, shipper-originated data to inform decision-making and investment. Legislative updates highlighted strong momentum around infrastructure funding, supply chain security, and modernization initiatives, including significant proposed investments in ports, rail, and highways. The Freight Network Optimization Tool (FNOT) was emphasized as a critical data asset, with ongoing enhancements supporting both domestic and international freight analysis, particularly with UK trade flows.

A central takeaway was the urgent need for direct engagement with shippers, identified as the “missing link” in validating freight demand and unlocking new transportation solutions. The forum reinforced the importance of collaboration across public and private sectors to develop diversified, resilient, and sustainable logistics networks that enhance regional competitiveness and economic growth.

Master List of Key Messages

- The central strategic question remains unresolved: quantifying palletized air freight currently trucked to Chicago.
- Approximately 15 trucks per night transport international air freight from MSP to Chicago.
- Shippers—not freight forwarders or carriers—are the most reliable source of actionable freight data.
- Lack of shipper engagement is a major barrier to developing alternative logistics solutions.
- Significant legislative efforts are underway to fund freight infrastructure and improve supply chain systems.
- The Freight Network Optimization Tool (FNOT) is a critical asset for data-driven decision-making.
- Great Lakes shipping via Duluth presents a viable, sustainable alternative to coastal congestion.
- International Falls inland port concept represents a promising multimodal logistics innovation.
- Collaboration across stakeholders is essential to advancing transportation alternatives.
- Early success stories are necessary to validate and scale new logistics models.

Master List of Key Tasks

- Engage directly with shippers to collect origin/destination freight data.
- Support MAC in identifying demand for upper-deck international air freight service.



- Expand and sustain funding for the Freight Network Optimization Tool (FNOT).
- Develop targeted outreach strategies for key export/import industries.
- Advance Duluth port initiatives through shipper engagement and pilot programs.
- Identify early adopters for Great Lakes shipping routes.
- Continue evaluation and development of the International Falls inland port concept.
- Facilitate collaboration between public agencies, private sector, and international partners.
- Monitor and support legislative initiatives related to freight and infrastructure.
- Prepare for deeper discussion on International Falls at ICM Forum #13.

Key Discussions

1. Legislative and Policy Updates

Dr. John Pournoor provided a comprehensive update on Minnesota's legislative landscape, emphasizing infrastructure investment, supply chain security, and regulatory developments impacting freight and logistics.

Key Messages

- Strong legislative focus on freight infrastructure and supply chain resilience.
- Significant funding proposals for ports, rail, and highways.
- Increasing attention to supply chain crime and emerging technologies.

Key Tasks

- Track progress of key funding bills.
- Align regional initiatives with legislative priorities.
- Advocate for continued investment in freight infrastructure.

Expanded Discussion

Dr. John Pournoor of Government Analytica delivered an in-depth briefing on the current Minnesota legislative session, highlighting several key areas directly impacting freight transportation and economic development. Central to his update were major infrastructure and freight-related funding proposals aimed at strengthening the state's logistics capabilities. Among these were a \$45 million request to upgrade river and lake ports to accommodate increased freight volumes, a \$20 million proposal to enhance short-line rail connectivity for rural manufacturers, and \$400 million in trunk highway bonds targeted toward high-impact trade corridors.

In addition to infrastructure investments, Dr. Pournoor addressed growing concerns around logistics and supply chain crime, emphasizing the need for stronger policy frameworks to safeguard goods movement. He also discussed emerging technologies, including autonomous vehicles, and their potential implications for freight transportation systems.

Labor and operational regulations for the trucking industry were another focal point, reflecting ongoing challenges in workforce availability and compliance. These regulatory considerations are critical as the state seeks to balance efficiency with safety and labor standards.

Overall, the legislative environment appears supportive of long-term investments in freight mobility and economic competitiveness. However, aligning these opportunities with actionable industry data and stakeholder collaboration will be essential to maximizing their impact.



2. International Air Freight Opportunity (MSP vs. Chicago)

The group examined the feasibility of shifting international air freight from Chicago to MSP, identifying data gaps and stakeholder challenges.

Key Messages

- Current estimate: ~15 trucks per night transport freight to Chicago.
- Shippers are the key to unlocking accurate demand data.
- Freight forwarders often distort origin/destination data.

Key Tasks

- Develop strategies to engage shippers directly.
- Support MAC outreach to airlines and logistics partners.
- Identify pilot opportunities for direct MSP international freight.

Expanded Discussion

A central focus of the forum was the ongoing challenge of quantifying and potentially redirecting international air freight currently transported by truck from the Minneapolis–Saint Paul region to Chicago O’Hare. Brian Peters of the Metropolitan Airports Commission shared findings from a recent air freight study, which estimated that approximately 15 trucks per night carry palletized international freight to Chicago for onward distribution via wide-body aircraft.

Despite this baseline insight, participants acknowledged significant limitations in available data. A key issue identified was the reliance on freight forwarders, who often obscure true shipment origins and destinations by attributing freight to major hub airports. This practice creates data distortions that hinder accurate demand assessment.

Josh Gelling emphasized that shippers—the original source of goods—represent the most reliable data source. However, engaging shippers has proven challenging, as there is currently limited proactive demand signaling for alternative logistics options.

The discussion also referenced a missed opportunity involving Abbott Medical, which selected Indianapolis over Minnesota for a logistics hub despite significant freight volumes originating from the region. This example underscored the potential economic impact of failing to develop competitive freight solutions locally.

