



# IMTS Steering Committee Meeting

## Draft Illinois Marine Transportation System Plan and Economic Impact Analysis

Online Meeting

July 23, 2020



ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN



Illinois Department of Transportation



# How Far We've Come

**2019**

**Today**

- ✓ *Facilities Inventory*
- ✓ *Economic Impact Analysis*
- ✓ *Port Profiles*
- ✓ *Peer State Review*
- ✓ *Stakeholder Outreach*

- ✓ *Industry Profiles*
- ✓ *Inventory of Carriers and Operators*
- ✓ *Programmatic Recommendations*
- ✓ *Benefits of Action*

6 Steering Committee Meetings

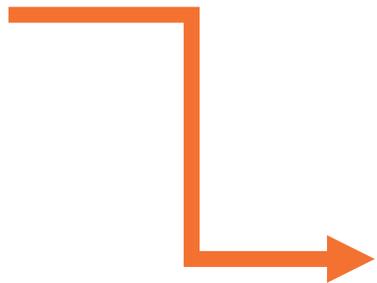
Over 70+ Stakeholder Interviews



# Agenda

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

- Overview of the IMTS Plan



THE PLAN IS DIVIDED IN THE FOLLOWING CHAPTERS:

[ 1 ]

INTRODUCTION

[ 2 ]

HISTORY AND  
SYSTEM OVERVIEW

[ 3 ]

PUBLIC PORT  
DISTRICT PROFILES

[ 4 ]

COMMODITY FLOWS  
AND ECONOMIC VALUE

[ 5 ]

NEEDS ASSESSMENT  
AND STRATEGY  
DEVELOPMENT

[ 6 ]

IMPLEMENTATION



# Chapter 1: Introduction



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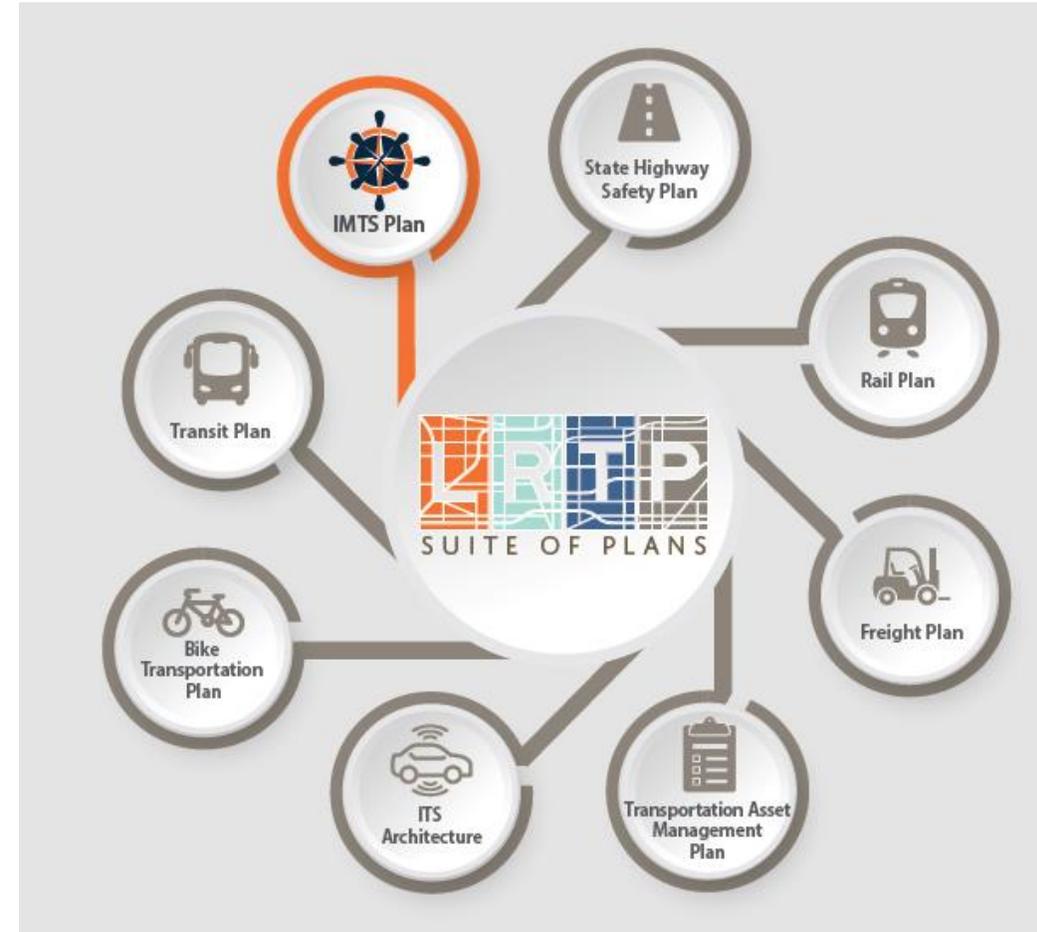
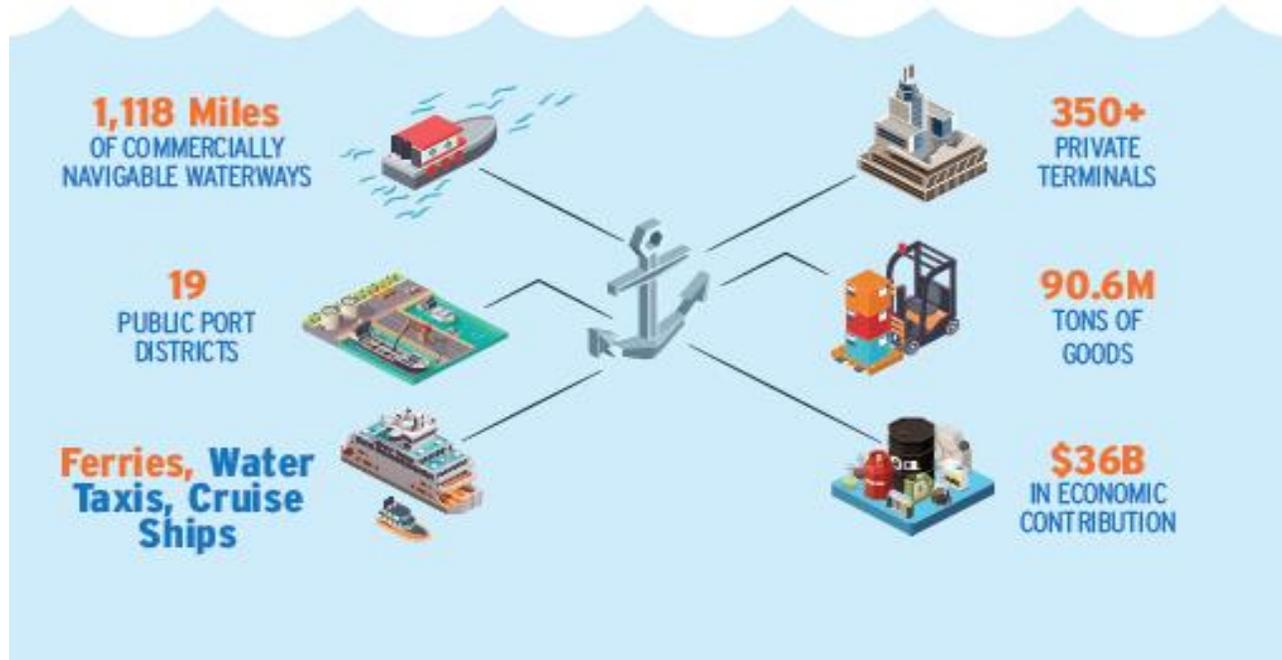


