



***MOVING* WILL COUNTY**

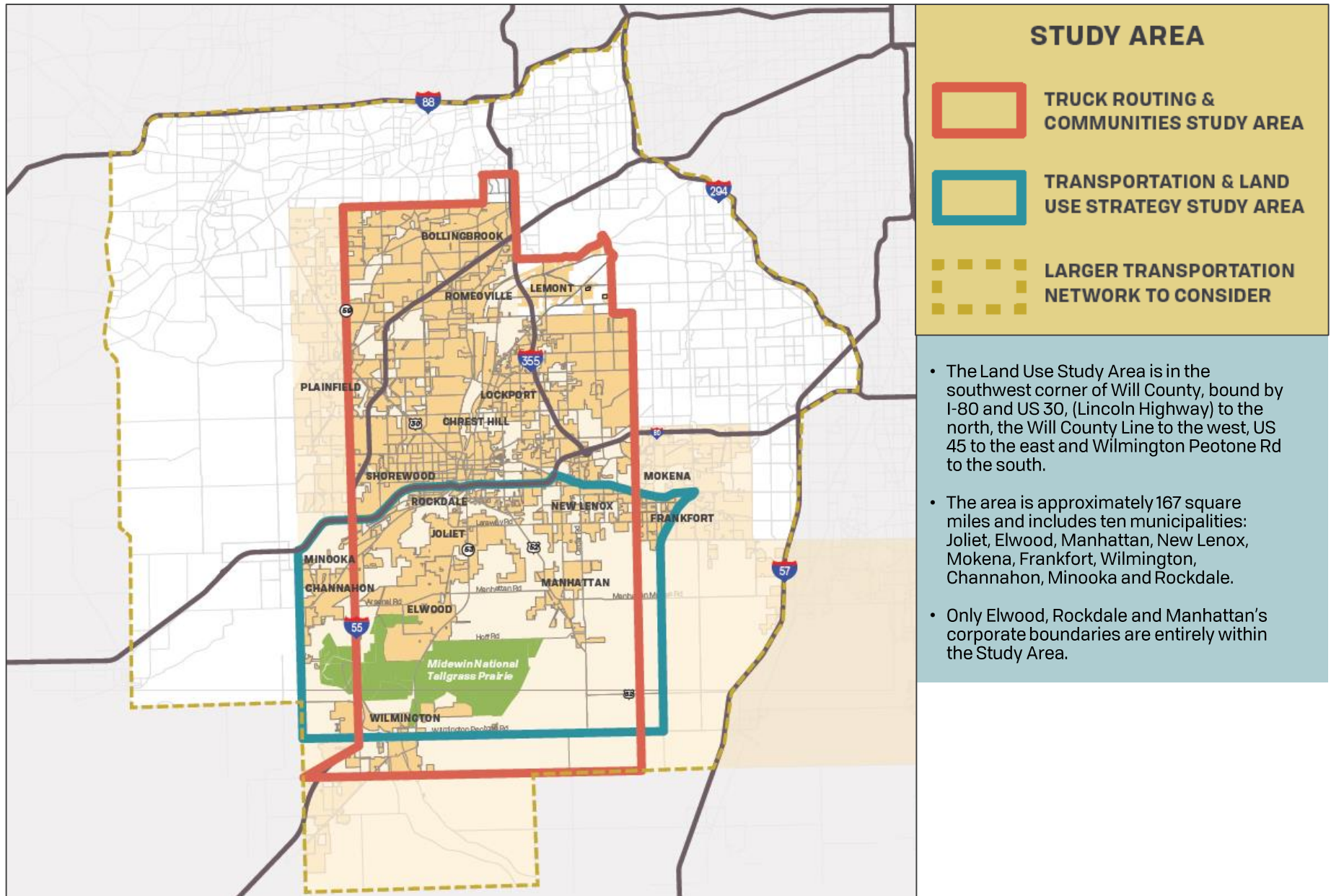
EXISTING CONDITIONS REPORT

Land Use & Market Analysis

REVISED JUNE 12, 2020

Truck Routing and Land Use Study Area Boundaries

REVISÉ JUNE 12, 2020



Summary of Existing Land Uses

REVISED JUNE 12, 2020

Residential Uses

- Existing residential uses predominantly consist of owner-occupied single-family detached dwellings that are generally over 20 years old. There are minimal multifamily units in the Study Area.
- Community feedback suggests there is a need for more affordable workforce housing, senior housing, multifamily, and rental options in the Study Area.

Retail & Office Uses

- Existing retail uses in the Study Area are predominantly strip retail and small neighborhood retail centers.
- Regional retail centers are primarily along I-80 in the Village of New Lenox at the northern edge of the Study Area.
- Study Area has minimal office use.

Industrial Uses

- The majority of major industrial uses are near the intermodal facilities and the I-55 and I-80 corridors.

Civic and Institutional

- Two High Schools serve the Study Area: Joliet Central High School (in Downtown Joliet, outside the Study Area) and Lincoln Way West High School in New Lenox.

Agricultural Uses

- The majority of the Study Area currently consists of agricultural uses.
- The majority of the farmlands have prime soils according to the USDA. Prime farmland is land that has the best combination of physical and chemical characteristics for producing food, feed, forage, fiber and oilseed crops.
- Generational farms are located in the area as well as farmsteads identified as historically significant by the 2009 Rural Historic Structure Survey by the County.

Sports, Entertainment & Tourism

- Major national tourism destinations are in the Study Area, including Historic Route 66 (IL 53), the Midewin National Tallgrass Prairie, and the Abraham Lincoln National Cemetery.
- Regional destinations include the Chicagoland Speedway, Route 66 Raceway, Autobahn County Club and Hollywood Casino and Hotel, all located in the City of Joliet.

Open Spaces

- The Open Space system in the Study Area is anchored by major Federal, State, and County protected lands.
- Federal lands include the Midewin National Tallgrass Prairie and the Abraham Lincoln National Cemetery.
- State and IDNR lands include Braidwood

Dunes and Savanna, Grant Creek Prairie, Hitts Siding Prairie, Sand Ridge Savanna, Wilmington Shrub Prairie, Des Plaines Dolomite Prairie Land, and Water Reserve, and Channahon State Park.

- Forest Preserve District of Will County (FPDWC) lands include Prairie Creek, Laughton, Jackson Creek and Sugar Creek Preserves, McKinley Woods, and Briscoe Mounds.

Natural Resources

- The Study Area has some of the most valuable natural resources in the County, including six watersheds around the DuPage, Kankakee and Des Plaines Rivers and Jackson, Prairie and Forked Creeks.
- According to the USDA, majority of the area has high hydric soils. Hydric soils are soils where water remains at or near the soil surface for extended time periods during the growing season. These soils are critical for the formation of many types of wetlands.

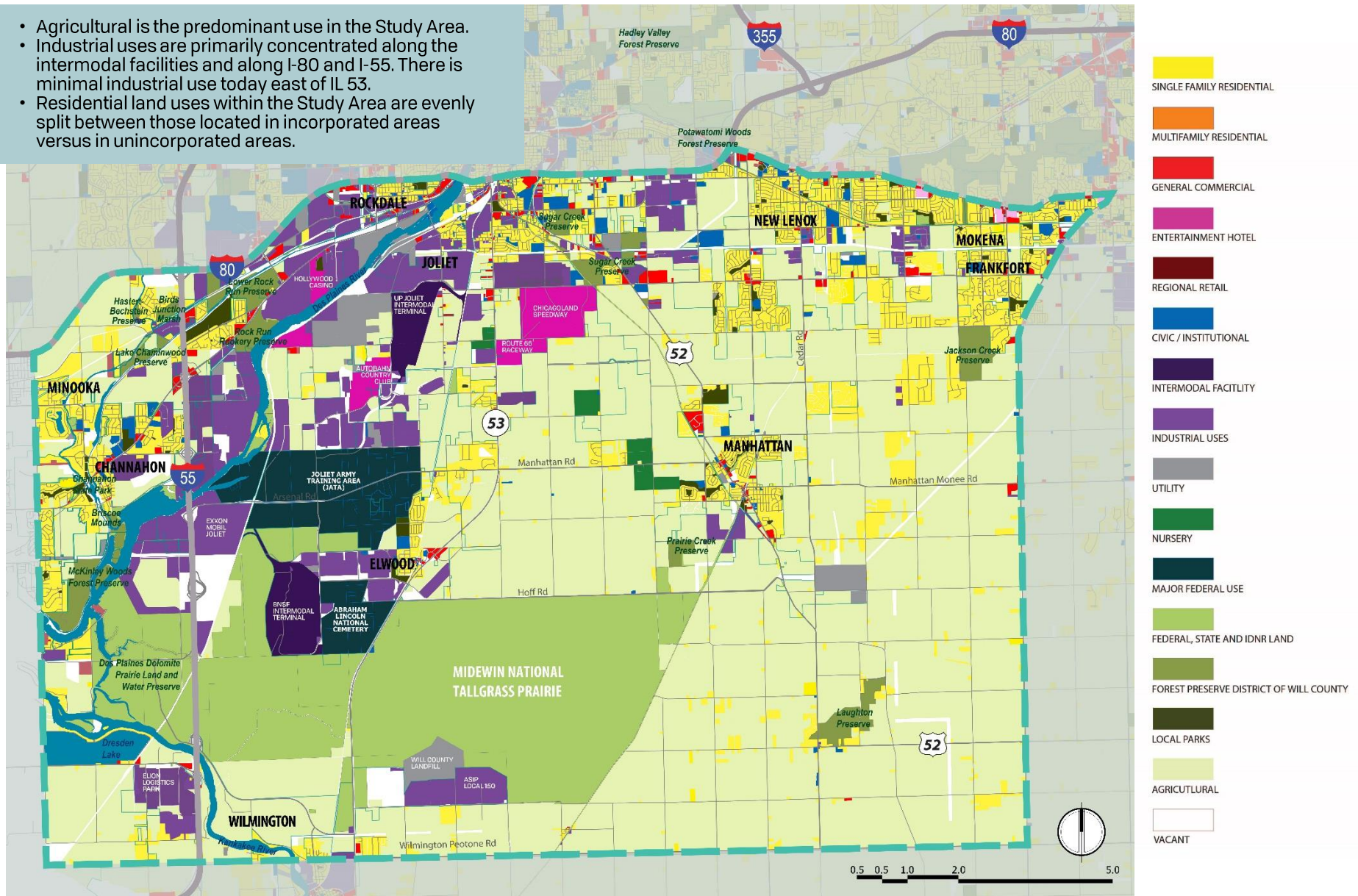
Trails

- Wauponsee Glacial Trail, I & M Canal Trail, and Old Plank Road Trail are three major regional trails that run through the Study Area. These connect to local trails in IDNR and FPDWC open spaces and Midewin National Tallgrass Prairie.
- FPDWC has significant trails planned in the Study Area to create major east west connections and corridors along creeks.

Summary Map of Existing Land Uses

REVISED JUNE 12, 2020

- Agricultural is the predominant use in the Study Area.
- Industrial uses are primarily concentrated along the intermodal facilities and along I-80 and I-55. There is minimal industrial use today east of IL 53.
- Residential land uses within the Study Area are evenly split between those located in incorporated areas versus in unincorporated areas.



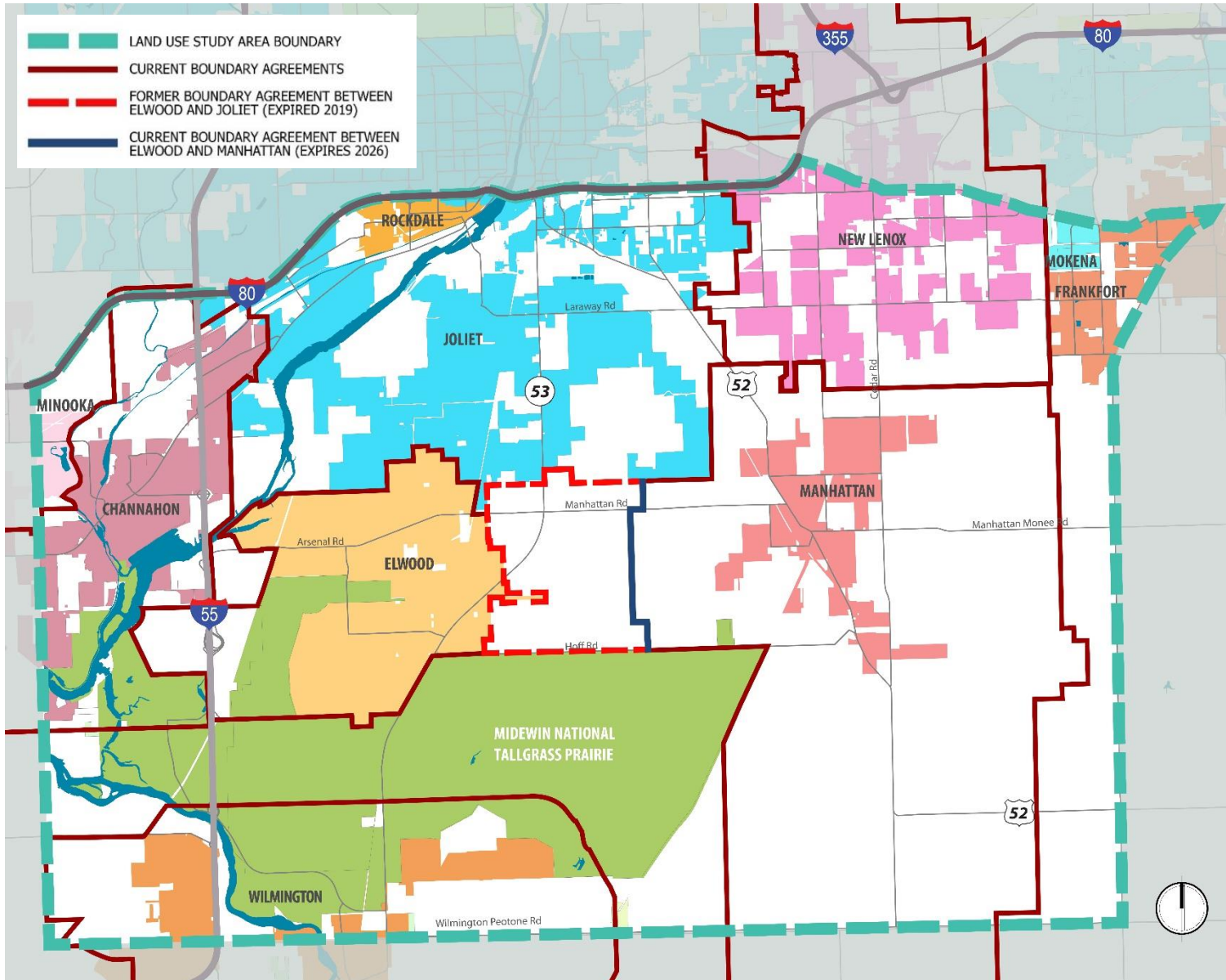
Data sources: CMAP Land Use, 2015; Satellite Imagery, 2017. Note: The CMAP 2015 Land Use Inventory data used in this analysis is draft data.

