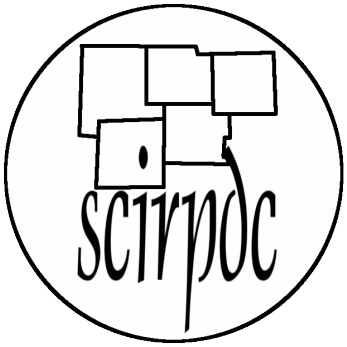
South Central Illinois Regional Freight Truck Analysis



South Central Illinois Regional Planning & Development Commission

Economic Development District

Table of Contents

Forward

The South Central Illinois Regional Planning & Development Commission (SCIRPDC) has developed the South Central Illinois Regional Freight Truck Analysis for local, regional, state and federal economic development and transportation planning purposes. This document will specifically aid the membership of SCIRPDC with the development and implementation of a regional plan of action, and help identify investment priorities and funding sources for the Economic Development District (EDD).

This Regional Freight Truck Analysis provides up-to-date freight truck information for the region in order to paint a realistic picture of the current regional freight system. It is SCIRPDC's goal to work together with public officials, community and private sector leaders, and non-profit organizations in order to utilize this freight analysis to:

- Identify the inventory of the current freight truck system
- Identify major strengths and weaknesses of the current freight truck system
- Identify regional and industry specific issues and trends
- Develop specific regional and local freight truck needs and recommended improvements
- Aid in the recruitment, retention and expansion of businesses
- Support the continued revision of the five-county EDD's Comprehensive Economic Development Strategy

The South Central Illinois Regional Planning & Development Commission provides solutions to the challenges of local government. A multitude of programs and projects are initiated each year at the federal, state, regional and local levels. Your regional planning commission creates the needed venue and framework to coordinate these programs and goals into a whole. It is the Commission's function to take the goals and objectives within this document and turn them into success for the five-county EDD of Clay, Effingham, Fayette, Jasper, and Marion Counties along with the governments and special taxing districts within.

List of Figures

List of Tables

Executive Summary

The South Central Illinois Regional Freight Truck Analysis is an economic development and transportation planning effort that focuses exclusively on the freight truck transportation system in the South Central Illinois five-county EDD, including the counties of Clay, Effingham, Fayette, Jasper and Marion. This study was funded by the Illinois Department of Transportation, and data was provided by Transearch International.

This regional freight truck analysis is intended to provide an initial evaluation of freight truck movement through the SCIRPDC Region, and further identify the strengths and weaknesses within the current regional freight truck system. Specifically, this analysis examines the movement of goods and commodities in the region, identifies regional commodity clusters and industry sectors, and quantitatively assesses the concentration of those commodities within the region. The main findings of these particular analyses are listed below.

Key Findings

- Freight truck traffic on I-57 and I-70, which run through the SCIRPDC Region, is expected to grow exponentially over the next few decades.

- Regional freight truck transportation corridors are above-average and provide access to numerous external metropolitan markets throughout the Midwest and beyond.

- The region's most significant commodity export categories include: Machinery & Transportation Equipment; Warehousing; Electrical, Scientific, or Medical Equipment, and Prepared Foods.

- The region's emerging commodity export categories include: Livestock & Dairy; Forest & Related Prod.; Rubber or Misc. Plastic Prod.; and Pulp, Paper, Print Material, or Allied Prod.

- Transportation planning efforts should be focused on ensuring that municipal roadways are being actively maintained and improved so that the expected future growth in freight truck movement can be properly utilized to improve the region's overall economy.

- As necessary roadway improvements become apparent, the region should make use of state or federal programs to help fund those projects. Examples of these programs include: IDOT Economic Development Program; IDOT Truck Route Access Program; EDA Economic Development Assistance Program; and the EDA Public Works Program.

I. Introduction

a. Purpose of Freight Truck Analysis

The South Central Illinois Freight Truck Analysis is an economic development and transportation planning effort that focuses exclusively on freight truck traffic and movement within the South Central Illinois Region, including Clay, Effingham, Fayette, Jasper and Marion counties. Although many regional freight studies are multimodal, or focusing on multiple modes of transportation such as semi-truck, rail, barge and air, this particular analysis concentrates on semi-truck transportation only. Therefore, any commodities shipped through other means of transportation besides semi-truck are not included in this particular analysis. In 2012, over 13 million tons of freight was moved via semi-truck in the United States, equaling 67% of the total amount of freight moved by all modes of transportation. [1] This particular percentage is forecasted to stay relatively constant for some time and displays the heavy reliance on freight truck transportation in the United States, hence this particular study's focus on freight truck movement.

The purpose of this analysis is to provide an assessment of freight truck movement through the SCIRPDC Region, and further identify any strengths or weaknesses within the current regional freight truck system. This analysis also examines the movement of regional commodities, identifies regional commodity clusters and industry sectors, and quantitatively assesses the concentration of those commodities within the region.

This analysis was developed following an extensive review of numerous sources of data and information, including, Geographic Information Systems (GIS), the U.S. Department of Transportation (USDOT), the Illinois Department of Transportation (IDOT), the Federal Highway Administration (FHWA) and specific regional freight truck data collected and distributed by Transearch International. This data included freight truck statistics, freight truck access mapping, regional commodity import and export data, etc.

Following these analyses, this study will attempt to provide a list of primary freight needs and recommended improvements throughout the five-county EDD, as well as offer implementation strategies for achieving those improvements. From here it will then be possible to provide suggested changes or alterations in project planning and include the freight analysis findings in upcoming planning processes of local, regional, state and federal entities. A regional example of these planning processes would be SCIRPDC's Comprehensive Economic Development Strategy.

b. Freight Transportation and Regional Economic Development

Before examining the undeniable connection between freight transportation and regional economic development it is important to first define these two terms separately. Freight transportation can be expressed as the process of moving particular commodities or goods by ground, rail, air, sea or a combination of two or more of these modes of shipment, known as intermodal freight transport, from one place to another.

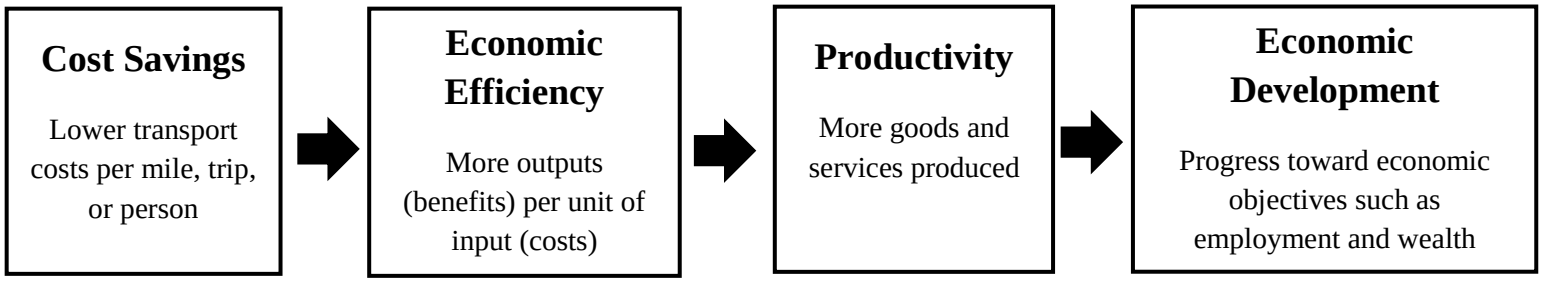
Additionally, regional economic development is simply the persistent and determined actions of policy makers and communities that promote the standard of living and economic wellbeing of the region. These

actions could include the development of human capital, the improvement of critical infrastructure and the promotion of regional competitiveness, to just name a few.

The integral relationship between freight transportation planning and regional economic development cannot be overstated. As described by Todd Litman of the Victoria Transport Policy Institute in British Columbia, "Transport policy and planning decisions often have significant economic development impacts by affecting government and consumer expenditures, employment opportunities, resource consumption, productivity, local environmental quality, property values, affordability and wealth income."[2]

Figure 1-1 provides a very basic conceptual framework illustrating just how effective transportation planning decisions, once fully implemented, can create successful economic development growth. As shown below an effective transportation plan can reduce overhead expenses which in turn may increase business profits, reduce retail prices, improve the quality of service, etc.

Figure 1-1: Transportation Planning & Regional Economic Development



Source: Evaluating Transportation Economic Development Impacts, Victoria Transport Policy Institute, 2010

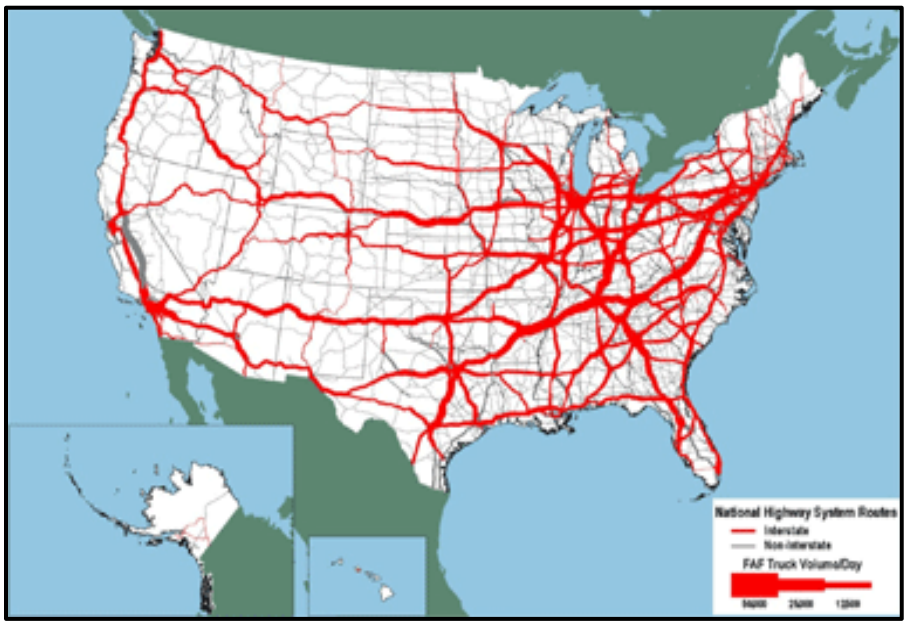
Just as decisions regarding freight transportation planning can make regional economic growth easier to achieve, they can also become huge obstacles to growth. For example, a business miscalculating the distance from a particular commodity's distribution facility to its final destination can have negative economic impacts that would increase overhead expenses, decrease business profits, and ultimately cause a chain reaction that would have the complete opposite effect as the framework in figure 1 illustrates. Moreover, building a distribution facility in a location that does not have adequate highway or interstate access is not a risk that any company is going to take, so ensuring that all industrial and business parks are placed in locations that have the necessary access to major roads is critical to business and economic development growth. The overall intent of this analysis is to provide insights into the current regional freight truck transportation system so that any necessary changes and improvements can be made to increase the efficiency of current business operations and attract future growth.

c. United States Freight Truck Transportation Summary

Around 10,500 trucks travel the national interstate highway system every day, and this number is projected to double by the year 2035 due to expected increases in export rates, population growth and demand for goods. 3 This specific statistic does not include freight truck movement on U.S., State or County highways, which would increase this figure exponentially. **Figure 1-2** provides a visual

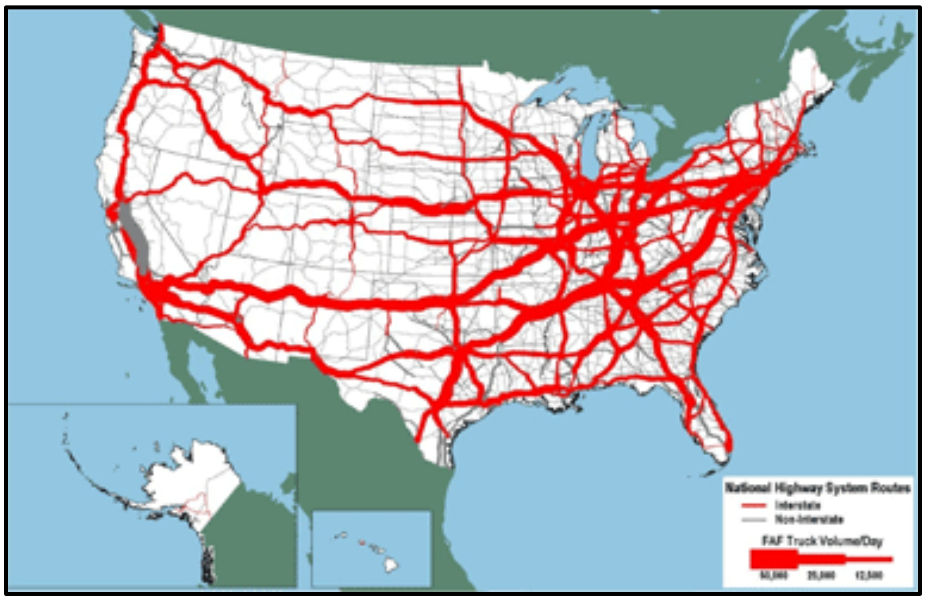
illustration of daily freight truck traffic in the United States and **Figure 1-3** shows the expected increase in freight traffic by the year 2040.

Figure 1-2: 2007 U.S. Freight Truck Movements



Source: U.S. Department of Transportation, Federal Highway Administration

Figure 1-3: 2040 U.S. Freight Truck Movements



Source: U.S. Department of Transportation, Federal Highway Administration

After only briefly comparing these maps, it becomes obvious that over the next several decades the expected increase in freight truck traffic will make it necessary to have attainable transportation plans in place to account for these large increases in traffic and have the means to utilize the increased traffic to more efficiently move goods across the country.

Table 1-1 below displays the top commodities in the United States measured in millions of tons and billions of dollars respectively. The top ten commodities in 2012 measured by weight accounted for 65% of the total tonnage for all commodities, but only a marginal 16% of the total value of commodities. Conversely, the top ten commodities by value accounted for 58% of the total value for all commodities, but only 13% of all tons[1]. This illustrates that more tonnage does not necessarily equate to a higher value or profit margin for businesses or their host municipalities. On the contrary, those commodities that weigh less are actually more likely to be valued higher, in dollars, than those commodities that weigh more. As one example, these commodities could include industry specific mechanical or electronic parts that are necessary for building larger-scale machines or devices.

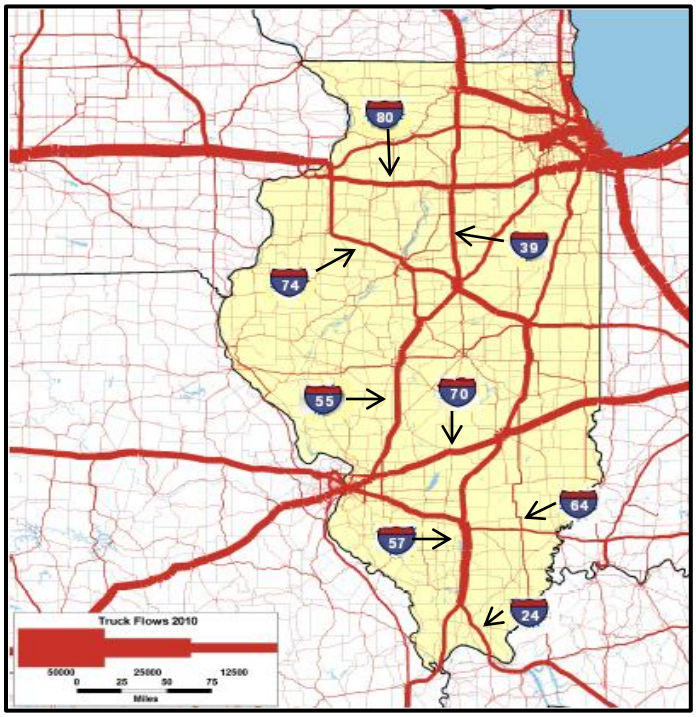
In broader terms, when examining freight movement, relying on a singular indicator, such as commodity tonnage, to determine freight system success would be rather misguided. There are numerous indicators that must be taken into consideration when determining the effectiveness of a particular freight truck system (eg. locally, regionally, or nationally). Some of these indicators would include the current freight infrastructure, commodity import and export data, the location of internal and external industry sectors, among many others.

Table 1-1: 2012 U.S. Top Commodities

Millions of Tons		Billions of Dollars	
Gravel	2,319	Machinery	1,836
Cereal Grains	1,595	Electronics	1,492
Coal	1,527	Motorized Vehicles	1,348
Natural Gas, Coke, Asphalt, etc.	1,442	Mixed Freight	1,090
Non-Metallic Mineral Prod.	1,442	Pharmaceuticals	909
Waste/Scrap	1,368	Misc. Manufactured Prod.	717
Gasoline	1,030	Textiles/Leather	710
Crude Petroleum	783	Gasoline	705
Fuel Oils	765	Plastics/Rubber	601
Natural Sands	585	Articles of Base Metal	588
All Commodities	**19,662 (100%)**	**All Commodities**	**17,352 (100%)**
Freight By Truck	**13,182 (67%)**	**Freight By Truck**	**11, 130 (64%)**

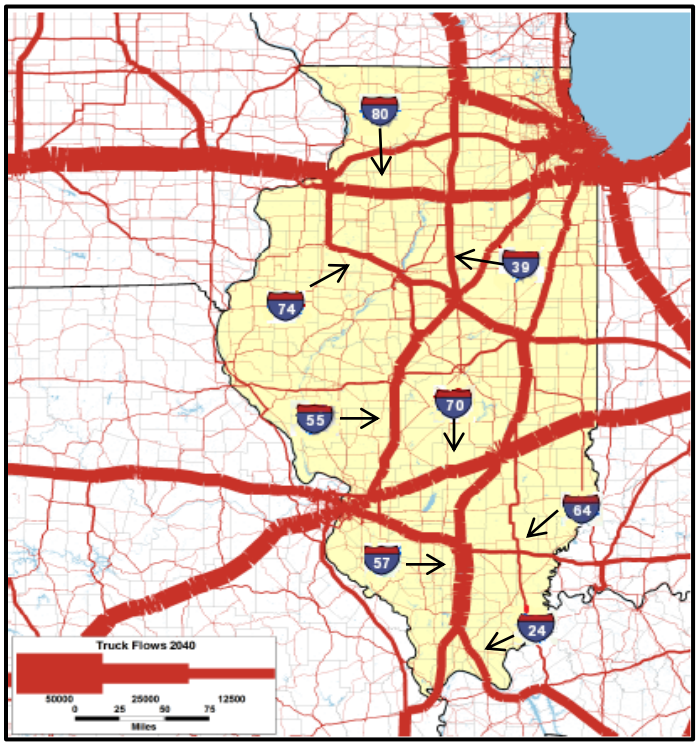
Source: U.S. Department of Transportation, Federal Highway Administration

Figure 1-4: 2010 Illinois Freight Truck Movements



Source: IL Department of Transportation, 2012 Freight Mobility Plan

Figure 1-5: 2040 Illinois Freight Truck Movements



Source: IL Department of Transportation, 2012 Freight Mobility Plan

d. Illinois Freight Truck Transportation Summary

Just as freight truck traffic is expected to grow exponentially across the United States in the few decades, the same goes for the State of Illinois. Commodities moved by truck in the State of Illinois amounted to about 800 million tons in 2010, equaling 62% of all freight transported. Of the 800 million tons, over 500 million tons (63%) were freight movements that both originated and ended in Illinois. By 2040, commodities moved by truck in Illinois are expected to reach just over one billion tons (67%).[4] These statistics are illustrated above in **Figures 1-4 and 1-5**. Specifically, these two maps exhibit the large expected growth in freight truck traffic on several Illinois interstates including I-80, I-70, I-74, I-64, I-57, I-55, I-39 and I-24.

These two freight truck movement maps show that over the next 30 years, freight truck traffic will nearly double on most all of the interstates crossing through the State of Illinois. Of particular interest to this study are those interstates that cross through or near the SCIRPDC Region, including I-24, I-55, I-57, I-64 and I-70. All five of these interstates are expected to have large increases in freight truck traffic within the SCIRPDC Region in the years to come. Due to this expected growth, detailed plans must be discussed and implemented to continue to improve upon the roadway infrastructure in the region. Whether those improvements will be widening or increasing the number of lanes through high traffic areas, or simply continuing a strategic road maintenance plan, the region's governmental entities must work hand in hand with both IDOT and USDOT to ensure that these improvements will be completed with local, regional, state and national interests in mind.

Table 1-2: 2010 Illinois Top Outbound Commodities

Millions of Tons		Billions of Dollars	
Coal	85	Machinery	88
Mixed Freight	35	Electronics	75
Cereal Grains	34	Mixed Freight	66
Prepared Foods	25	Pharmaceuticals	60
Petroleum or Asphalt Prod.	24	Motorized Vehicles	49
Stone, Ore, or Mineral Prod.	23	Base Metals	35
Machinery	19	Gasoline	32
Misc. Manufactured Prod.	18	Misc. Manufactured Prod.	30
Live Animals/Animal Feed	18	Plastics/Rubber	30
Paper, Pulp, or Allied Prod.	17	Articles of Base Metal	30
All Commodities	**376 (100%)**	**All Commodities**	**807 (100%)**
Freight by Truck	**145 (39%)**	**Freight by Truck**	*****

Source: IL Department of Transportation, 2012 Freight Mobility Plan; * Missing Data

Similar to the top U.S commodities displayed in table 1-1, **Table 1-2** above displays the top outbound commodities from Illinois measured in both millions of tons and billions of dollars. Comparable to the nation as a whole, Illinois' top commodities by weight include Coal, Mixed Freight (intermodal freight) and Cereal Grains, which combined make up 41% of all outbound commodities by weight. When looking

at outbound freight by value there are also strong similarities between Illinois and the United States. Machinery and Electronics are the top two commodities in value for both Illinois and the United States, and for Illinois they make up 20% of all outbound commodities.