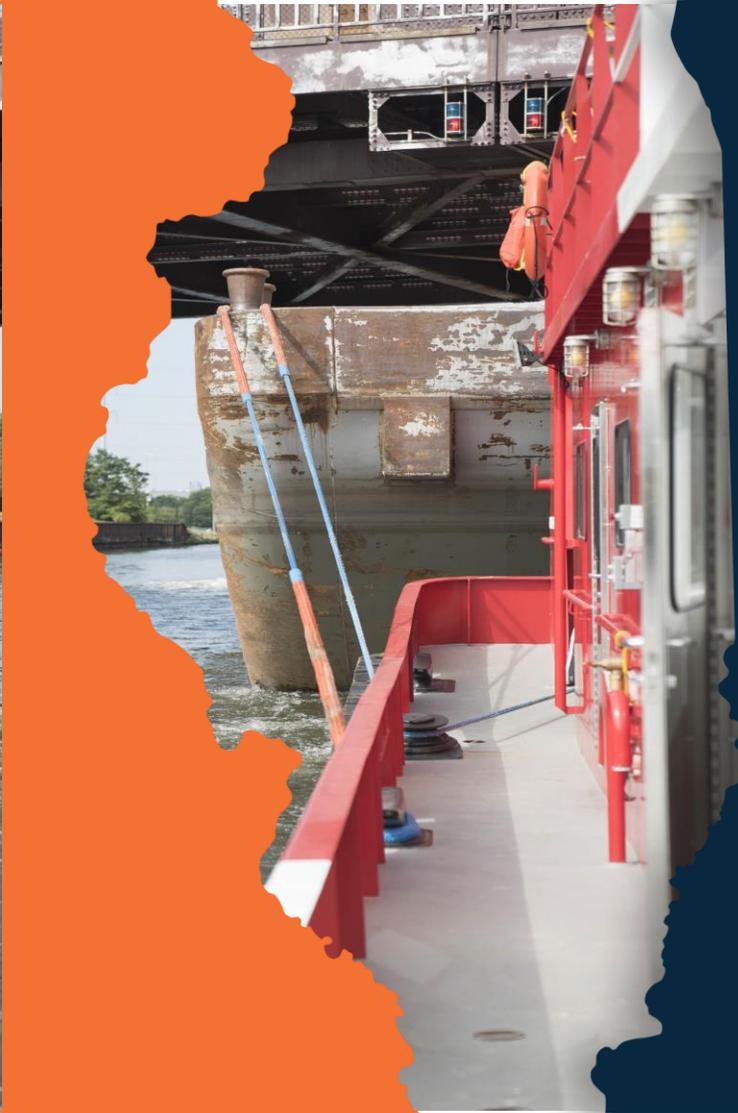
# Introduction

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

### ■ Highlights

- » IDOT's First ever IMTS Plan
- » Joins other plans as part of the Long-Range Transportation Plan Suite of Plans





# Chapter 2: History and System Overview



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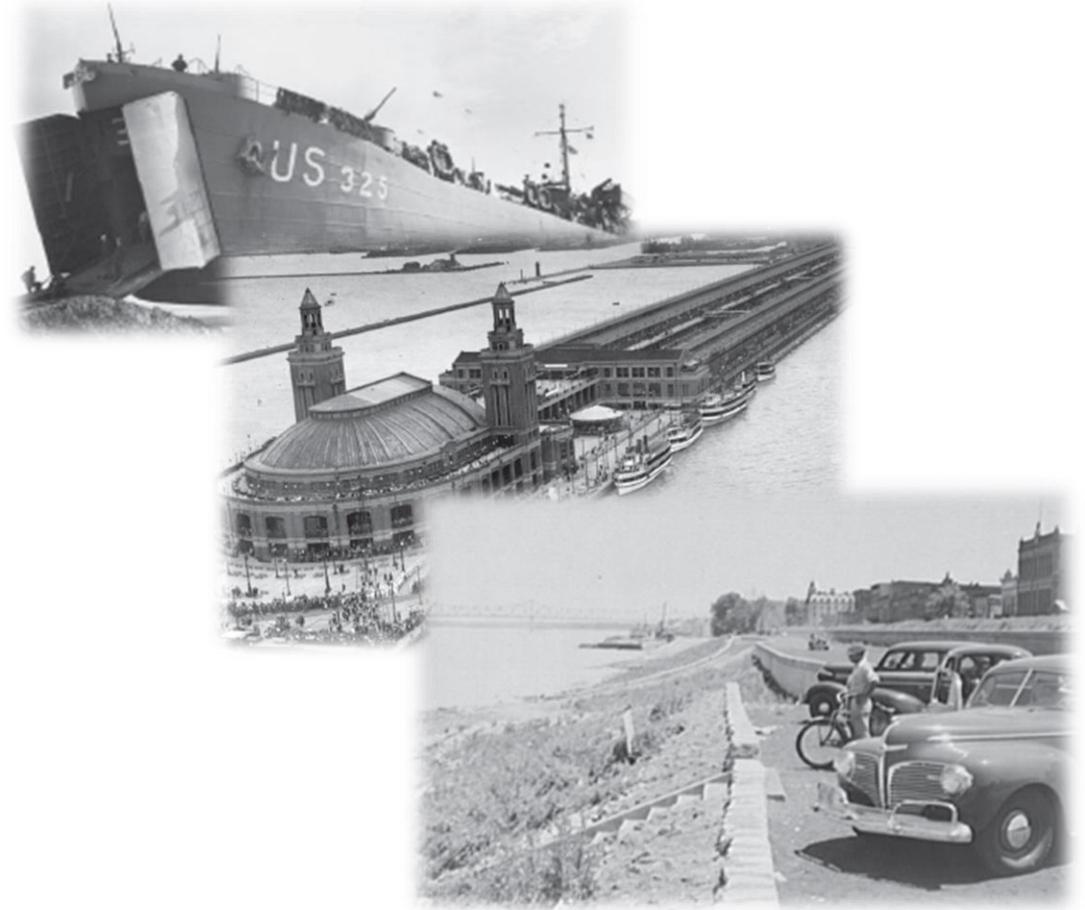
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# History

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

- Provide a history of the IMTS over the past millennia.
- Topics covered
  - » Mississippian Culture (Cahokia Mounds)
  - » European Exploration and Settlement
  - » Illinois & Michigan Canal
  - » Chicago Sanitary and Ship Canal
  - » 4 ½ Foot and 9 Foot Channel Projects
  - » IMTS Role in WWII
  - » History of IDOT and the IMTS





# History

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

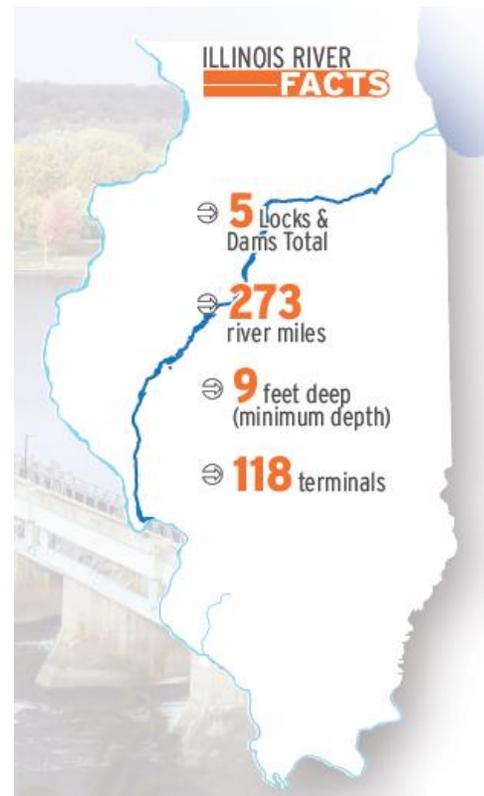




# System Overview

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

- Provides an overview of the IMTS
- Topics covered
  - » National Marine Highway System
  - » Commercially Navigable Waterway Profiles
  - » Lock and Dam System
  - » Ferry and Cruise Industry
  - » Cargo Type
  - » Overview of Benefits of the IMTS



# Questions?



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# Chapter 3: Public Port District Profiles



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- Port District Profiles
- Topics covered
  - » Overall Port District Powers
  - » Overview of all 19 Public Port Districts
    - ✓ Multimodal Connections
    - ✓ Top Commodities
    - ✓ Economic Impact
    - ✓ Terminals
    - ✓ Capital Needs
    - ✓ History

TABLE 3.1 Public Port District Listing

PUBLIC PORT DISTRICT	DATE ESTABLISHED	AUTHORIZATION
Alexander-Cairo	2010	70 ILCS 1801/10
America's Central	1959	70 ILCS 1860/3
Havana Regional	1967	70 ILCS 1805/1
Heart of Illinois Regional	2003	70 ILCS 1807/10
Illinois International	1951	70 ILCS 180/3
Illinois Valley Regional	1971	70 ILCS 185/3
Jackson-Union Counties Regional	1976	70 ILCS 1820/3
Joliet Regional	1957	70 ILCS 1825/3
Kaskaskia Regional	1965	70 ILCS 1830/3
Masac-Metropolis	2009	70 ILCS 1831/10
Mid-America Intermodal Authority	1998	45 ILCS 165/10, and 70 ILCS 1831/10
St. Carmel Regional	1969	70 ILCS 1835
Ottawa	2011	70 ILCS 1837/10
Seneca Regional	1961	70 ILCS 1845/3
Shawneetown Regional	1961	70 ILCS 1850/3
Southwest Regional	1961	70 ILCS 1855/3
Upper Mississippi River International	2009	70 ILCS 1863/3
Waukegan	1955	70 ILCS 1865/3
White County	1971	70 ILCS 1870/1