Moving Will County Land Use Study

Existing Jurisdictional Boundaries and Land Uses

Existing Jurisdictional Boundaries

REVISED JUNE 12, 2020



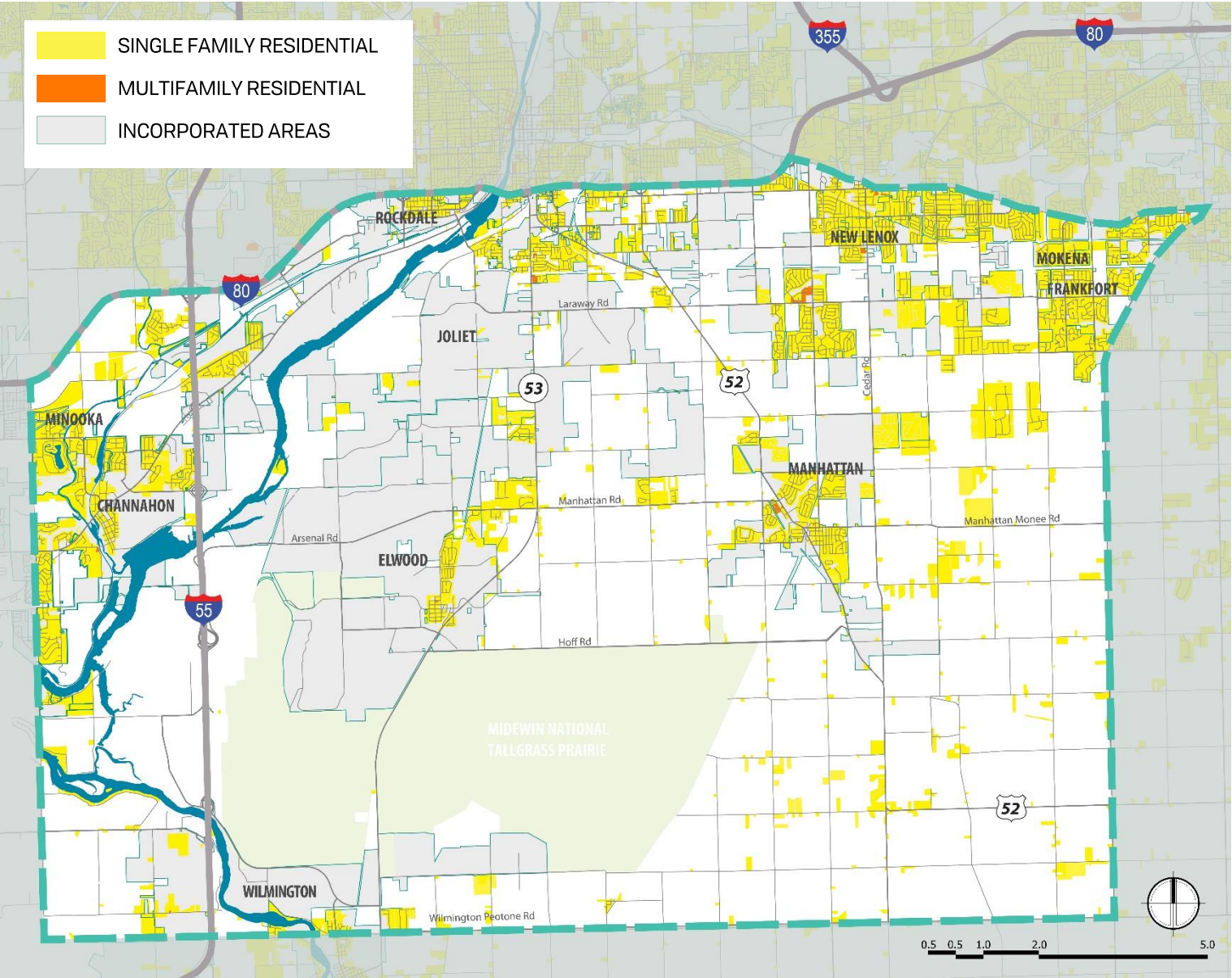
Municipalities in the Study Area:

- City of Joliet
- Village of Elwood
- Village of Manhattan
- Village of New Lenox
- Village of Mokena
- Village of Frankfort
- Village of Wilmington
- Village of Channahon
- Village of Minooka
- Village of Rockdale

There are over **~167 square miles** of unincorporated land (shown in white) within the overall Study Area.

Existing Residential Uses

REVISED JUNE 12, 2020



Existing residential uses predominantly consist of owner occupied single family dwellings that are generally over 20 years old.

There are minimal multifamily units in the Study Area.

Housing Tenure & Age

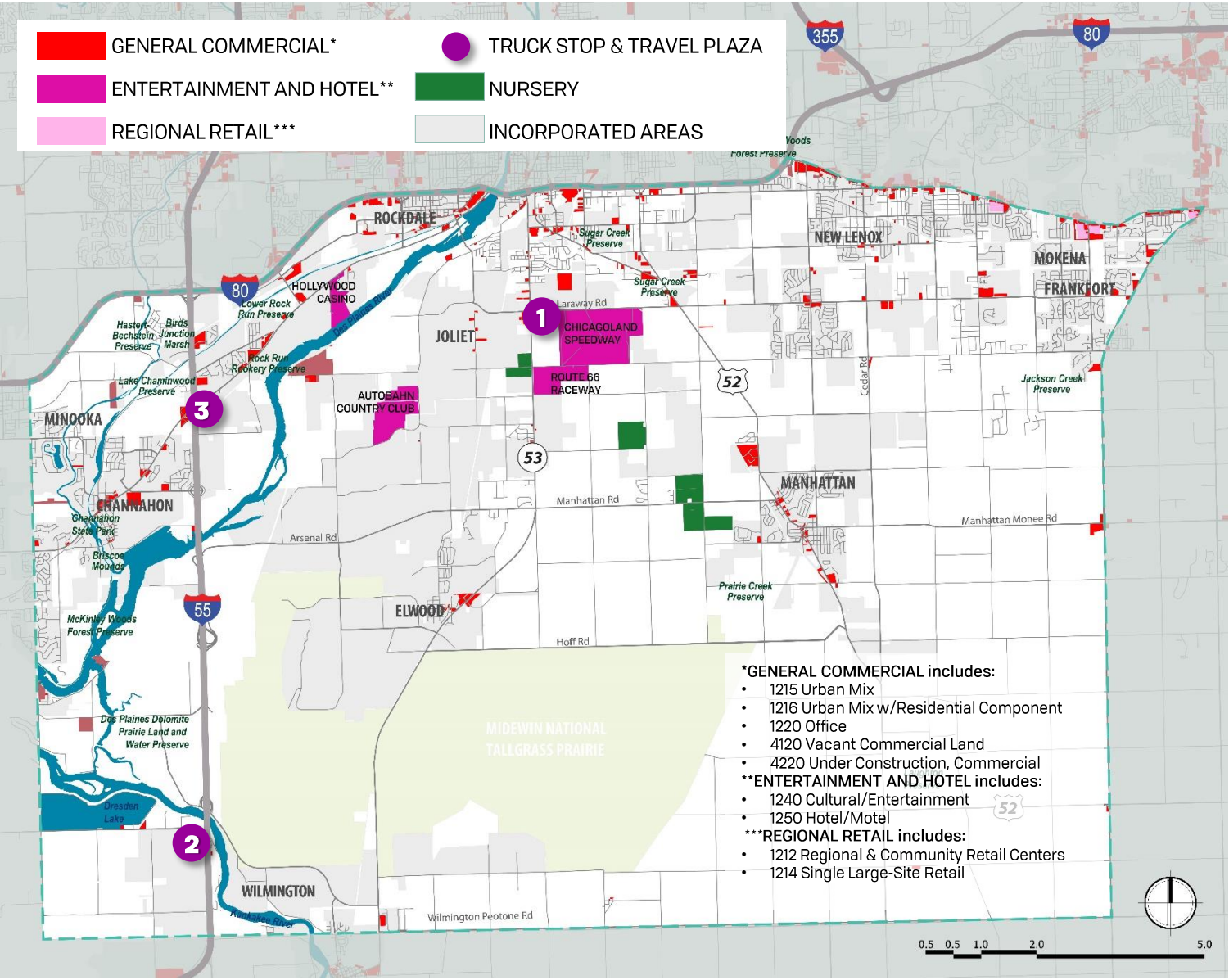
- From 2010 to 2019, housing tenure in the Study Area shifted slightly further toward owner occupancy (86.9% in 2010 to 87.6% in 2019)
- Only 3% of housing units were built in 2010 or later
- 47.8% were built in the 1990s and 2000s
- The oldest units, built before 1950, make up only 8.8% of the housing stock

Table 1: Total Square Miles of Residential Land Uses in Study Area

Residential	Sq. Mi.	% Total
Municipality	9.14	47.8%
Unincorporated	9.99	52.2%
Total (Land Use Study Area)	19.13	

Existing Commercial Uses

REVISED JUNE 12, 2020



Existing retail uses in the Study Area are predominantly strip retail and small neighborhood retail centers.

Regional retail centers are primarily along I-80 in the Village of New Lenox at the northern edge of the Study Area.

There is minimal office use in the Study Area.

Major entertainment anchors include:

- Chicagoland Speedway and Route 66 Raceway
- Autobahn County Club
- Hollywood Casino & Hotel

Major truck stop related retail uses and travel plazas are concentrated at the following locations:

1. I-53 and Laraway Road
2. I-55 and Lorenzo Road
3. I-55 and Eames Street

Table 2: Total Square Miles of Commercial Land Uses in Study Area

Commercial	Sq. Mi.	% Total
Municipality	4.07	78.3%
Unincorporated	1.12	21.7%
Total (Land Use Study Area)	5.19	

Existing Residential and Commercial Uses

REVISED JUNE 12, 2020

Table 3: Top 5 Municipalities with the Highest Percentage of Residential Land Uses (in sq. mi.)

Municipality	Municipality Total Area ¹	Residential	% of Total Area
Village of Minooka	0.99	0.59	60%
Village of Mokena	8.84	4.86	55%
Village of New Lenox	15.59	6.58	42%
Village of Frankfort	15.65	6.39	41%
Village of Channahon	8.72	2.80	32%
Total: All Municipalities Within/Partially Within Land Use Study Area	140.76	42.09	30%

Minooka, Mokena and New Lenox have the highest percentage of total area dedicated to residential uses (Table 3), and Mokena, Rockdale, and Joliet have the highest percentage of total land area dedicated to commercial uses (Table 4).

Overall, commercial accounts for a relatively small percentage of the land uses within the municipalities of the Study Area (7% of total municipal area) as well as the overall Study Area, including unincorporated and municipal areas (5%).

Table 4: Top 5 Municipalities with the Highest Percentage of Commercial Land Uses (in sq. mi.)

Municipality	Municipality Total Area ¹	Commercial	% of Total Area
Village of Mokena	8.84	1.17	13%
Village of Rockdale	1.33	0.16	12%
City of Joliet	55.00	6.01	11%
Village of Frankfort	15.65	0.97	6%
Village of Channahon	8.72	0.48	5%
Total: All Municipalities Within/Partially Within Land Use Study Area	140.76	10.33	7%

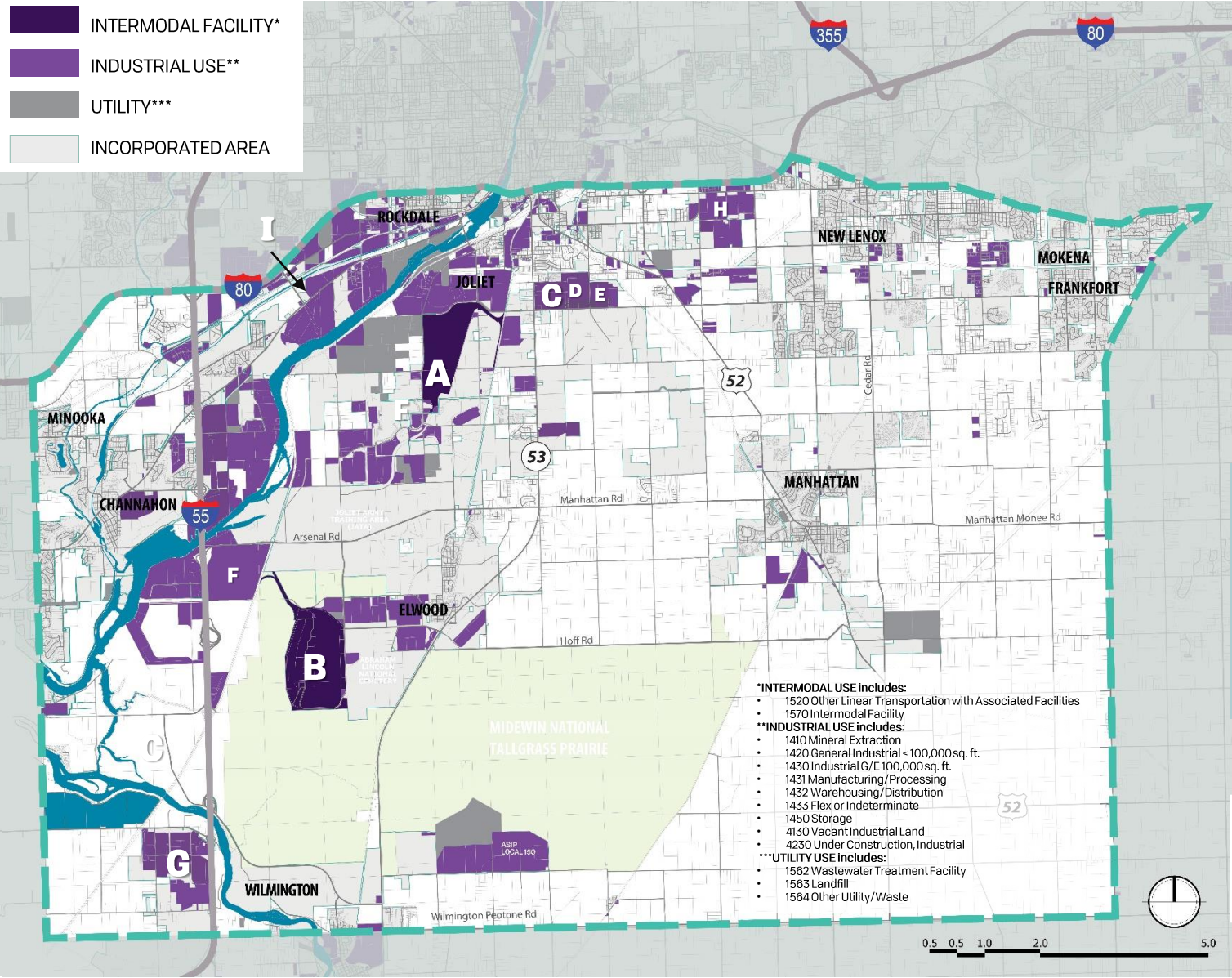
Notes for both tables:

Municipalities considered for the top 5 were those within or partially within the Land Use study area.

The total land area listed for each municipality only reflects the portion of a municipality's land area within Will County and the Study Area (e.g., Village of Minooka does not reflect the area of land that is in Kendall County or Grundy County).

Existing Industrial Uses

REVISED JUNE 12, 2020



Major Existing Industrial Anchors in the Study Area include the following:

- A. The Union Pacific Global IV Intermodal
- B. The BNSF Logistics Park Intermodal
- C. Laraway Crossing Business Park
- D. Amazon Fulfillment Center
- E. IKEA Distribution Center
- F. Exxon Joliet
- G. Elion Logistics Park
- H. Cherry Hill Business Park
- I. Rock Creek Logistics Center
- J. Estes Truck Terminal

The majority of major industrial uses are near the intermodal facilities and the I-55 and I-80 corridor.

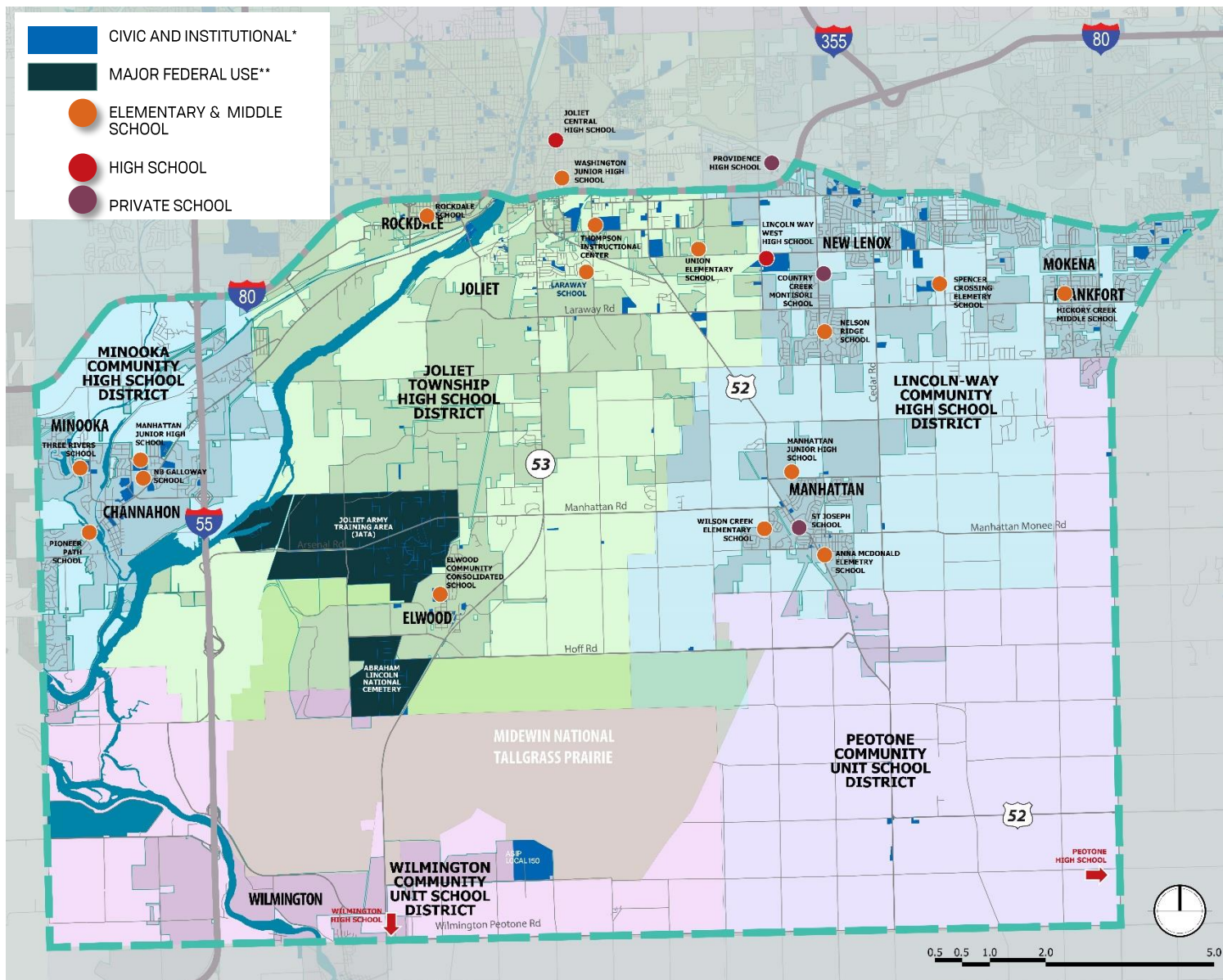
The amount of industrial uses on municipal land versus on unincorporated land is nearly evenly split.