One stark difference between Illinois outbound freight and the top U.S. commodities is the overall percentage of freight weight transported via truck. Illinois' freight weight via truck only equals 39% of the total outbound commodities, while the United States displays a percentage of 67%. This may demonstrate that the heavier freight in Illinois, such as Coal or Cereal Grains, are moved through other means of transportation such as rail, barge, or air, rather than semi-truck transportation, while the United States as a whole appears to use truck transportation first and foremost.

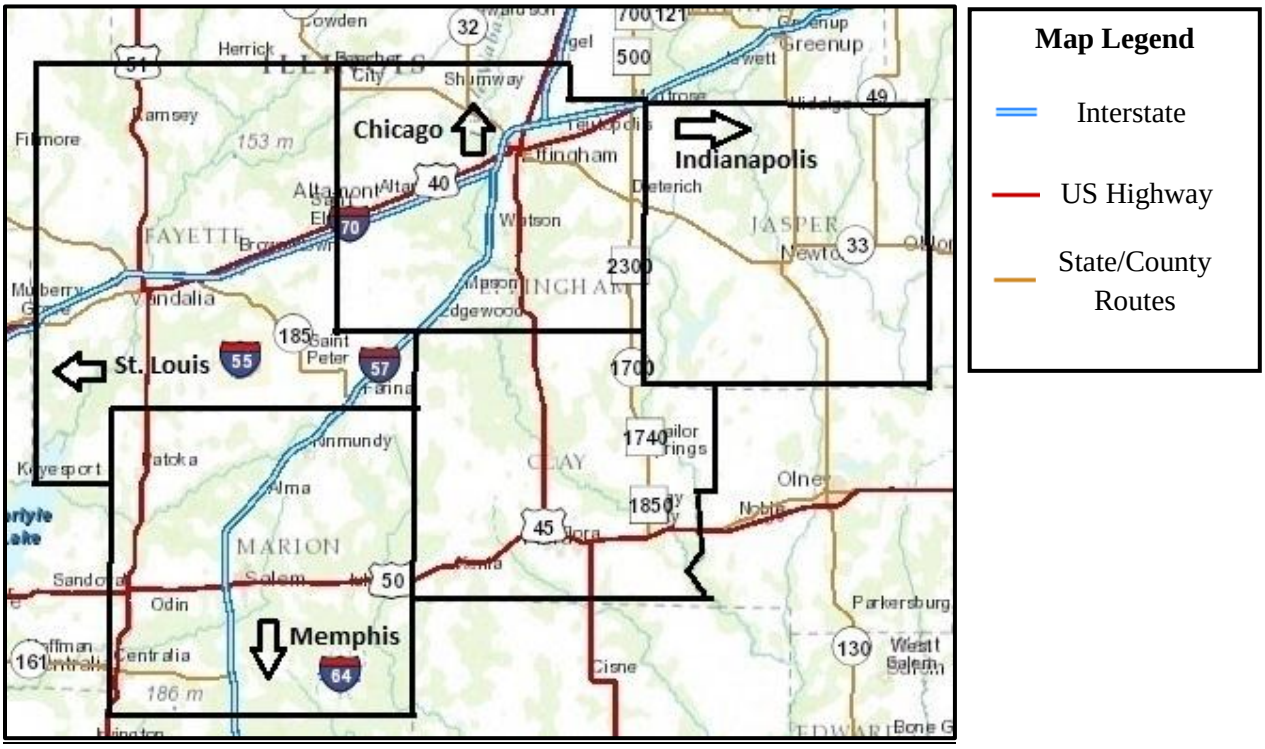
Although there is missing data relative to the dollar value of commodities transported by semi- truck for Illinois, it would be expected that the percentage of freight value by truck in Illinois would be comparable to the percentage of freight weight by truck.

II. Regional Freight Truck Analysis

a. Freight Truck Transportation

The South Central Illinois Region is fortunate to currently have above-average ground transportation access (as exhibited on **Figure 2-1**). Most notably, the region has direct access to I-57 which provides a connection to both Chicago, Illinois and Memphis, Tennessee, as well as I-70 which connects Pittsburgh, Pennsylvania with Denver, Colorado and crosses through several large metropolitan areas in between including, Columbus, Ohio; Indianapolis, Indiana; St. Louis, Missouri; and Kansas City, Missouri. I-64 is immediately south of the five-county region and stretches from St. Louis, Missouri to the Virginian Coastline passing through many notable cities, including Louisville, Kentucky and Richmond, Virginia. I-24 and I-55 are also within reasonable proximity to the South Central Illinois EDD and, in conjunction with I-57 and I-70, afford excellent ground transportation linkages to the majority of Midwestern U.S. metropolitan markets.

Figure 2-1: South Central Illinois Regional Freight Truck Access



Source: ArcGIS, U.S. Department of Transportation

U.S. Routes 40, 45, 50 and 51 provide yet another accessible means of ground transportation within the five-county region and linkages to other important intermediate destinations within Illinois and adjoining states. Furthermore, a network of state routes 32, 33, 37, 49, 128, 130, 140, 161 and 185 provide an additional transportation network which further connects the region's incorporated areas and serves as farm to market connections throughout the entire region.

As discussed in the previous section, all the interstates crossing through the SCIRPDC Region will experience a large increase in truck traffic in the next few decades. However, preparing for the increased traffic, along with the necessary maintenance and improvements that will follow, is not the only concern relative to freight movement in the SCIRPDC Region. What is of the utmost importance is ensuring that our state, county, and local roadways are also prepared for this increase of freight truck traffic. In order to ensure efficient freight truck movement, all the governmental entities within the SCIRPDC Region, along with the businesses located within their corresponding governmental boundaries, must have sufficient maintenance and improvement plans in place to account for the ever-growing amount of freight truck transportation in the area. Planning efforts must also ensure that each municipality is able to take advantage of this growing freight truck industry through economic development activities such as aggressive business retention and expansion efforts, proactive business recruitment and industrial or business park creation and improvement.

b. Industrial and Business Park Location

Collectively, the SCIRPDC Region includes eight municipalities, large and small, that have established industrial or business parks. Single industrial parks exist in Altamont, Dieterich, Flora, Newton, Salem and Sandoval. The City of Centralia has two industrial parks, while the City of Effingham hosts one freight truck accessible industrial park, in addition to three business parks that offer ideal locations for business and corporate offices. The current tenancy of the region's industrial parks is about 46%, with

Table 2-1: Regional Truck Accessible Industrial Parks

Municipality	Total Acres	Available Acres
Altamont		
Altamont Industrial Park	51	6
Centralia		
Industrial Park #1	175	22
Industrial Park #2	215	195
Dieterich		
Zumbahlen Industrial Park	45	7
Effingham		
Effingham Bus. Park	225	5
South Route 45 Park	37	20
Amer. Way Bus. Park	70	35
Network Centre	50	20
Flora		
Flora Industrial Park	170	70
Newton		
Southtown Industrial Park	48	44
Salem		
Salem Business Park	208	165
Sandoval		
Robinson Industrial Park	33	20
Region Totals	**1,327**	**609**

Source: SCIRPDC 2014-2016 CEDS

approximately 718 acres of a possible 1,327 currently occupied. This clearly illustrates that there is still an abundance of parcels of real estate available for new business growth as well as business expansion.

Table 2-1, located on the previous page, displays the municipalities with established industrial and business parks along with their corresponding size and availability. Although not included in the table, the City of Vandalia has numerous strategically located industrial sites, though no formally established industrial park. Furthermore, what is most important and relevant to this particular analysis is the location of these industrial parks and their proximity to interstate highways or other major routes for efficient freight truck access. Subsequent county specific sections will afford a detailed analysis of each of the municipality's corresponding industrial and/or business parks as well as their current freight truck transportation access to major roadways.

c. Freight Truck Commodity Exports

Examining the region's freight truck exports provides a view of the region's most valuable and concentrated industries, while also displaying those industry sectors that are need of improvement. **Table 2-2** shows all the freight truck commodity exports from the SCIRPDC Region in 2012, broken down into 21 categories, and measured by both dollar value and tonnage.

Table 2-2: Regional Commodity Exports

Commodity Category	Millions of Dollars	Tons
Machinery & Transportation Equip.	815	89,000
Warehousing	560	445,000
Electrical, Scientific, or Medical Equip	445	43,000
Prepared Foods	395	566,000
Primary Metal & Fabricated Products	305	130,000
Stone, Ore or Mineral Products	227	844,000
Livestock & Dairy	194	132,000
Forest & Related Products	185	221,000
Rubber or Misc. Plastic Products	152	41,000
Pulp, Paper, Print Material, or Allied Prod.	141	52,000
Chemicals or Allied Products	131	45,000
Agricultural Products	100	221,000
Petroleum or Coal Products	84	79,000
Misc. Manufactured Products & FAK*	56	7,000
Waste or Scrap	25	107,000
Meat and Seafood	15	4,000
Crude or Natural Gas	13	78,000
Textile Mill, Apparel & Leather Products	12	2,000
Tobacco & Alcohol	2	1,000
Coal or Coal By-Products	-	-
Ordnance & Accessories	-	-
Region Totals	**3,855**	**3,107,000**

Source: Transearch , 2012 *FAK = Freight of All Kinds

In 2012, the region's exported commodities via freight truck were valued at more than 3.8 billion dollars and weighed over three million tons. Although at first glance these figures seem large, when compared to Illinois and the United States, these figures' apparent large size is greatly diminished. Nevertheless, these statistics are vital to better understand the region's current economy and growth potential. The region's top five valued commodity exports make up 65% of the total commodity exports for the entire region. Although this does show several strong area industry clusters, there is always a danger in having such a large portion of the region's exports in only five commodity, or industry, categories. Diversification of both the type and amount of businesses and industries within the region provides the capability to withstand or quickly recover from major disruptions or 'shocks' to its underlying economic base. Those 'shocks' could include natural disasters, industry closures or layoffs, etc. Prevention is key, and the first step in preventing devastating impacts from these 'shocks' is industry diversification.

Taking an even closer look at the region's top commodities by value, we can see that the most influential commodity categories in terms of exported goods include, Machinery & Transportation Equipment; Warehousing; Electrical, Scientific, or Medical Equipment; Prepared Foods; and Primary Metal & Fabricated Products. By tonnage, Stone, Ore, or Mineral Products; Prepared Foods; Warehousing; Forest & Related Products; and Agricultural Products make up the top five commodities. Furthermore, when comparing commodity value and weight we can see that there are three commodities among the top five in value and weight, Stone, Ore, or Mineral Products; Prepared Foods; and Warehousing. On another note, the region did not export any Coal or Coal By-Products or Ordnance & Accessories (eg. Military Manufacturing), and only two million dollars or 1,000 tons of Tobacco & Alcohol via freight truck. However, if other modes of transportation were included in this analysis, specifically rail, undoubtedly some of these figures would no longer be zero, Coal or Coal By-Products in particular.

Moreover, **Table 2-4**, on the following page, provides a deeper analysis of the region's commodity exports through comparing its top five, and lowest five, commodity exports by value against those same commodity exports from the United States. This comparison provides the regional freight truck export data with context, offering a view that allows for deeper understanding and implication discussion. Since table 2-4, and many subsequent tables in this analysis, includes Location Quotient Analysis, a brief explanation of how a Location Quotient (LQ) is determined and utilized is necessary before going further.

LQ analysis is essentially a way of quantifying how concentrated a particular industry, cluster, occupation, demographic group, etc. is in one region as compared to a larger reference region. The central objective of LQ analysis is to reveal what makes a particular region or locale "unique" in comparison to the larger reference region. In more specific terms, LQ analysis is a ratio that compares one region to a larger reference region according to a particular characteristic or asset. **Table 2-3**, on the following page, summarizes both how the LQ is determined and some basic implications depending on the subsequent value of the LQ.

As shown on table 2-4, the region has two commodities above and two commodities below the LQ threshold of 1.0. These four commodities are in both the region's top five commodities and lowest five commodities, further demonstrating rather mixed results in terms of industry concentration. Among the region's top five commodity exports both Machinery & Transportation Equipment and Prepared Foods are being exported at a high volume by dollar value relative to the nation, while Electrical, Scientific, or Medical Equipment and Primary Metal & Fabricated Products, fall below what would be expected

Table 2-3: Location Quotient Analysis

Equation	Value	Implication
$LQ = \frac{\left(\frac{\text{Regional Commodity Export}}{\text{Total Regional Exports}}\right)}{\left(\frac{\text{National Commodity Export}}{\text{Total National Exports}}\right)}$	LQ > 1	Region has proportionally more exports of the particular commodity than the larger comparison area
	LQ < 1	May indicate an opportunity to develop businesses in the region

Table 2-4: Regional Commodity Exports vs. U.S. Commodity Exports

Commodity Category	United States ($)	SCIRPDC Region ($)	Location Quotient
Regional Top Five			
Machinery & Transportation Equip.	56,279	815	1.2
Warehousing	*	560	-
Electrical, Scientific, or Medical Equip.	131,745	445	.3
Prepared Foods	17,552	395	2.0
Primary Metal & Fabricated Products	30,648	305	.9
Regional Lowest Five			
Waste or Scrap	1,096	25	2.0
Meat and Seafood	11,384	15	1.3
Crude or Natural Gas	*	13	-
Textile Mill, Apparel & Leather Products	17,997	12	.06
Tobacco & Alcohol	3,233	2	.06
All Commodity Exports	**341,000**	**3,855**	

Source: Transearch, 2012; Bureau of Transportation Statistics, NAFTA U.S. Exports, 2012
Note: Dollar amounts are measured in millions of dollars. * Missing Data

relative to the national average, although only slightly. These results demonstrate that the region has strong Machinery & Transport Equipment and Prepared Foods commodity export clusters, but has room for business expansion and growth among the production of Electrical, Scientific, or Medical Equipment and, although not to the same extent, Primary Metal & Fabricated Products.

Regarding the region's lowest five commodity exports, a similar result is found to the one above. Both Waste or Scrap and Meat and Seafood exports, although low relative to the region's exports, fair quite well when measured against the national average. On the other hand, Textile Mill, Apparel & Leather products and Tobacco & Alcohol exports are not only low among the region's total exports, but are even lower compared to the national average, not even reaching an LQ of 0.1. This displays a possible opportunity for growth. However, in terms of the SCIRPDC Region, more focus should be put on continuing the development of existing industry sectors that already have a foundation in the region. This does not mean ignore opportunities for new industry expansion, but rather put more effort in growing those industries that are here, but not yet at their full potential (e.g. LQs between 0.5 and 1.0).

d. Freight Truck Commodity Imports

The region's commodity imports must also be taken into consideration to further identify the current flow of commodities into the region. **Table 2-5** below provides the region's commodity imports in detail. As a whole, the region imported over 3.1 billion dollars in commodities weighing more than 4 million tons via freight truck. One important finding from these statistics when compared against the regional commodity exports is that the region is exporting 699 million dollars more in commodities than it is importing, showing a rather significant regional balance of trade surplus relative to freight truck transportation.

Table 2-5: 2012 Regional Commodity Imports

Commodity Category	Millions of Dollars	Tons
Warehousing	642	517,000
Machinery & Transportation Equip.	442	71,000
Petroleum or Coal Products	412	467,000
Primary Metal & Fabricated Products	399	165,00
Agricultural Products	214	645,000
Electrical, Scientific, or Medical Equip.	182	18,000
Chemicals or Allied Products	149	53,000
Prepared Foods	142	130,000
Rubber or Misc. Plastic Products	121	28,000
Forest & Related Products	84	130,000
Stone, Ore or Mineral Products	77	1,565,000
Pulp, Paper, Print Material, or Allied Prod.	77	41,000
Livestock & Dairy	52	31,000
Meat and Seafood	46	40,000
Misc. Manufactured Products & FAK	43	19,000
Textile Mill, Apparel & Leather Products	40	290,000
Tobacco & Alcohol	26	15,000
Waste or Scrap	8	30,000
Ordnance & Accessories	1	50
Coal or Coal By-Products	1	29,000
Crude or Natural Gas	.004	1
Region Totals	**3,156**	**4,257,000**

Source: Transearch, 2012

Furthermore, similar to the region's exports, the top four commodity imports into the region by value equal 60% of all commodity imports. Those commodity categories include Warehousing; Machinery & Transportation Equipment; Petroleum or Coal Products; and Primary Metal & Fabricated Products.

The two lowest commodity exports by value from table 2-2, other than those that equaled zero, were Textile Mill, Apparel & Leather Products and Tobacco & Alcohol. These two commodity categories were also found to have LQ values below .1 in table 2-3, illustrating the regions far below average production compared to the nation. The region exports a total of 15 million dollars from these two commodity categories while it imports 66 million dollars, a trade deficit of 51 million dollars. These three basic statistics illustrate a possible opportunity for business expansion in these areas and at the very least a marginal demand for that expansion. However, as mentioned previously, focusing on the production and

export of commodities currently being produced in a higher volume is more cost-effective in the short term. Expanding growth in these commodity categories should be viewed as a future goal in a strategic plan rather than an urgent need.

Another finding when comparing the region's commodity exports and imports is that three commodity categories, Warehousing; Machinery & Transportation Equipment; and Primary Metal & Fabricated Products, made the top five, in terms of value, in both the commodity imports and exports tables. This demonstrates that although the region is producing vast quantities of these commodities, most of those products or services are being exported out of the region. It can therefore be conjectured that the region then must import those same commodities from external markets in order to meet consumer demand. Furthermore, it is plausible to infer that decreasing the region's outbound exports of those specific commodities, and rather keeping them within the region, may help decrease the importing costs. Keep in mind, this is only a preliminary discovery and prior to any decisions being made regarding these commodities, more detailed analysis of these two specific commodity categories is necessary.

e. Regional Commodity Import Origin and Export Destination

Taking the regional import and export analysis one step further, commodity import origin and export destination data will help further narrow down the region's key trade partners and the most utilized roadway infrastructure. **Table 2-6** shows the region's top five cities and states for both commodity imports and exports. What is most evident from the table below is that most exports from the SCIRPDC Region do not travel to far, with most all the commodity exports traveling to nearby larger metropolitan cities and Midwestern states, with the one exception being the State of Texas. This illustrates that when it comes to freight truck exports, the most utilized interstates are I-57 to Champaign and Chicago; I-70 to St. Louis and Indianapolis, as well as I-64 and I-69 to Evansville, Indiana. The exports that travel to Ohio will also be utilizing most predominantly I-70, and those traveling to Texas will most likely use I-57 to I-55 before reaching other closer proximity interstates or U.S. highways further south.

Table 2-6: Regional Top Import/Export Cities and States

Import Origin		Export Destination	
Top Cities	Top States	Top Cities	Top States
St. Louis, MO	Indiana	St. Louis, MO	Missouri
New York, NY	Missouri	Evansville, IN	Illinois
Los Angeles, CA	Illinois	Chicago, IL	Indiana
Nashville, TN	Ohio	Champaign, IL	Texas
Indianapolis, IN	New York	Indianapolis, IN	Ohio

Source: Transearch, 2012

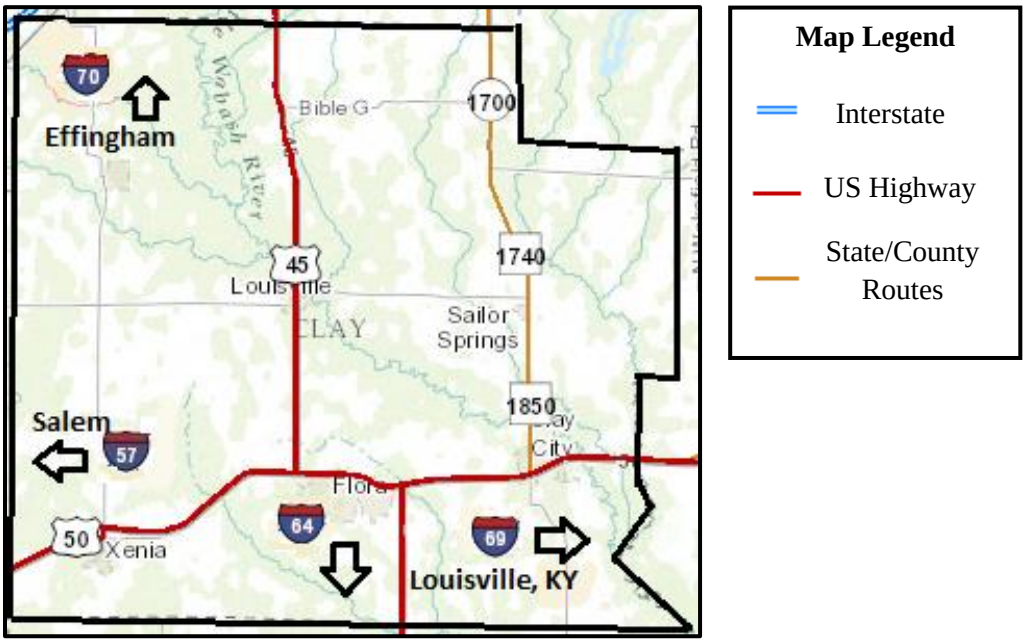
The majority of regional imports come from a slightly broader range, with New York and Los Angeles being the furthest traveled distance from the SCIRPDC Region. The imports from these two cities will most noticeably utilize I-70 to reach the region before connecting with the region's localized highway system to reach their final destination. The other three import origin cities are within much closer proximity and will primarily use I-57, I-70 and I-24 to reach the South Central Illinois Region. The top import origin states follow a similar pattern to the top export destination states with the only difference being that the State of New York replaces the State of Texas. The remainder of the top states are within the Midwest Region and have the same interstate and highway access as the top import origin cities discussed above.