### 3.1 PUBLIC PORT DISTRICT POWERS

Each Public Port District has unique and specific enabling legislation; however, there are similar powers afforded to each. Below are commonly held powers each port district enjoys:

- Issue permits: for the construction of all wharves, piers, dolphins, booms, weirs, breakwaters, bulkheads, jetties, bridges or other structures of any kind, over, under, in, or within 40 feet of any navigable waters within the Port District; for the deposit of rock, earth, sand or other material, or any matter of any kind or description in said waters.
- Prevent or remove obstructions, including the removal of wrecks
- Locate and establish dock lines and shore or harbor lines
- Regulate the anchorage, moorage and speed of water borne vessels and establish and enforce regulations for the operation of bridges. (Mid-America, Ottawa and Upper Mississippi don't)
- Acquire, own, construct, lease and maintain water terminal facilities and transportation facilities within the Port District
- Fix and collect just, reasonable and nondiscriminatory charges for the use of such facilities. The charges so collected shall be used to defray the reasonable expenses of the Port District and to pay the principal of and interest on any revenue bonds issued by the District.

Additionally, some districts have the following powers:

- Police its physical property only and all waterways and to exercise police powers in respect thereto or in respect to the enforcement of any rule or regulation provided by the ordinances of the District and to employ and commission police officers and other qualified persons to enforce the same.
- Build, construct, repair, and maintain levees.



## HEART OF ILLINOIS REGIONAL PORT DISTRICT

The Heart of Illinois Regional Port District, branded as TransPORT, is located in Central Illinois. The Port District's boundaries consist of Peoria, Fulton, Tazewell, Woodford, and Marshall Counties and all of Mason County except for Havana Township.



### Port District Biography

The Port District's strategic location in Central Illinois provides it a great logistical advantage. Central Illinois is one of the state's greatest regions for agriculture with corn and soybeans being one of the greatest produced commodities. In addition, located within the Port District is the Peoria's metro area, one of the state's largest urban centers. Home to Fortune 500 firms, Caterpillar, Komatsu America, Liberty Steel, two significant regional healthcare systems, and numerous professional technical services (finance, legal, engineering) companies. The Port District is the northernmost point on the Illinois River to have year-round access and is part of Foreign-Trade Zone #114. The Port District spans both urban and rural communities providing the district diverse industry and potential for growth.

1939



Construction was complete on the Peoria Lock and Dam

2003



Heart of Illinois Regional Port District was created

2004



Peoria Lock and Dam was added to the National Register of Historic Places

2020



US Army Corps of Engineers Peoria Lock and Dam receives Major Maintenance Program funding





## Multimodal Connections

### HIGHWAY

Several interstates, state routes, and US highways traverse the port district, these include I-39, I-74, I-155, I-474, IL 8, IL 9, IL 17, IL 26, IL 29, IL 78, IL 89, IL 91, IL 95, IL 97, IL 100, IL 116, IL 117, IL 122, US 24, and US 136. Additionally, there are a total of 12.62 Critical Urban Freight Corridor miles and 16.89 Critical Rural Freight Corridor miles within the port district

### RAIL

Four class I railroads provide service throughout the port district, these include Union Pacific (UP), Canadian National (CN), Burlington Northern Santa Fe (BNSF), and Norfolk Southern (NS). Additionally the following class III railroads provide services to the district Toledo Peoria and Western (TPW), Tazewell and Peoria Railroad (TZPR), Keokuk Junction (KJRY), Illinois & Midland Railroad (IMRR), and Iowa Interstate railroad (IAIS).

### WATER

The Illinois River flows 90.5 miles through the port district and is part of Marine Highway 55.

### LOCKS and DAMS

- Peoria Lock and Dam

### AIR

- General Downing-Peoria International Airport - PIA (Peoria, IL)
- Pekin Municipal Airport - C15 (Pekin, IL)
- Marshall County Airport - C75 (Lacon, IL)
- Mount Hawley Auxiliary Airport - 3MY (Peoria, IL)



### Port District Top Commodities:



### 2017 Commodities by County\* (inbound, outbound, in-state):



\*Note Heart of Illinois Regional Port District does not encompass the entirety of Mason County

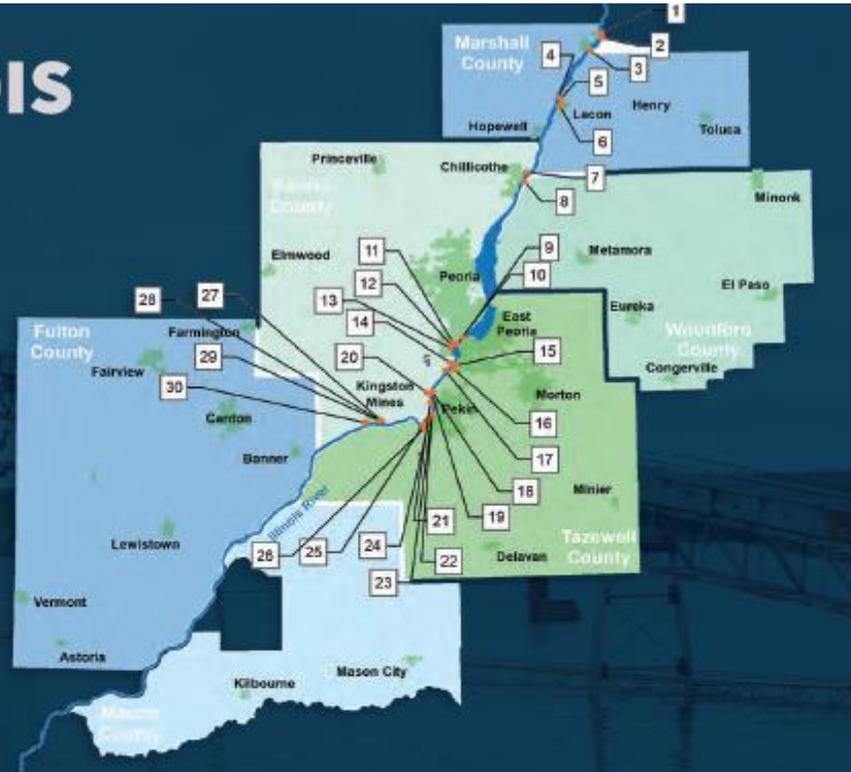


# HEART OF ILLINOIS REGIONAL PORT DISTRICT

## List of Terminals (Public and Private)

- 1 Ozinga Materials, Inc., Henry Terminal
- 2 Koch Nitrogen Co., Henry Terminal Dock
- 3 Adm/Growmark River System, Henry Grain Elevator Dock
- 4 Midwest Foundation Corp., Lacon Mooring Dock
- 5 Adm/Growmark River System, Lacon Grain Elevator Wharf
- 6 Cargill Aghorizons, Lacon Grain Elevator Dock
- 7 Galena Road Gravel, Chillicothe Dock
- 8 Louis Dreyfus Corp., Chillicothe Grain Elev
- 9 Adm/Growmark River System, Peoria Terminal Wharf
- 10 Artco Fleeting Services, Peoria Dock And Fleet Moorings
- 11 J & L Dock Facilities Wharf
- 12 Peoria Barge Terminal Wharf
- 13 Peoria River Terminal Wharf
- 14 Central Illinois Freight Handling Corp. Dock
- 15 Adm/Growmark, Creve Coeur Grain Dock
- 16 Koch Nitrogen Co., North Pekin Terminal Barge Dock
- 17 Keystone Steel & Wire Co., Dock
- 18 Mosaic, Pekin
- 19 Terra Industries, Pekin
- 20 Vistra Energy
- 21 Cargill Crop Nutrition, Pekin Terminal Dock

- 22 Semmaterials, Pekin Asphalt Plant Dock
- 23 Garvey Marine, Pekin Left Bank Fleet Mooring
- 24 CHS, Pekin Grain Elevator Dock
- 25 Pacific Ethanol, Pekin
- 26 American Milling Co., Pekin Grain Elevator Dock
- 27 CF Industries, Peoria Warehouse No. 1 Dock
- 28 CF Industries, Peoria Warehouse No. 2 Dock
- 29 CF Industries, Peoria Warehouse Docks
- 30 CF Industries, Kingston Mines Terminal Dock





## Economic Impact

It is estimated that marine cargo activity being handled within the Heart of Illinois Regional Port District directly or indirectly supports 27,624 jobs within the state. These workers earn an estimated 1.6 billion in wages and contribute approximately 2.7 billion towards State GDP. The activity enabled comes from shippers across the state making use of facilities within the district, as well as the services supporting their goods movement. The following table breaks out the impact by the type of activity occurring.