Table 3: Total Square Miles of Industrial Land Uses in Study Area

Industrial	Sq. Mi.	% Total
Municipality	11.94	49.6%
Unincorporated	12.11	50.4%
Total (Land Use Study Area)	24.05	

Existing Civic and Institutional Uses

REVISÉ JUNE 12, 2020



There are two High Schools serving the Study Area:

1. Joliet Central High School (in Downtown Joliet, outside the Study Area)
2. Lincoln Way West High School in New Lenox

*CIVIC AND INSTITUTIONAL includes:

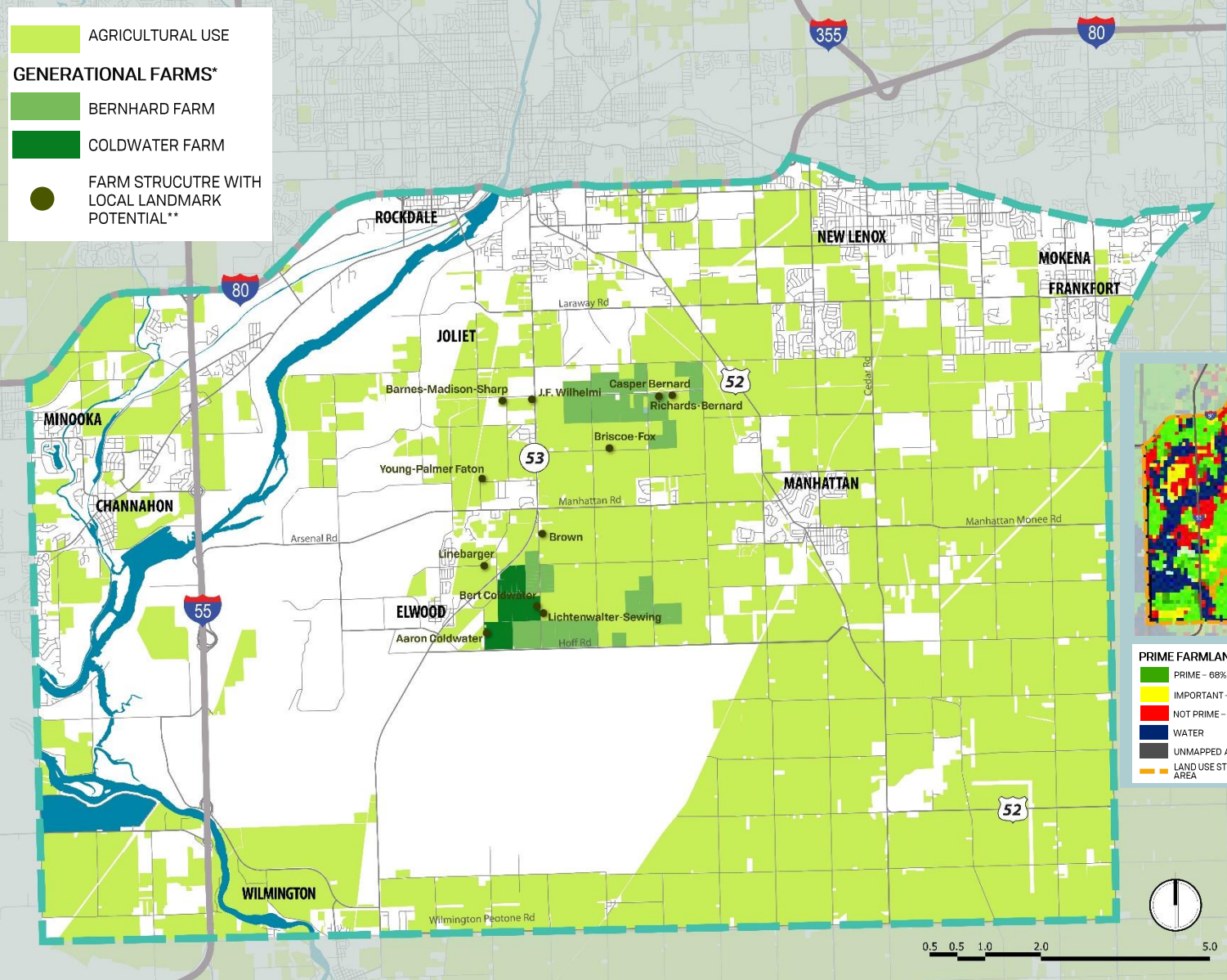
- 1310 Medical Facilities
 - 1321 K-12 Educational Facilities
 - 1322 Post-Secondary Educational Facilities
 - 1350 Religious Facilities
 - 1360 Cemeteries
 - 1370 Other Institutional
- **MAJOR FEDERAL USES include:**
- 1330 Government Administration and Services

Table 4: Total Square Miles of Civic/Institutional Land Uses in Study Area

Civic/Institutional	Sq. Mi.	% Total
Municipality	4.74	64.3%
Unincorporated	2.63	35.7%
Total (Land Use Study Area)	7.37	

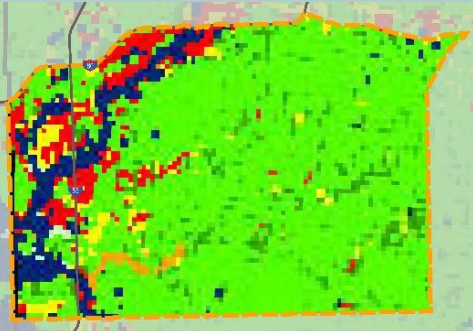
Existing Agricultural

REVISED JUNE 12, 2020



The majority of the Study Area consists of agricultural uses and is located on unincorporated land (nearly 93%).

There are generational farms in the Study Area as well as farmsteads identified as historically significant by the 2009 Rural Historic Structure Survey by the County.



Majority of the study area has Prime Farmland, according to the USDA

Table 5: Total Square Miles of Agricultural Land Uses in Study Area

Agricultural	Sq. Mi.	% Total
Municipality	9.20	7.4%
Unincorporated	114.48	92.6%
Total (Land Use Study Area)	123.68	

Data sources: * Parcel information provided by Jackson Township, **2009 Rural Historic Structure Survey, Jackson Township CMAP Land Use, 2015; Satellite Imagery, 2017. Note: The CMAP 2015 Land Use Inventory data used in this analysis is draft data.

Existing Industrial, Civic/Institutional, and Agricultural Uses

REVISED JUNE 12, 2020

Table 6: Top 5 Municipalities with the Highest Percentage of Industrial Land Uses (in sq. mi.)

Municipality	Municipality Total Area ¹	Industrial	% of Total Area
Village of Rockdale	1.33	0.91	69%
Village of Elwood	13.82	4.68	34%
Village of Channahon	8.72	2.31	27%
City of Joliet	55.00	12.34	22%
Village of Manhattan	6.33	0.96	15%
Total: All Municipalities Within/Partially Within Land Use Study Area	140.76	26.15	19%

Rockdale, Elwood, and Channahon have the highest percentage of total area within their boundaries dedicated to industrial uses (Table 6).

Elwood, New Lenox, and Joliet have the highest percentage of total area within their boundaries dedicated to civic or institutional uses (Table 7).

Manhattan, Minooka, and Wilmington have the highest percentage of total area within their boundaries dedicated to agricultural uses (Table 8).

Table 7: Top 5 Municipalities with the Highest Percentage of Civic or Institutional Land Uses (in sq. mi.)

Municipality	Municipality Total Area ¹	Civic/ Institutional	% of Total Area
Village of Elwood	13.82	3.51	25.0%
Village of New Lenox	15.59	0.63	4.0%
City of Joliet	55.00	2.03	3.7%
Village of Channahon	8.72	0.29	3.4%
Village of Frankfort	15.65	0.46	3.0%
Total: All Municipalities Within/Partially Within Land Use Study Area	140.76	7.45	5.3%

Notes for all tables:

Municipalities considered for the top 5 were those within or partially within the Land Use Study Area.

The total land area listed for each municipality only reflects the portion of a municipality's land area within Will County and the Study Area (e.g., Village of Minooka does not reflect the area of land that is in Kendall County or Grundy County).

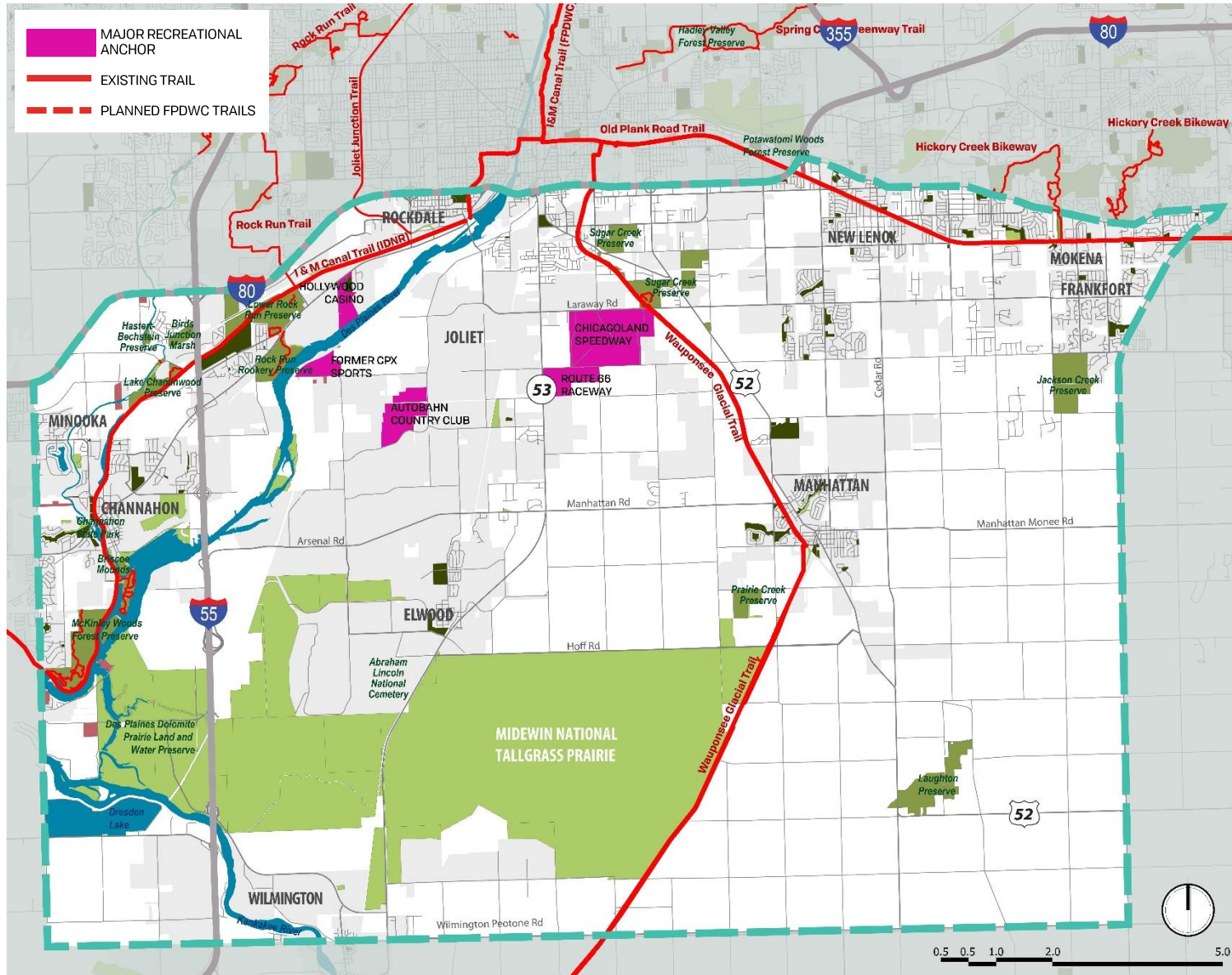
Data sources: CMAP Land Use, 2015. Note: The CMAP 2015 Land Use Inventory data used in this analysis is draft data.

Table 8: Top 5 Municipalities with the Highest Percentage of Agricultural Land Uses (in sq. mi.)

Municipality	Municipality Total Area ¹	Agricultural	% of Total Area
Village of Manhattan	6.33	1.78	28.0%
Village of Minooka	0.99	0.14	13.8%
Village of Wilmington	14.34	1.76	12.3%
Village of Elwood	13.82	1.66	12.0%
Village of Frankfort	15.65	1.77	11.3%
Total: All Municipalities Within/Partially Within Land Use Study Area	140.76	14.19	10.1%

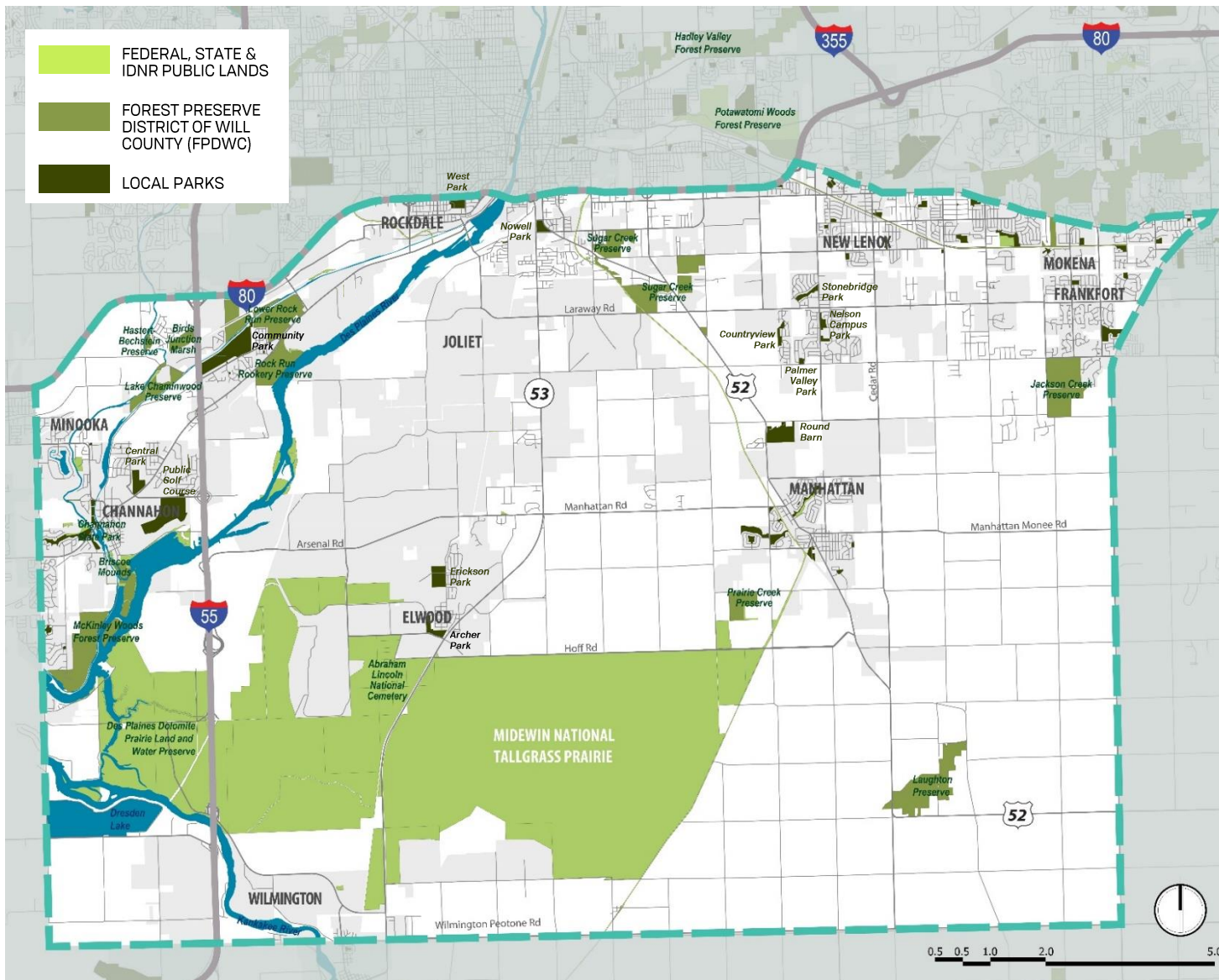
Existing Sports & Entertainment Uses

REVISED JUNE 12, 2020



Data sources: CMAP Land Use, 2015; Satellite Imagery, 2017; FPDWC GIS, 2019. Note: The CMAP 2015 Land Use Inventory data used in this analysis is draft data.