III. Clay County Freight Truck Analysis

a. Freight Truck Transportation

Figure 3-1 provides an illustration of Clay County's current freight truck infrastructure and access to major roadways. Although Clay County does not have any direct access to interstates, it is within close proximity to four interstates including I-57 and I-70 to the west and northwest, I-64 to the south, and I-69, located in Indiana, to the east. Clay County is also home to two major U.S. Highways, U.S. 45 and U.S. 50, which cross paths in the City of Flora and provide freight truck transportation across nearly all of the United States.

Figure 3-1: Clay County Freight Truck Access



Source: ArcGIS, U.S. Department of Transportation

U.S. 45 is a border-to-border route that travels approximately 1,300 miles north-south starting from Lake Superior in Wisconsin and ending at the Gulf of Mexico in Mobile, Alabama. Along this route there is direct and easy access to several large metropolitan areas such as Madison, Wisconsin and Chicago, Illinois to the north as well as Jackson, Mississippi and Mobile, Alabama to the south. U.S. 50 is a major east-west route that stretches over 3,000 miles from Ocean City, Maryland, near the Atlantic Ocean, to Sacramento, California. Similar to U.S. 45, U.S. 50 is within arm's length of many large metropolitan areas across the United States including, but not limited to, Cincinnati, Ohio and Washington, DC to the east as well as St. Louis and Kansas City, Missouri to the west.

Although, at first glance Clay County does not appear to be prime area for a business or industry to locate, after reviewing the county's roadway infrastructure and access to major freight truck transportation routes, Clay County is great centralized location to provide the import and export of goods and commodities across the entire United States.

b. City of Flora Industrial Park

Figure 3-2, located on the following page, provides a map of the Flora Industrial Park in Clay County. Flora is the largest municipality in Clay County and is home to most of the major businesses within the county. Within the City of Flora there is a rather diverse group of businesses that include North American Lighting, Inc., who specialize in producing headlamps, fog lamps, and auxiliary combination systems at the Flora facility[5], Sherwin-Williams, who produce paints, stains, and other protective finishes, Hella Electronics, who focus on the design, engineering and manufacturing of electronic components, among several others that can be seen on figure 3-2. Even with the current large occupancy of the industrial park, which has a total size of approximately 240 acres, there is still around 70 acres available for new businesses or business expansion.

The Flora Industrial Park is located on the eastern side of the city and is only a few short minutes from the crossing of U.S. 45 and U.S. 50, two of the longest U.S. Highways in the country. Both of these U.S. Highways have access to I-57 to the east, I-70 to the north and I-69 to the west in Indiana, all offering linkages to several other major roadways that provide access to destinations across the nation.

c. Clay County Commodity Exports

As is shown on **Table 3-1**, Clay County exported more than one billion dollars in commodities via freight truck weighing in at 291 thousand tons. The county's top four commodity exports by value, Machinery & Transportation Equipment; Electrical, Scientific, or Medical Equipment; Primary Metal & Fabricated Products; and Chemicals or Allied Products account for 89% of all of the county's commodity exports. While on the opposite end of the spectrum, six of 21 commodity categories used in this analysis come up with zero exports, albeit several of these commodity categories would be expected to rise with other freight transportation modes included.

When comparing the county against the entire SCIRPDC Region, the county's commodity exports, in terms of dollars, account for nearly 27% of the region's total exports, but only 9% of the region's total export tonnage. The SCIRPDC Region's top commodity export, in dollars, was Machinery & Transportation Equipment coming in at approximately 815 million. Of that, nearly 400 million dollars in exports came from Clay County, equaling 49% of the entire region's Machinery & Transportation Equipment exports. Furthermore, nearly 66% of the region's third highest export commodity, Electrical, Scientific, or Medical Equipment, also came from Clay County. Although not a top commodity within the region as whole, Clay County accounted for 87% of all Chemicals or Allied Products exported from the SCIRPDC Region. These figures show how vital Clay County is to several of the region's top commodity exports and how important Clay County's industry is to the success of the region. However, with that said, continued diversification, as discussed previously, of the county's business and industry should be an essential goal to achieve in order for continued economic growth.

Table 3-2 dives deeper into Clay County's commodity exports in relation to the region by providing LQ analysis. Rather than compare Clay County to the entire nation, this particular LQ analysis provides a specific LQ figure that illustrates how concentrated each particular commodity category is in the county versus the region. The LQ figures were calculated using a similar formula to the one previously discussed on table 2-3.

Figure 3-2: Flora Industrial Park

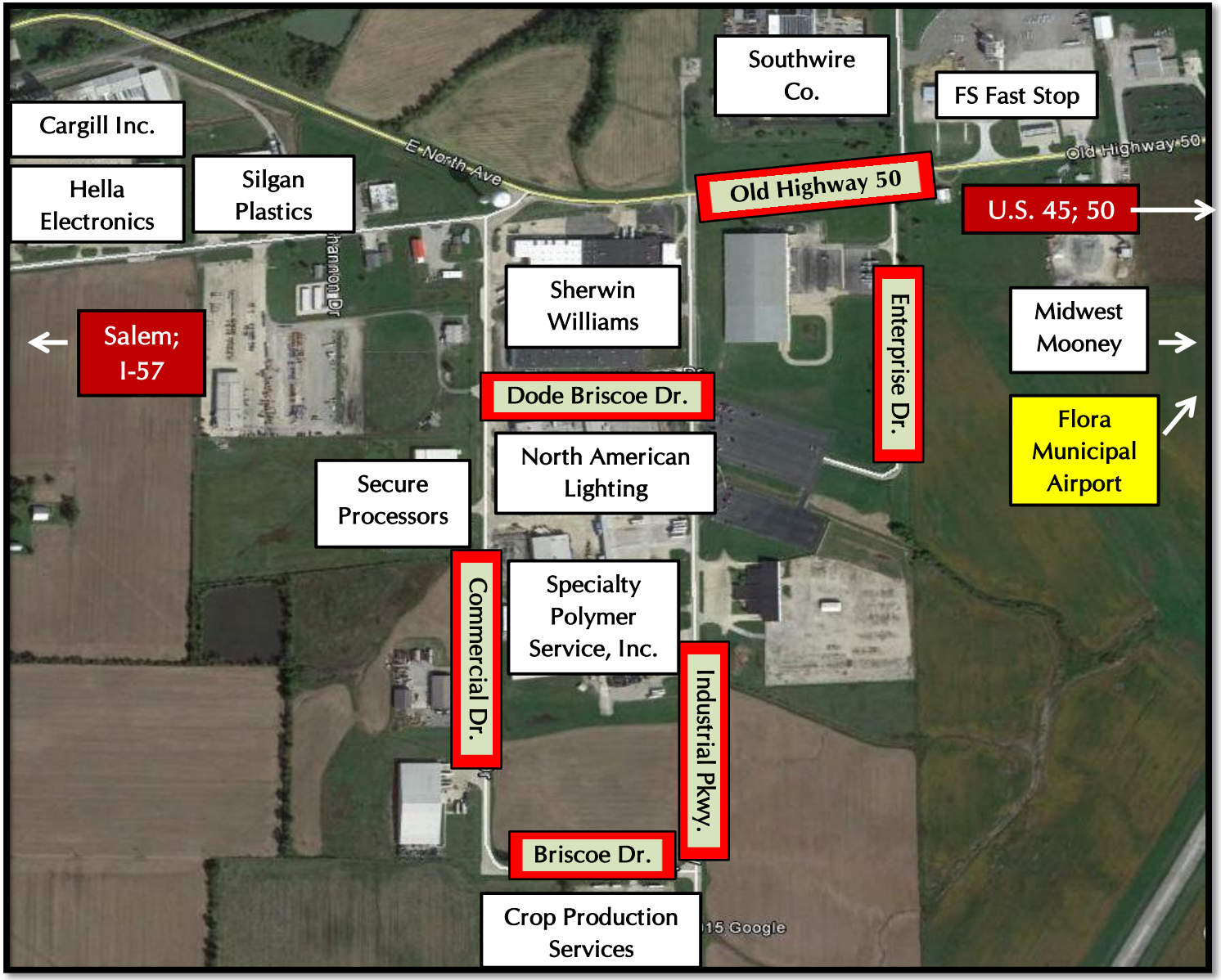


Table 3-1: Clay County Commodity Exports

Commodity Category	Millions of Dollars	Tons
Machinery & Transportation Equip.	397	45,000
Electrical, Scientific, or Medical Equip.	292	25,000
Primary Metal & Fabricated Products	115	46,000
Chemicals or Allied Products	114	34,000
Livestock & Dairy	41	21,000
Rubber or Misc. Plastic Products	28	8,000
Agricultural Products	20	41,000
Warehousing	8	6,000
Waste or Scrap	4	24,000
Meat and Seafood	3	700
Pulp, Paper, Print Material, or Allied Prod.	3	2,000
Forest & Related Prod.	2	4,000
Stone, Ore or Mineral Prod.	2	32,000
Crude or Natural Gas	1	5,000
Prepared Foods	.006	1
Coal or Coal By-Products	-	-
Misc. Manufactured Products & FAK	-	-
Ordnance & Accessories	-	-
Petroleum or Coal Products	-	-
Textile Mill, Apparel & Leather Prod.	-	-
Tobacco & Alcohol	-	-
County Totals	**1,030**	**291,000**

Source: Transearch, 2012

As shown on table 3-2, located on the following page, the top four Clay County LQs align directly with the top four commodity exports from the county. Chemicals or Allied Products (LQ = 3.7); Electrical, Scientific, or Medical Equipment (LQ = 2.5); Machinery & Transportation Equipment (LQ = 1.9); and Primary Metal & Fabricated Products (LQ = 1.4). Again, an LQ that is greater than one indicates that the specific commodity export category, or to take it one step further, industry sector, is one of the most predominant producers of a particular commodity relative to the region as a whole. In simple terms, an LQ above 1.0 indicates a significant regional industry sector.

In terms of which businesses are producing these commodity exports, Specialty Polymer Service Inc. and Sherwin-Williams are likely the most significant producers of Chemicals or Allied Products, which has the highest LQ of 3.7. Clay County's second highest LQ is in the commodity category Electrical, Scientific, or Medical Equipment and the leading industries from this category would seem to include both Southwire Co. and Hella Electronics, to name just two examples. Furthermore, North American Lighting, which employs over 800 people from the surrounding SCIRPDC Region[6], is without a doubt the largest contributor to the exportation of Machinery & Transportation Equipment from Clay County.

Table 3-2: Clay County Commodity Location Quotients

Commodity Category	SCIRPDC Region ($)	Clay County ($)	Location Quotient
Machinery & Transportation Equip.	815	397	1.9
Warehousing	560	8	.08
Electrical, Scientific, or Medical Equip	445	292	2.5
Prepared Foods	395	.006	*
Primary Metal & Fabricated Products	305	115	1.4
Stone, Ore or Mineral Products	227	2	.03
Livestock & Dairy	194	41	.8
Forest & Related Products	185	2	.04
Rubber or Misc. Plastic Products	152	28	.5
Pulp, Paper, Print Material, or Allied Prod.	141	3	.08
Chemicals or Allied Products	131	114	3.7
Agricultural Products	100	20	.7
Petroleum or Coal Products	84	-	0
Misc. Manufactured Products & FAK	56	-	0
Waste or Scrap	25	4	.7
Meat and Seafood	15	3	.8
Crude or Natural Gas	13	1	.3
Textile Mill, Apparel & Leather Products	12	-	0
Tobacco & Alcohol	2	-	0
Coal or Coal By-Products	-	-	-
Ordnance & Accessories	-	-	-
Totals	**3,855**	**1,030**	

Source: Transearch, 2012; Note: Dollar amounts are measured in millions of dollars. * Less than .01

Although, many of the above-mentioned businesses contribute also to the Primary Metal & Fabricated Products commodity exports, one additional not yet mentioned business that would have an important impact on this category would be Silgan Plastics, who is most known for their manufacturing of plastic bottles and other containers.

Categories that have LQs just below 1.0 indicate an established industry sector foundation that may continue to grow with proactive business expansion efforts. These commodity categories include Livestock & Dairy (LQ = .8); Agricultural Products (LQ = .7), probably coming largely from Crop Production Services; and Waste or Scrap (LQ = .7), at least in part coming from the Secure Processors, who focus on electronics recycling. Since the LQs for these commodity categories are below 1.0, but still relatively high, this indicates a great opportunity to pursue growth in those industries and further diversify the county's economic development platform. There are many other businesses not mentioned here that are important contributors to Clay County's commodity exports, but to provide an exhaustive list of each individual business and their corresponding contributions would be time-consuming and ineffective related to this study.

d. Clay County Commodity Imports

Table 3-3: Clay County Commodity Imports

Commodity Category	Millions of Dollars	Tons
Primary Metal & Fabricated Products	169	71,000
Machinery & Transportation Equip.	94	11,000
Warehousing	56	41,000
Electrical, Scientific, or Medical Equip.	39	4,000
Petroleum or Coal Products	34	38,000
Chemicals or Allied Products	34	16,000
Rubber or Misc. Plastic Products	25	6,000
Misc. Manufactured Products & FAK	19	15,000
Meat and Seafood	15	32,000
Prepared Foods	11	11,000
Agricultural Products	10	30,000
Stone, Ore or Mineral Prod.	10	151,000
Forest & Related Prod.	8	10,000
Textile Mill, Apparel & Leather Prod.	6	900
Livestock & Dairy	4	3,000
Pulp, Paper, Print Material, or Allied Prod.	4	2,000
Tobacco & Alcohol	3	2,000
Waste or Scrap	.3	60
Coal or Coal By-Products	.03	70
Crude or Natural Gas	-	-
Ordnance & Accessories	-	-
County Totals	**542**	**444,000**

Source: Transearch, 2012

Table 3-3 above shows a summary of the total amount of Clay County's commodity imports from 2012. In sum, Clay County imported 542 million dollars of commodities that weighed a total of 444 thousand tons. Comparing these figures to the county's overall export figures it becomes apparent that Clay County has exported far more commodities, in terms of dollars, than it has imported. Specifically, the county exported 488 million dollars more in commodities than it imported, illustrating a rather large balance of trade surplus. On the other hand, the county imported 444 thousand tons of commodities compared to only exporting 291 thousand tons. This difference of 153 thousand tons is nearly completely made up from Stone, Ore or Mineral Products imports which weighed in at 151 thousand tons. This large amount of imported Stone, Ore or Mineral Products is logical since this particular commodity category, and industry sector, only exported two million dollars and 32 thousand tons, hence the need for a large amount of imports from this particular commodity category.

The county's top two commodity imports, Primary Metal & Fabricated Products and Machinery & Transportation Equipment not only coincide with the county's top commodity exports, but also account for 49% of the county's total commodity exports. This can likely be explained in large part by the

movement of specific electrical, machine, and transportation parts and equipment from other regions necessary for the manufacturing of specific goods that are produced by Clay County industries.

e. Clay County Commodity Import Origin and Export Destination

Table 3-4: Clay County Top Import/Export Cities and States

Import Origin		Export Destination	
Top Cities	Top States	Top Cities	Top States
St. Louis, MO	Indiana	St. Louis, MO	Indiana
New York, NY	Missouri	Evansville, IN	Missouri
Los Angeles, CA	Illinois	New York, NY	Illinois
Indianapolis, IN	Ohio	Chicago, IL	Kentucky
Chicago, IL	New York	Indianapolis, IN	Texas

Source: Transearch, 2012

Table 3-4 displays Clay County's top five cities and states for both commodity imports and exports. The similarities between Clay County's top import origins and export destinations with that of the entire SCIRPDC Region are obvious and somewhat expected. As the table indicates, St. Louis is the most common commodity import origin and export destination continuing to illustrate the high volume activity on I-57, I-70 and I-64 as well as U.S. Highway 50, which provides a direct connection with St. Louis. Most all of the commodity imports and exports through Clay County are cities or states within the Midwest Region, the only exceptions being the cities of New York and Los Angeles, as well as the State of Texas.

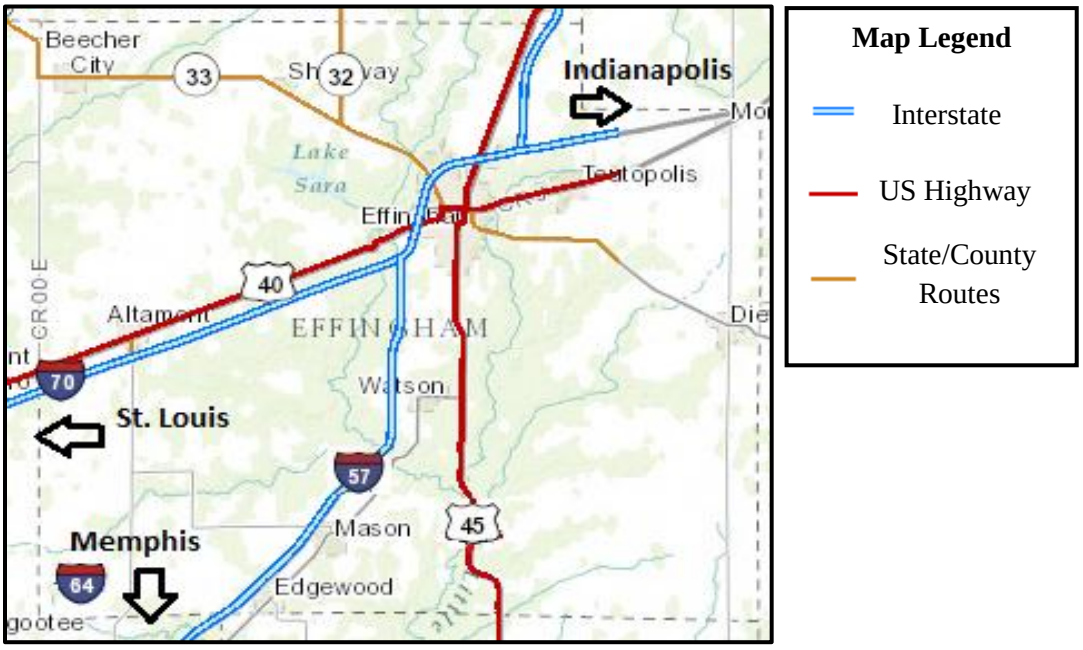
Clay County, in terms of both imported and exported commodities, is undoubtedly utilizing U.S. Highways 45 and 50 as the key roadways for both the origin of commodity exports and the destination for commodity imports. Not only do these two highways provide critical linkages to numerous interstates and stretch east-west and north–south respectively, but they also converge in two separate places within the City of Flora, Clay County's central industrial hub. As we move into the future, ensuring the proper maintenance, upkeep, and continued improvement of these two highways within Clay County is absolutely critical to flow of freight both for Clay County and all other destinations that are within close proximity to these two major roadways. In order to achieve these goals, continued conversation and discussion about problem areas with these two roadways is critical, and these discussions should be done in concert with local, regional, state, and federal officials.

IV. Effingham County Freight Truck Analysis

a. Freight Truck Transportation

Effingham County can be considered both the transportation and industrial hub of the SCIRPDC Region, most notably due to the direct crossing of two major interstates in the City of Effingham, I-57 and I-70, and additionally I-70 provides access to I-64. Effingham County also has two major U.S. Highways, U.S. 40 and 45, which intersect in the center of the City of Effingham. The county is also home to other state and county highways that provide easy access with local municipalities and other bordering counties. **Figure 4-1** provides an illustration of this roadway infrastructure.

Figure 4-1: Effingham County Freight Truck Access



Source: ArcGIS, U.S. Department of Transportation

I-57 is a north-south interstate that stretches from Chicago, Illinois to Sikeston, Missouri that connects I-94 in Chicago with I-55 in near Sikeston, Missouri and along the way provides linkages to I-74 in Champaign, Illinois, I-70 in Effingham, I-64 near Mount Vernon, Illinois and I-24, just south of Marion, Illinois. Effingham County is also the crossroads of U.S. 40 and 45. U.S. 45 is a north-south route starting from Lake Superior in Wisconsin and ending at the Gulf of Mexico in Mobile, Alabama. U.S. 40 is an east-west route that stretches from Baltimore, Maryland to Silver Summit, Utah. This particular highway crosses through 12 states and runs parallel with several interstates including I-70, I-64, I-68 (Maryland) and I-95 (Maryland & Delaware).

With the crossroads of I-57 and I-70 as well as U.S. 40 and 45 both centrally located in Effingham County, it is easy to see why it is not only the central transportation and industry hub of the SCIRPDC Region, but also arguably one of the main industry hubs in the entire nation.

b. City of Altamont Industrial Park

Figure 4-2 displays the City of Altamont's Industrial Park and provides a map of many of the businesses that are located within it. Altamont has a population just over 2,000 and is located southwest of the City of Effingham. The city's industrial park has wide-range of businesses including retail stores, a fitness center, and a hotel, among many others. Specifically, some of these businesses include Minnesota Limited Inc., who provide pipeline and station services for the oil and gas industry; BK Resources, who provide contractual plumbing services; Landmark Structures Inc., who provide prefabricated wood products; and many others shown on figure 4-2. Currently the Altamont Industrial Park has only six available acres out of a total of 57 in their industrial park. However, this still leaves enough room for continued business expansion to fill the existing available land.

The Altamont Industrial Park is located directly south of I-70 and U.S. Highway 40, giving the businesses located there excellent access to both the St. Louis and Indianapolis metropolitan areas. I-57 is also only a short distance east and provides a close proximity north-south route to go along with the east-west route of I-70.

c. Village of Dieterich Zumbahlen Industrial Park

The Village of Dieterich is one of the smallest municipalities in the region with an established industrial park with a population of less than 600 according to the 2010 Census. Nevertheless, the Zumbahlen Industrial Park, located at the north-east side of town and shown on **Figure 4-3**, has a total of 52 acres, with a current occupancy of 45 acres, leaving approximately seven acres still available for use. The businesses that are currently located within the industrial park include Advance Powder Technology, providing powder coating to manufacturing companies most notably, Niebrugge Lumber & Agriculture Services, Ideal Machine, among several others.