	PORT USER	MARINE INDUSTRY	MARINE SUPPORTING	TOTAL
Employment	21,583	2,285	3,756	27,624
Income	\$1,270.2M	\$153.8M	\$254.2M	\$1,678.2M
Value Added	\$2,151.8M	\$259.4M	\$365.9M	\$2,777.1M
Output	\$4,562.4M	\$585.9M	\$649.3M	\$5,797.6M



## CAPITAL NEEDS

The Heart of Illinois Port District does not own or operate any terminal facilities. If the port district were to construct a terminal a major investment would be required to include heavy cranes, dredging, and storage facilities. Depending on the type of terminal, the cost of construction could range from a couple million dollars to tens of millions of dollars.

# Questions?



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# Chapter 4: Commodity Flows and Economic Value



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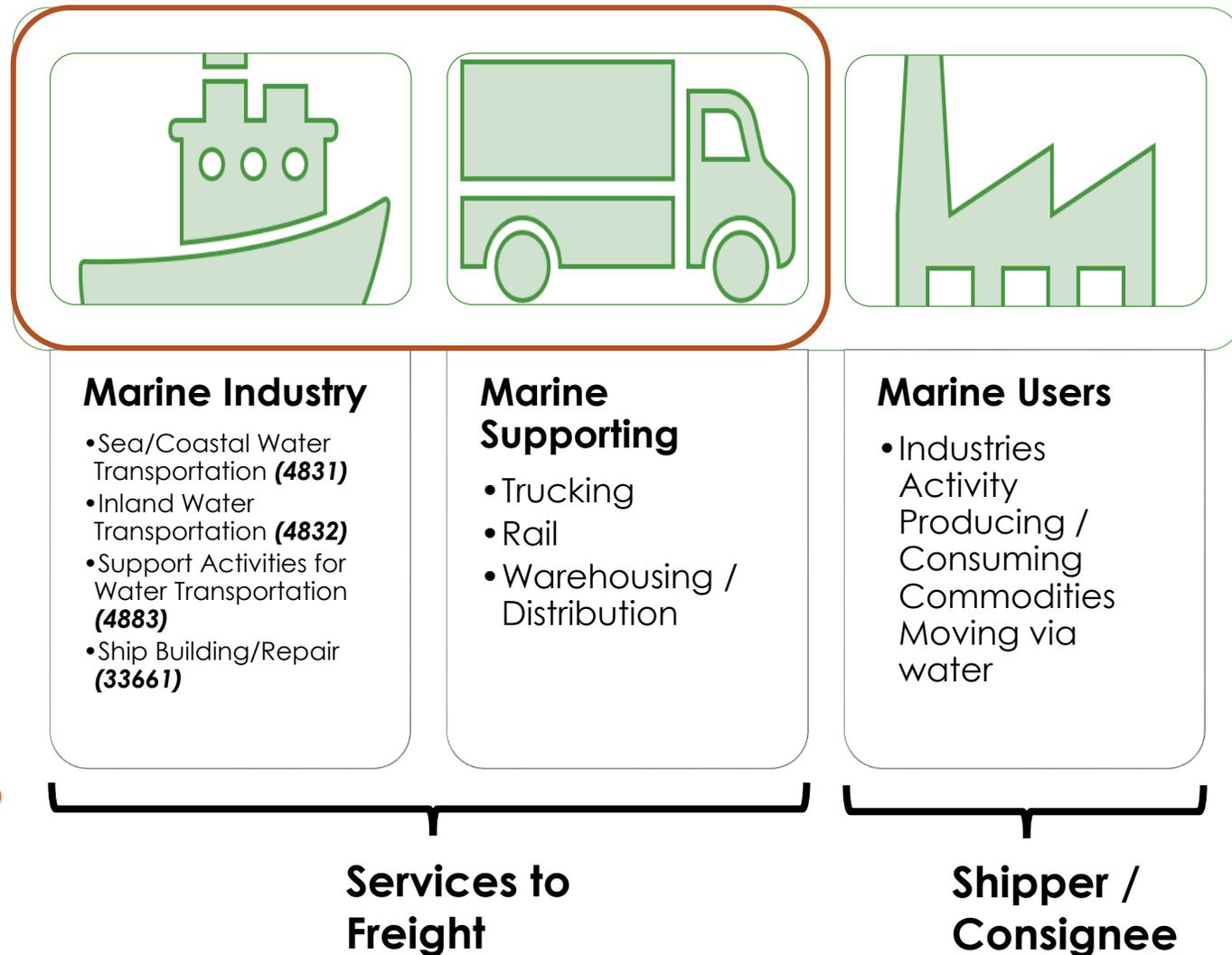
# Commodity Flows and Economic Value

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

- Provides an overview of the commodity flows and economic value
- Topics covered
  - » Commodity Flows
  - » Economic Impact
  - » Industry Profiles

**90.6 Million Tons Moved Annually or 9% of Total State Freight Tonnage**

**\$36 Billion in Economic Contribution to the State**



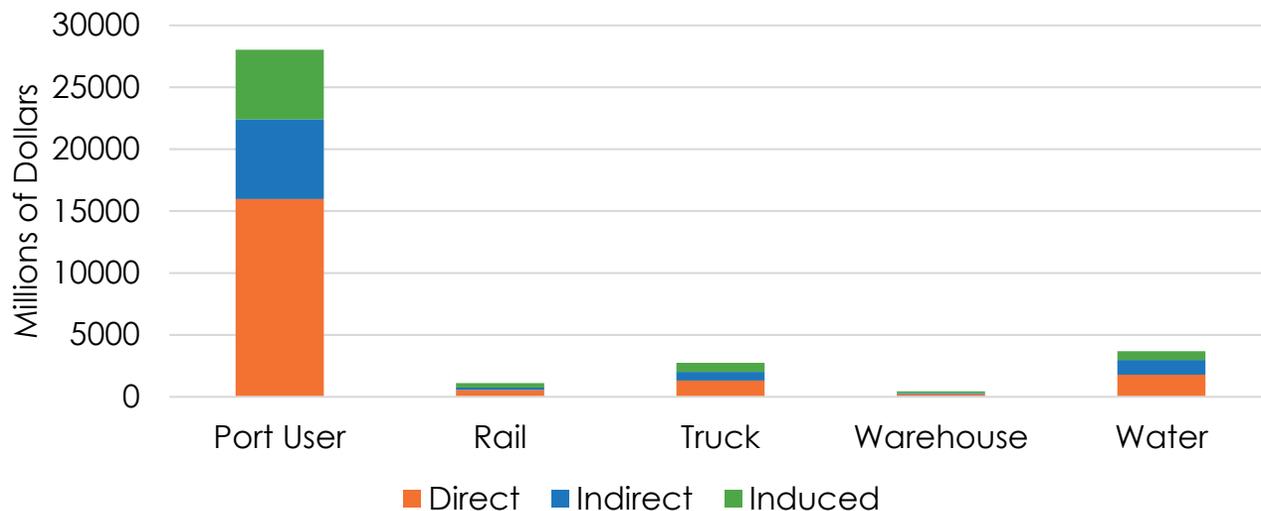


# Commodity Flows and Economic Value

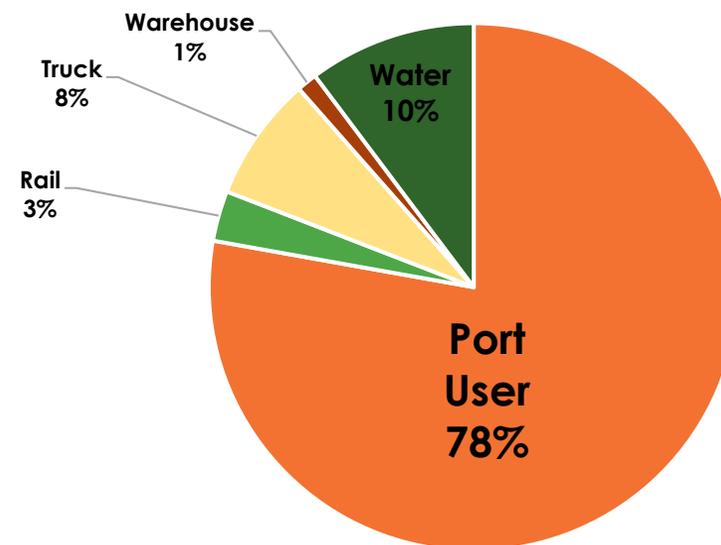
## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