Participants concluded that direct shipper engagement is essential to validating demand and supporting the case for new international air service from MSP. Without this data, efforts to attract carriers and establish new routes will remain constrained.

3. Freight Network Optimization Tool (FNOT)

FNOT advancements and its role in supporting freight planning and economic development were reviewed.

Key Messages

- FNOT provides critical import/export and corridor data.
- Enhancements improve visibility into trade flows, including UK connections.
- Continued funding is essential for sustainability.

Key Tasks

- Secure long-term funding for FNOT.
- Expand data integration with industry stakeholders.
- Utilize FNOT insights to support strategic initiatives.

Expanded Discussion



Ben Zietlow of Quetica presented an update on the Freight Network Optimization Tool (FNOT), a key analytical platform designed to support freight planning and economic development in Minnesota. The latest enhancements to the tool include updated baseline demand data, improved visualization of truck corridors, and the introduction of transportation cost adjustment factors, all of which enhance its utility for stakeholders.

A significant portion of the discussion focused on FNOT's import/export capabilities, particularly in relation to trade with the United Kingdom. Participants reviewed detailed data sets covering major import categories such as electronics, motor vehicles and parts, and machinery, as well as export categories including agricultural products, food goods, and mixed freight. These insights are critical for identifying opportunities to optimize trade routes and logistics strategies.

The tool's alignment with broader initiatives, including Great Lakes shipping development, was also emphasized. By providing granular data on freight flows and economic value, FNOT enables more informed decision-making and supports the case for alternative transportation options.

However, participants noted that the long-term effectiveness of FNOT depends on sustained funding and continued data enhancement. Stakeholders from MnDOT, MnDEED, and GREATER MSP all expressed strong support for the tool, recognizing its value in advancing regional economic competitiveness.

Ensuring the sustainability and expansion of FNOT will be essential to maintaining a data-driven approach to freight and logistics planning.

4. Duluth Port & Great Lakes Shipping Initiative

The forum explored expanding containerized shipping via Duluth and the Great Lakes–St. Lawrence Seaway corridor.

Key Messages

- Great Lakes shipping offers a sustainable alternative to coastal routes.
- Agriculture is a key target sector.
- Early success stories are critical to scaling adoption.

Key Tasks

- Identify pilot shipments and early adopters.
- Engage shippers on cost and routing benefits.
- Leverage FNOT data to support business cases.

Expanded Discussion

Jan Bauer led a discussion on the strategic opportunity to expand containerized shipping through the Port of Duluth and the Great Lakes–St. Lawrence Seaway corridor. This initiative aims to provide an alternative to traditional coastal shipping routes, which are often congested and less efficient for certain trade flows.

Agriculture was identified as a particularly strong candidate for this shipping model, given the region's production capacity and export potential. The discussion also highlighted the growing interest among global stakeholders in diversifying entry points into the U.S. market, creating a favorable environment for Great Lakes shipping expansion.

Jonathan Lamb emphasized the sustainability advantages of waterborne freight, noting its significantly lower carbon footprint compared to trucking or air transport. This aligns with broader environmental goals and increasing demand for greener supply chain solutions.

Jan Bauer outlined the economic benefits of developing this corridor, including job creation, port growth, and enhanced supply chain resilience. However, she stressed that success will depend on



targeted engagement with shippers and collaboration with industry experts to optimize routing and total landed costs.

A key challenge is shifting entrenched logistics behaviors away from coastal gateways. Demonstrating early success through pilot projects and real-world case studies will be critical to building confidence and encouraging broader adoption.

5. International Falls Inland Port Initiative

A new inland port and Foreign Trade Zone concept was introduced, with further discussion planned.

Key Messages

- International Falls offers a strategic multimodal logistics opportunity.
- Public-private partnership model is proposed.
- Further exploration will continue in the next forum.

Key Tasks

- Prepare for deeper analysis in ICM #13.
- Evaluate feasibility and stakeholder interest.
- Assess integration with existing logistics networks.

Expanded Discussion

Felix Asemota shared an emerging concept for a multimodal inland port and Foreign Trade Zone located in International Falls, Minnesota, at the U.S.-Canada border. This initiative is envisioned as a multi-phase development structured as a public-private partnership with the City of International Falls. The proposed platform would leverage both U.S. and Canadian road and rail networks to create a new logistics gateway for goods moving in and out of the Upper Midwest. Its strategic location at a key border crossing positions it as a potential hub for international trade, offering an alternative to more congested or centralized logistics corridors.

While the concept holds significant promise, the forum did not explore it in depth due to time constraints. Participants agreed that additional discussion and analysis are needed to fully understand its feasibility, potential impact, and alignment with existing infrastructure and supply chain systems. The initiative reflects a broader theme of the forum: the importance of developing diversified and resilient transportation options to support economic growth. If successfully implemented, the International Falls project could complement other initiatives discussed, such as air freight optimization and Great Lakes shipping.

A more comprehensive review of this concept is scheduled for ICM Forum #13, where stakeholders will have the opportunity to examine its technical, economic, and operational dimensions in greater detail.

Closing Note

The session reinforced a shared commitment to advancing Minnesota's freight and logistics ecosystem through collaboration, innovation, and data-driven strategies. Continued engagement—particularly with shippers—will be critical to turning these discussions into actionable outcomes.