Zumbahlen Industrial Park is located along Illinois Route 33 which stretches from the east of Effingham to the Illinois-Indiana border and provides access to I-57 and I-70 in Effingham. Again, although Dieterich is a rather small municipality, its location does provide excellent access to two major interstate highways and can be a great location for numerous types of industry and businesses.

d. City of Effingham Industrial and Business Parks

The City of Effingham has a total of four truck accessible business and industrial parks including the Effingham Business Park, South Route 45 Park, American Way Business Park and Network Centre. Within these four parks there is a total approximate acreage of 382, of which currently includes around 80 acres of available land. Maps of these four business and industrial parks are located on **Figures 4-4**, **4-5** and **4-6**. These parks include a wide range of businesses and industries including FedEx Freight; Sherwin Williams; Pinnacle Foods; and Heartland Dental, to just name a few examples.

These four parks are each located in highly visible and accessible areas each within direct access to both I-57 and I-70 along with U.S. 40, U.S. 45 and IL 33. These highways provide any Effingham business or industry with first-rate freight truck transportation access to large metropolitan areas across the nation

Figure 4-2: Altamont Industrial Park

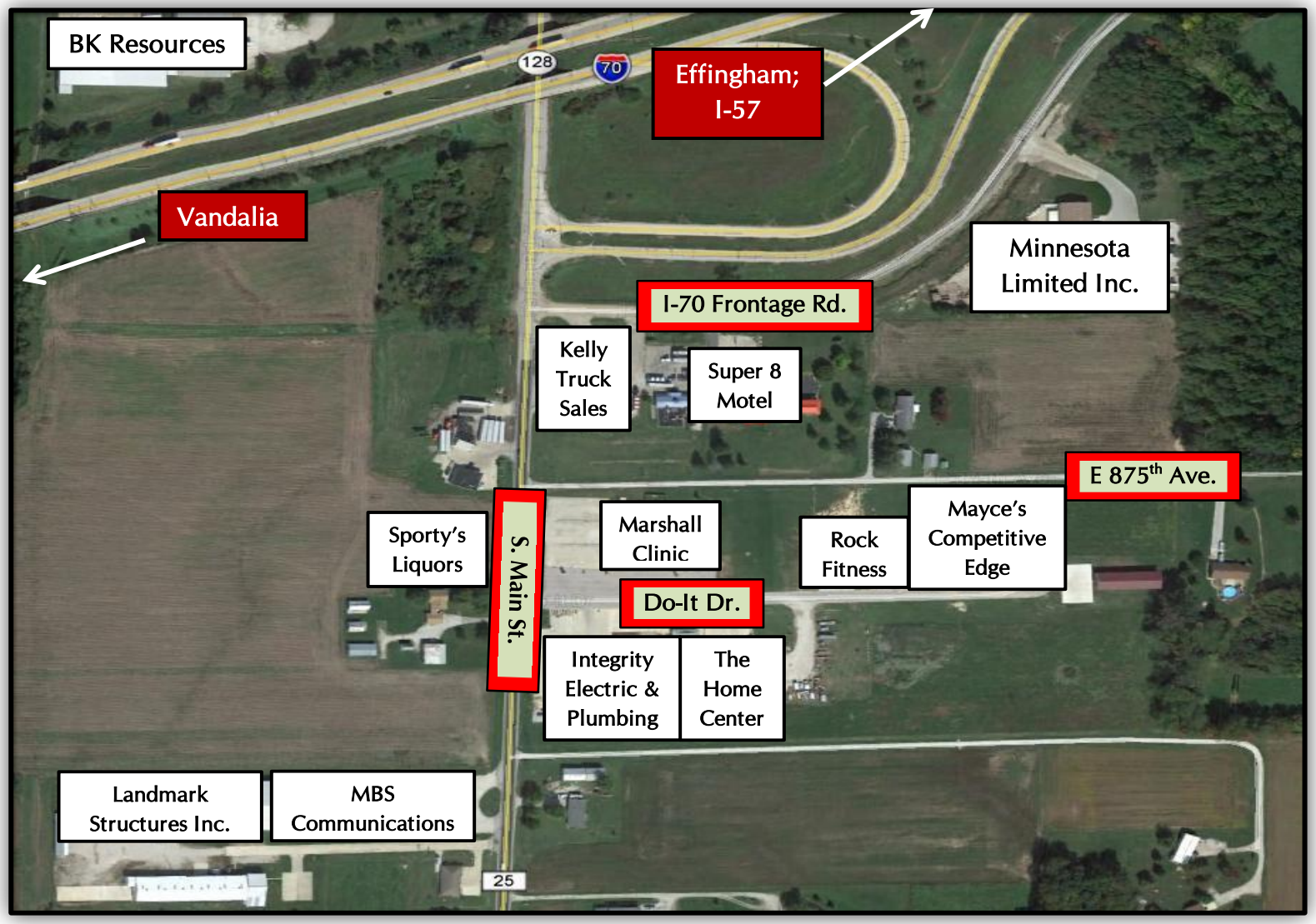


Figure 4-3: Zumbahlen Industrial Park

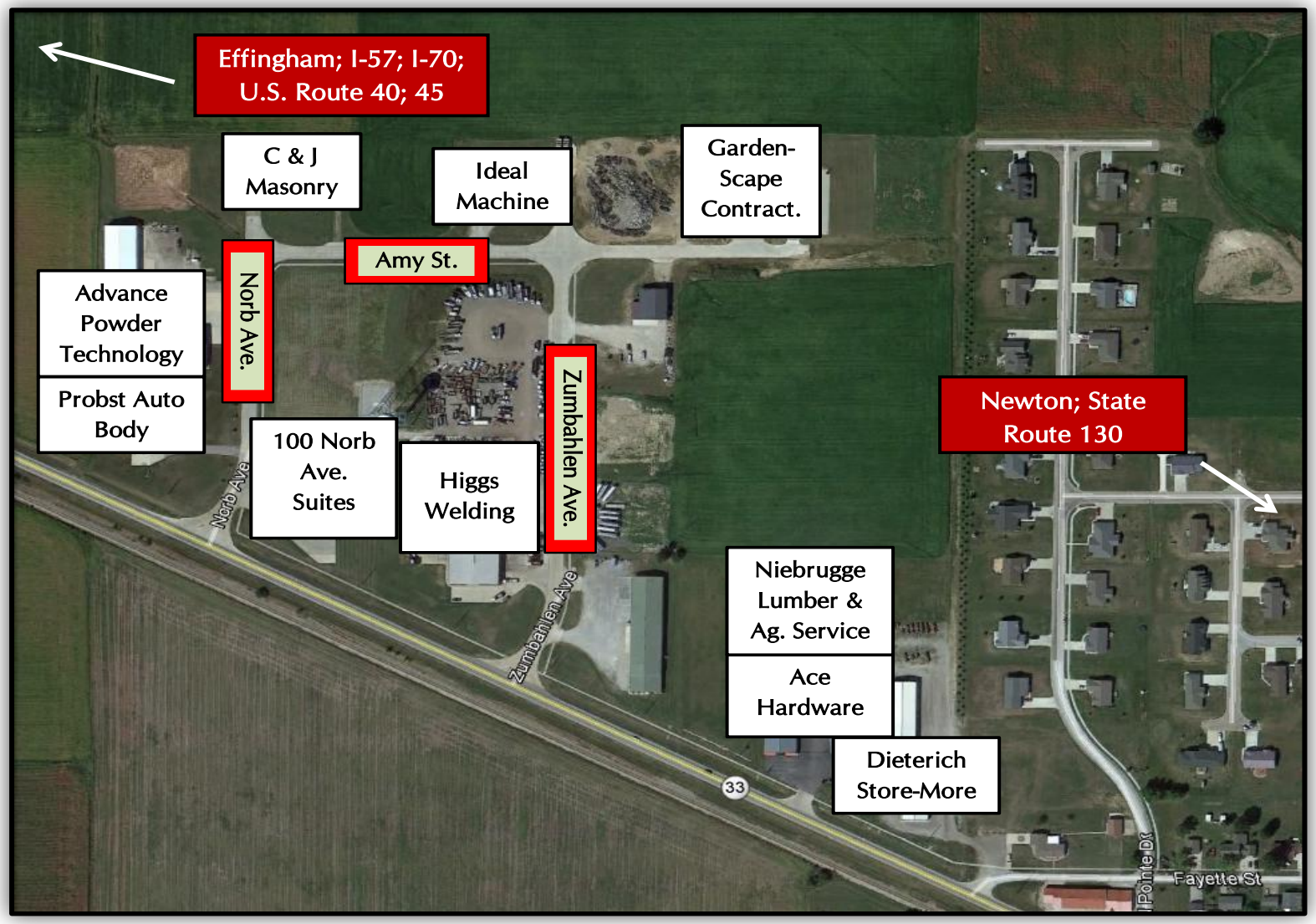


Figure 4-4: Effingham Business Park/South Route 45 Park

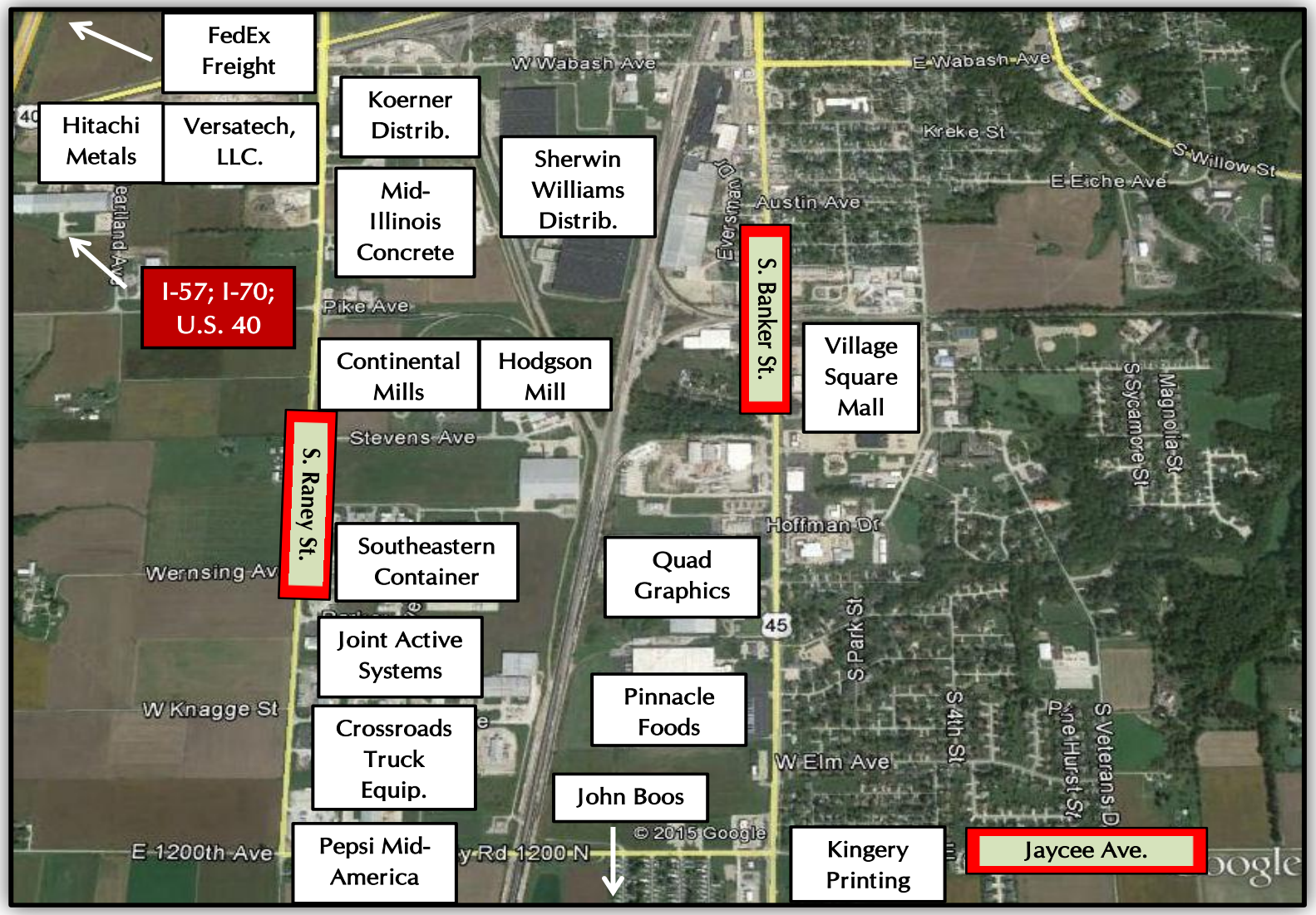


Figure 4-5: Network Centre

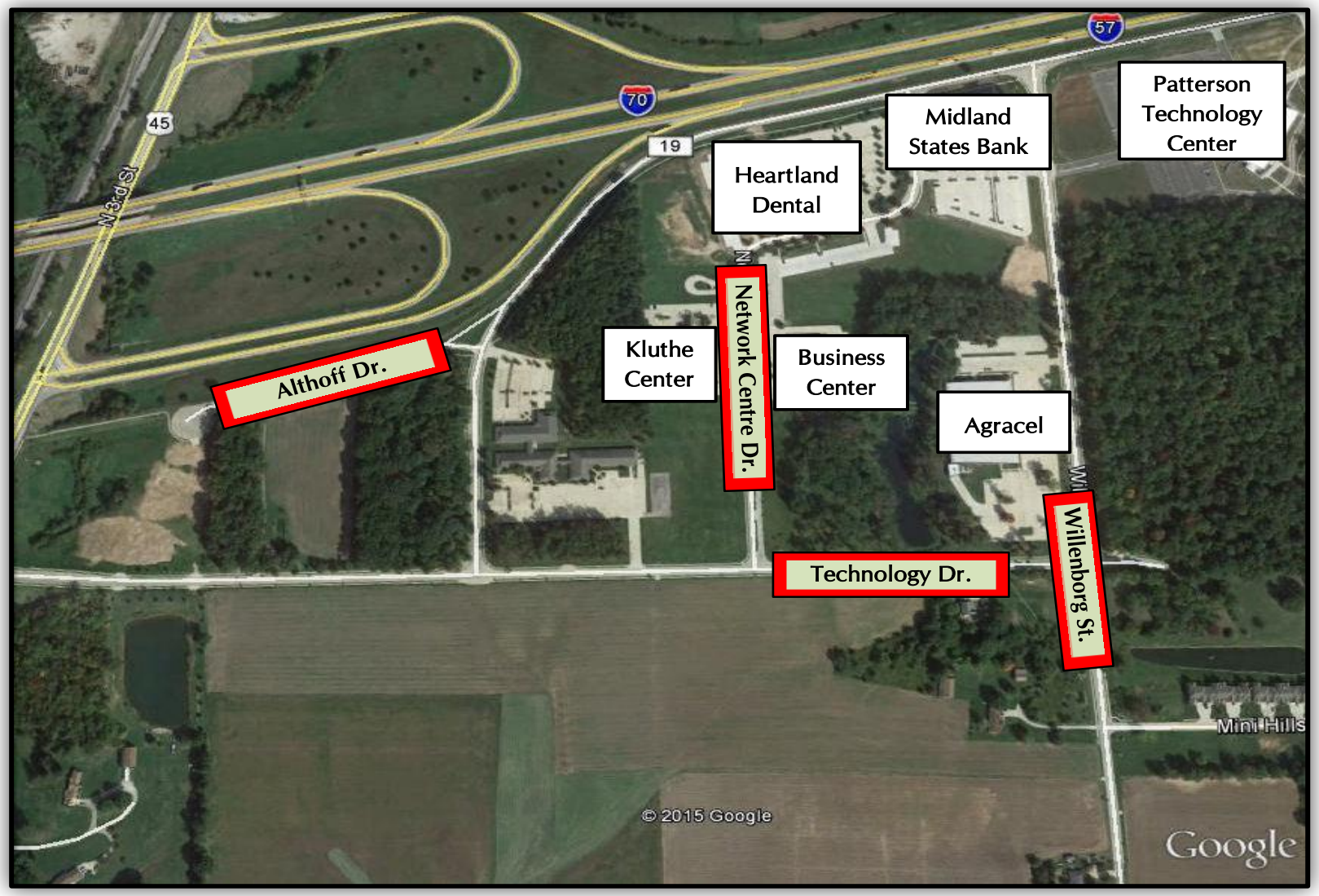
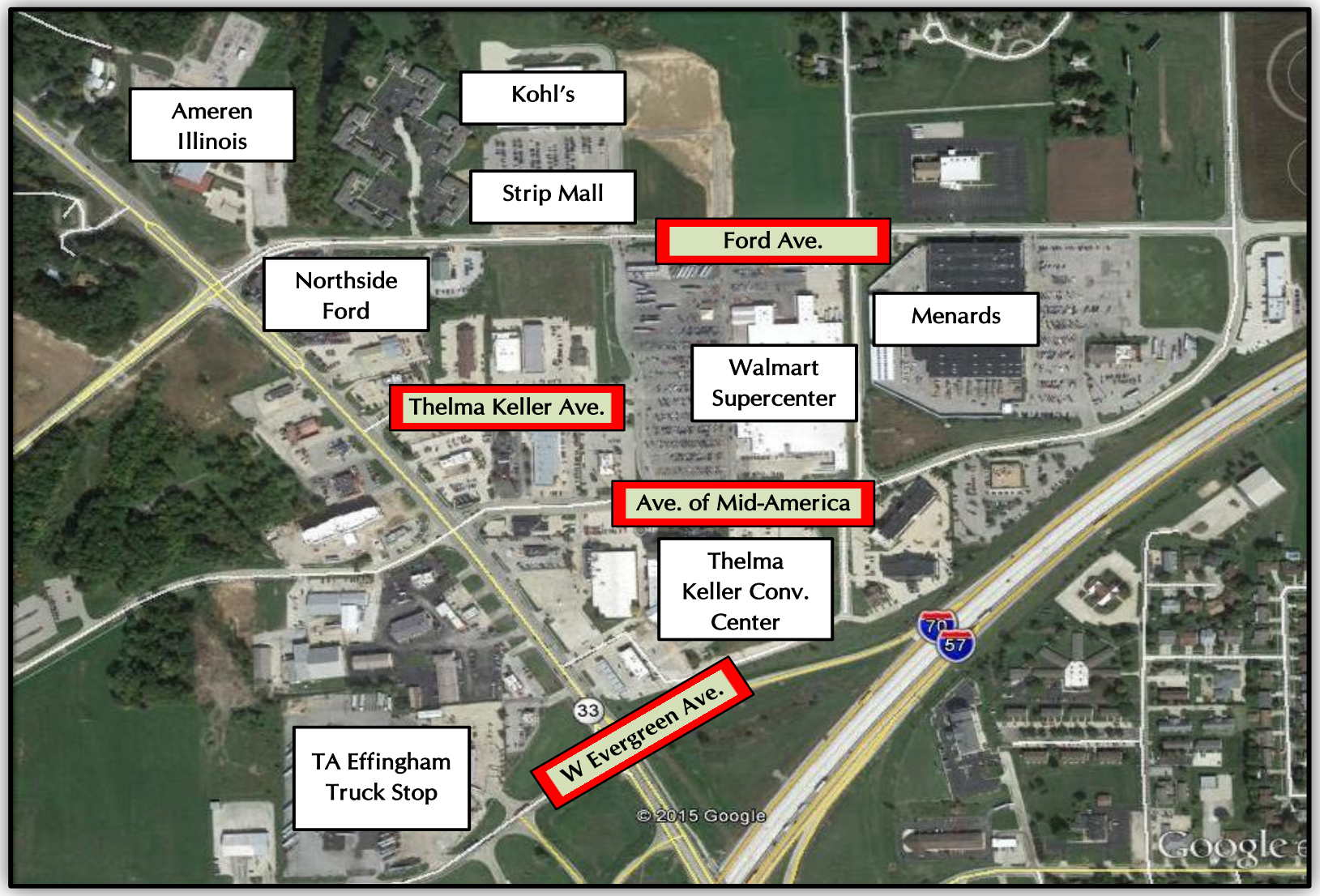


Figure 4-6: American Business Way Park



e. Effingham County Commodity Exports

As is indicated on **Table 4-1**, Effingham County exported more than 1.3 billion dollars in commodities via freight truck, leading the SCIRPDC Region in that category, and weighing close to 1.4 million tons. The county's top commodity exports included Warehousing; Machinery & Transportation Equipment; Prepared Foods; and Forest & Related Products. These four commodity categories make up for 68% of the total amount of commodity exports for Effingham County in 2012.