Impact Type	Direct Impact				Total Impact			
	Employment	Income (\$M)	Value Added (\$M)	Output (\$M)	Employment	Income (\$M)	Value Added (\$M)	Output (\$M)
Port User	59,372.9	3,681.5	6,216.1	15,968.5	127,481.4	7,815.2	13,286.5	28,035.3
Rail	1,704.7	302.4	368.1	564.1	4,913.2	489.8	689.3	1,109.8
Truck	8,015.9	513.4	617.8	1,314.0	16,581.8	1,013.2	1,472.5	2,749.3
Warehouse	1,831.0	117.9	140.0	216.4	3,299.3	198.6	283.1	446.5
Water	3,757.7	301.2	539.0	1,790.7	14,353.2	966.2	1,629.7	3,683.4
<b>Total</b>	<b>74,682.2</b>	<b>4,916.4</b>	<b>7,880.9</b>	<b>19,853.6</b>	<b>166,628.9</b>	<b>10,483.1</b>	<b>17,361.1</b>	<b>36,024.4</b>

Composition of Total Impacts (Economic Output)



Total Output by Activity (\$M)

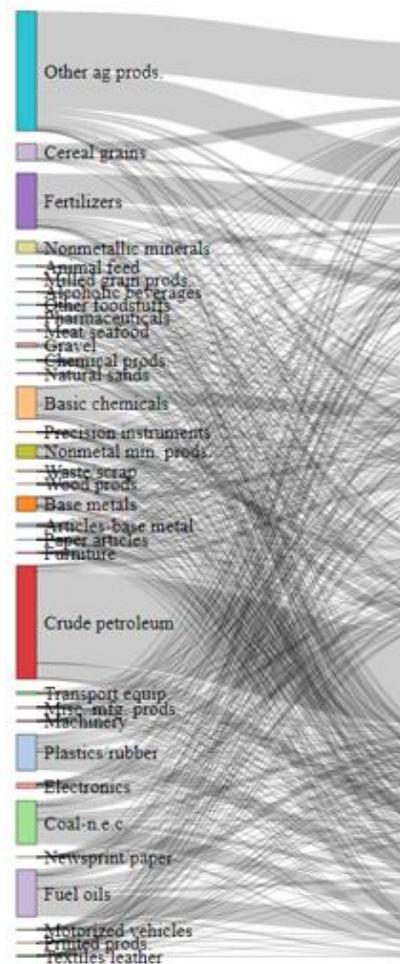




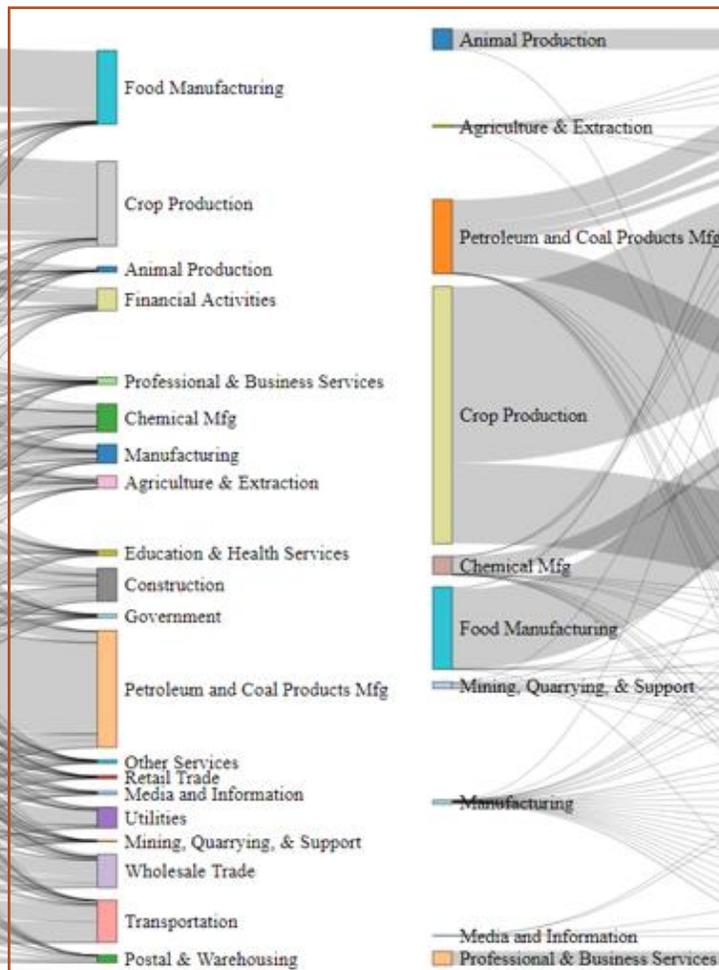
# Commodity Flows and Economic Value

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

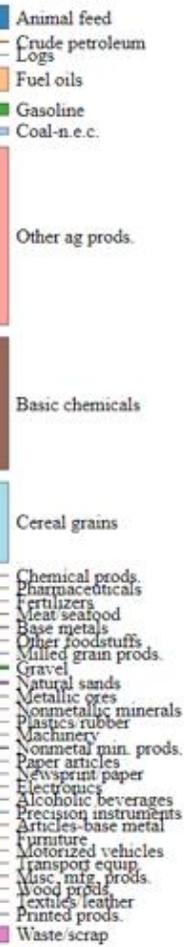
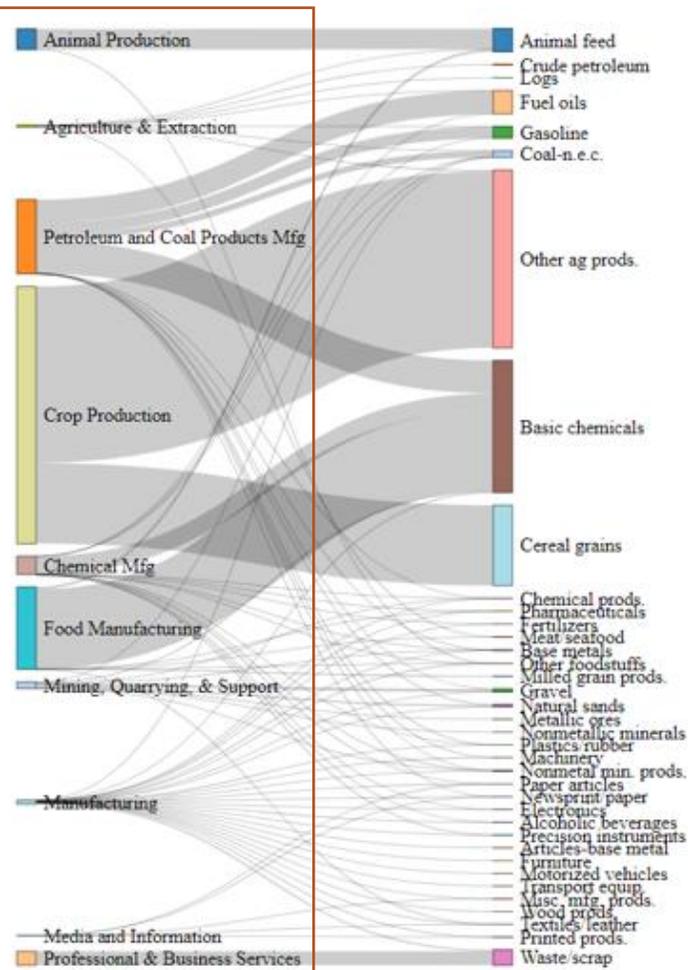
### Inbound Freight