REVISÉ JUNE 12, 2020



The Open Space system in the study area is anchored by major Federal, State and County protected lands.

These include the following:

Federal

- The Midewin National Tallgrass Prairie
- Abraham Lincoln National Cemetery

State and IDNR

- Braidwood Dunes and Savanna
- Grant Creek Prairie
- Hitts Siding Prairie
- Sand Ridge Savanna
- Wilmington Shrub Prairie
- Des Plaines Dolomite Prairie Land and Water Reserve
- Channahon State Park

Forest Preserve District of Will
County (FPDWC)

- Prairie Creek Preserve
- Laughton Preserve
- Jackson Creek Preserve
- Sugar Creek Preserve
- McKinley Woods
- Briscoe Mounds

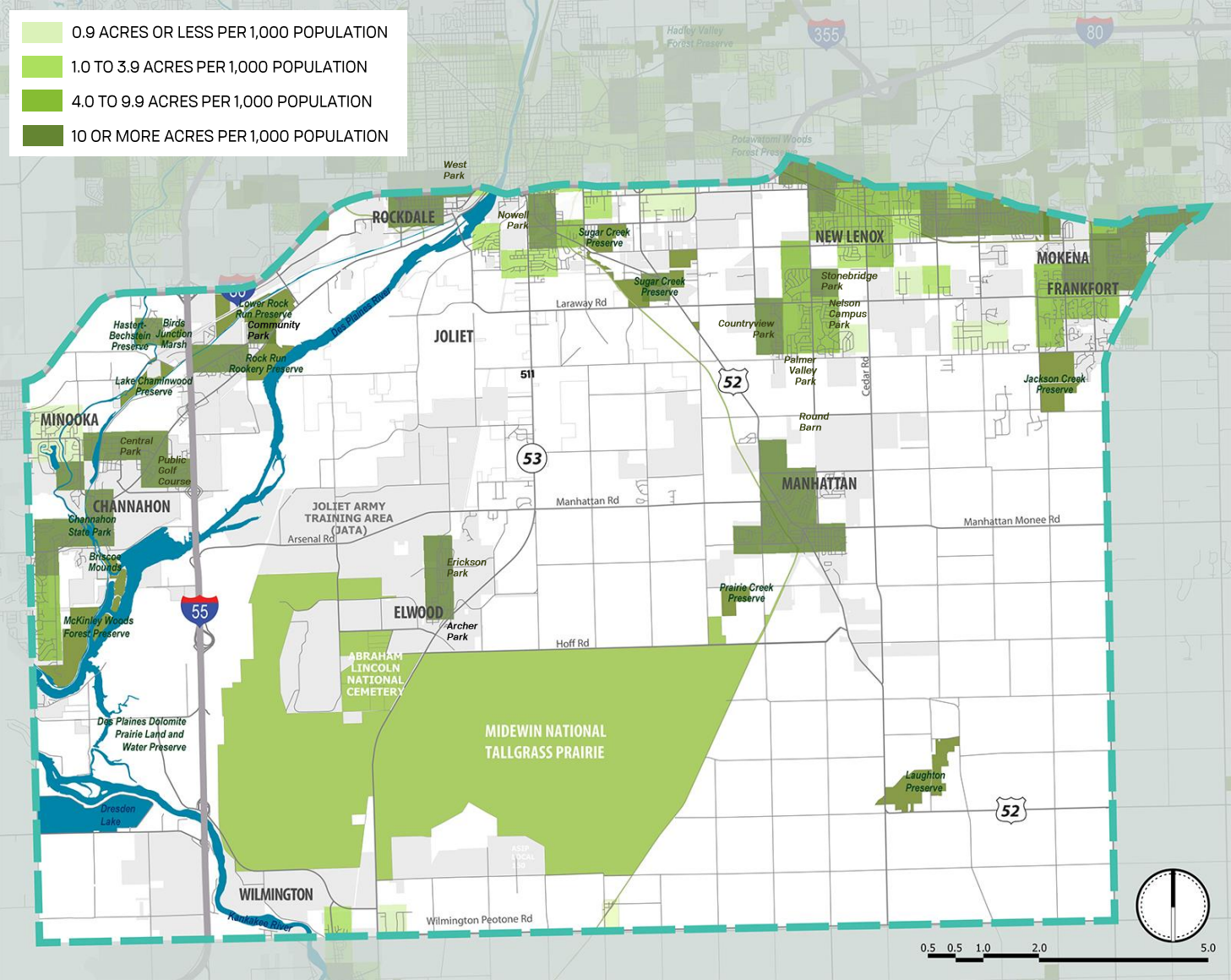
Table 9: Total Acreage of Parks, Forest Preserves, and Open Spaces by Jurisdiction

Jurisdiction	Sq. Mi.
Municipality/Other	1.7
County (Forest Preserves)	4.1
State (State Park)	5.7
Federal (Midewin)	29
Total	40.5

Note: This data was aggregated from several different sources: CMAP's 2015 Land Use Inventory, Will County Forest Preserve dataset, and USDA – Forest Service's National Forest Preserve dataset. Note: The CMAP 2015 Land Use Inventory data used in this analysis is draft data.

Park Access

REVISED JUNE 12, 2020



This map shows access to parks per 1,000 people based on geographic proximity to recreational open space.¹

All the communities in the Study Area have a portion of their land where there is 10 or more acres per 1,000 population.

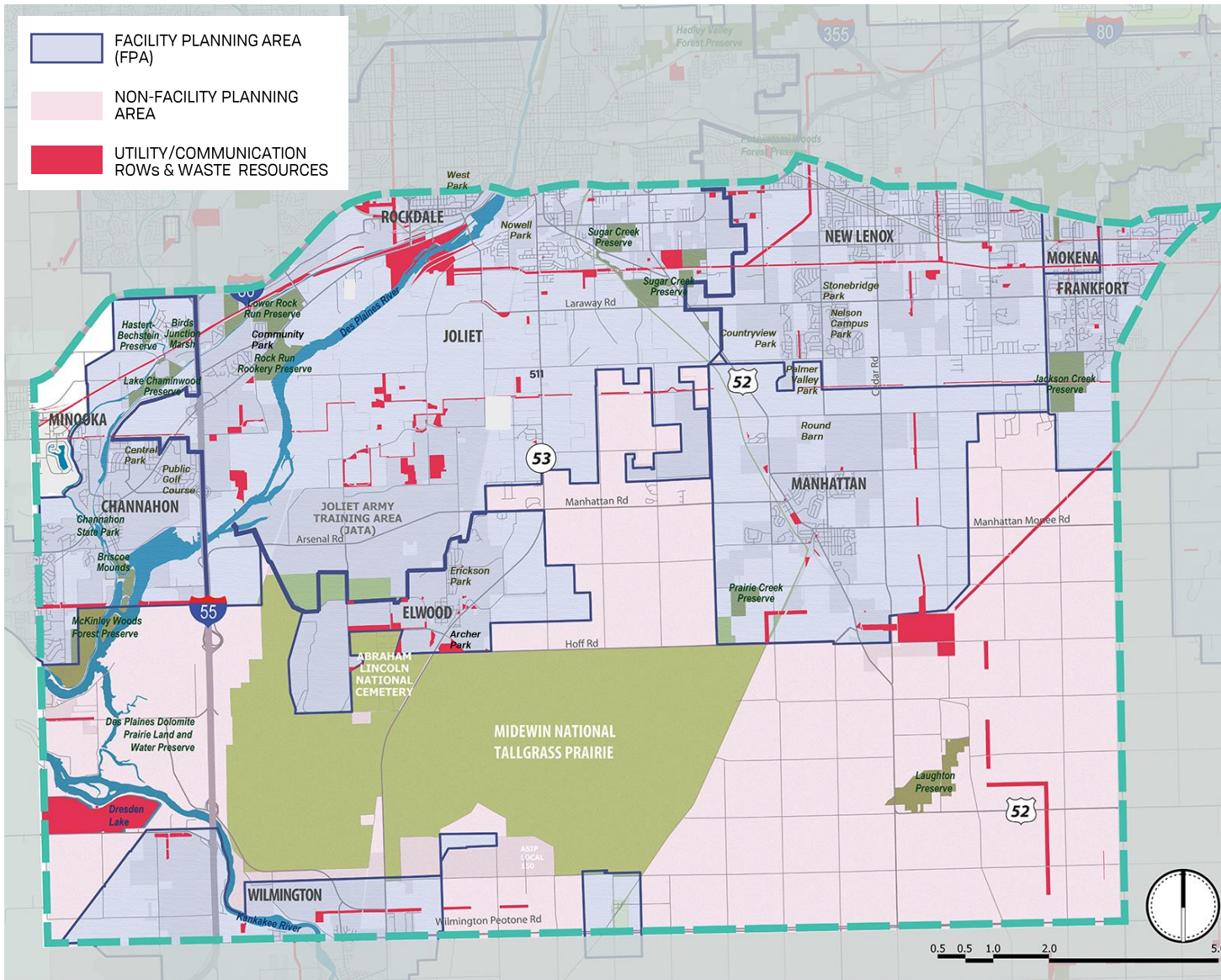
Table 10: Total Square Miles of Park Access per 1,000 Population in Study Area

Per 1,000 Population	Sq. Mi.	% Total
0.9 Acres or Less	2.7	1.1%
1.0 to 3.9 Acres	2.5	1.0%
4.0 to 9.9 Acres	5.8	2.4%
10.0 Acres or More	13.2	5.4%
Land Use Study Area	243	

¹Data sources: CMAP ON TO 2050 Layer: Park Access, 2018.

Existing Infrastructure

REVISED JUNE 12, 2020



A Facility Planning Area (FPA) is defined as a centralized sewer service area to be considered for possible wastewater treatment facilities within a 20-year planning period. These areas also include the treatment cells, storage area, and land application area for treated wastewater, if applicable.¹

Will County does not maintain data on existing Water and Sewer Infrastructure and to date local data has only been provided by the Village of Manhattan. Therefore, this map does not reflect local data.

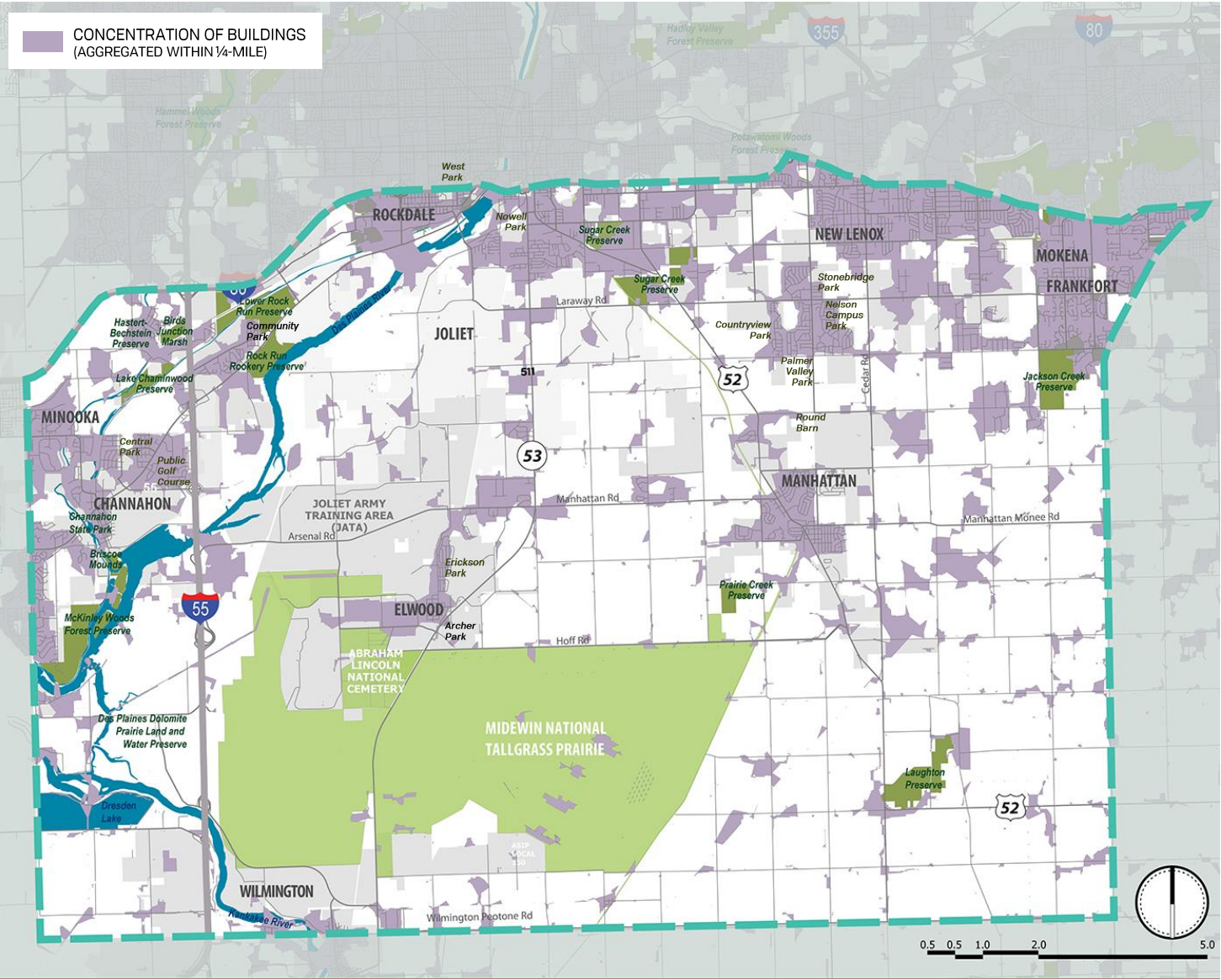
The map shows Facility Planning Areas and Utility/Communication ROWs & Water Resources that include the following from CMAP's 2015 Land Use draft dataset:

- 1550 Communication
- 1561 Utility Right-of-Way
- 1564 Other Utility/Waste
- 1565 Stormwater Management

¹CMAP, <https://www.cmap.illinois.gov/programs/water/water-quality/wastewater-planning>

Water Sewer Utilities (based on Building Footprint Density)

REVISED JUNE 12, 2020



With a significant amount of open space in the Study Area, it is important to consider areas for potential infill development that are already located near existing utility services.