Table 4-1: Effingham County Commodity Exports

Commodity Category	Millions of Dollars	Tons
Warehousing	312	254,000
Machinery & Transportation Equip.	216	24,000
Prepared Foods	206	424,000
Forest & Related Prod.	164	200,000
Primary Metal & Fabricated Products	95	39,000
Pulp, Paper, Print Material, or Allied Prod.	79	23,000
Livestock & Dairy	71	58,000
Electrical, Scientific, or Medical Equip.	71	13,000
Stone, Ore or Mineral Prod.	25	273,000
Rubber or Misc. Plastic Products	22	6,000
Agricultural Products	17	37,000
Textile Mill, Apparel & Leather Prod.	11	2,000
Chemicals or Allied Products	8	7,000
Misc. Manufactured Products & FAK	7	2,000
Waste or Scrap	6	25,000
Meat and Seafood	3	800
Crude or Natural Gas	.2	1,000
Coal or Coal By-Products	-	-
Ordnance & Accessories	-	-
Petroleum or Coal Products	-	-
Tobacco & Alcohol	-	-
County Totals	**1,312**	**1,388,000**

Source: Transearch, 2012

Effingham County accounted for just over 34% of the entire SCIRPDC Region's total commodity exports by value and nearly 45% of the region's total export tonnage, most notably coming from Prepared Foods; Stone, Ore, or Mineral Products; and Warehousing. Effingham County and the region have three of the top four commodity export categories in common including Warehousing; Machinery & Transportation Equipment; and Prepared Foods. Effingham County accounts for 41% of those three commodity exports, and specifically account for 56% of Warehousing as well as 52% of Prepared Foods. Moreover, Effingham County's exports are well-diversified with eight commodity categories exporting more than 70 million dollars. One particular commodity that sets Effingham County apart from the rest is their Forest

Table 4-2: Effingham County Commodity Location Quotients

Commodity Category	SCIRPDC Region ($)	Effingham County ($)	Location Quotient
Machinery & Transportation Equip.	815	216	.8
Warehousing	560	312	2.4
Electrical, Scientific, or Medical Equip	445	71	.4
Prepared Foods	395	206	1.6
Primary Metal & Fabricated Products	305	95	.9
Stone, Ore or Mineral Products	227	25	.3
Livestock & Dairy	194	71	1.0
Forest & Related Products	185	164	2.6
Rubber or Misc. Plastic Products	152	22	.5
Pulp, Paper, Print Material, or Allied Prod.	141	79	1.5
Chemicals or Allied Products	131	8	.2
Agricultural Products	100	17	.3
Petroleum or Coal Products	84	-	0
Misc. Manufactured Products & FAK	56	7	.5
Waste or Scrap	25	6	.8
Meat and Seafood	15	3	.5
Crude or Natural Gas	13	.2	.03
Textile Mill, Apparel & Leather Products	12	11	2.7
Tobacco & Alcohol	2	-	0
Coal or Coal By-Products	-	-	-
Ordnance & Accessories	-	-	-
Totals	**3,855**	**1,312**	

Source: Transearch, 2012; Note: Dollar amounts are measured in millions of dollars.

& Related Products industry which exported 164 million dollars in commodities, with the rest of the region only exporting 21 million, equating to a total of 89% coming from Effingham County alone.

Table 4-2 displays Effingham County's commodity export LQs versus the region as a whole. In this particular case, the top location quotients do not necessarily coincide with the top commodity export categories. The top LQs for Effingham County that cross the LQ > 1 threshold includes Textile Mill, Apparel & Leather Products (LQ = 2.7); Forest & Related Products (LQ = 2.6); Warehousing (LQ = 2.4); Prepared Foods (LQ = 1.6); and Pulp, Paper, Print Material, or Allied Products (LQ = 1.5). These five LQs all indicate that, when compared to the region as a whole, these specific industry sectors are well-established exporters that are particularly successful in Effingham County.

The businesses most closely associated with these high LQs would be John Boos & Co, who provides world-renowned wood and stainless steel kitchenware, likely to account for the Forest & Related Products industry. Continental Mills, Hodgson Mill and Pinnacle Foods most likely accounting for the Prepared Foods industry, along with the innumerable amount of other restaurants and eateries. As for the Pulp, Paper, Print Material, or Allied Products category, Kingery Printing as well as Quad Graphics are likely to be the most essential contributors. However, the LQs that may be even more important are those that are close to reaching the 1.0 threshold indicating a great opportunity for expansion and growth.

In the case of Effingham County, those industry sectors or commodity categories include Waste or Scrap (LQ = .8); Machinery & Transportation Equipment (LQ = .8); and Primary Metal & Fabricated Products (LQ = .9). A few of the current businesses that would fit into some of these commodity export categories would be Hitachi Metals; Versatech LLC; John Boos & Co.; among others. These three LQs represent industry sectors that are expanding and can, with thoughtful growth and expansion, become excellent export producing businesses for the county and the entire region.

f. Effingham County Commodity Imports

Table 4-3: Effingham County Commodity Imports

Commodity Category	Millions of Dollars	Tons
Warehousing	285	232,000
Petroleum or Coal Products	200	221,000
Machinery & Transportation Equip.	176	23,000
Agricultural Products	133	489,000
Primary Metal & Fabricated Products	88	35,000
Electrical, Scientific, or Medical Equip.	80	8,000
Prepared Foods	58	47,000
Forest & Related Prod.	53	96,000
Chemicals or Allied Products	51	16,000
Rubber or Misc. Plastic Products	45	10,000
Pulp, Paper, Print Material, or Allied Prod.	28	12,000
Stone, Ore or Mineral Prod.	23	504,000
Textile Mill, Apparel & Leather Prod.	17	3,000
Livestock & Dairy	16	10,000
Meat and Seafood	16	4,000
Misc. Manufactured Products & FAK	12	2,000
Tobacco & Alcohol	8	7,000
Waste or Scrap	5	18,000
Ordnance & Accessories	.6	30
Coal or Coal By-Products	.1	4,000
Crude or Natural Gas	-	-
County Totals	**1,292**	**1,743,000**

Source: Transearch, 2012

Table 4-3 above displays the total commodity imports for Effingham County in 2012. As shown, Effingham County imported nearly 1.3 billion dollars in commodities weighing almost 1.75 million tons. These figures, combined with the county's total commodity imports, illustrate that the county exported 20 million dollars more in commodities than it imported demonstrating a small balance of trade surplus. In terms of weight, the county imported 355 thousand more tons of commodities than it exported. This difference was made up almost wholly by the import of Agriculture Products, which weighed in at nearly 500 thousand tons, and to equating to 133 million dollars. Since Effingham County only exported 17

million dollars' worth of Agriculture Products, the large amount of imports from this particular commodity makes logical sense.

The pending recruitment of Beck's Superior Hybrids, Inc. into the City of Effingham could, in time, alter the findings relative to Agricultural Products quite sharply. Specifically, increases in Effingham County's Agricultural Products commodity exports would likely in turn increase the commodity or industry sector's LQ relative to the region, and ultimately further diversify not only the county's industry sector, but the regional economy as a whole.

Effingham County's top three commodity imports coincide with the top three commodity imports for the entire SCIRPDC Region. These commodity categories include Warehousing; Petroleum or Coal Products; and Machinery & Transportation Equipment. Effingham County accounts for 44% of the total regional imports in these three particular commodity categories. Overall, when measuring by dollar value, Effingham County accounted for nearly 41% of the region's total commodity imports, and when measured by weight, Effingham County again accounts for 41%. The high figures are not necessarily unexpected since Effingham County is not only the central industry hub of the region, but also the second highest populated county in the SCIRPDC Region, with only Marion County slightly above.

g. Effingham County Commodity Import Origin and Export Destination

Table 4-4 displays Effingham County's top five cities and states for both commodity imports and exports. After reviewing table 4-4, and comparing it against the top import origins and export destinations for the region, what can be seen is that in terms of both import and exports, Effingham County has a slightly further reach across the nation than the SCIRPDC Region as a whole. This is not unexpected due to the centralized location that Effingham has regionally and nationally, along with their high volume of national industry chains and businesses.

Table 4-4: Effingham County Top Import/Export Cities and States

Import Origin		Export Destination	
Top Cities	Top States	Top Cities	Top States
New York, NY	Indiana	St. Louis, MO	Missouri
St. Louis, MO	Missouri	Des Moines, IA	Illinois
Los Angeles, CA	Illinois	New York, NY	Texas
Nashville, TN	New York	Evansville, IN	Iowa
Savannah, GA	Texas	Champaign, IL	Indiana

Source: Transearch, 2012

In terms of Effingham County exports, it becomes clear that several interstates are widely used across Illinois in order to efficiently deliver the county's commodity exports. These include I-57, and U.S. 40 for St. Louis; I-57 for Champaign; I-57 to I-74 and then north to I-80 for Des Moines, Iowa; I-70 for New York; and I-57 to I-64 for Evansville, Indiana. The top states follow a similar pattern of roadway usage with the addition of Texas which would likely utilize I-57 to I-55 to exit the Southern Illinois border before connecting to other closer proximity interstates or major highways near Texas.

When it comes to the county's imports the top states are relatively the same as with the exports, except for New York, which would utilize I-70 to reach Effingham County. Los Angeles would also use I-70, while commodity imports from Nashville, Tennessee, and Savannah, Georgia, would predominately use I-24 to enter southern Illinois connecting then to I-57 or U.S. 45 to reach Effingham County.

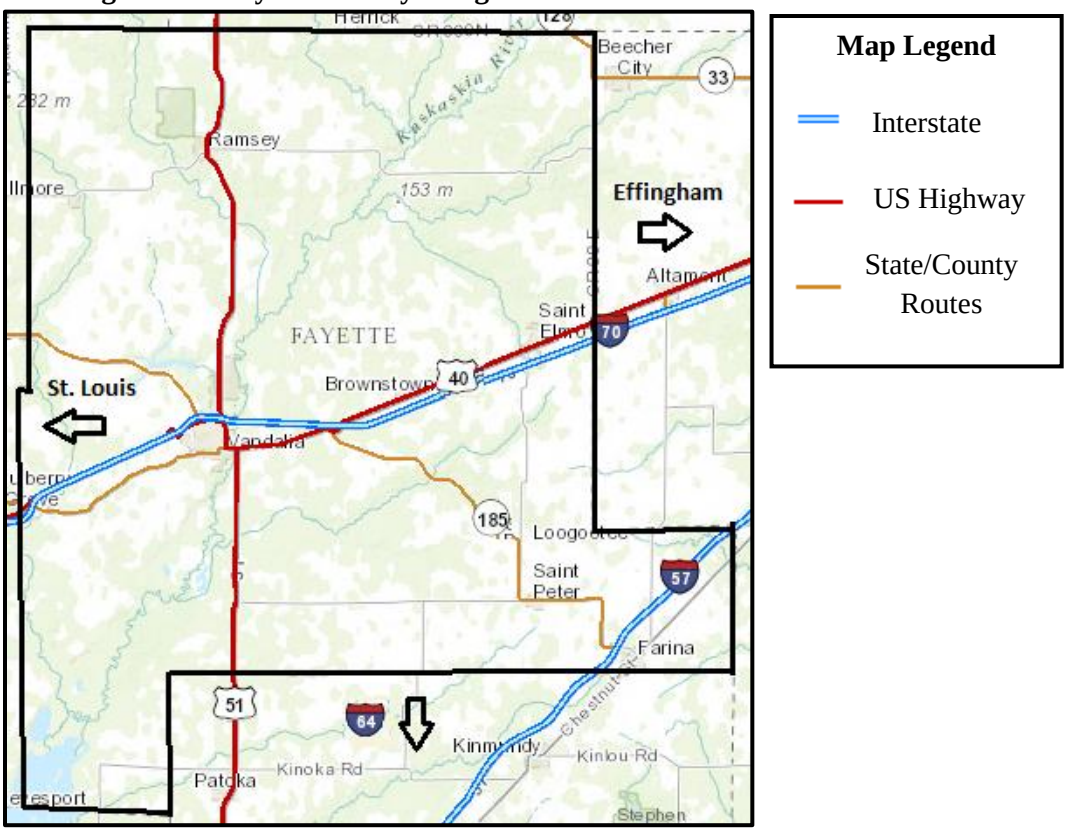
Effingham County is currently undergoing an I-57 lane expansion project in order to make freight truck movement more efficient and to deal with the ever-growing freight truck traffic near the City of Effingham. As the growth in freight truck traffic continues to grow in the next several decades, as illustrated in section one of this analysis, other interstate improvement projects within the SCIRPDC Region similar to the one that is currently underway will without a doubt become necessary. In order to ensure that projects such as these are completed in an efficient and timely manner, plans must be put into place years ahead of time to help guarantee successful implementation.

V. Fayette County Freight Truck Analysis

a. Freight Truck Transportation

Figure 5-1 provides a representation of Fayette County's current freight truck infrastructure and access to major roadways. Fayette County does have both I-57 and I-70 as the two most noticeable means of freight truck transportation. While I-70 runs directly through the center of the county, alongside U.S. 40, I-57 only crosses the southwest corner of the county near the City of Farina, but is accessible within the county through Illinois Route 185. The county also has a north-south U.S. Highway, U.S. 51, along with easy access to I-64 south of the county border, which runs east-west from Missouri to Virginia.

Figure 5-1: Fayette County Freight Truck Access



Source: ArcGIS, U.S. Department of Transportation

I-57 is a north-south interstate that stretches from Chicago to Sikeston, Missouri that connects I-94 in Chicago with I-55 in near Sikeston, Missouri and along the way provides linkages to I-74 in Champaign, Illinois, I-70 in Effingham, I-64 near Mount Vernon, Illinois and I-24 just south of Marion, Illinois. The City of Vandalia is near the center of Fayette County and provides the crossroads of U.S. 40 stretching east-west from Baltimore, Maryland to Silver Summit, Utah, and U.S. 51, running north-south from the Wisconsin-Michigan border to New Orleans, Louisiana covering over 1200 miles. Along U.S. 51, as just one example, are several large metropolitan areas including Madison, Wisconsin; Memphis, Tennessee; and Jackson, Mississippi before arriving in New Orleans.

b. City of Vandalia Industry

Fayette County is the only county in the SCIRPDC Region without any formally established industrial parks; however that does not mean that the county is without several strong industry sectors. This is especially the case in the City of Vandalia. **Figure 5-2** provides a map of some of the main businesses and industries within the City of Vandalia in Fayette County. Some of these businesses include Van Seal Corporation, a designer and manufacturer of radial and hydraulic seals; Octochem Inc., who provide marketing services for the chemical and biotechnology industries; Fayco Enterprises, a not-for-profit aiding people with disabilities to become productive citizens in their communities; and All Steel Products, providing piping and tubing services. These four businesses alone combine to bring over 325 jobs to the City of Vandalia and Fayette County.

Most of Vandalia's key businesses, including those mentioned above, are located either just north or south of I-70, with direct access to both north-south route U.S. 51 and the east-west route, U.S. 40. Although direct figures regarding available acreage for business growth and expansion were not available as of the writing of this study, there is undoubtedly available land parcels for continued growth both within the City of Vandalia and Fayette County as a whole.

c. Fayette County Commodity Exports

As displayed on **Table 5-1**, Fayette County exported 437 million dollars of commodities weighing 652 thousand tons in 2012. The county's top commodity exports by value included Warehousing; Stone, Ore or Mineral Products; Rubber or Miscellaneous Plastic Products; and Petroleum or Coal Products. These four commodity categories account for almost 76% of all commodity exports from Fayette County. Of the 652 thousand tons of commodity exports 345 thousand, or 53%, came from Stone, Ore, or Mineral Products.

Although Fayette County only accounts for 11% of the SCIRPDC Region's total commodity exports, the county makes up for 56% of the region's Petroleum or Coal Products, 36% of the region's Stone, Ore, or Mineral Products exports and just over 34% of the region's Rubber or Miscellaneous Plastic Products exports. On the other hand, not only does six commodity categories come in at less than 10 million dollars in exports, in seven commodity categories Fayette County did not account for any exports. This plainly illustrates a need to continue to diversify the industry that is currently within the county. This is especially obvious when 34% of the entire county's exports are dependent upon one commodity or industry sector, in this case being the Warehousing industry. Again, this analysis does not include commodities shipped by other modes of transportation (e.g. rail, barge, air), however, even if other transportation modes were included in this study, there would still continue to be a need to diversify the county's commodity exports and industry sectors.

Taking a deeper look at Fayette County's exports versus the region as a whole, **Table 5-2** offers the county commodity export LQs. Despite the fact that Fayette County's overall freight truck commodity exports only make up for 11% of the entire region's exports, the county does display several high LQs. These higher LQ figures include Crude or Natural Gas (LQ = 5.3); Petroleum or Coal Products (LQ = 5.1); Stone, Ore or Mineral Products (LQ = 3.2); Rubber or Miscellaneous Plastic Products (LQ = 3.1); and Warehousing as well as Meat and Seafood (LQ = 2.3). It is important to remember that these high LQ figures, especially in the case of those stretching over five, do not mean that these are overall high volume

Figure 5-2: City of Vandalia Industry

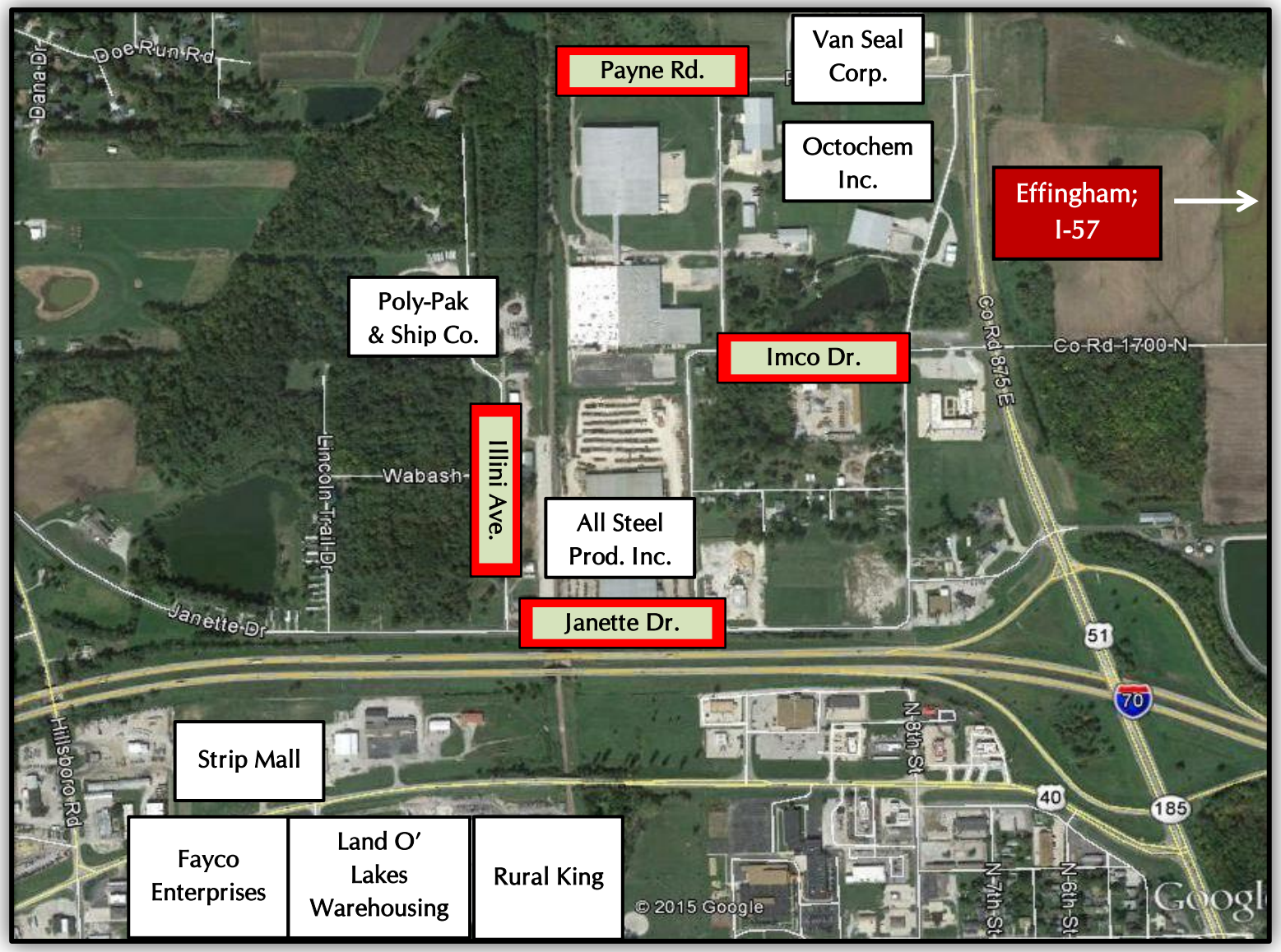


Table 5-1: Fayette County Commodity Exports

Commodity Category	Millions of Dollars	Tons
Warehousing	150	113,000
Stone, Ore or Mineral Prod.	82	345,000
Rubber or Misc. Plastic Products	52	14,000
Petroleum or Coal Products	47	44,000
Prepared Foods	41	24,000
Agricultural Products	14	24,000
Forest & Related Prod.	13	9,000
Livestock & Dairy	11	15,000
Crude or Natural Gas	7	44,000
Pulp, Paper, Print Material, or Allied Prod.	5	700
Electrical, Scientific, or Medical Equip.	4	400
Waste or Scrap	4	16,000
Meat and Seafood	4	1,000
Machinery & Transportation Equip.	2	200
Chemicals or Allied Products	-	-
Coal or Coal By-Products	-	-
Misc. Manufactured Products & FAK	-	-
Ordnance & Accessories	-	-
Primary Metal & Fabricated Products	-	-
Textile Mill, Apparel & Leather Prod.	-	-
Tobacco & Alcohol	-	-
County Totals	**437**	**652,000**

Source: Transearch, 2012

exports, but only high relative to the SCIRPDC Region. With that said though, Fayette County does have freight truck commodity uniqueness, if you will, relative to the region, specifically when it comes to Crude or Natural Gas and Petroleum or Coal Products. The high volume of Coal Products shipped via freight truck is shipped from three coal mines located in the northern portion of Fayette County. These coal mines include Brown, Gooden and Ramsey, which can be described as Drift, Strip and Shaft mines respectively[7]. As for the commodity category Stone, Ore or Mineral Products (LQ = 3.2), the most likely locations that export these commodities are county quarries including Hicks Stone Quarry and the Winter Stone Company Pit (St. Elmo Quarry). The export commodity category of Rubber or Miscellaneous Plastic Products which has a relatively high LQ of 3.1, most likely derive from two specific well-established businesses in the City of Vandalia, both the Van Seal Corporation and Poly-Pak & Ship Co, whom both specialize in the use of plastic materials. Van Seal Corporation in particular is likely to consume large amounts of rubber materials in their manufacturing processes, and therefore are a large contributor to this category. Fayette County also has several other commodity export categories, or industry sectors, that are nearing the 1.0 LQ threshold or are just above including Waste or Scrap (LQ = 1.5); Agricultural Products (LQ = 1.3); and Prepared Foods (LQ = .9). Some of the Fayette County businesses that may be associated with

Table 5-2: Fayette County Commodity Location Quotients

Commodity Category	SCIRPDC Region ($)	Fayette County ($)	Location Quotient
Machinery & Transportation Equip.	815	2	.02
Warehousing	560	150	2.3
Electrical, Scientific, or Medical Equip	445	4	.08
Prepared Foods	395	41	.9
Primary Metal & Fabricated Products	305	-	0
Stone, Ore or Mineral Products	227	82	3.2
Livestock & Dairy	194	11	5.0
Forest & Related Products	185	13	.6
Rubber or Misc. Plastic Products	152	52	3.1
Pulp, Paper, Print Material, or Allied Prod.	141	5	.3
Chemicals or Allied Products	131	-	0
Agricultural Products	100	14	1.3
Petroleum or Coal Products	84	47	5.1
Misc. Manufactured Products & FAK	56	-	0
Waste or Scrap	25	4	1.5
Meat and Seafood	15	4	2.3
Crude or Natural Gas	13	7	5.3
Textile Mill, Apparel & Leather Products	12	-	0
Tobacco & Alcohol	2	-	0
Coal or Coal By-Products	-	-	-
Ordnance & Accessories	-	-	-
Totals	**3,855**	**437**	

Source: Transearch, 2012; Note: Dollar amounts are measured in millions of dollars.

these particular commodity export categories include Countryside Disposal Inc., located in St. Elmo, and New Holland Agriculture, located in Vandalia, as just two examples of many.

d. Fayette County Commodity Imports

Table 5-3, located on the following page, displays the total commodity imports for Fayette County. As shown, Fayette County imported over 400 million dollars in commodities weighing about 1 million tons. When measuring Fayette County's commodity exports against its commodity imports we can see a small balance of trade surplus of 21 million dollars. When looking at the weight of commodity imports versus commodity exports, Fayette County imported 348 thousand more tons of commodities than it exported. This difference is most predominantly accounted for by the import of Textile, Mill, and Apparel & Leather Products which weighed in at 284 thousand tons. This large amount, at least in weight, of imports from this particular commodity category may seem high, but since Fayette County did not export any products from this particular industry, at least via freight truck, in all probability means the county did not produce any either, at least in large volume, and therefore made this large commodity import necessary.