### Illinois Industries



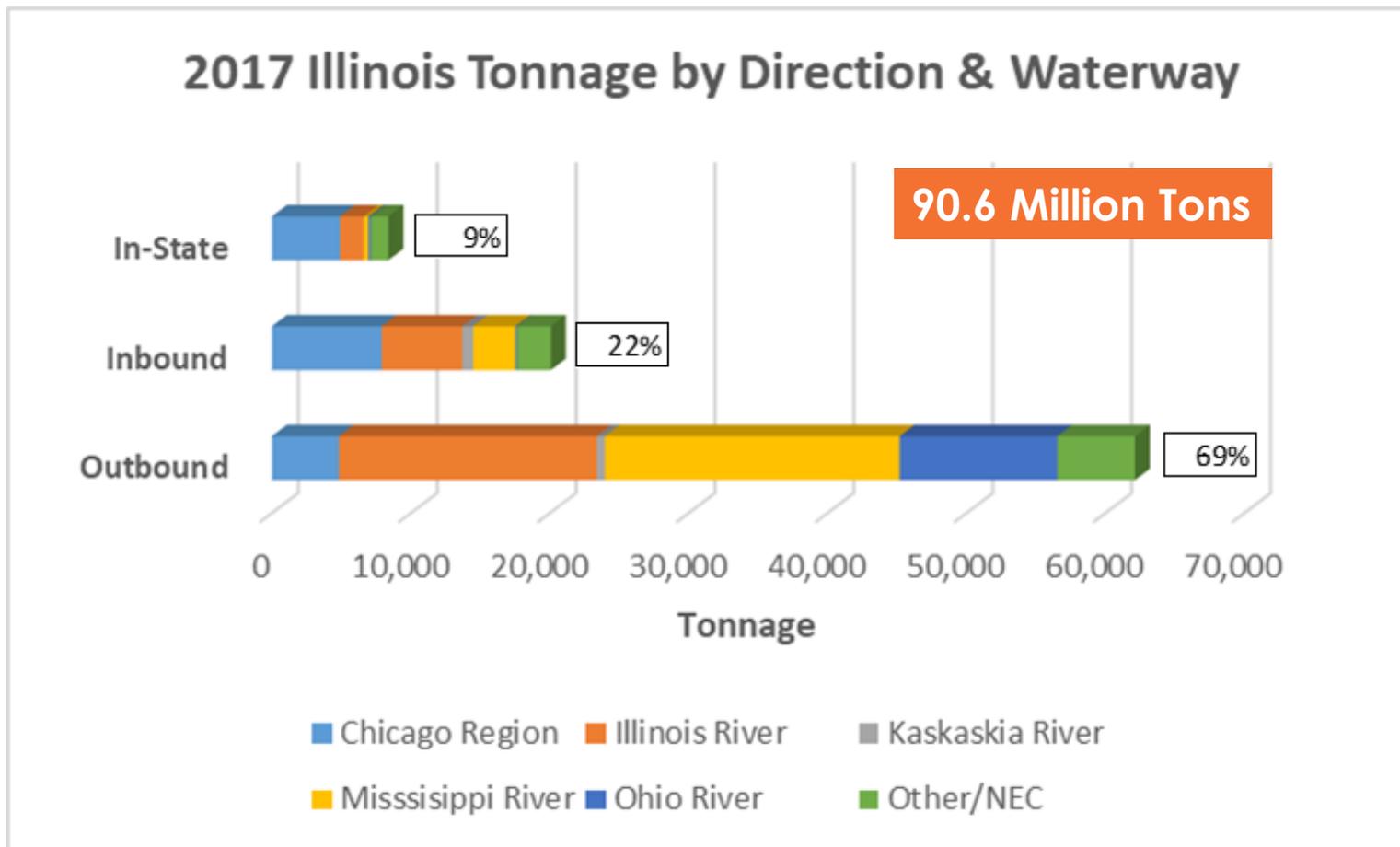
### Outbound Freight





# Illinois Waterway 2017 Freight Tonnage

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN



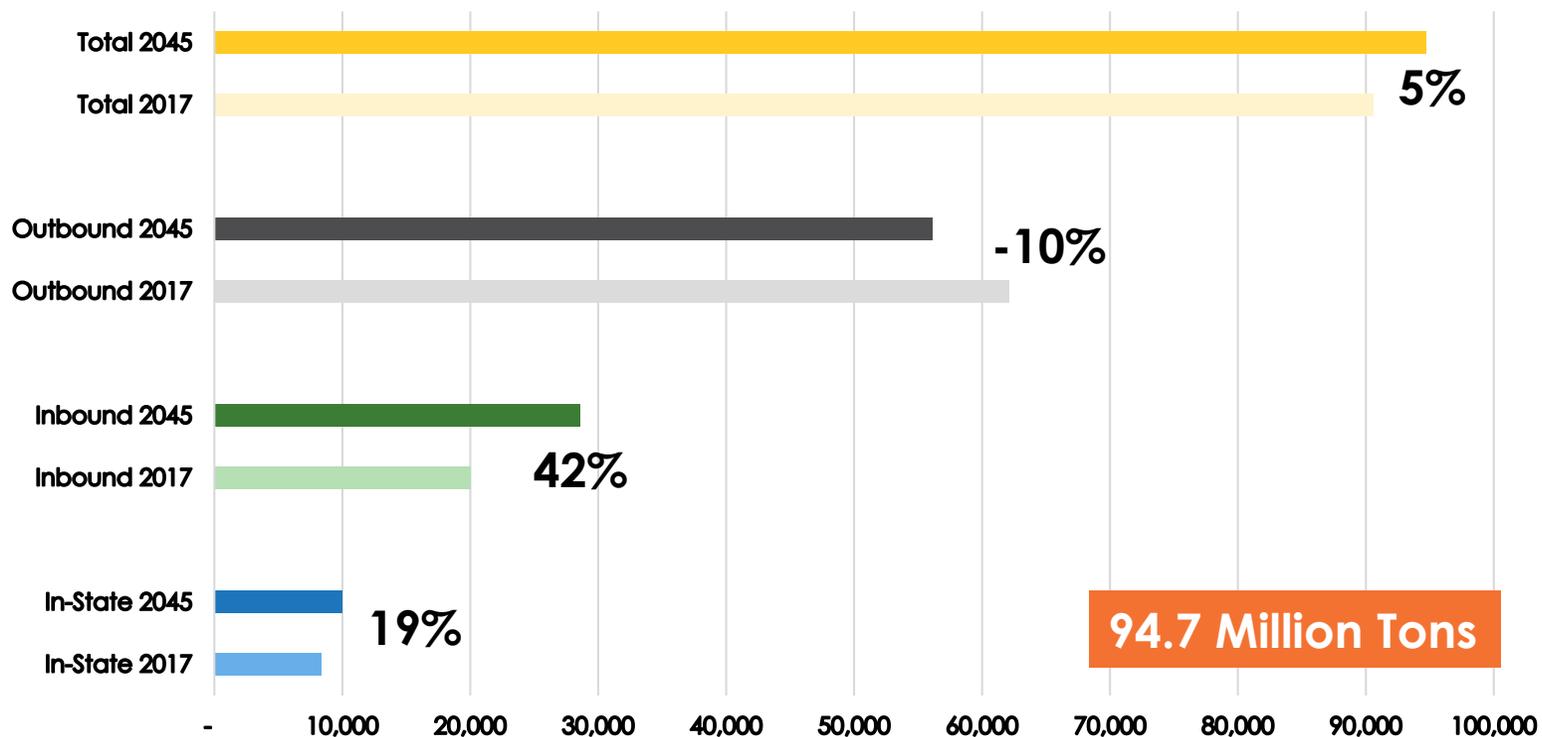
- Two-thirds outbound
- Mississippi and Illinois River volumes roughly equal
- Chicago Region particularly significant for in-state
- Ohio River mainly outbound



# Illinois Waterway 2045 Freight Forecast

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

Forecast Tonnage Growth by Direction

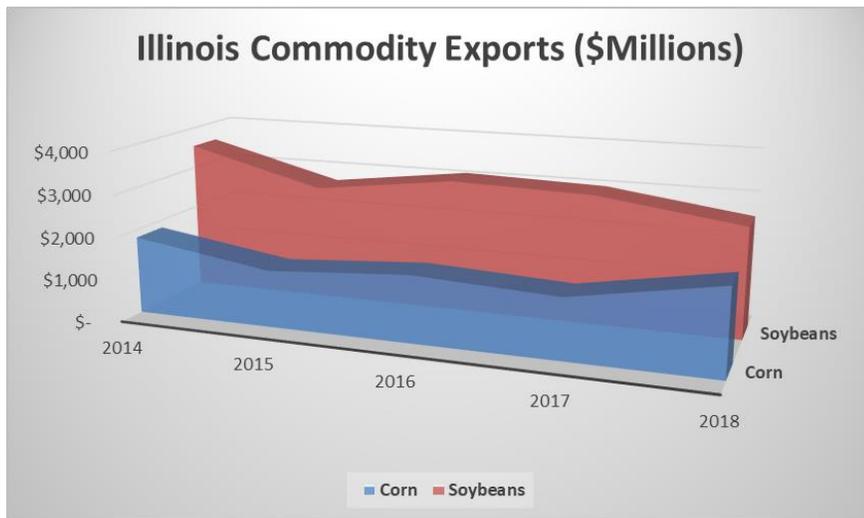


- 4 million ton net gain
- Loss in outbound freight offset elsewhere
- Outbound decline is mainly in coal
- Ohio River loses most traffic: ↓ 31%
- Chicago Region gains most: ↑ 37%