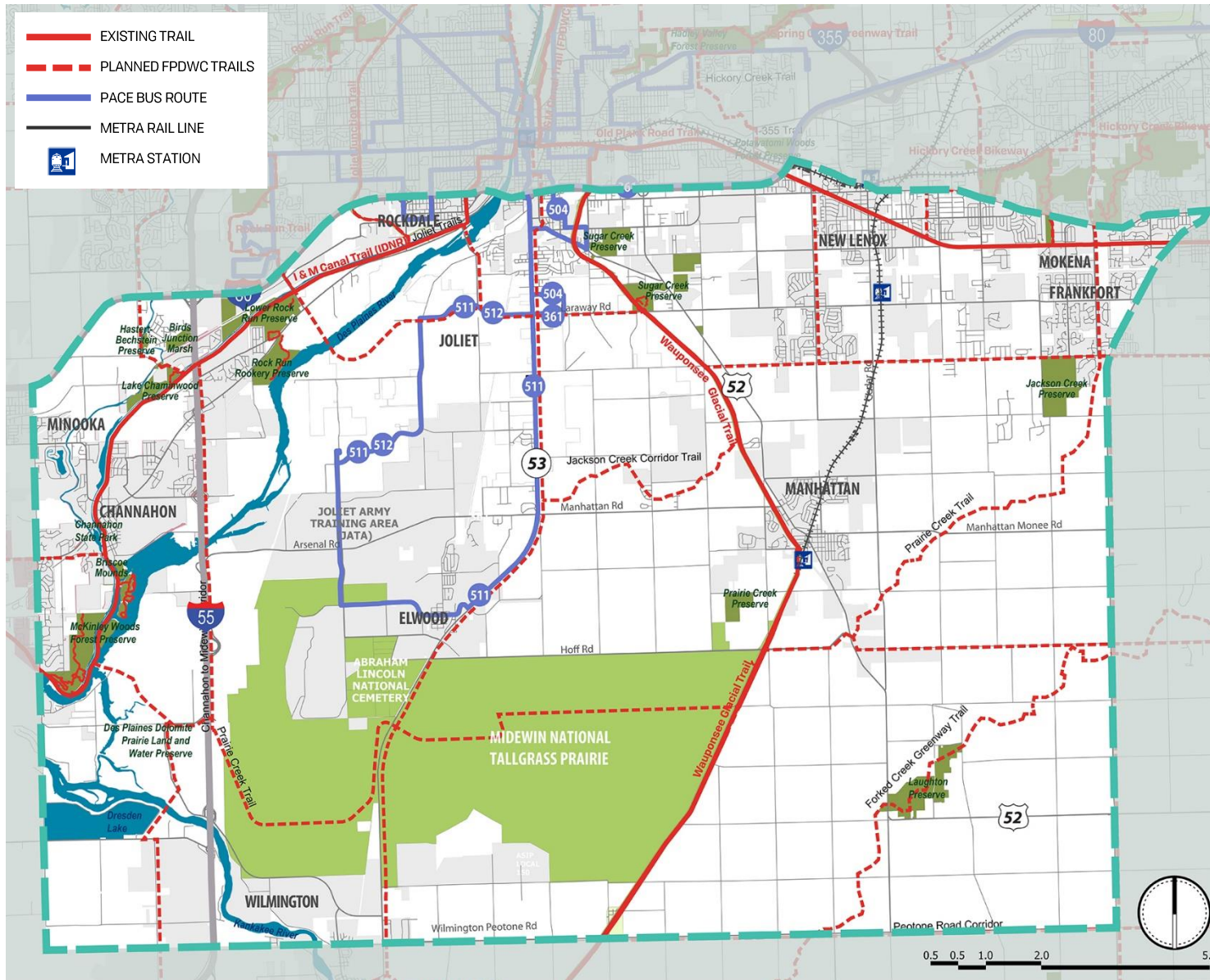
As a proxy for the location of water and sewer utilities, the density of building footprints was considered. Areas with concentrations of buildings (within a quarter mile of each other) were analyzed and indicated on this map.

Table 11: Total Square Miles of Building Concentration in Study Area

Building Concentration (aggregated within 1/4-mile)	Sq. Mi.	% Total
Incorporated	23.2	9.5%
Unincorporated	20.9	8.6%
Land Use Study Area	243	

Existing Transit and Trail Connectivity

REVISED JUNE 12, 2020



PACE operates a variety of routes within the Study Area. These five routes include both local, fixed and express services:

- Route 361 (Harvey – Laraway Crossings Express)
- Route 504 (South Joliet)
- Route 505 (West Joliet Loop)
- Route 511 (Joliet-Elwood-Centerpoint)
- Route 512 (Joliet - Centerpoint).

METRA also serves several communities within the Study Area via the SouthWest Service (SWS). Communities with a Metra station include:

- New Lenox
- Manhattan
- Joliet (with a station just north of the study area boundary in Downtown Joliet).

Besides transit, western Will County also has a network of regional bicycle trails with plans to expand the network in the future. Further details about these future expansions can be found in Will County's 2016 Bikeway Plan. Some of the more extensive trails in the Study Area include:

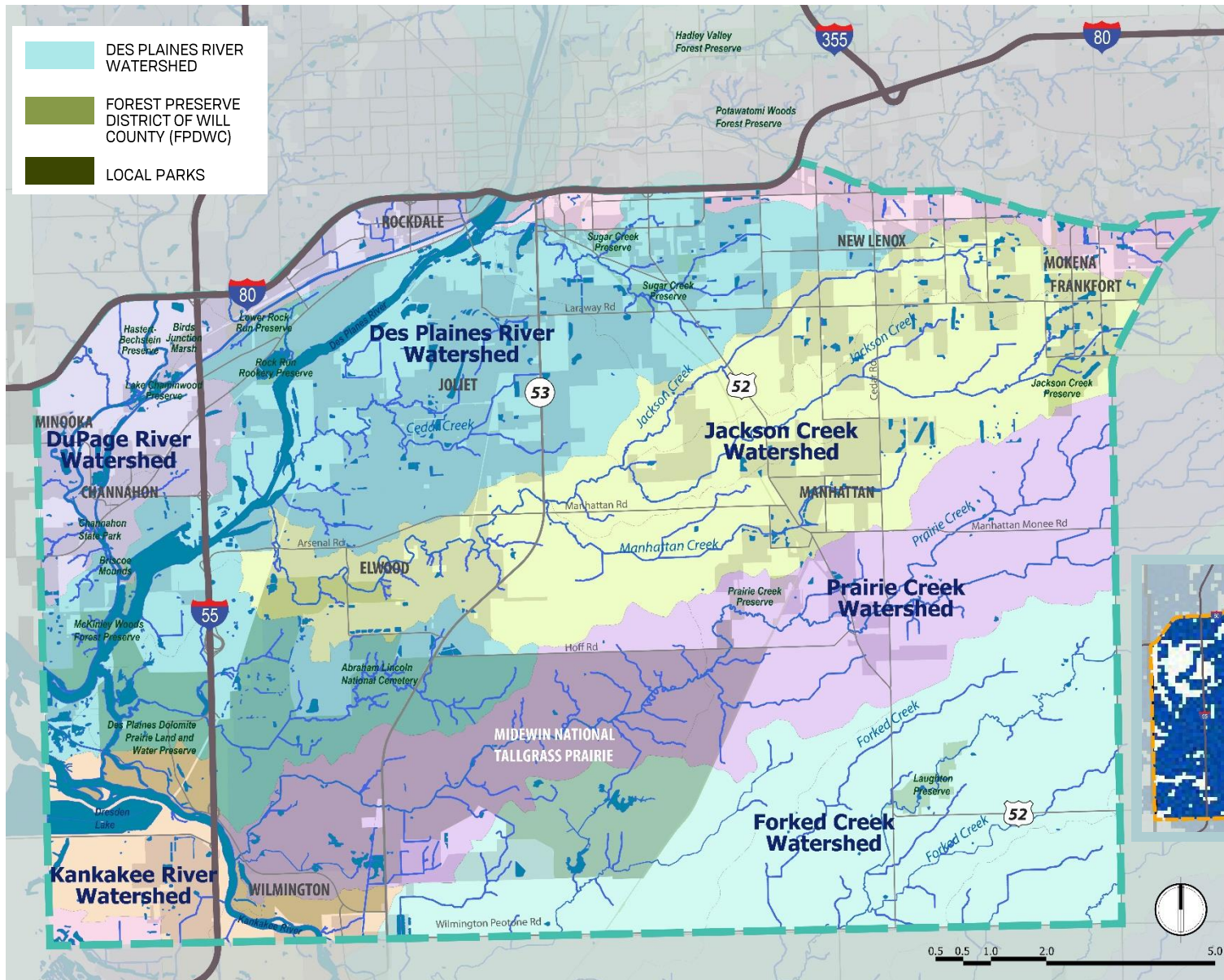
- Wauponsee Glacial Trail
- I & M Canal Trail
- Old Plank Road Trail
- Trails in the Midewin National Tallgrass Prairie.

Moving Will County Land Use Study

Environmental and Natural Resources

Existing Natural Resources

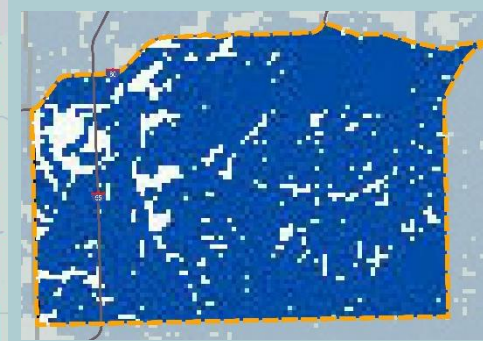
REVISED JUNE 12, 2020



The Study Area has six watersheds around the following major waterways:

1. DuPage River
2. Kankakee River
3. Jackson Creek
4. Prairie Creek
5. Forked Creek
6. Des Plaines River

The majority of the Study Area has high hydric soils, according to the USDA. Hydric soils are soils where water remains at or near the soil surface for extended time periods during the growing season. These soils are critical for the formation of many types of wetlands.



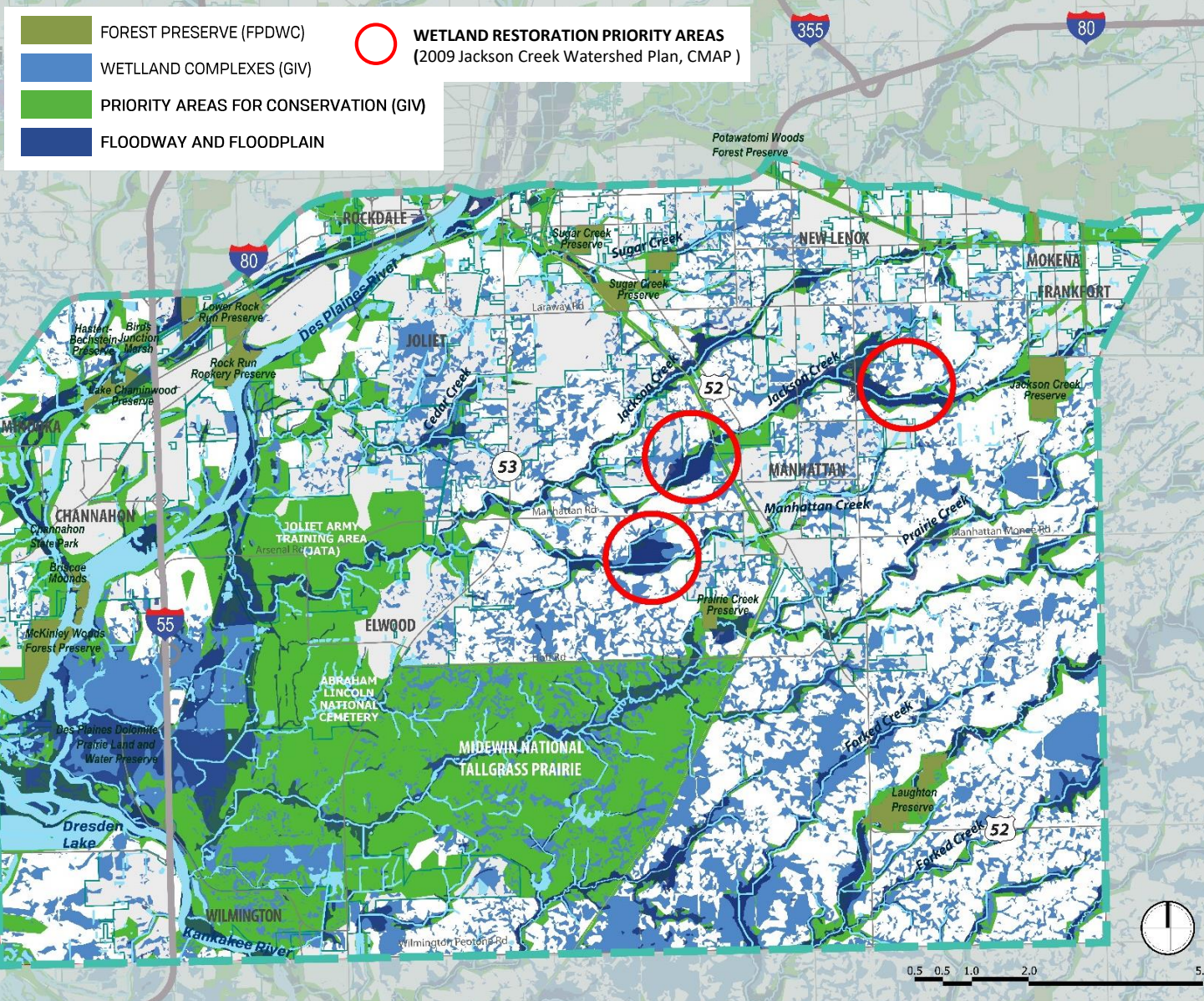
■ HYDRIC SOILS



0.5 0.5 1.0 2.0 5.0

Existing Waterways, Floodplains, Wetlands & Fish Habitat

REVISED JUNE 12, 2020



Waterways include Des Plaines, Kankakee and DuPage Rivers and Sugar, Cedar, Jackson, Manhattan, Prairie and Forked creeks.

Fish Habitat

- According to the 2009 Field Museum Study, "Fishes of Will County", a total of 112 fish species has been recorded in Will County over the past 107 years and many of these are threatened or endangered today.
- Diversity of fishes in Jackson Creek includes a typical creek species and more unusual ones like Western Creek Chubsucker, Black Redhorse, Golden Redhorse and Northern Hog Sucker. These species prefer clean water, abundant native vegetation, clean gravel and sand and a steady reliable flow of water to feed and spawn.

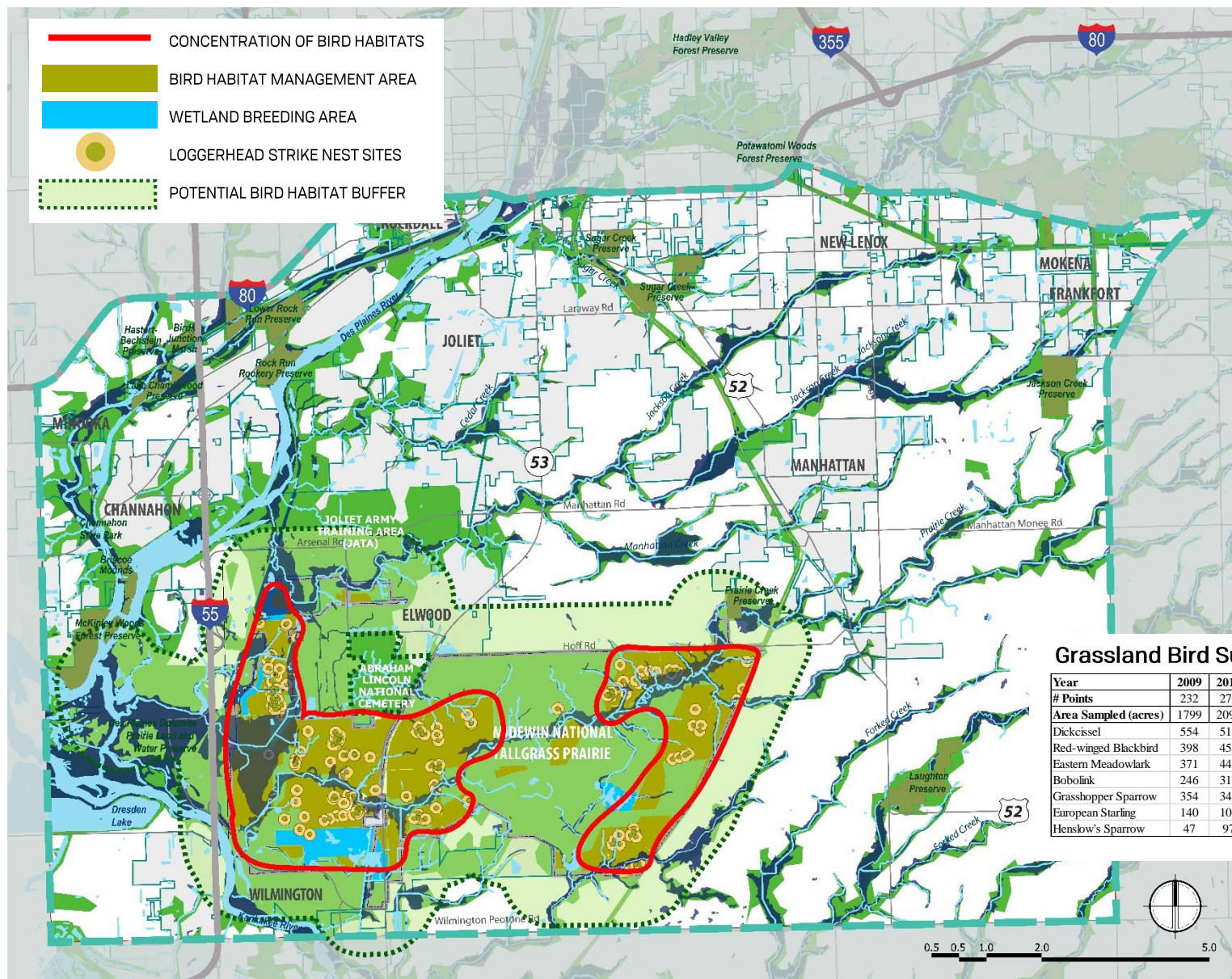
Jackson Creek

The 2009 Jackson Creek Watershed Plan identifies three high-priority areas for wetlands restoration

- A. Spangler Road to the Wauponsee Trail along Jackson Creek
- B. Area between Ridge, Brown, Cherry Hill, and Manhattan Roads (Sections 13 and 24, Jackson Township). This area was also specifically called out for wetland restoration in the Village of Manhattan's 2003 Manhattan Creek protection resolution.
- C. Area between Baker, Reiter, Delaney, and Schoolhouse Roads (Sections 2, 3, and 4 in Manhattan Township)

Midewin Bird Habitats

REVISÉ JUNE 12, 2020



The Midewin National Tallgrass Prairie is host to a large variety of bird species and habitats. According to ebird, 167 species of birds have been sighted in the Midewin.

