



CMAP GO TO 2040

Freight land use clusters in northeastern Illinois

Presentation to CMAP's Freight Committee
October 24, 2016

Background

2

- Third CMAP Policy Update in a series on industrial development and freight land uses
 - ▣ January 16, 2015: [Industrial development trends in the CMAP region](#)
 - ▣ October 23, 2015: [Impacts of national development trends on the Chicago region](#)
 - ▣ August 26, 2016: [Freight land use clusters in northeastern Illinois](#)
- Continues staff research into [freight land use issues](#) presented to Freight Committee in Spring 2016

Why freight land use clusters?

3

- Many land uses generate freight activity, but some are more freight-intensive than others.
- Freight-intensive land uses tend to co-locate in order to take advantage of efficiencies.
- Identifying regional clusters of dense, freight-supportive land uses will help to focus future research and recommendations.

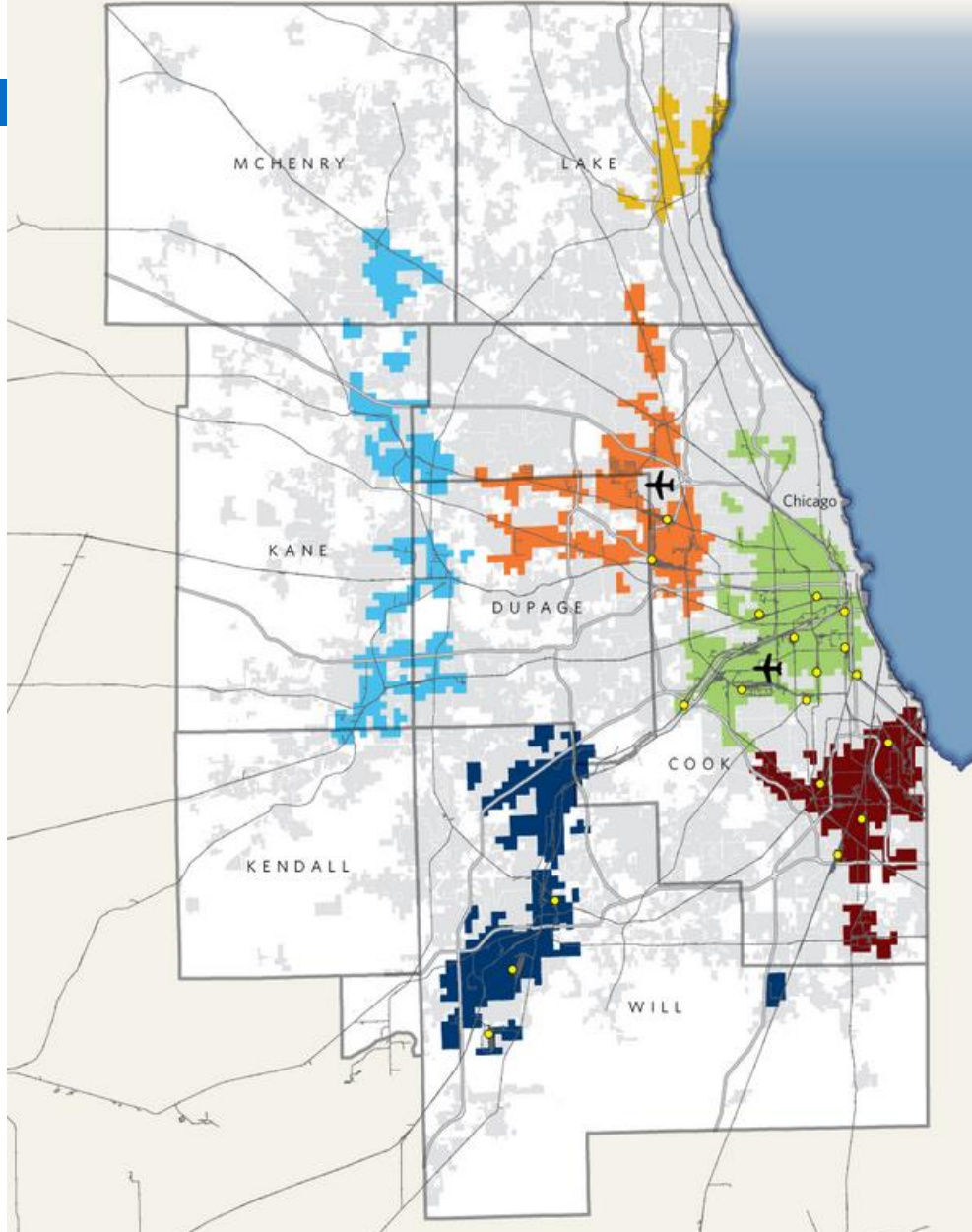
Identifying regional clusters

4

- Cluster analysis based on:
 - ▣ Rentable building area for warehouse, manufacturing/
food processing, and distribution
 - ▣ Industrial land use area
- Iterations of cluster analysis, with further refinement based on geography, statistical profile, and qualitative factors
- Developed six clusters in the region

Freight-supportive land use clusters

Source: Chicago Metropolitan Agency for Planning analysis of CoStar 2015 data and CMAP Land Use Inventory 2013 data.



Cluster profiles

6

- Relevant statistics about these clusters can be organized into three sections
 - Land use
 - RBA/buildings
 - Infrastructure
 - Employment

Cluster profiles: land use

7

Land use by freight-supportive cluster, 2013

	Land Area sqmi	Industrial Land sqmi	Median Utilized Parcel Size SF	Median Vacant Parcel Size SF
Greater O'Hare	100.8	26.0	245,452	62,764
CoreMidway	132.8	21.8	49,322	12,551
Will County	103.9	30.9	421,386	228,111
Fox River Valley	101.6	22.5	258,360	115,834
South Cook	83.3	14.8	115,359	44,744
North Chicagoland	24.2	6.1	190,656	108,805

Cluster profiles: buildings

8

RBA and age by freight-supportive cluster, 2015