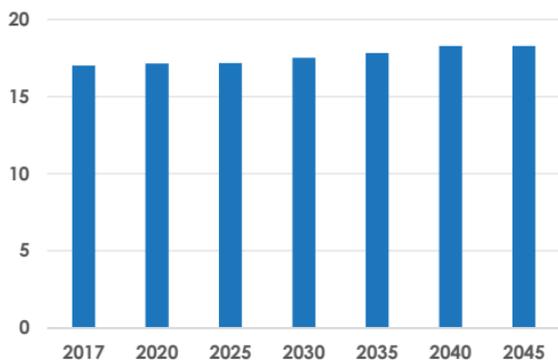


# Food Products Outlook

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

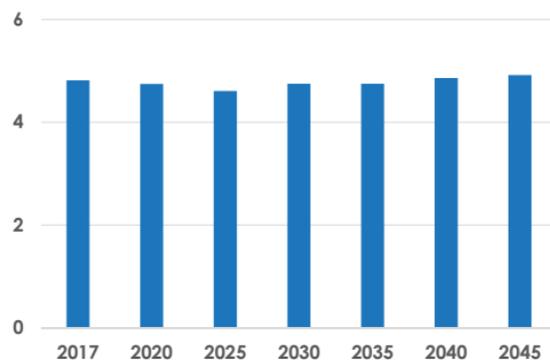


Corn Millions of Tons



Growth Through 2045: **7.5%**

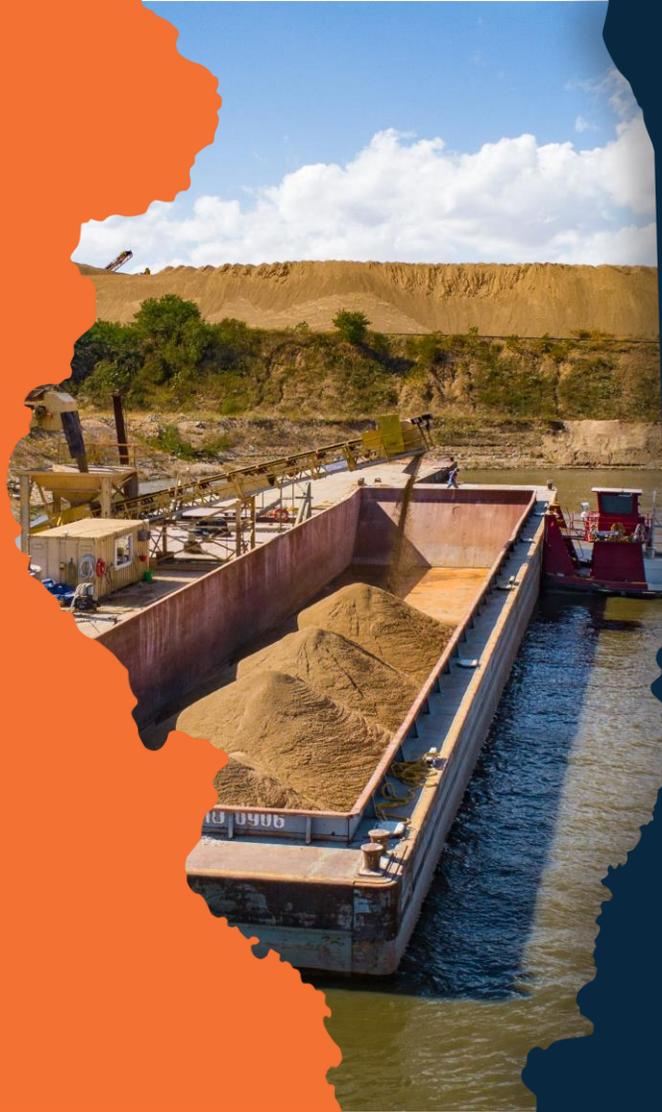
Soybeans Millions of Tons



Growth Through 2045: **2.2%**

- Food products are #1 on IMTS and mainstay of outbound volume: 56 percent in 2017
- Two-thirds of food is corn and soybeans
- Volatile export market is key driver of volume for top commodity group on IMTS
- 2045 forecast expects continuing, moderate growth

# Chapter 5: Needs Assessment and Strategy Development



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# Needs Assessment and Strategy Development

## ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

- Provides an analysis of the needs and strategies for the IMTS
- Topics covered
  - » Peer State and Neighbor State Review
    - ✓ MTS Planning and Funding Programs
    - ✓ Dredging Programs
  - » Critical Needs of the IMTS and Its Stakeholders
  - » Programmatic Recommendations
  - » Benefits of Action

FIGURE 5.2 Case Study Highlights – Maritime Staff and/or Dedicated Section

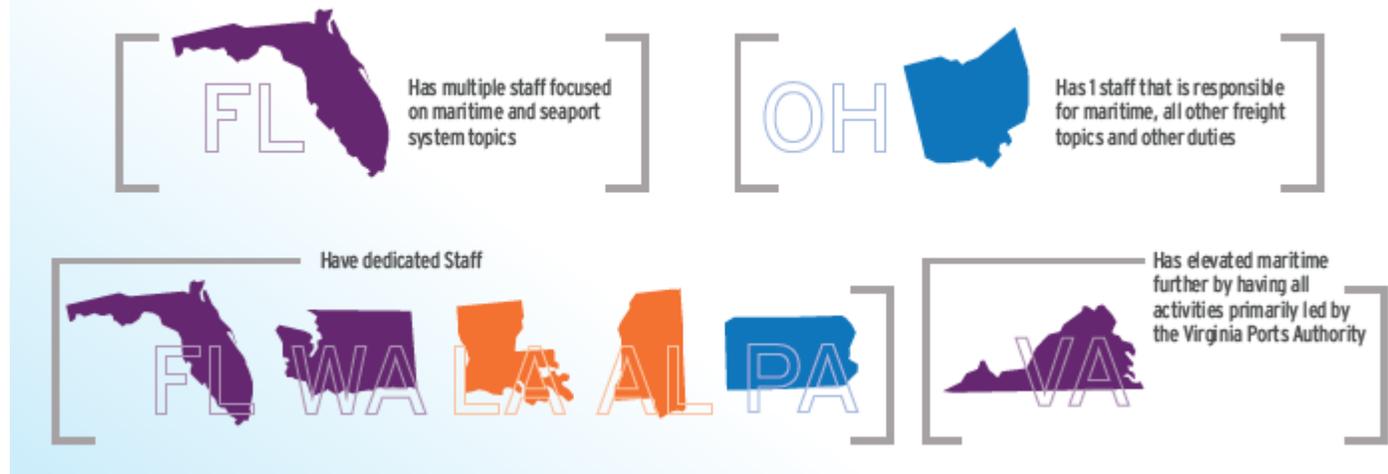


FIGURE 5.3 Case Study Highlights – Integration of Maritime Planning





# Programmatic Recommendations

### 5.3.3 RECOMMENDATION #1: RE-ESTABLISH A MARINE SECTION WITHIN IDOT

IDOT should re-establish a marine section with dedicated staff within its organizational structure. This will provide better support for maritime system planning and MTS stakeholders, elevate awareness of the MTS as part of the state multimodal transportation system, and position IDOT to provide effective leadership on MTS issues. Key functions of the new section and staff would include:

- Leverage and coordinate expertise that already exists within IDOT, including IDOT District staff
- Liaison with port districts, associations, private terminals, federal agencies, and other key system stakeholders
- Lead a new state-level Marine Transportation System Advisory Board (see Recommendation 3)
- Educate the state legislature and their staff on the benefits the marine system has on the state's transportation network and economy; educate the public on the importance of the marine transportation system
- Provide technical assistance/support to stakeholders (grant applications, policy changes, understanding regulations, etc.)
- Provide multimodal communication & coordination with external entities when an IDOT-sponsored project will impact marine facilities
- Collect and monitor data; perform or manage system-wide or sub-regional studies; coordinate research activities
- Participate in state and national marine organizations
- Coordinate and administer applicable IDOT MTS funding programs (see Recommendation 8)