Map shows the areas of concentration for bird habitats including significant areas for grassland bird habitat management, upland sandpiper breeding grounds, wetland bird breeding areas, and Loggerhead Strike nest sites.

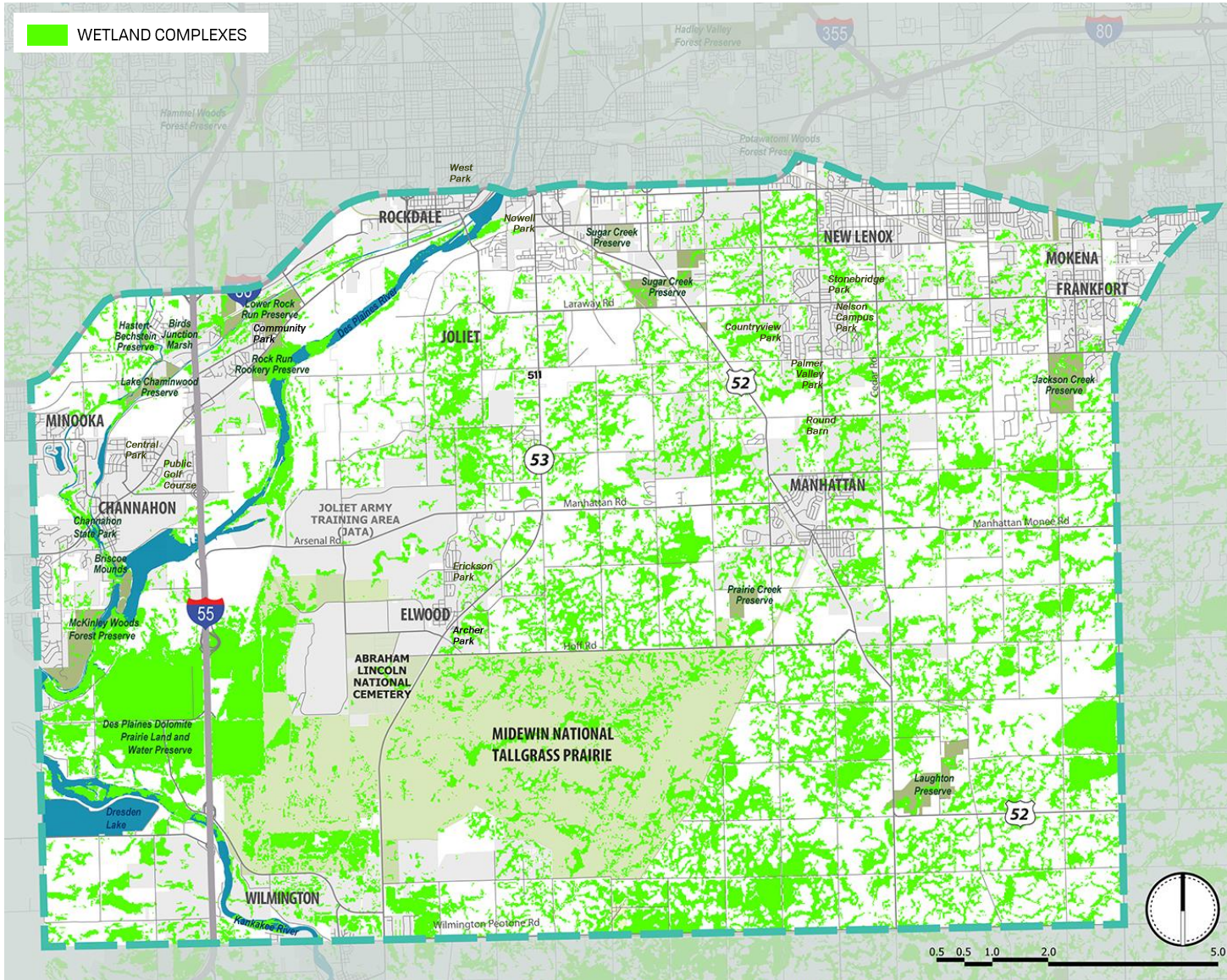
Midwin has suggested a potential perimeter buffer of approx. 1,200m or .75 miles per USDOT's Section 4f Act. This buffer could protect bird habitats from encroaching development, traffic movement and noise.

Grassland Bird Survey Results, 2009-2016

Year	2009	2010	2011	2012	2013	2014	2015	2016
# Points	232	270	273	312	299	169	152	183
Area Sampled (acres)	1799	2094	2117	2419	2318	1310	1178	1419
Dickcissel	554	512	667	721	500	363	301	438
Red-winged Blackbird	398	457	491	775	552	377	299	430
Eastern Meadowlark	371	445	439	515	512	317	203	270
Bobolink	246	311	417	332	380	174	184	262
Grasshopper Sparrow	354	345	434	311	281	198	166	213
European Starling	140	102	50	329	134	135	41	42
Henslow's Sparrow	47	97	100	130	62	46	47	68

Wetland Complexes

REVISED JUNE 12, 2020

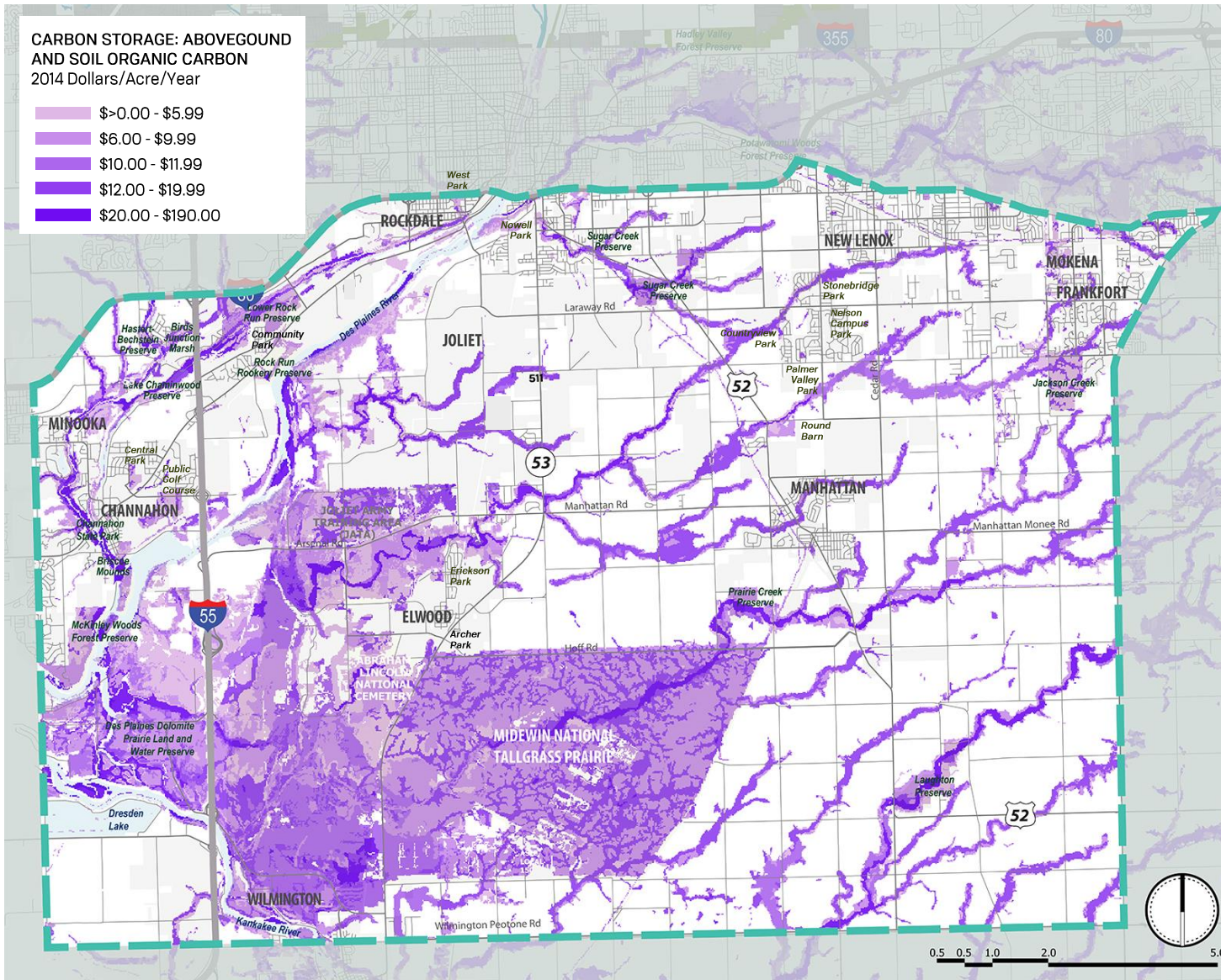


Wetland Complexes are areas with favorable wetland conditions that are potential restoration and enhancement opportunities for future site scale investigation.

The Land Use Study Area contributes to almost 8% of the CMAP region's Wetland Complex area. Wetland Complexes make up about 24% of the total Study Area. They are not indicated as having an ecosystem service value economic benefit but they are considered to be areas for potential restoration.

Carbon Storage

REVISÉ JUNE 12, 2020

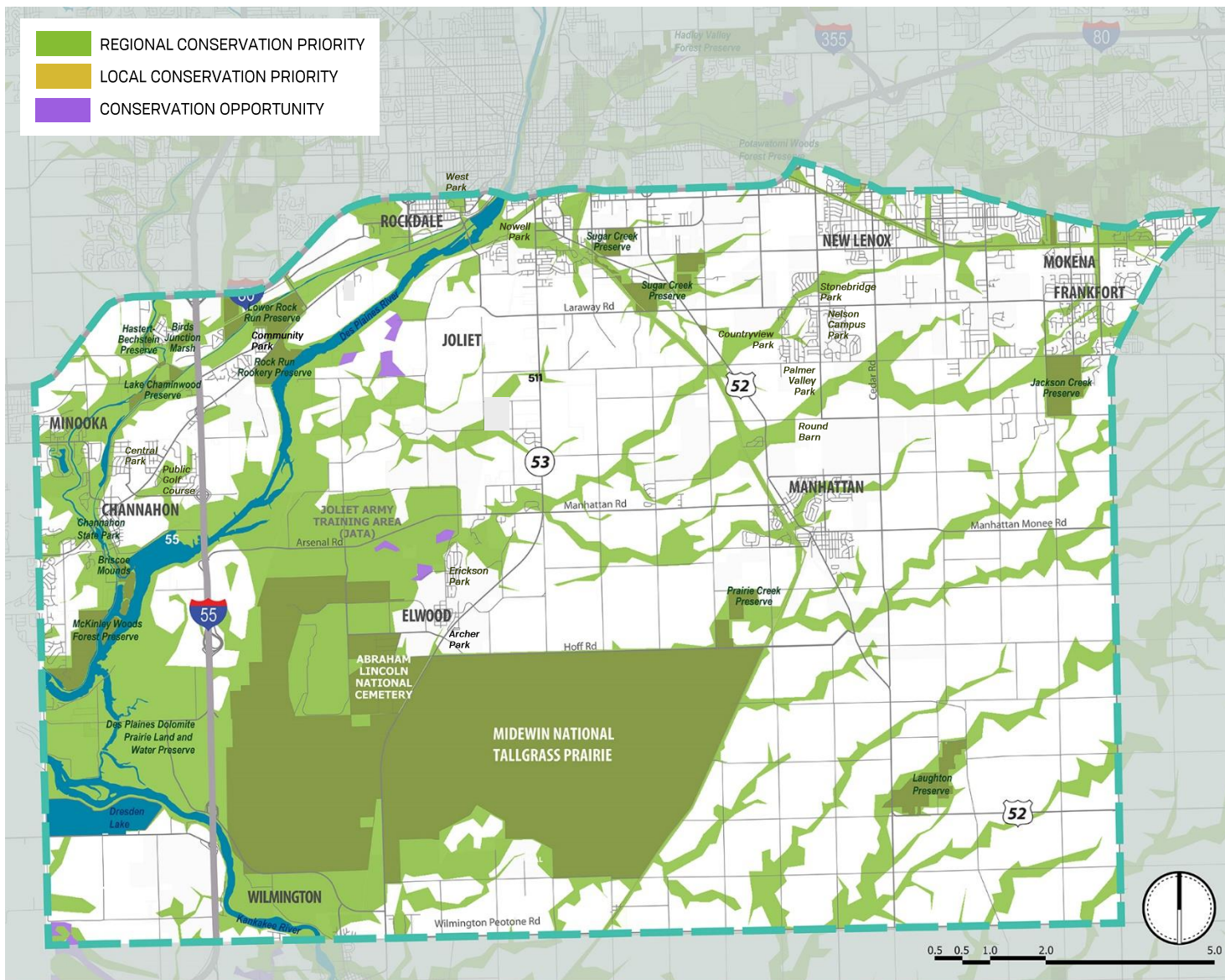


As part of the Green Infrastructure Vision, the Carbon Storage goal is to sequester carbon in vegetation and soils, thus reducing atmospheric CO₂ and global climate change.¹

The Land Use Study Area contributes to almost 5% of the CMAP region's Carbon Storage value. Carbon Storage makes up 11% of the aggregate ecosystem services valued in the Study Area.

Conservation Areas

REVISÉ JUNE 12, 2020



This map identifies areas that may be considered priorities for conservation, and reflects county-level green infrastructure plans where they exist.¹

The vast majority of conservation areas in the Study Area are identified as a Regional Conservation Priority and cover Midewin National Tallgrass Prairie and the Des Plaines Dolomite Prairie Land and Water Preserve.

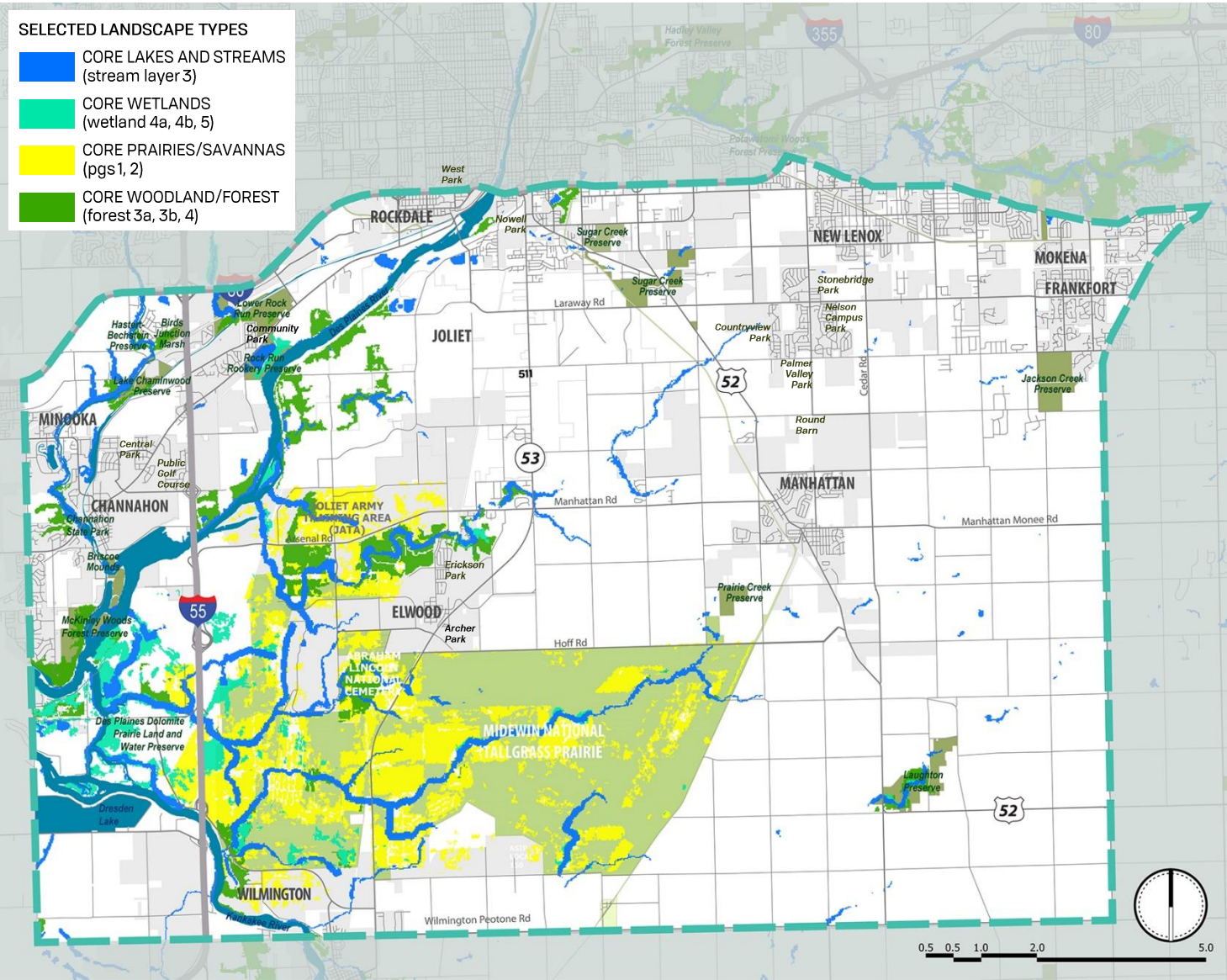
Table 12: Total Square Miles of Conservation Areas in Study Area

	Sq. Mi.	% Total
Regional Conservation Priority	0.5	0.2%
Local Conservation Priority	100.5	41.3%
Conservation Opportunity	0.0	0.0%
Land Use Study Area	243	

¹Data sources: CMAP ON TO 2050 Layer: Conservation Areas, 2018.