The county's top three commodity imports, in terms of dollars, coincide with the SCIRPDC Region's top commodity imports, just as Effingham County's top imports did in the previous section. Those top import categories for the county included Warehousing; Petroleum or Coal Products; and Machinery &

Transportation Equipment. Overall the county only accounts for about 13% of the region's imports, comparing similarly to the 11% of commodity exports Fayette County accounts for relative to the entire region.

Table 5-3: Fayette County Commodity Imports

Commodity Category	Millions of Dollars	Tons
Warehousing	110	89,000
Petroleum or Coal Products	70	81,000
Machinery & Transportation Equip.	55	8,000
Agricultural Products	44	65,000
Prepared Foods	22	20,000
Chemicals or Allied Products	15	5,000
Stone, Ore or Mineral Prod.	15	419,000
Rubber or Misc. Plastic Products	13	3,000
Primary Metal & Fabricated Products	13	5,000
Livestock & Dairy	12	7,000
Electrical, Scientific, or Medical Equip.	11	1,000
Tobacco & Alcohol	8	4,000
Forest & Related Prod.	7	7,000
Pulp, Paper, Print Material, or Allied Prod.	7	4,000
Meat and Seafood	7	2,000
Misc. Manufactured Products & FAK	5	800
Textile Mill, Apparel & Leather Prod.	2	284,000
Coal or Coal By-Products	.1	3,000
Waste or Scrap	.1	200
Ordnance & Accessories	.06	4
Crude or Natural Gas	.002	1
County Totals	**416**	**1,000,000**

Source: Transearch, 2012

e. Fayette County Commodity Import Origin and Export Destination

Table 5-4 displays Fayette County's top five cities and states for both commodity imports and exports. As is the case with most all of the top import origins and export destinations, Fayette County's top origins and destinations are very much centralized in the Midwestern Region with only a few exceptions in the import origin category. When it comes to the county's exports, I-70 and I-64 appear to be the most commonly used freight truck roadways, with St. Louis directly off of I-70, although U.S. 40 is another alternative that would also be utilized. Evansville, Indiana and Louisville, Kentucky are both directly accessible from I-64, located to the south of the region. Chicago and Champaign are both easily reached through I-57 north, which from Fayette County can be accessed on I-70 toward Effingham. U.S. 51 is another possible route, and in reality may provide more direct access to Chicago and Champaign from Fayette County, depending on the exact origin of the commodity export in the county.

Table 5-4: Fayette County Top Import/Export Cities and States

Import Origin		Export Destination	
Top Cities	Top States	Top Cities	Top States
St. Louis, MO	Illinois	St. Louis, MO	Illinois
New York, NY	Missouri	Evansville, IN	Missouri
Los Angeles, CA	Indiana	Chicago, IL	Indiana
Chicago, IL	Wisconsin	Champaign, IL	Wisconsin
Evansville, IN	Ohio	Louisville, KY	Ohio

Source: Transearch, 2012

In terms of the top states, other portions of Illinois, Missouri and Indiana would all be accessed through I-57, I-64 and I-70. Wisconsin would be most directly linked with U.S. 51, which runs through the heart of Fayette County and links directly to Madison, Wisconsin, while Ohio would likely be accessed through I-70, which stretches through the City of Columbus, Ohio. The import origins will also use a similar pattern of interstates upon entering Illinois, specifically New York and Los Angeles would utilize most notably I-70 and Evansville, Indiana, as noted earlier, would utilize I-64 before reaching I-57.

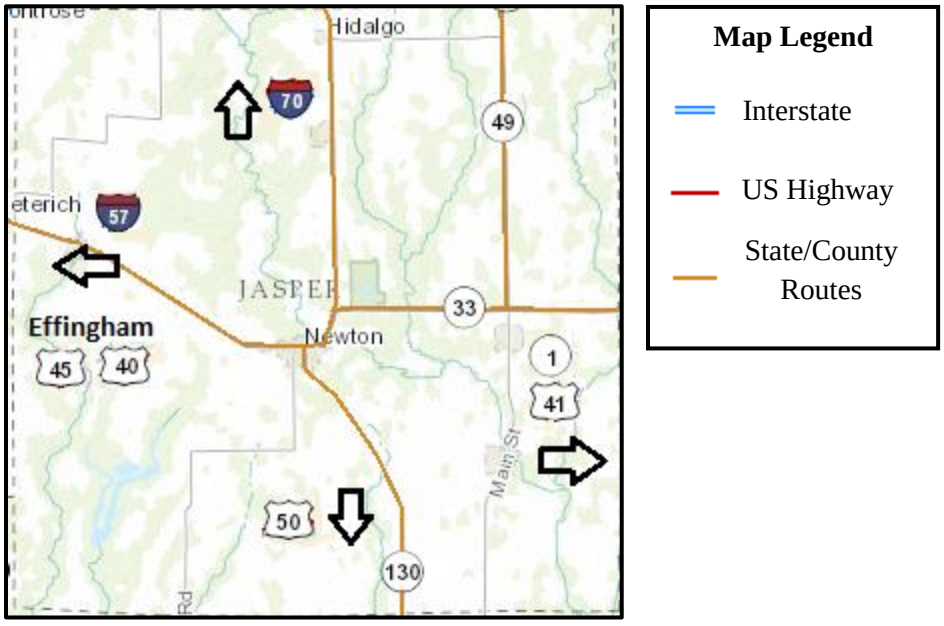
Fayette County must also consider the future increase of freight truck traffic and how it may affect the businesses and industry that lie within its borders. Specifically, if business and industry growth occur, as one would hope, looking into interstate lane expansions on I-70, especially near the City of Vandalia, may become necessary. Continuing to follow through with the proper maintenance of U.S. 40 and U.S. 51 are also critical to Fayette County's freight truck movement and economy. Not to go unnoticed is IL 185 which almost directly connects the county to three different interstates including I-55 to the west near the City of Litchfield in Montgomery County, I-57 near the Village of Farina, and I-70 near the City of Vandalia. It is and will continue to be critical to properly maintain and continually improve IL 185 due to its important location and accessibility within Fayette County.

VI. Jasper County Freight Truck Analysis

a. Freight Truck Transportation

Figure 6-1 provides a map of Jasper County and its current freight truck roadway infrastructure, as well as major roadways and highways that are within close proximity. Jasper County does not have the luxury of having any interstates located within the county borders, but does have access to I-57 to the west and I-70 to the north. When it comes to major U.S. Highways, although not within Jasper County, U.S. 40 and U.S. 45 are to the west, U.S. 41 is further east in Indiana and U.S. 50 is located south of the county. Jasper County does have three Illinois Routes including IL 49 and the crossroads of IL 33 and IL 130 through the City of Newton, Jasper's county seat.

Figure 6-1: Jasper County Freight Truck Access



Source: ArcGIS, U.S. Department of Transportation

Despite the fact that Jasper County does not have many direct connections to major roadways within the county borders, the county does have adequate Illinois Routes that provide access to numerous major roadways and highways that stretch across the entire United States. I-57 and I-70, to the west and north respectively, provide excellent trucking access to all four corners of the nation. U.S. 40, 41, 45 and 50 are all either in close proximity or within easy access from the county, and similar to the interstates, provide major connections to large metropolitan areas across the United States including, Sacramento, California; Denver, Colorado; Kansas City and St. Louis, Missouri; Indianapolis, Indiana; Columbus, Ohio; and many more.

Again, although at first glance Jasper County does not appear to have adequate access to major roadways and highways, it is within close enough proximity to numerous major highways and is in a more than adequate position to utilize its centralized location to its advantage. With that said, there will always be

some difficulty in persuading interested businesses or industries to locate in Jasper County due to the lack of readily available interstate or U.S. Highway access within the county borders.

b. City of Newton Southtown Industrial Park

Figure 6-2 offers a diagram of the City of Newton's Southtown Industrial Park. The City of Newton is the county seat of Jasper County, and has a population of around 2,800. The Southtown Industrial Park currently has Grain Systems Inc., a large manufacturer of steel farm grain bins and other grain storage and Parrish Oil Production Inc., who serve as excavating contractors. Norris Electric Cooperative is located just south of the industrial park, while the Jasper County Community Center and Alco (now shuttered), a retail store, are both located to the north of the industrial park.

The Southtown Industrial Park has approximately 48 total acres of land, of which currently only four acres are occupied, leaving 44 acres of land available for business expansion. This remaining acreage of land is located on the northeast part of figure 6-2 just north of Industrial Drive, and extending a bit further north than is shown on the map. The industrial park is located along IL 130 and gives those businesses located in the park access to IL 33 to the north which connects to I-57 and I-70 in Effingham and IL 1 to the east. IL 130 also provides access to U.S. 50 to the south, a direct roadway that stretches across the United States east to west and connects to I-69 to the west in Indiana and I-57 to the west in Salem, Illinois.

c. Jasper County Commodity Exports

Shown on **Table 6-1**, Jasper County exported 240 million dollars of commodities with a total weight of 170 thousand tons in 2012. Jasper county's top three commodity exports included Machinery & Transportation Equipment; Livestock & Dairy; and Primary Metal & Fabricated Products. Just these three commodities alone account for 77% of the entire county's commodity exports, indicating a large reliance on only three specific industry sectors, which certainly could be an issue if one of these specific commodity or industry sectors faces an economic 'shock', as discussed earlier, such as a loss of large employer.

Of the five counties within the SCIRPDC Region, Jasper County exports the fewest amount of commodities and only accounts for about 6% of the region's total exports. However, Jasper County does account for a large portion of the region's export of the commodity category Livestock & Dairy. Not only does Jasper County export more Livestock & Dairy than any of the other counties in the SCIRPDC Region, but it also accounts for 35% of the total export of Livestock & Dairy. In terms of dollars, that 35% equates to 67 million dollars out of the region's total of 194 million.

Moving on to look at Jasper County's commodity export LQs in relation to the SCIRPDC Region, we can see that there are several LQs that cross the 1.0 threshold, shown on **Table 6-2**. The largest and most noticeable include Meat and Seafood (LQ = 6.3); Livestock & Dairy (LQ = 5.6); Agricultural Products as well as Miscellaneous Manufactured Products & FAK (LQ = 2.0); and Machinery & Transportation Equipment (LQ = 1.7).

The top two LQ figures stand out among the rest, Meat and Seafood as well as Livestock & Diary, both have LQs above 5.5 indicating a very strong regional presence, relative to these particular industry

Figure 6-2: Southtown Industrial Park

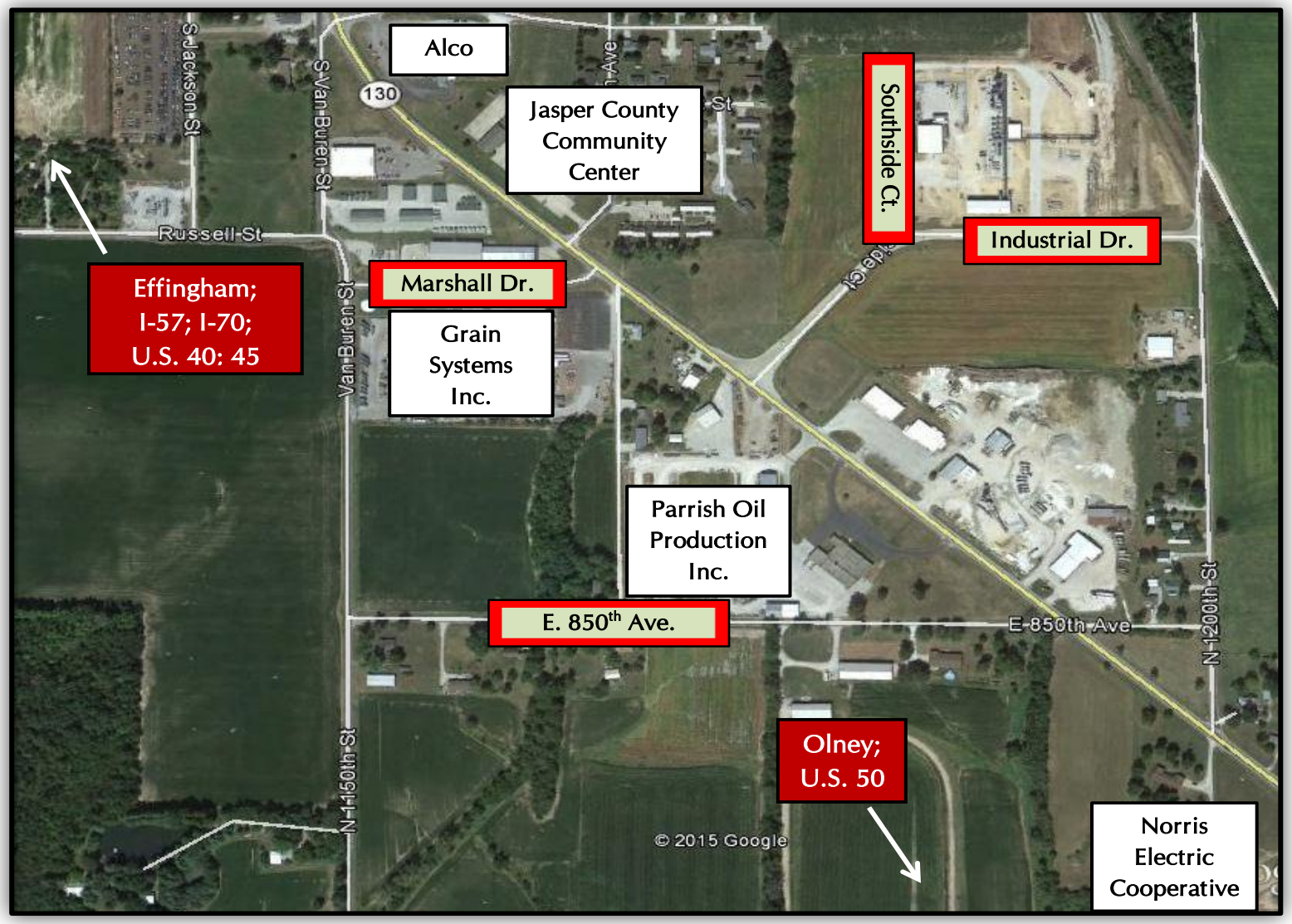


Table 6-1: Jasper County Commodity Exports

Commodity Category	Millions of Dollars	Tons
Machinery & Transportation Equip.	85	11,000
Livestock & Dairy	67	35,000
Primary Metal & Fabricated Products	32	24,000
Agricultural Products	15	32,000
Stone, Ore or Mineral Prod.	7	47,000
Pulp, Paper, Print Material, or Allied Prod.	6	900
Meat and Seafood	6	1,000
Misc. Manufactured Products & FAK	4	1,000
Prepared Foods	4	2,000
Warehousing	4	3,000
Electrical, Scientific, or Medical Equip.	3	200
Chemicals or Allied Products	3	1,000
Waste or Scrap	2	6,000
Crude or Natural Gas	1	5,000
Forest & Related Prod.	.5	800
Textile Mill, Apparel & Leather Prod.	.4	80
Petroleum or Coal Products	.1	400
Coal or Coal By-Products	-	-
Ordnance & Accessories	-	-
Rubber or Misc. Plastic Products	-	-
Tobacco & Alcohol	-	-
County Totals	**240**	**170,000**

Source: Transearch, 2012

sectors. In the case of Jasper County, specifying which particular companies are accounting for these two high LQs is challenging. Nonetheless, FS Total Livestock Services, located in Newton, and the Hartrich Meat Processing Plant, located in Sainte Marie, both certainly have a significant impact on the export of Livestock & Dairy and Meat and Seafood within Jasper County. As for the high Agricultural Products LQ (LQ = 2.0), companies such as Grain Systems Inc. and Agrium Inc., both located in Newton, are likely to be two of several essential contributors.

The export of the commodity category Miscellaneous Manufactured Products & FAK (LQ = 2.0) would appear to arise from companies such as Skyline Steel; Evapco Inc.; A-J Welding & Steel, Inc.; among others. Another commodity export category, which leads all others in Jasper County in terms of dollars, is Machinery & Transportation Equipment (LQ = 1.7). Within this particular sector Jasper County businesses such as Urfer Transportation Inc., in West Liberty, Lewis Transportation Inc., in Newton, and MCS Trucking Inc., also located in Newton, each surely have a positive impact on the export of these commodity services. This summary is only meant to serve as a small sample of the numerous businesses, small and large, that make a direct impact on the production and export of these key commodities in Jasper County. Undoubtedly there are many other businesses and industries that play a key role in the export of Jasper County commodities and services.

Table 6-2: Jasper County Commodity Location Quotients

Commodity Category	SCIRPDC Region ($)	Jasper County ($)	Location Quotient
Machinery & Transportation Equip.	815	85	1.7
Warehousing	560	4	.1
Electrical, Scientific, or Medical Equip	445	3	.1
Prepared Foods	395	4	.2
Primary Metal & Fabricated Products	305	32	1.3
Stone, Ore or Mineral Products	227	7	.5
Livestock & Dairy	194	67	5.6
Forest & Related Products	185	.5	.04
Rubber or Misc. Plastic Products	152	-	0
Pulp, Paper, Print Material, or Allied Prod.	141	6	.7
Chemicals or Allied Products	131	3	.4
Agricultural Products	100	15	2.0
Petroleum or Coal Products	84	.1	.02
Misc. Manufactured Products & FAK	56	4	2.0
Waste or Scrap	25	2	1.3
Meat and Seafood	15	6	6.3
Crude or Natural Gas	13	1	1.3
Textile Mill, Apparel & Leather Products	12	.4	.5
Tobacco & Alcohol	2	-	0
Coal or Coal By-Products	-	-	-
Ordnance & Accessories	-	-	-
Totals	**3,855**	**240**	

Source: Transearch, 2012; Note: Dollar amounts are measured in millions of dollars.

Another commodity category, or industry sector, that seems prepared for continued expansion based upon the regional LQs include most notably the Pulp, Paper, Print Material, or Allied Products (LQ = .7), most likely coming predominately from Total Printing Systems Enterprises Inc. (TPS), located in Newton. Also deserving of mention would be the commodity categories of Stone, Ore or Mineral Products as well as Textile Mill, Apparel & Leather Products, both of which have possible emerging LQs of .5.

d. Jasper County Commodity Imports

Jasper County's commodity imports are shown on **Table 6-3**, located on the following page, and illustrate that in 2012 the county imported 146 million dollars in commodities that weighed in at 183 thousand tons, both figures of which were the lowest in the SCIRPDC Region. What is first apparent when comparing Jasper County's commodity exports versus the county's imports is the rather large balance of trade surplus of 94 million dollars. In terms of weight, Jasper County nearly imported the same amount of commodities as it exported, with only a slight 13 thousand ton import surplus. This small difference is most likely accounted for by the county's import of Coal or Coal By-Products, which totaled 18 thousand tons in 2012.

