Agenda

- Stakeholder Outreach
- Facilities Inventory
- Commodity Flows
- Economic Value
- Peer States Review
- Next Steps
Stakeholder Outreach Update
Stakeholder Engagement

Stakeholder Types
- Port District
- MPO
- Railroad
- Trucking
- Tow Operators
- Agriculture Industry
- Chemical Industry
- Manufactures

Total Consultations To Date
28

Consultations Since Last Meeting
7

Upcoming Consultations
Facilities Inventory
Facilities Inventory – Statewide

**TERMINALS LOCATED WITHIN PORT DISTRICT BOUNDARIES**

- **288** (68.6%)
- Private / Public

**TERMINALS LOCATED OUTSIDE PORT DISTRICT BOUNDARIES**

- **132** (31.4%)
Facilities Inventory – Port District Profile

Overview
» Location
» Bio
» History

Facilities
» Specific Port Terminals
» Modal Connections

Economic Value
» Commodity Volumes
» Economic Benefit
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 WARF
13. PEORIA RIVER TERMINAL WARF
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. SHELL OIL PRODUCTS - U.S., BARTONVILLE, TERMINAL DOCK
19. CARRI SHARF MATERIALS
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
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
Commodity Flows
Commodity Flow Status

Key Issue: Accurate 2017 Tonnages by Waterway
  » Drives county estimates

Status: Working with USACE and IWR on Data
  » USACE/IWR offering data more precise than public sources
  » Preliminary figures retain some overlap between waterways
  » Kaskaskia tonnages provided directly by Port

Statewide 2017 Total Tonnage Stands at:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Outbound</td>
<td>62,115</td>
<td></td>
</tr>
<tr>
<td>Inbound</td>
<td>20,073</td>
<td></td>
</tr>
<tr>
<td>Intrastate</td>
<td>8,374</td>
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<tr>
<td><strong>Total:</strong></td>
<td><strong>90,562</strong></td>
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Total IL 2017 Tonnage (000)
Commodity Flow Status

**Additional Issue: Forecast Commodity Distinction**

- Can distinguish corn from soybeans in base data and forecast rates
- Forecast remains statewide
  - Same commodity growth rates in every county
  - County activity obviously shifts with crop rotation

**Next Steps:**

- Conclude waterway analysis with USACE/IWR
- Revise county estimates and update forecasts
- Incorporate in report and summaries
Economic Value
Economic Value

IMTS reliant industry effects on State’s economy

Port contribution to state economy

Economic Impact Analysis

Port contribution to regional economy
Waterways Impact Analysis Methodology

Terminal Industry
Local area employment supporting terminals/movement of goods

Terminal User
Freight shipments representing the producers of goods being shipped via waterways

Transportation User
Trucking / Rail services tied to movement of waterways goods to and from terminal
Maritime Employment

- **Industry**
  - Ship Building and Repairing
  - Deep Sea Freight Transportation
  - Deep Sea Passenger Transportation
  - Inland Water Freight Transportation
  - Inland Water Passenger Transportation
  - Coastal and Great Lakes Freight Transportation
  - Coastal and Great Lakes Passenger Transportation
  - Scenic and Sightseeing Transportation, Water
  - Port and Harbor Operations
  - Marine Cargo Handling
  - Navigational Services to Shipping
  - Other Support Activities for Water Transportation
Maritime-Related Employment

- **Industry**
  - Line-Haul Railroads
  - Short Line Railroads
  - General Freight Trucking, Local
  - General Freight Trucking, Long-Distance, Truckload
  - General Freight Trucking, Long-Distance, Less Than Truckload
  - Specialized Freight (except Used Goods) Trucking, Local
  - Specialized Freight (except Used Goods) Trucking, Long-Distance
  - Support Activities for Rail Transportation
  - Other Support Activities for Road Transportation
  - Freight Transportation Arrangement
  - Packing and Crating
  - Couriers and Express Delivery Services
  - General Warehousing and Storage
  - Refrigerated Warehousing and Storage
  - Farm Product Warehousing and Storage
  - Other Warehousing and Storage
District Level Employment Activity

Activity Fields

- Establishments
- Jobs
- Income
- Value Added
- Output
### Maritime Activity

<table>
<thead>
<tr>
<th>Establishments</th>
<th>Jobs</th>
<th>Income</th>
<th>Value Added</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>549</td>
<td>$60.0 million</td>
<td>$111.7 million</td>
<td>$298.0 million</td>
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</table>

### Maritime-Related Activity

<table>
<thead>
<tr>
<th>Establishments</th>
<th>Jobs</th>
<th>Income</th>
<th>Value Added</th>
<th>Output</th>
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</thead>
<tbody>
<tr>
<td>162</td>
<td>5,365</td>
<td>$359 million</td>
<td>$449 million</td>
<td>$791 million</td>
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Peer State Review
Peer States Review

Illinois Marine Transportation System Plan

**GOAL:** Identify best practices to help IDOT best address system needs

**Key points of comparison**
- DOT structure
- Port governance
- Funding and financial assistance
- Technical assistance
- Advocacy

**Use findings to inform maritime system recommendations**
- Policy
- Programs
- Partnerships and advocacy

There is no "**ONE-SIZE FITS-ALL**" solution
Peer States Review

Illinois Marine Transportation System Plan

Great Lakes and Inland River Ports

Only Great Lakes Ports

+2 Canadian Provinces
  - Ontario
  - Quebec

Inland River Ports

Gulf and Inland River Ports

Other – not connected to IL system

Other – not connected to IL system

Ontario

Quebec
### Considerations:

- **Freight office**
- **Dedicated staff with maritime responsibilities**
- **Partner with econ. dev. organizations to fill role**
- **Outside, independent maritime entity**

<table>
<thead>
<tr>
<th>Ohio</th>
<th>Minnesota</th>
<th>Indiana</th>
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<tbody>
<tr>
<td>1 staff in the Division of Planning that coordinates all multimodal freight issues, including maritime.</td>
<td>Office of Freight and Commercial Vehicle Operations with dedicated staff for freight topics. <strong>1 staff dedicated to maritime.</strong></td>
<td>InDOT has rail, air, and transit funded/staffed programs – no maritime.</td>
</tr>
</tbody>
</table>
## Considerations:
- Port authorities or districts
- State oversight
- Local role
- Singular legislation

### Missouri
Missouri law requires the DOT to approve the creation of a new port district by cities and counties.

### Wisconsin
The DOT has jurisdiction over ports and waterways. Municipalities have authority to make harbor improvements.

### Virginia
The Virginia Port Authority is a political subdivision of the Commonwealth that owns and oversees the Port of Virginia (group of facilities).
Next Steps

Facilities Inventory

Complete Economic Impact Analysis
Complete Port Profiles
Complete Peer State Review
Continue Stakeholder Outreach
Prepare Inventory of Carriers and Operators
Develop Industry Profiles

Prepare Inventory of Carriers and Operators

3rd Steering Committee Meeting - November
Questions?