Core Landscape

REVISED JUNE 12, 2020



Areas within the Green Infrastructure Vision are classified into four general landscape types: woodlands/forests, prairie/grassland/savanna, wetlands, and streams/lakes. These can be used to identify areas for conservation and potential restoration.

The majority of the selected core landscapes analyzed in this map are located in or near existing open spaces, lakes, and rivers.

Of particular note, the Land Use Study Area comprises over 40% of the CMAP region's total core prairie and savannas area.

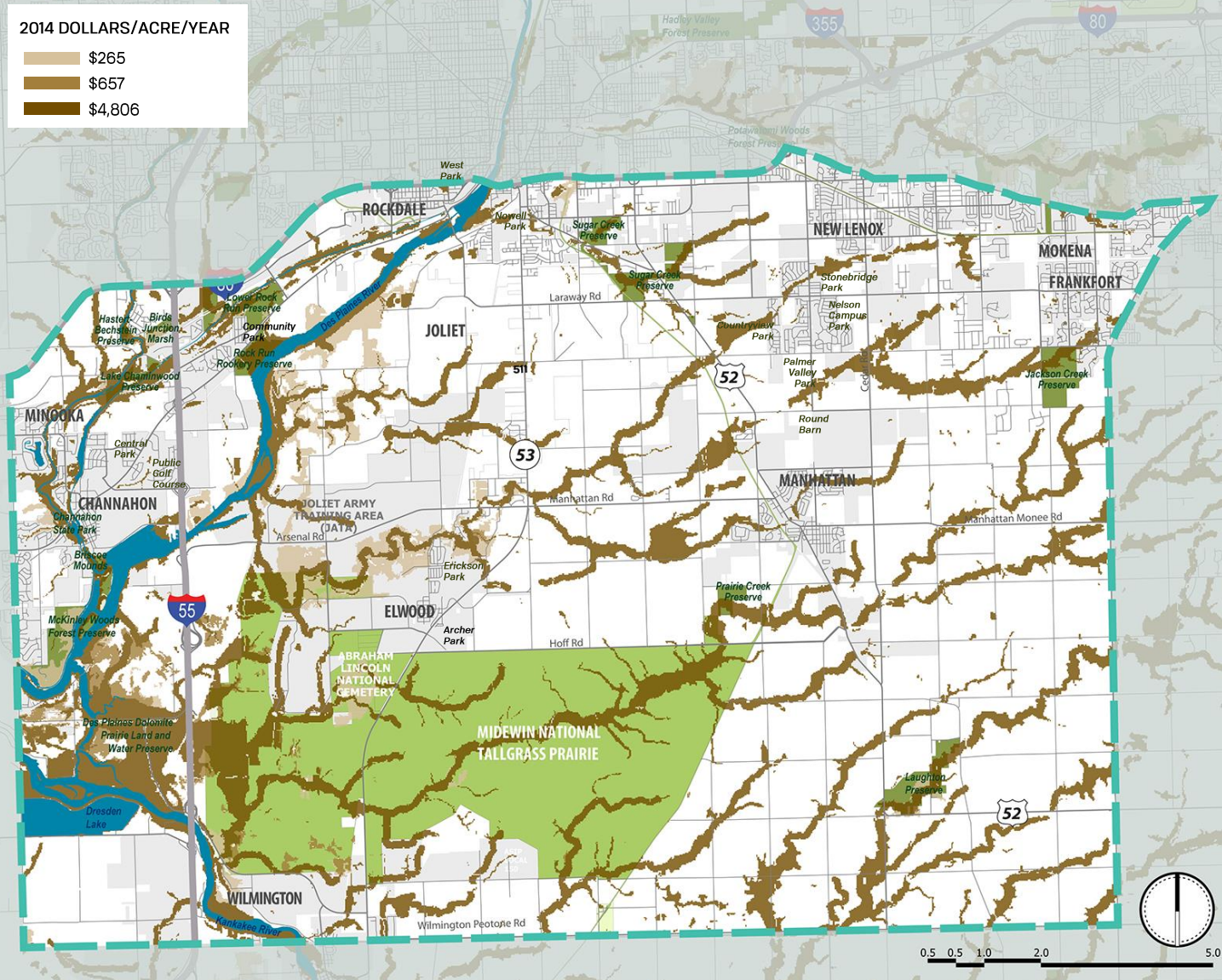
Table 13: Percent of Each Landscape Type in Study Area

Selected Landscape Types	% of Study Area
Core Lakes and Streams	4.6%
Core Wetlands	1.8%
Core Prairies and Savannas	5.8%
Core Woodlands and Forests	2.9%

¹Data sources: Green Infrastructure Vision Data, 2015.

Groundwater Recharge

REVISÉ JUNE 12, 2020

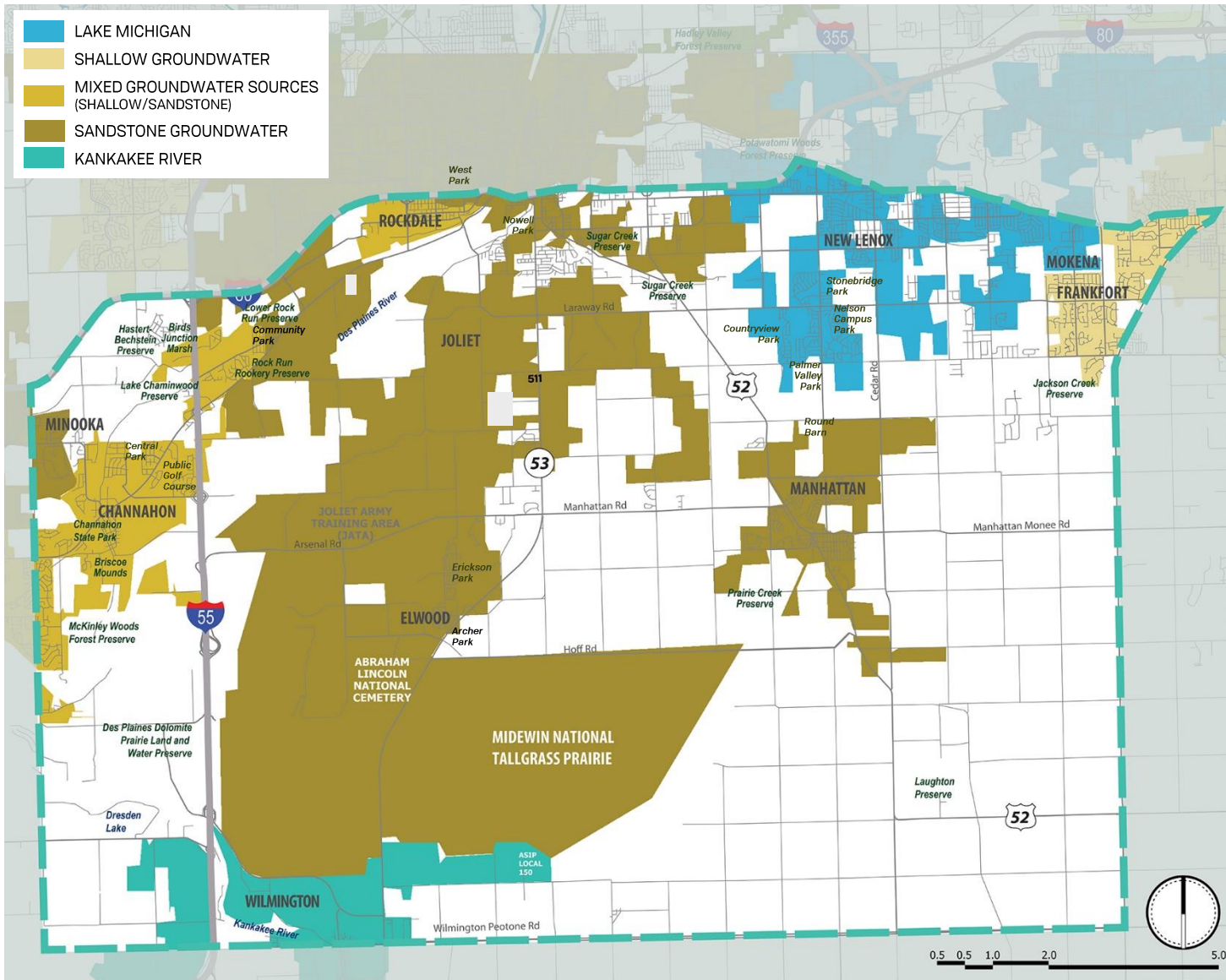


As part of the Green Infrastructure Vision, the Groundwater Recharge goal is to maintain natural rates of groundwater recharge and aquifer replenishment.¹

The Land Use study area contributes to over 8% of the CMAP region's overall Groundwater Recharge value, based on Green Infrastructure Vision data. Groundwater Recharge makes up over 24% of the aggregate ecosystem services valued in the Study Area.

Drinking Water Sources

REVISED JUNE 12, 2020



This map identifies the different sources of water supply for municipalities in the region in recognition of their unique challenges and management needs.¹

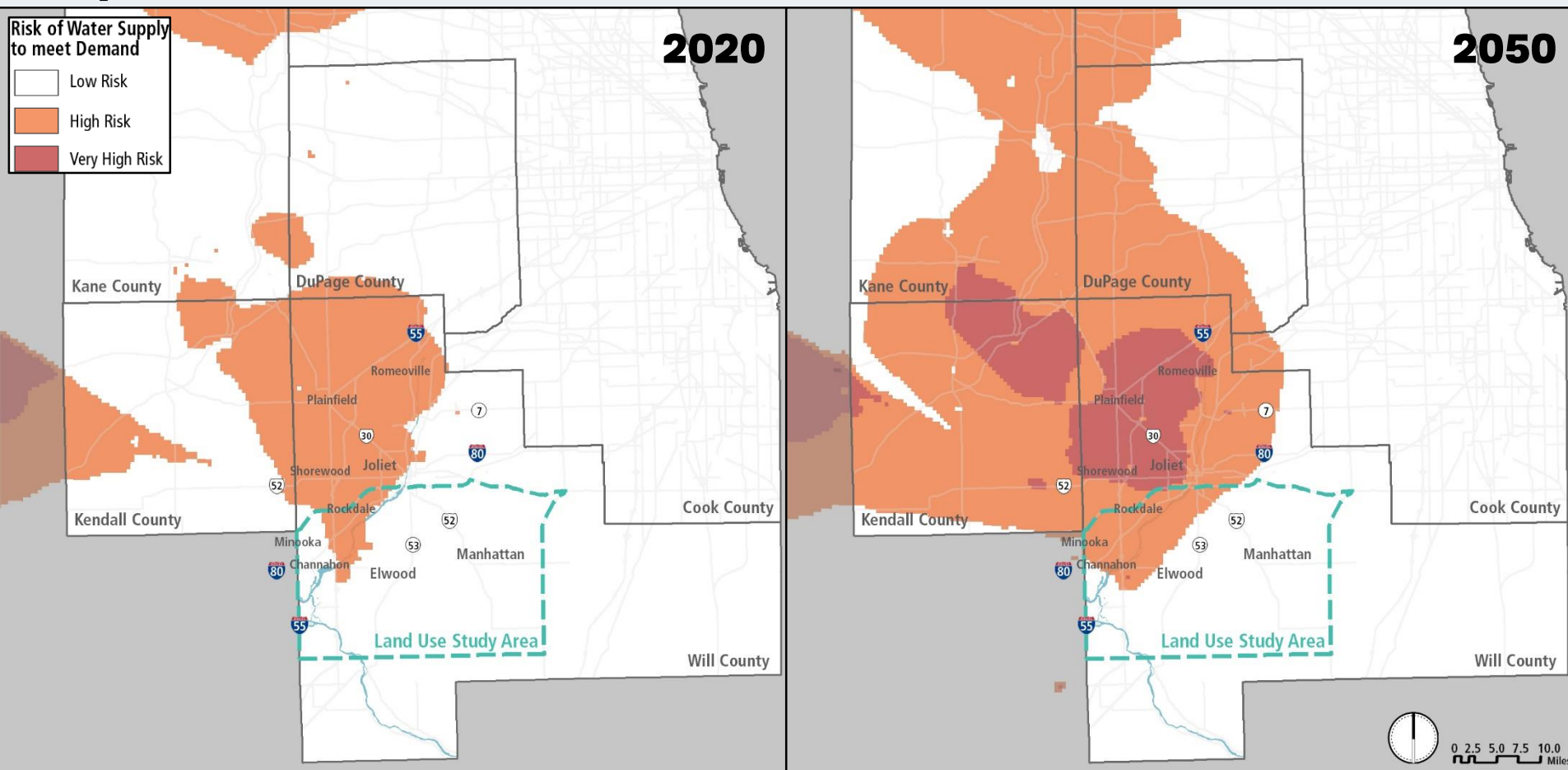
There are water supply challenges in the Study Area, which is primarily served by groundwater (84%). The majority of communities and other entities (over 70% of the Study Area) source their drinking water specifically from **sandstone** groundwater, including: Joliet, Elwood, Manhattan, Minooka, and Midewin/Abraham Lincoln National Cemetery. The Illinois State Water Survey predicted that the aquifer system will not meet the monthly water demand by 2030. The projections of when each community could run out of water could likely be shortened by new private well development. An additional 2-3 million gallons per day could be the tipping point and desaturate the aquifer, which could happen from new private industrial and commercial high capacity wells. The communities are exploring switching to Lake Michigan water, but even with the switch, groundwater will be needed as a backup.

About 11% of the Study Area is served by Lake Michigan and 7% by the Kankakee River.

¹Data sources: CMAP ON TO 2050 Layer: Drinking Water, 2018.