#### Synergies with other IDOT modal plans and policies:

##### STATEWIDE LONG-RANGE TRANSPORTATION PLAN:

	<b>ECONOMY CHAPTER OBJECTIVES</b>	1	2	3	4	5
		✓	✓		✓	

	<b>LIVABILITY CHAPTER OBJECTIVES</b>	1	2	3	4	5
		✓				

	<b>MOBILITY CHAPTER OBJECTIVES</b>	1	2	3
		✓		

	<b>RESILIENCY CHAPTER OBJECTIVES</b>	1	2	3	4	5
				✓		

	<b>STEWARDSHIP CHAPTER OBJECTIVES</b>	1	2	3	4	5
			✓			

##### ILLINOIS STATE FREIGHT PLAN

###### FREIGHT GOALS

					
<b>IMPROVE SAFETY</b>	<b>IMPROVE EFFICIENCY</b>	<b>GROW THE ECONOMY</b>	<b>PRESERVE EXISTING INFRASTRUCTURE</b>	<b>EXPAND INFRASTRUCTURE STRATEGICALLY</b>	<b>SUPPORT MULTIMODAL DISTRIBUTION</b>
✓	✓	✓	✓	✓	✓



# Benefits of Action

## ■ Highlights

### » Direct

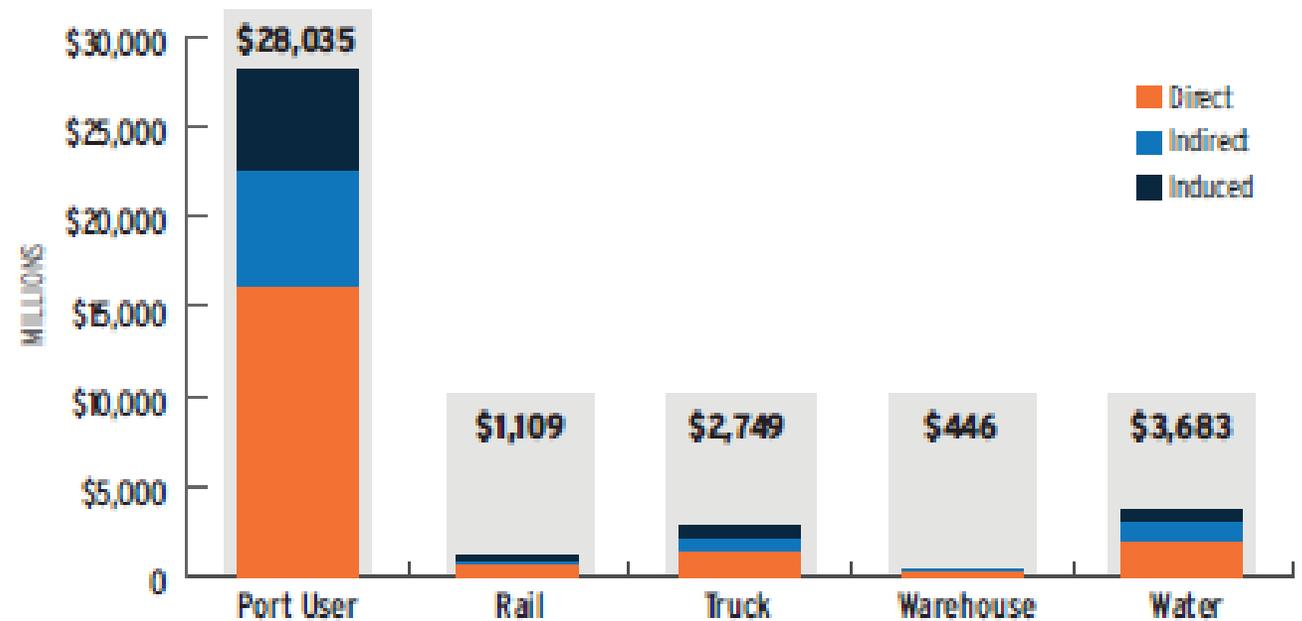
- ✓ 75 Thousand Employees
- ✓ \$7.9 Billion in Value-Added

### » Total

- ✓ 167 Thousand Employees
- ✓ \$17.4 Billion in Value-Added

FIGURE 5.6 Summary of Statewide MTS Economic Impact

Composition of Total Impacts (Economic Output)



# Chapter 6: Implementation



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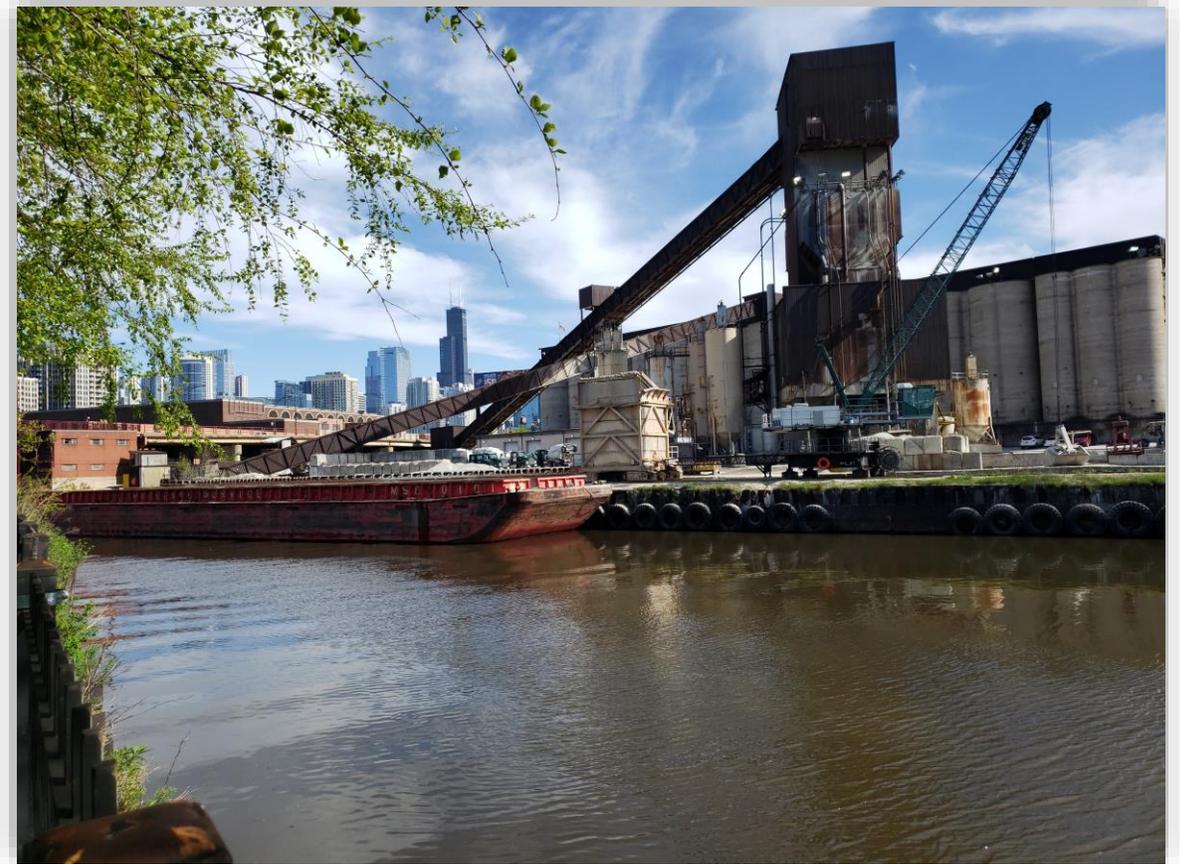


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# Implementation

- Work Together to Implement the Programmatic Recommendations
- Implementation Partners
  - » Illinois Department of Transportation (IDOT)
  - » Illinois Department of Commerce and Economic Opportunity (DCEO)
  - » Illinois Department of Natural Resources (IDNR)
  - » Illinois Environmental Protection Agency (IEPA)
  - » United States Army Corps of Engineers (USACE)
  - » Port Districts
  - » Illinois Port Association (IPA)
  - » Inland Rivers Ports & Terminals Association (IRPT)



## NEXT STEPS for IMTS Plan

- **July 30<sup>th</sup>: Presentation to IL State Freight Advisory Committee**
- **Early August: Full Draft Plan to Steering Committee for Review & Comment (2-week review)**
- **Late August/September: Address/Respond to Steering Committee Comments**
- **September: Release Draft Plan and Overview PowerPoint for Broad Stakeholder Review (30 – day review)**
- **October: Address/Respond to Comments**
- **November: Publish Final Plan**





**Application Window this Fall**

# Thank you!



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