	<i>RBA all types</i>	<i>Warehouse RBA % of Cluster</i>	<i>Manu & Food RBA % of Cluster</i>	<i>Distribution RBA % of Cluster</i>	<i>Median Year Built</i>	<i>Median Building RBA</i>	<i>Vacancy Rate</i>
Greater O'Hare	225.1 M	134.9 M 60%	64.1 M 28%	26.0 M 12%	1975	23,627	6.3%
Core/Midway	192.2 M	89.6 M 47%	87.4 M 45%	15.2 M 8%	1953	24,013	8.4%
Will County	113.3 M	59.8 M 53%	17.0 M 15%	36.5 M 32%	1996	48,841	8.1%
Fox River Valley	97.0 M	46.0 M 47%	36.5 M 38%	14.5 M 15%	1987	29,836	6.5%
South Cook	52.4 M	20.6 M 39%	27.3 M 52%	4.5 M 9%	1970	23,512	7.5%
North Chicagoland	27.2 M	8.9 M 33%	15.8 M 58%	2.5 M 9%	1983	26,625	7.6%

Cluster profiles: infrastructure and employment

9

	Rail Miles	National Highway Freight Network Miles	Truck Route Miles	Intermodal Lifts	Freight-Manufacturing Employment
Greater O'Hare	349.2	30.7	72.6	529,000	132,900
Core/Midway	817.2	80.2	71.2	4,641,000	108,700
Will County	197.9	28.2	65.9	1,463,000	23,400
Fox River Valley	171.4	12.6	42.6	NA	57,100
South Cook	531.5	35.5	39.1	885,000	31,300
North Chicagoland	54.0	4.0	10.7	NA	16,200

Three largest cluster profiles

10

- Greater O'Hare
 - ▣ Largest and densest in region
 - ▣ Low vacancy rates, heavy concentration in warehouse uses, a very high density of truck routes, and easy access to O'Hare International Airport
- Core/Midway
 - ▣ Extensive legacy infrastructure, the oldest median building age, smallest median parcel size, and highest building vacancy rate
 - ▣ Internal variation: industrial areas near Midway Airport are newer and larger than the areas to the north and east, with differing land use challenges
- Will County
 - ▣ Emerging freight center with newer and larger industrial buildings, specialization in modern distribution facilities
 - ▣ Internal variation: developed northern half, which would be the second-densest in the region, and the relatively undeveloped southern half

Moving forward

- Developed baseline understanding of the key freight land use clusters in the region.
- Work with stakeholders to refine and potentially divide clusters.
- Develop Regional Freight Plan recommendations on planning needs and next steps for freight activity areas.



CMAP GO TO 2040

Questions?