Jasper County's three top commodity imports, measured in dollars, were similar to many other counties in the region and almost wholly coincided with the region's top commodity imports. Those top import

Table 6-3: Jasper County Commodity Imports

Commodity Category	Millions of Dollars	Tons
Warehousing	39	32,000
Petroleum or Coal Products	27	33,000
Machinery & Transportation Equip.	26	4,000
Primary Metal & Fabricated Products	9	3,000
Agricultural Products	8	20,000
Rubber or Misc. Plastic Products	6	2,000
Chemicals or Allied Products	6	2,000
Prepared Foods	5	4,000
Livestock & Dairy	4	2,000
Electrical, Scientific, or Medical Equip.	4	500
Waste or Scrap	3	11,000
Stone, Ore or Mineral Prod.	3	50,000
Meat and Seafood	2	400
Forest & Related Prod.	1	2,000
Pulp, Paper, Print Material, or Allied Prod.	.9	600
Tobacco & Alcohol	.8	200
Coal or Coal By-Products	.7	18,000
Misc. Manufactured Products & FAK	.4	90
Textile Mill, Apparel & Leather Prod.	.3	50
Crude or Natural Gas	.011	1
Ordnance & Accessories	-	-
County Totals	**146**	**183,000**

Source: Transearch, 2012

categories for the county included Warehousing; Petroleum or Coal Products; and Machinery & Transportation Equipment. In sum, by dollar value, Jasper County only accounted for 6% of the region's total commodity exports and less than 5% of the region's total commodity imports.

e. Jasper County Commodity Import Origin and Export Destination

Table 6-4, located on the following page, illustrates Jasper County's top five cities and states for both commodity imports and exports. As is the case with most all of the top import origins and export destinations within the SCIRPDC Region, the county's top commodity origins and destinations are almost wholly located in the Midwestern Region with only a few exceptions. When it comes to the county's exports, I-70, I-64, I-57 and I-24 all appear to be commonly used freight truck roadways for Jasper County. St. Louis is located directly off of I-70 to the west, while Indianapolis is accessible to the east using I-70; and Evansville, Indiana is located almost directly off of I-64 to the south. Both Evansville and Indianapolis could also be reached through the use of I-69, located in Indiana; however, in most cases, I-70 is probably what is most utilized. Furthermore, Chicago is easily accessed from I-57; and Nashville, the only exception to the upper Midwest export pattern, is reached through I-57 south to I-24.

Table 6-4: Jasper County Top Import/Export Cities and States

Import Origin		Export Destination	
Top Cities	Top States	Top Cities	Top States
St. Louis, MO	Indiana	St. Louis, MO	Illinois
Indianapolis, IN	Missouri	Evansville, IN	Missouri
Evansville, IN	Illinois	Chicago, IL	Indiana
Los Angeles, CA	Ohio	Indianapolis, IN	Tennessee
Nashville, TN	Tennessee	Nashville, TN	Ohio

Source: Transearch, 2012

In terms of the top states, other portions of Illinois, Missouri and Indiana would all be accessed through I-57, I-64 and I-70. Tennessee would be most directly linked with I-57 to I-24 leading to Nashville, while Ohio would also be accessed through I-70 which stretches through Columbus, Ohio. The import origins, which are almost identical to the export destination cities and states, will also use a similar pattern of interstates and other roadways upon entering Illinois. The only difference in the import origins and the export destinations is the City of Los Angeles, which would utilize most notably I-70 to enter Illinois and from their use linking U.S. and IL highways to reach the final destination in Jasper County.

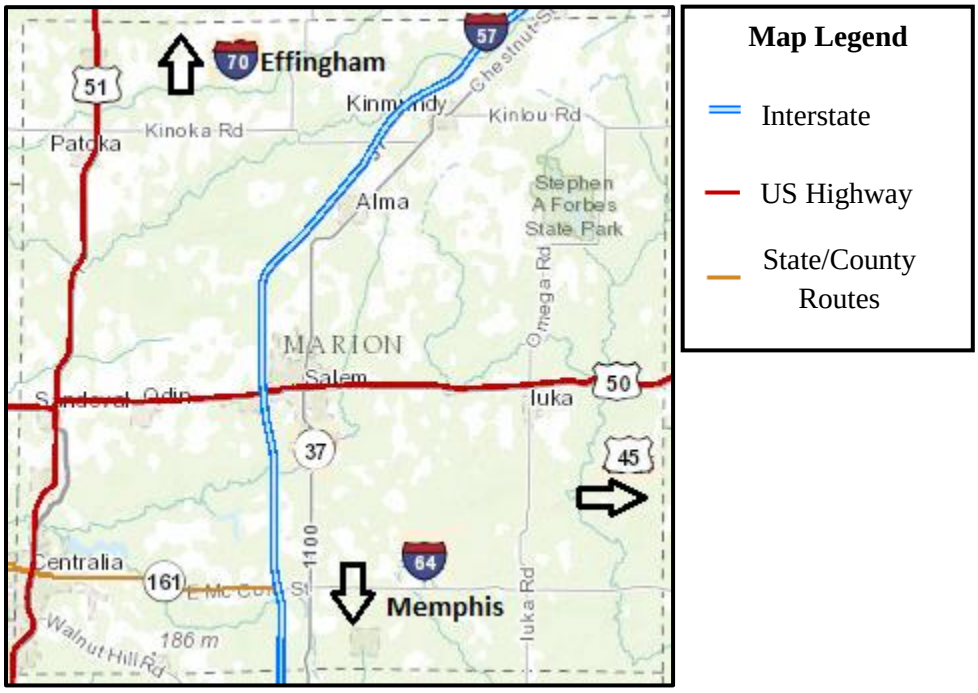
Although Jasper County does not have to concern itself with the continued growth in freight truck traffic on Illinois interstates directly, the county must ensure that its IL Routes, 130, 33 and even 49, are all properly maintained and improved as necessary to make certain that they are in adequate shape to handle the increased truck traffic that will undoubtedly occur as an aside to the increased traffic on the interstates.

VII. Marion County Freight Truck Analysis

a. Freight Truck Transportation

Figure 7-1 provides an illustration of Marion County's current freight truck infrastructure and access to major roadways. I-57 runs directly through the center of Marion County, specifically through the City of Salem, and provides an easy connection to I-70 to the north in Effingham and I-64 to the south in Mount Vernon. Marion County is also home to the crossroads of U.S. 50 and U.S. 51 on the western side of the county in Village of Sandoval, while U.S. 45 is just east of the county border. The county is also home to IL 37 and IL 161, while IL 15 is just south of the county border.

Figure 7-1: Marion County Freight Truck Access



Source: ArcGIS, U.S. Department of Transportation

I-57 is a north-south interstate that stretches from Chicago to Sikeston, Missouri that connects I-94 in Chicago with I-55 in near Sikeston, Missouri and along the way provides linkages to I-74 in Champaign, Illinois, I-70 in Effingham, I-64 near Mount Vernon, Illinois and I-24 south of Marion, Illinois. Marion County is also the crossroads of U.S. 50 and U.S. 51. U.S. 50 is an east-west route that stretches over 3,000 miles from Ocean City, Maryland, near the Atlantic Ocean, to Sacramento, California. U.S. 51 is a north-south route that stretches from the Wisconsin-Michigan border to New Orleans, Louisiana covering over 1200 miles.

Marion County, similar to Effingham County, has excellent access to several major interstates and other highways providing easy distribution of products and other particular commodities all across the United States.

b. City of Centralia Industrial Parks

Both **Figures 7-2 and 7-3** provide illustrations of the City of Centralia's two formally established industrial parks. The City of Centralia is actually located in four counties, Marion; Clinton; Jefferson; as well as Washington and has a population of around 13,000. Centralia's first industrial park (figure 7-2) located to the south of town includes businesses such as the Swan Corporation, a leader in the kitchen and bath industry; Graphic Packaging International; Engineered Fluid Inc., who custom engineers water distribution systems; and Big 3 Precision Products, who conduct machining services. Centralia's second industrial park (figure7-3) currently has both Monsanto Corporation, a provider of a wide range of agricultural products, and Country Bob's Inc., a nationally recognized sauce and seasoning company.

These two industrial parks include a total acreage of around 390 with around 217 acres still available for business growth and expansion. Of those 217 acres, as can be seen through figures 7-2 and 7-3, Industrial Park #2 has 195 available acres. Both industrial parks are located with direct access to U.S. 51 which to the south connects to IL 15. Using IL 161, which runs through the center of the City of Centralia, there is easy access to I-57 to the east in between Salem, Illinois and Mount Vernon, Illinois.

c. City of Salem Business Park

Figure 7-4 displays a map of the Salem Business Park and the surrounding area. The City of Salem is the county seat of Marion County and has a population just under 7,500. The Salem Business Park is home to several businesses including Con-Way Central Express, specializing in transportation and logistics; North American Lighting, focusing on signal lighting operations in Salem; and Americana Building Products, who most notably provide outdoor living construction. Beyond the Salem Business Park are several other critical businesses to Marion County including, but not limited to, Schutt Sports Manufacturing; Bettendorf-Standford Bakery Equipment; Polar Service Center-Jarco, who manufactures propane delivery trucks and refined fuel tank wagons; and Radiac Abrasives, who provides precision engineered grinding wheels for several different primary metals industries.

The Salem Business Park presently has 165 acres available for business expansion out of a total 208 acres, indicating that 43 acres are currently occupied. The business park is located on the western side of the city with direct access to U.S. 50. I-57 is located just to the east of the industrial park and provides access to many major roadways across Illinois and beyond.

d. Village of Sandoval Robinson Industrial Park

Figure 7-5 displays the Robinson Industrial Park located in the Village of Sandoval located to the west of Salem, Illinois with a population of about 1,250. Within the industrial park are two key businesses, Team Fenex, providing mobile power equipment, and Evergreen Pools & Spas. Beyond the industrial park to the north is Steel Fab, a manufacturer of steel products.

The park currently has 20 available acres out of a total of 33 acres. Robinson Industrial Park is located on the east side of Sandoval and has direct access to the crossroads of U.S. 50 and U.S. 51 which provide linkages to I-57 to the east, IL 15 to the south and St. Louis to the west. Sandoval, although currently a relatively small village, does have some above-average access to major roadways and may create more economic success through attempting to grow businesses that can exploit the St. Louis metropolitan area.

Figure 7-2: Centralia Industrial Park # 1

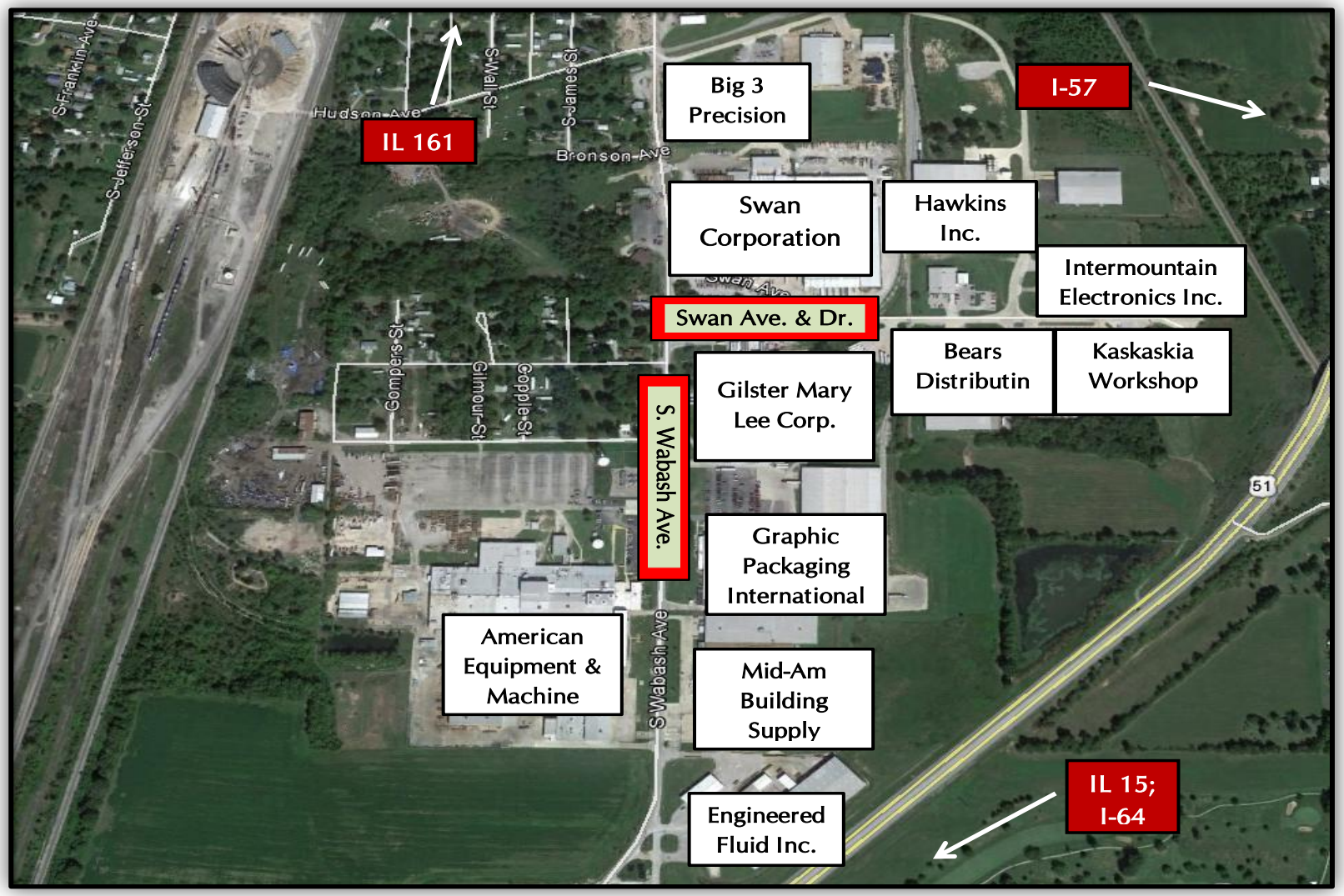


Figure 7-3: Centralia Industrial Park # 2

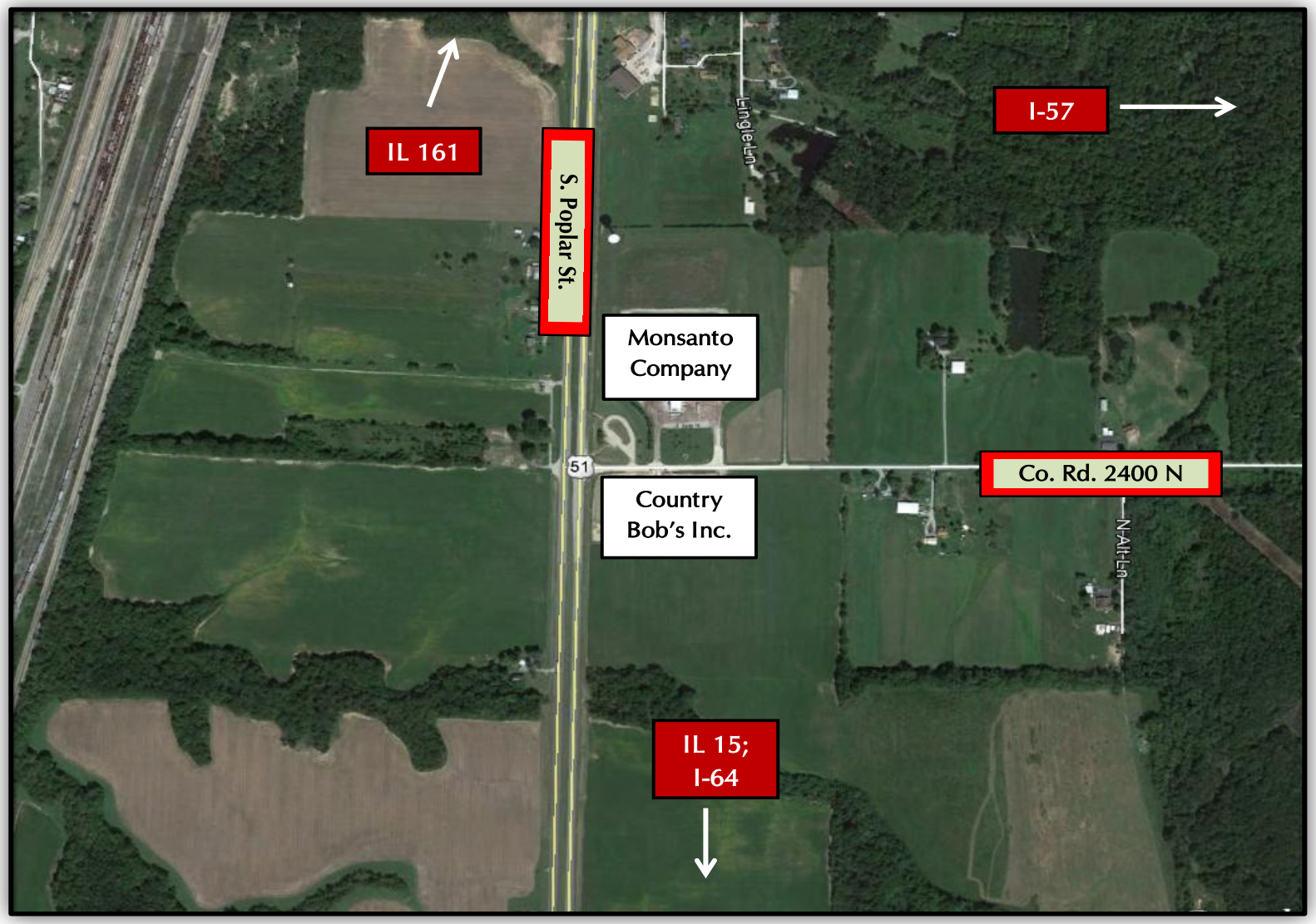


Figure 7-4: Salem Business Park

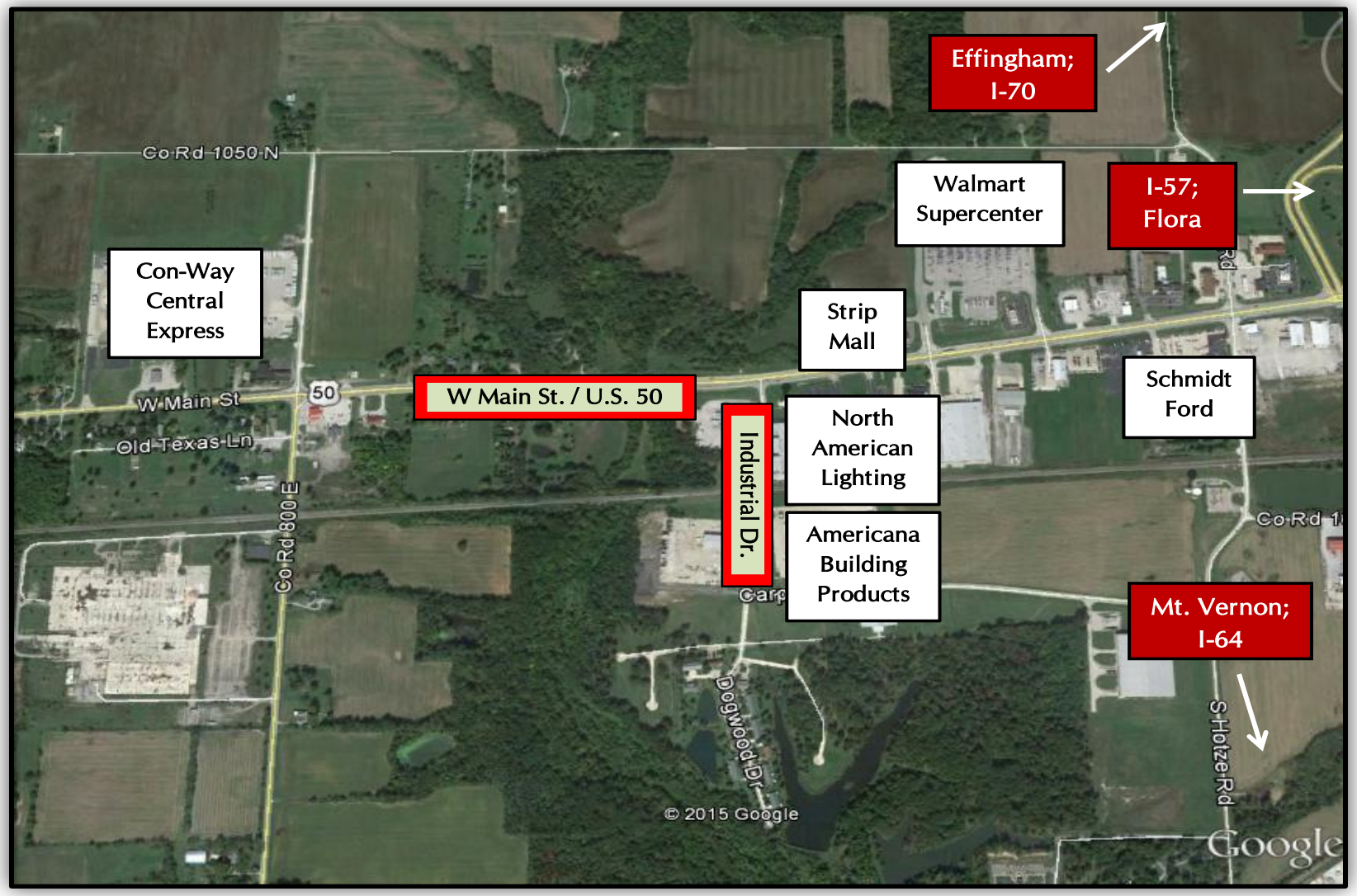
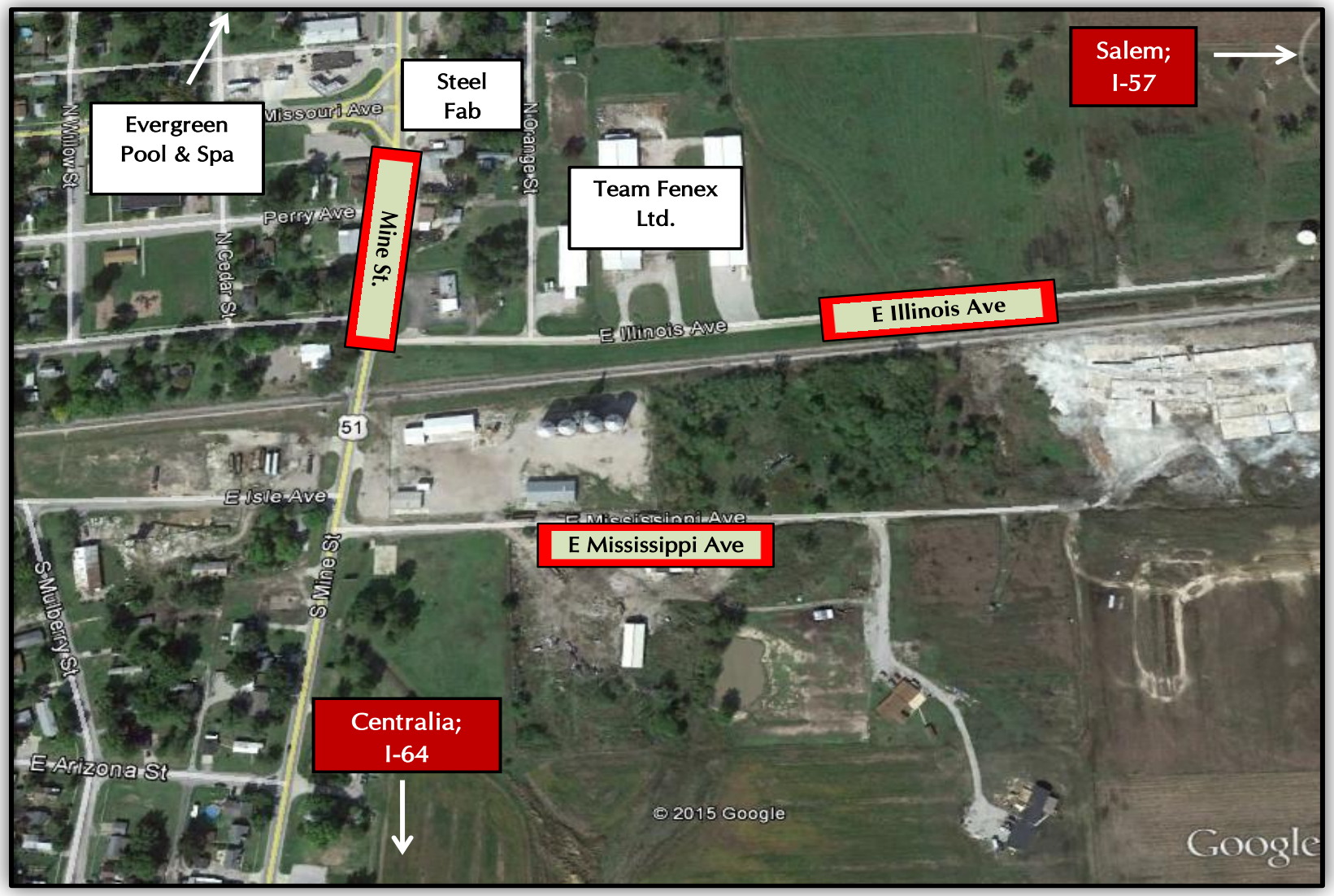


Figure 7-5: Robinson Industrial Park



e. Marion County Commodity Exports

Table 7-1: Marion County Commodity Exports

Commodity Category	Millions of Dollars	Tons
Prepared Foods	143	117,000
Machinery & Transportation Equip.	116	10,000
Stone, Ore or Mineral Prod.	112	147,000
Warehousing	85	69,000
Electrical, Scientific, or Medical Equip.	75	4,000
Primary Metal & Fabricated Products	62	22,000
Rubber or Misc. Plastic Products	50	13,000
Pulp, Paper, Print Material, or Allied Prod.	48	26,000
Misc. Manufactured Products & FAK	44	5,000
Petroleum or Coal Products	36	34,000
Agricultural Products	34	87,000
Waste or Scrap	9	36,000
Chemicals or Allied Products	7	2,000
Forest & Related Prod.	5	7,000
Livestock & Dairy	4	3,000
Crude or Natural Gas	4	23,000
Tobacco & Alcohol	2	900
Textile Mill, Apparel & Leather Prod.	1	200
Coal or Coal By-Products	-	-
Meat and Seafood	-	-
Ordnance & Accessories	-	-
County Totals	**836**	**606,000**

Source: Transearch, 2012

As is shown on **Table 7-1** above, Marion County exported 836 million dollars in commodities weighing just over 600 thousand tons. The top four commodity exports from the county, measured in dollars, account for 55% of the entire county's commodity exports. These commodity categories include Prepared Foods; Machinery & Transportation Equipment; Stone, Ore, or Mineral Products; and Warehousing. Unlike many of the other counties in the region, even after considering those four top commodity categories, Marion County's exports are still well diversified with seven other commodity categories exporting more than 30 million dollars of goods or services.

When comparing Marion County to the SCIRPDC Region as a whole, the county accounts for nearly 22% of the region's commodity exports in terms of dollars and almost 20% of the region's commodity exports in terms of weight. More specifically, in terms of dollars, the county accounts for 79% of the region's Miscellaneous Manufactured Products & FAK, 49% of Stone, Ore or Mineral Products exports, 36% of Prepared Foods, and 34% of Pulp, Paper, Print Material, or Allied Products, to name a few. Marion County also accounted for all the Tobacco & Alcohol exports in the region, albeit only two millions dollars in value. Furthermore, there are still several other commodity exports in which Marion County accounted for more than 30% of the entire region's exports, indicating a very strong production and

Table 7-2: Marion County Commodity Location Quotients

Commodity Category	SCIRPDC Region ($)	Marion County ($)	Location Quotient
Machinery & Transportation Equip.	815	116	.7
Warehousing	560	85	.7
Electrical, Scientific, or Medical Equip	445	75	.8
Prepared Foods	395	143	1.7
Primary Metal & Fabricated Products	305	62	.9
Stone, Ore or Mineral Products	227	112	2.6
Livestock & Dairy	194	4	.1
Forest & Related Products	185	5	.1
Rubber or Misc. Plastic Products	152	50	1.5
Pulp, Paper, Print Material, or Allied Prod.	141	48	1.5
Chemicals or Allied Products	131	7	.3
Agricultural Products	100	34	1.3
Petroleum or Coal Products	84	36	2.0
Misc. Manufactured Products & FAK	56	44	5.0
Waste or Scrap	25	9	1.7
Meat and Seafood	15	-	0
Crude or Natural Gas	13	4	1.3
Textile Mill, Apparel & Leather Products	12	1	.3
Tobacco & Alcohol	2	2	4.0
Coal or Coal By-Products	-	-	-
Ordnance & Accessories	-	-	-
Totals	**3,855**	**836**	

Source: Transearch, 2012; Note: Dollar amounts are measured in millions of dollars.

distribution presence within the region relative to freight truck transportation.

Marion County's LQs relative to the SCIRPDC Region are illustrated above on **Table 7-2**. The top commodity LQs for Marion County include Miscellaneous Manufactured Products & FAK (LQ = 5.0); Tobacco & Alcohol (LQ = 4.0); Stone, Ore or Mineral Products (LQ = 2.6); Petroleum or Coal Products (LQ = 2.0), among many others. Due to the fact that Marion County's commodity exports are so diversified, or spread out amongst several different categories, a large majority of the county's LQs are cross the 1.0 threshold. Since this is the case, when examining the Marion County LQs, it must be done with a more critical view of each particular LQ figure.

The highest LQ figure in Marion County, Miscellaneous Manufactured Products & FAK (LQ = 5.0) is mostly likely made up of exports from businesses such as the Swan Corporation in Centralia, American Building Products and Schutt Sports Manufacturing in Salem, among several others. When it comes to Petroleum or Coal Products (LQ = 2.0), Marion County has multiple coal mining companies in several different municipalities, likely being the predominant source of most of this particular commodity category's exports.

Several of the emerging industry commodity categories in the county, relative to freight truck exports, appear to include Machinery & Transportation Equipment (LQ = .7), the top overall exporting commodity category in the region. Businesses associated with this commodity would include North American

Lighting; American Equipment & Machine; and Jarco as a few examples. Prepared Foods (LQ = 1.7) would be an example of another possible emerging commodity export or industry sector in Marion County and the businesses that would be in this category would include Country Bob's Inc.; Gilster May Lee Corporation; among others.

f. Marion County Commodity Imports

Table 7-3: Marion County Commodity Imports

Commodity Category	Millions of Dollars	Tons
Warehousing	152	124,000
Primary Metal & Fabricated Products	121	51,000
Machinery & Transportation Equip.	90	26,000
Petroleum or Coal Products	81	93,000
Electrical, Scientific, or Medical Equip.	49	5,000
Prepared Foods	47	48,000
Chemicals or Allied Products	43	13,000
Pulp, Paper, Print Material, or Allied Prod.	37	22,000
Rubber or Misc. Plastic Products	31	8,000
Stone, Ore or Mineral Prod.	27	441,000
Agricultural Products	19	42,000
Livestock & Dairy	16	9,000
Textile Mill, Apparel & Leather Prod.	15	2,000
Forest & Related Prod.	14	15,000
Meat and Seafood	7	2,000
Tobacco & Alcohol	6	2,000
Misc. Manufactured Products & FAK	6	1,000
Ordnance & Accessories	.4	20
Waste or Scrap	.1	200
Coal or Coal By-Products	.03	4,000
Crude or Natural Gas	-	-
County Totals	**761**	**909,000**

Source: Transearch, 2012

Marion County's commodity imports are displayed above on **Table 7-3**. As is shown, Marion County imported over 760 million dollars in commodities that weighed 909 thousand tons. Taking the amount of commodity exports the county displayed and subtracting the total amount of imports shows a large balance of trade surplus of 75 million dollars. In terms of weight, Marion County imported 303 thousand more tons of commodities than it exported. This rather large difference in commodity tonnage is likely accounted for by the 441 thousand tons of Stone, Ore or Mineral Products imported in 2012. Marion County only exported 147 thousand tons of those same commodities in 2012, which mostly likely explains the difference in commodity tonnage from commodity imports to exports.

When comparing the county imports to the SCIRPDC Region's imports we can see that three specific commodity categories, Warehousing; Machinery & Transportation Equipment; and Petroleum or Coal

Products are in each in the top four for both Marion County and the region. Overall, Marion County accounts for 24% of the entire county's imports and this figure is very similar to the county's percent of the region's exports which was almost 22%.

g. Marion County Commodity Import Origin and Export Destination

Table 7-4: Marion County Top Import/Export Cities and States

Import Origin		Export Destination	
Top Cities	Top States	Top Cities	Top States
St. Louis, MO	Missouri	St. Louis, MO	Missouri
New York, NY	Indiana	Evansville, IN	Illinois
Los Angeles, CA	New York	Des Moines, IA	Indiana
Des Moines, IA	Illinois	Champaign, IL	Texas
Nashville, TN	Texas	Indianapolis, IN	Iowa

Source: Transearch, 2012

Table 7-4 displays Marion County's top five cities and states for both commodity imports and commodity exports. As it has been nearly across the board with the entire region, most of Marion County's top origins and destinations are all within the Midwest Region, and this appears to be the case even more so with Marion County's top export destinations, aside from the State of Texas. I-70, I-57 and I-64 all seem to be the most utilized interstates in terms of the county's exports. Specifically, I-57 would be used to reach other interstates and major highways for every export destination, barring only St. Louis, which can be directly accessed via U.S. 50 from Marion County. As for the others, I-57 south to I-64 east will arrive at Evansville, Indiana; and Des Moines, Iowa can be reached through I-57 to I-74 and finally to I-80 which leads directly to Des Moines. Additionally, Indianapolis can be directly accessed from I-70 east in Effingham from I-57 north.

When looking at Marion County's import origins the Midwestern pattern breaks up with both New York and Los Angeles being in the top three cities. Imports from both New York and Los Angeles would utilize I-70 to enter the SCIRPDC Region, and ultimately Marion County. Des Moines, Iowa imports would utilize I-74 to I-57, and Nashville, Tennessee would most likely use I-24 to I-57 to reach the county.

Similar to many of the other counties in the SCIRPDC Region, Marion County must consider putting in place transportation maintenance and improvement plans to deal specifically with the continued growth in freight truck traffic, specifically along I-57. Again though, I-57 is only one piece of the puzzle, ensuring that there is adequate access to essential roadways to the industrial and business parks, as well as continued improvements to U.S. 50, U.S. 51, IL 37, IL 161 and other essential roadways should be important goals.

VIII. Regional Summary & Conclusion

a. Regional Freight Truck Issues and Trends

To begin, it is important to discuss in more detail the region's top industries related to freight truck transportation. These industries are not only well-established within the SCIRPDC Region, but account for a large majority of the region's production and distribution of goods and services. Understanding that these industries already have a strong foothold in the region is important to comprehend when municipalities, investment firms or other businesses are conducting business recruitment practices. Since these industries currently have an established presence in the region, efforts regarding these industry sectors should be more focused on continued expansion rather than recruitment. That is not to say that when opportunities arise, they should not be pursued and fully considered, but when conducting proactive business recruitment, efforts should be focused on the emerging industry sectors that are continually growing into large players in the region.

Table 8-1 indicates both the top six industry sectors, in terms of export dollars, within the region as well as six continually emerging industry sectors. All of these industry groups currently play an important role in the region's economy relative to freight truck transportation and the balance of trade with external markets. Specifically, this information can be used to help aid in the future expansion and recruitment of businesses in the region. However, keep in mind that when conducting business expansion and recruitment efforts, this is only one of many indicators that need to be considered before final decisions can be made.

Table 8-1: Leading and Emerging Regional Industry Sectors

Leading Industry Sectors	Emerging Industry Sectors
Machinery & Transportation Equipment	Livestock & Dairy
Warehousing	Forest & Related Products
Electrical, Scientific, or Medical Equipment	Rubber or Misc. Plastic Products
Prepared Foods	Pulp, Paper, Print Material, or Allied Prod.
Primary Metal & Fabricated Products	Chemicals or Allied Products
Stone, Ore, or Mineral Products	Agricultural Products

Note: Derived from Transearch, 2012

As was discussed throughout the entire study, the region's two interstates, I-57 and I-70, along with its four U.S. Highways, U.S. 40, U.S. 45, U.S. 50 and U.S. 51, are without a doubt the heaviest trafficked roadways within the region in terms of freight truck movement. Since these roadways are the region's most utilized freight truck transportation corridors, it is important to discuss the municipalities within the region in the best position to effectively utilize these roadways as well as the key external markets within

close proximity. The municipalities that are in the best position to take advantage of the current freight truck transportation corridors are nearly identical to those that have established industrial or business parks, with the addition of several others that have direct access to major regional interstates and U.S. highways. **Table 8-2** illustrates these municipalities and their corresponding directly accessible major roadways.

Table 8-2: Freight Truck Transportation Corridor(s)

Municipality	County	Freight Truck Transportation Corridor(s)
Clay City	Clay	U.S. 50
Flora	Clay	U.S. 50; U.S. 45
Louisville	Clay	U.S. 45
Xenia	Clay	U.S. 50
Altamont	Effingham	I-70; U.S. 40
Dieterich	Effingham	IL 33
Effingham	Effingham	I-57; I-70; U.S. 40; U.S. 45
Teutopolis	Effingham	I-70; U.S. 40
Brownstown	Fayette	I-70; U.S. 40
Farina	Fayette	I-57
Saint Elmo	Fayette	I-70; U.S. 40
Vandalia	Fayette	U.S. 40; U.S. 51
Newton	Jasper	IL 33; IL 130
Centralia	Marion	U.S. 51
Patoka	Marion	U.S. 51
Kinmundy	Marion	I-57
Sandoval	Marion	U.S. 50; U.S. 51
Salem	Marion	U.S. 50; I-57

Table 8-3, located on the following page, illustrates each of the five counties', and the region's commodity exports and commodity imports totals in terms of dollars and further indicates the corresponding balance of trade. These figures were all shown individually in the separated sections earlier in the analysis. However, due to the nature of the region's pattern of balance of trade surpluses, further discussion is necessary.

Within the entire SCIRPDC Region, each of the five counties displayed a freight truck balance of trade surplus in 2012. Since this data only covers one individual year, no generalizations can be made regarding whether this trade imbalance is good, bad, or benign. Although often times it is assumed that a balance of trade surplus is good and a balance of trade deficit is bad, this is not necessarily always the case and numerous other economic indicators are needed before these types of generalizations can be put forth. However, since the region's surplus is rather large, most notably coming from Clay County, some discussion about the implications of a continued annual surplus such as this is necessary.

The number one goal of economic and community development is to increase the standard of living for the surrounding area through multiple avenues, including job creation, public infrastructure

Table 8-3: Regional Freight Truck Balance of Trade

	Commodity Exports	Commodity Imports	Balance of Trade
Clay	1,030	542	488
Effingham	1,312	1,292	20
Fayette	437	416	21
Jasper	240	146	94
Marion	836	761	75
SCIRPDC Region	3,855	3,156	699

Note: All figures are measured in millions of dollars

improvements, the development of human capital and better health and safety, to name a few. What is essential to achieve these basic goals is the consumption of external goods and services from other markets (e.g. businesses and industry outside of the region). Therefore in order to accomplish the goals of economic development growth, trade deficits, or at least a more level balance of trade than this data illustrates, are better indicators of an improving regional standard of living. Although this is at a glance counterintuitive, to explain it simply, a region with trade deficits gets more than it gives, while a region with trade surpluses gives away more than it receives.

In practical terms, table 8-3 indicates that the region does not have enough retail outlets or vendors to provide a more equal balance of trade. This is especially the case in the three counties with the highest balance of trade surplus, Clay, Jasper and Marion Counties. If the central goal is economic development and increasing the region's standard of living, the trade surplus that occurred in 2012 with freight truck commodity movement cannot be a continually recurring theme for the region.

b. Freight Truck Recommendations and Opportunities

I-57 and I-70, along with U.S. Highways, U.S. 40, U.S. 45, U.S. 50 and U.S. 51, are without a doubt the most utilized roadways within the SCIRPDC five-county region. It is up to each municipality, county, and the region as a whole to hold a continued evaluation of these essential roadways to ensure not only that they are properly maintained, but also as time progresses, that they are improved upon as the region's freight truck needs continue to evolve.

It is also critical that those municipalities with established industrial parks, or large industry or business sectors continue to ensure that their connecting local roadways are linked to the abovementioned major highways and interstates in the most efficient way possible. If it is determined that improvements can be made to existing localized roadways, plans should be put into place for their future improvement.

With those plans in place, the implementation of IDOT programs such as their Economic Development Program (EDP) and Truck Access Route Program (TARP) would then be more efficiently executed increasing the possibility of funding. The IDOT EDP program is specifically used to improve highway access to new or expanding industrial, distribution, or tourism developments.[8] The IDOT TARP program is utilized to aid municipalities in upgrading current roadways to accommodate large freight trucks that previously could not be accessed.[9]

The Economic Development Administration also offers funding opportunities that can be utilized for both Economic Development Assistance and Public Works. The central goal of these grants is to support the implementation of economic development strategies that advance the economic prosperity of distressed communities.

Since this particular freight analysis only provides data and analysis on freight truck traffic and movement within the SCIRPDC Region, future analyses, if possible, should attempt to take into account the movement of freight by other modes of transportation such as rail, air, or barge. Most relevant to this region though is the lack of rail freight data. In order to create a more accurate picture of regional freight movement, continued examination of how to ascertain the proper rail freight data should continue to be pursued. With the inclusion of a regional rail freight study many of the questions that still remain regarding freight activity in the SCIRPDC Region would be answered, and a more complete picture could be drawn. Similarly, revisiting import and export freight truck data in the coming years would offer an opportunity to not only update this analysis, but provide the possibility to conduct trend analysis of the county and region's imports, exports, and LQs. This would afford the region with specific trend data over time, rather than only a snapshot of data for one year, as this analysis provides.

c. Concluding Discussion

In sum, the South Central Illinois Regional Freight Truck Analysis was developed for local, regional, state, and federal economic development and transportation planning purposes. The intent of this particular analysis was to provide a first-step in understanding the regional freight truck transportation system. Hopefully, the data and information provided within this document will continue to serve the SCIRPDC Region and assist its members in both economic development endeavors and transportation planning.

By no means is this meant to be the end of this particular analysis of freight truck movement within the region. As time goes on the current region's freight truck transportation system will continue to evolve and transform. This particular analysis is meant to be continually adjusted and improved upon as more information or relevant data becomes available.

d. References

[1] U.S. Department of Transportation. 2013. Freight Facts and Figures 2013. http://www.ops.fhwa.dot.gov/

[2] Litman, Todd. 2010. Evaluating Transportation Economic Development Impacts. *Victoria Transport Policy Institute.* http://www.vtpi.org/

[3]NADO Research Foundation. 2010. Inland Ports: Linking Freight and Regional Economic Development.

[4]Illinois Department of Transportation. 2012. Freight Mobility Plan.

[5]North American Lighting, Inc. 2015. About Us. http://www.nal.com/aboutus.aspx

[6]DCEO Community Profiles. 2013. Flora, Illinois. http://www2.illinoisbiz.biz/communityprofiles/profiles/Flora.HTM

[7]Illinois State Geological Survey. 2015. Directory of Coal Mines in Illinois, Fayette County.

[8]IDOT. 2015. Economic Development Program. http://www.idot.illinois.gov/

[9]IDOT. 2015. Truck Access Route Program. http://www.idot.illinois.gov/

Provided By:
South Central Illinois Regional Planning & Development Commission
120 Delmar Avenue
Suite A
Salem, Illinois 62881-2000

P: 618-548-4234 F: 618-548-4236

SCIRPDC Contributing Staff

James Patrick, Executive Director & Project Facilitator / Contributing Author

Luke Eastin, Economic Development Planner & Primary Author

Special thanks to the Illinois Department of Transportation and Transearch International for their assistance in the development of this document

Funding Provided By:

Illinois Department of Transportation

Data Provided By:

TRANSEARCH
YOUR WORLD PARTNER IN EXECUTIVE SEARCH