Aquifer Desaturation

REVISED JUNE 12, 2020



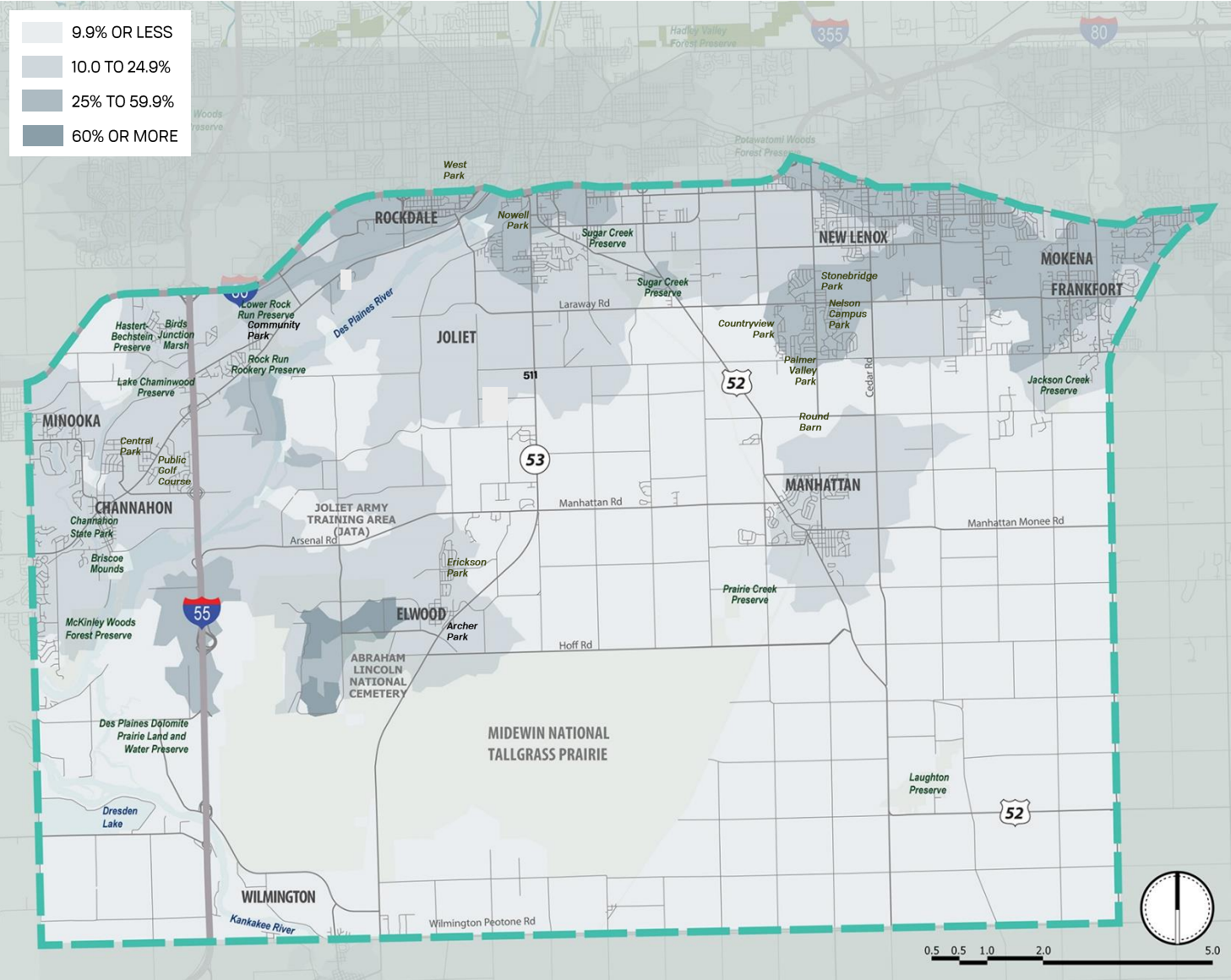
These maps depict modeled projections of risk that the regional water supply will face to meet demand. This includes existing and projected desaturation zones of the Ironton-Galesville sandstone aquifers in 2020 and 2050. Communities shown as high and very high risk in the land use study area include: Rockdale, Minooka, Channahon and Joliet.

The projected demands assume that all communities, other than Joliet, will remain on their existing water source. Risk areas are shown where wells are likely to encounter significant reductions in pumpage. The model assumes that Joliet is off the aquifer by 2030, as reflected in recent City Council decisions. However, risk areas are projected to persist even without Joliet using the aquifer.

The results assume no additional commercial or industrial wells (as it is hard to predict where and when they would go). However, if an additional well went in an orange risk area, pumping 3 million gallons a day, it would generate a very high risk area (red) for about a 1.5 mile radius around that well.

Imperviousness

REVISED JUNE 12, 2020



This map shows percent impervious surface by catchment, which is one of the many indicators that can be used to assess the quality of aquatic resources. Many of the region's water resources are still not meeting all the goals of the Clean Water Act, designated uses, Water Quality Standards, or measures of biological quality.¹

Impervious surfaces and other forms of development reduce the infiltration of water into the ground. Impervious surfaces often contribute to higher storm water runoff, greater sediment yields, and increased pollutant loads, all of which can degrade water quality. Sensitive streams, for instance, can be impacted by as little as 5 to 10 percent impervious surface area, with greater impairments expected when rates exceed 20 to 25 percent.²

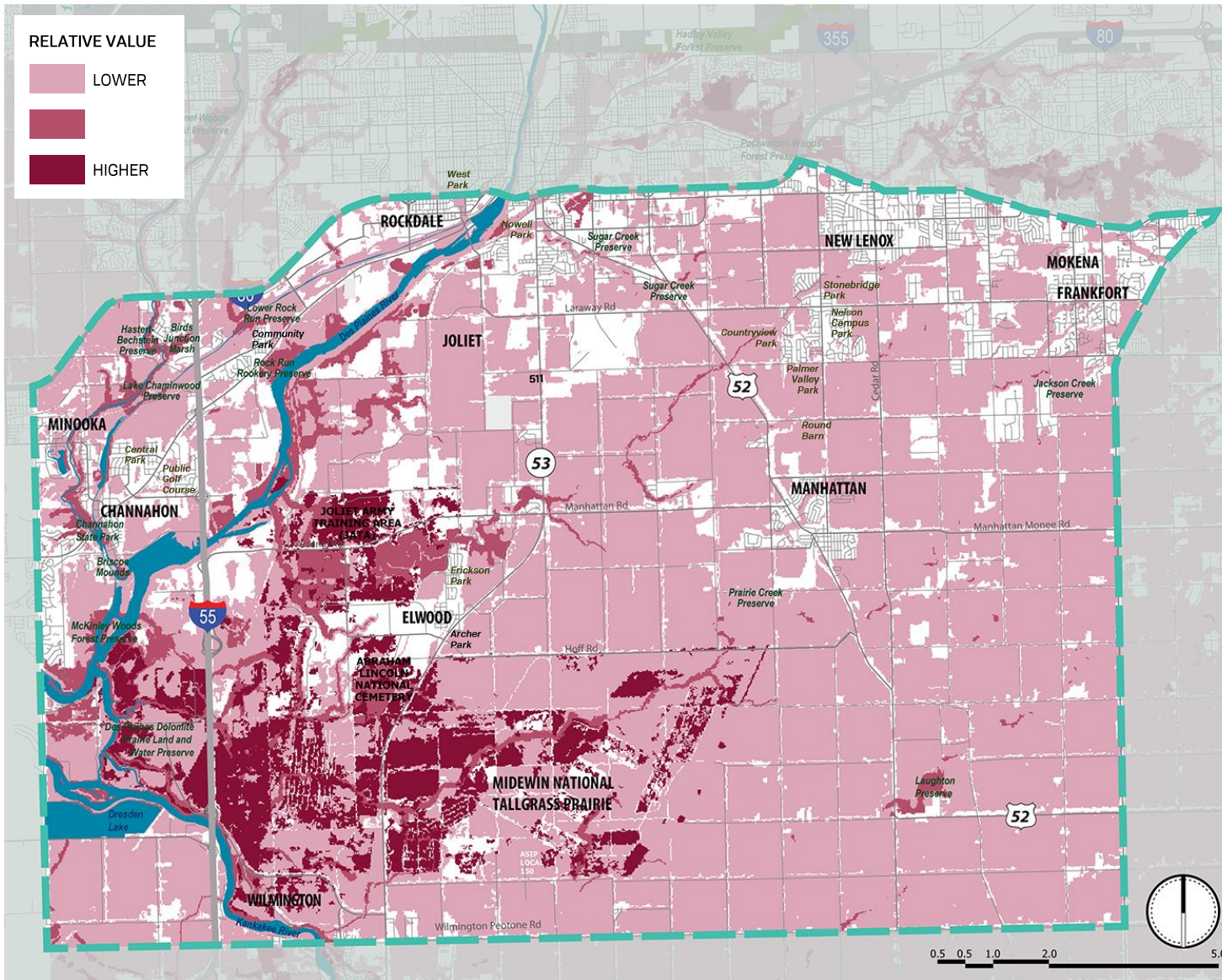
Table 14: Total Square Miles of Different Levels of Imperviousness in Study Area

	Sq. Mi.	% Total
9.9% or Less	151.1	62.2%
10% to 24.9%	67.1	27.6%
25% to 59.9%	23.3	9.6%
60% or More	1.3	0.5%
Land Use Study Area	243	

Data sources: ¹CMAQ ON TO 2050 Layer: Watershed Integrity, 2018.
²NOAA Office for Coastal Management, <https://coast.noaa.gov/howto/water-quality.html>

Native Flora and Fauna

REVISED JUNE 12, 2020



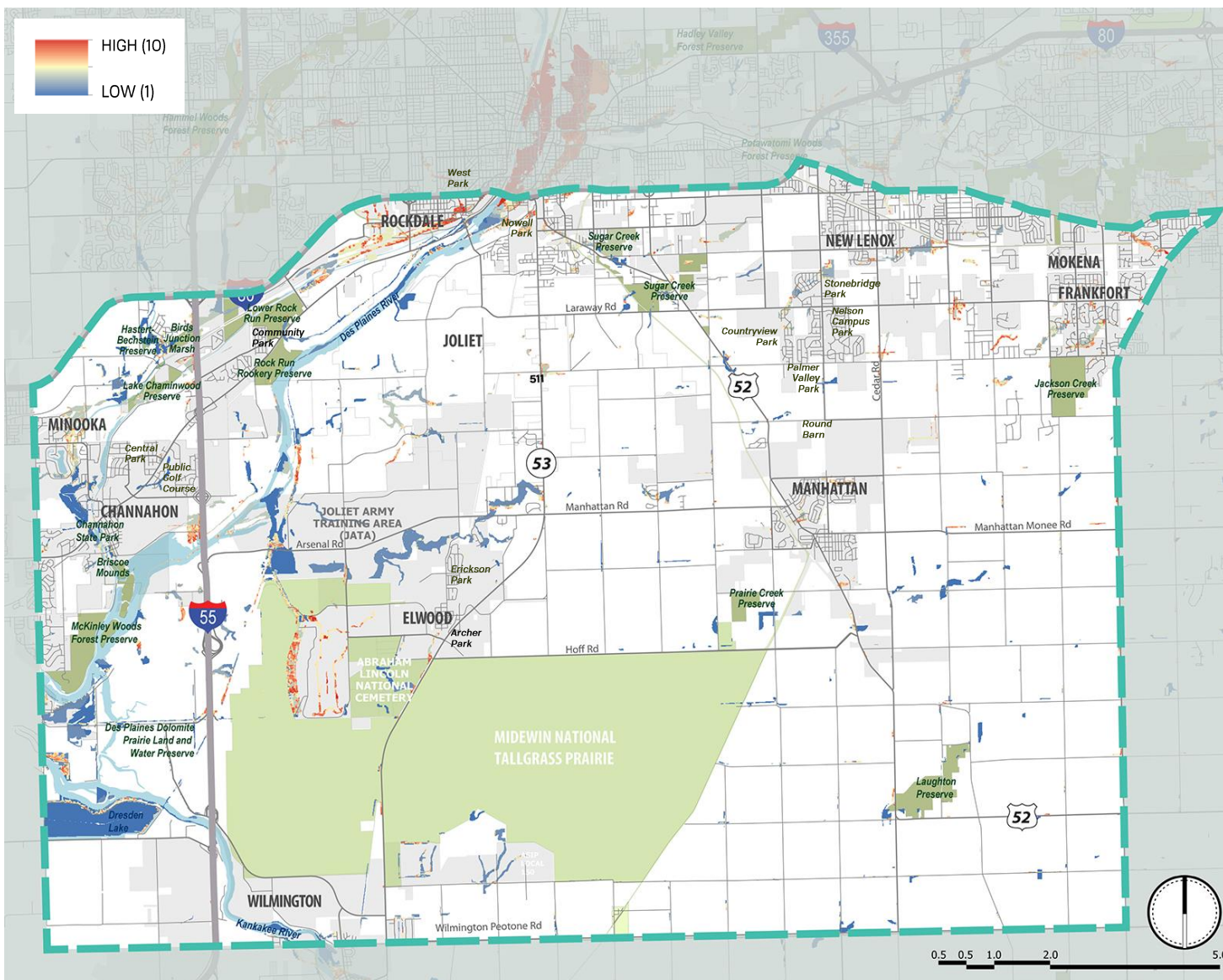
The Native Flora and Fauna ecosystem service, identified in the Green Infrastructure Vision, maintains species diversity and biomass. Areas indicated as a higher relative value provide opportunities for native vegetation and wildlife to thrive.¹

The concentrations of native flora and fauna with a higher relative regional value are primarily in areas with naturally preserved open space, such as forest preserves, Midewin National Tallgrass Prairie, Joliet Army Training Area and the Abraham Lincoln National Cemetery.

¹Data sources: Green Infrastructure Vision Data, 2015.

Riverine Flood Susceptibility Index

REVISÉ JUNE 12, 2020



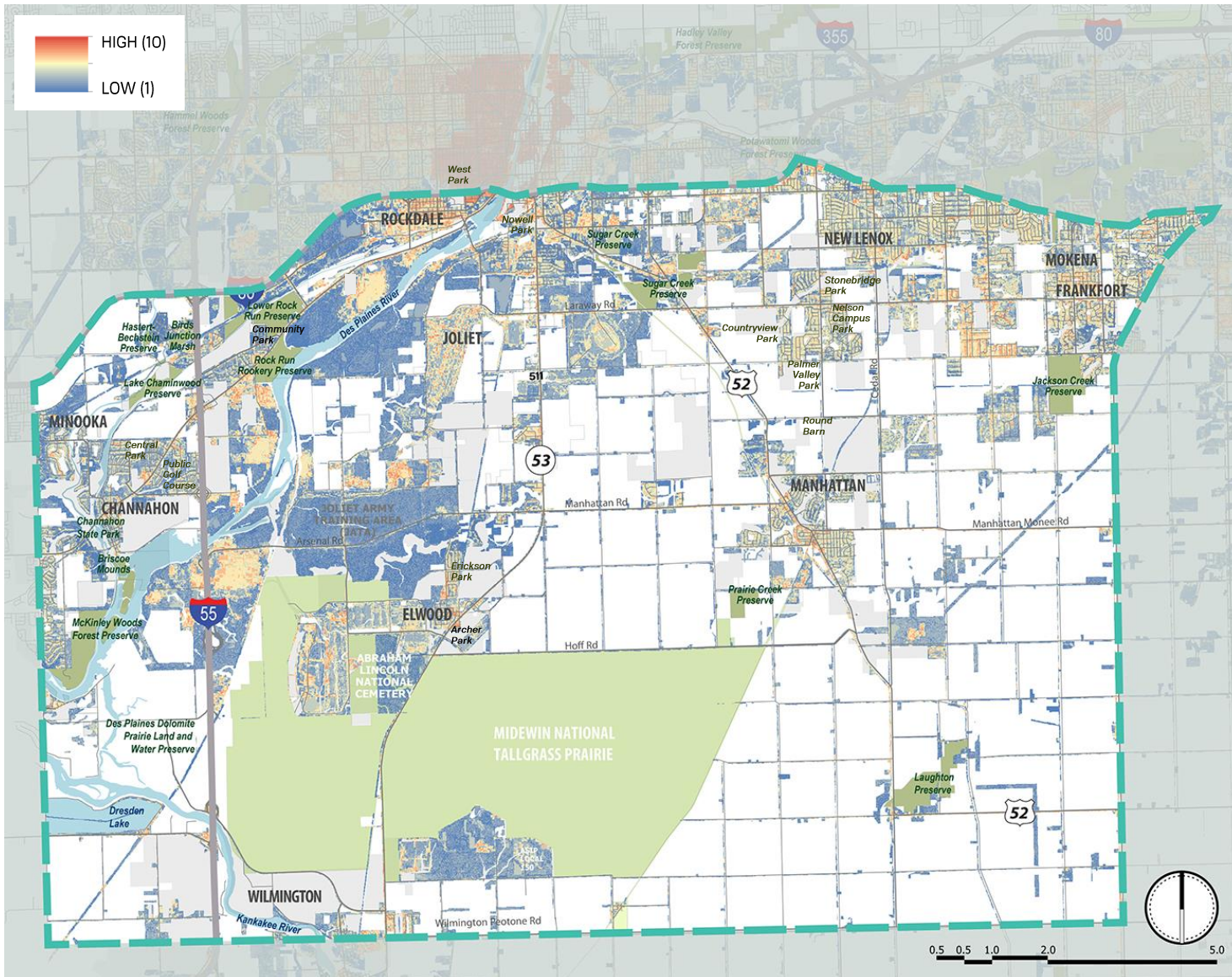
This map displays the riverine flood susceptibility index developed by CMAP to identify priority areas across the region for flooding mitigation activities.¹

Intuitively, areas closer to rivers, streams, and lakes experience the highest susceptibility to riverine flooding. Within the Study Area, Rockdale seems to be the community with the most area susceptible to riverine flooding.

¹Data sources: CMAP ON TO 2050 Layer: Flood Susceptibility Index, 2018.

Urban Flood Susceptibility Index

REVISED JUNE 12, 2020



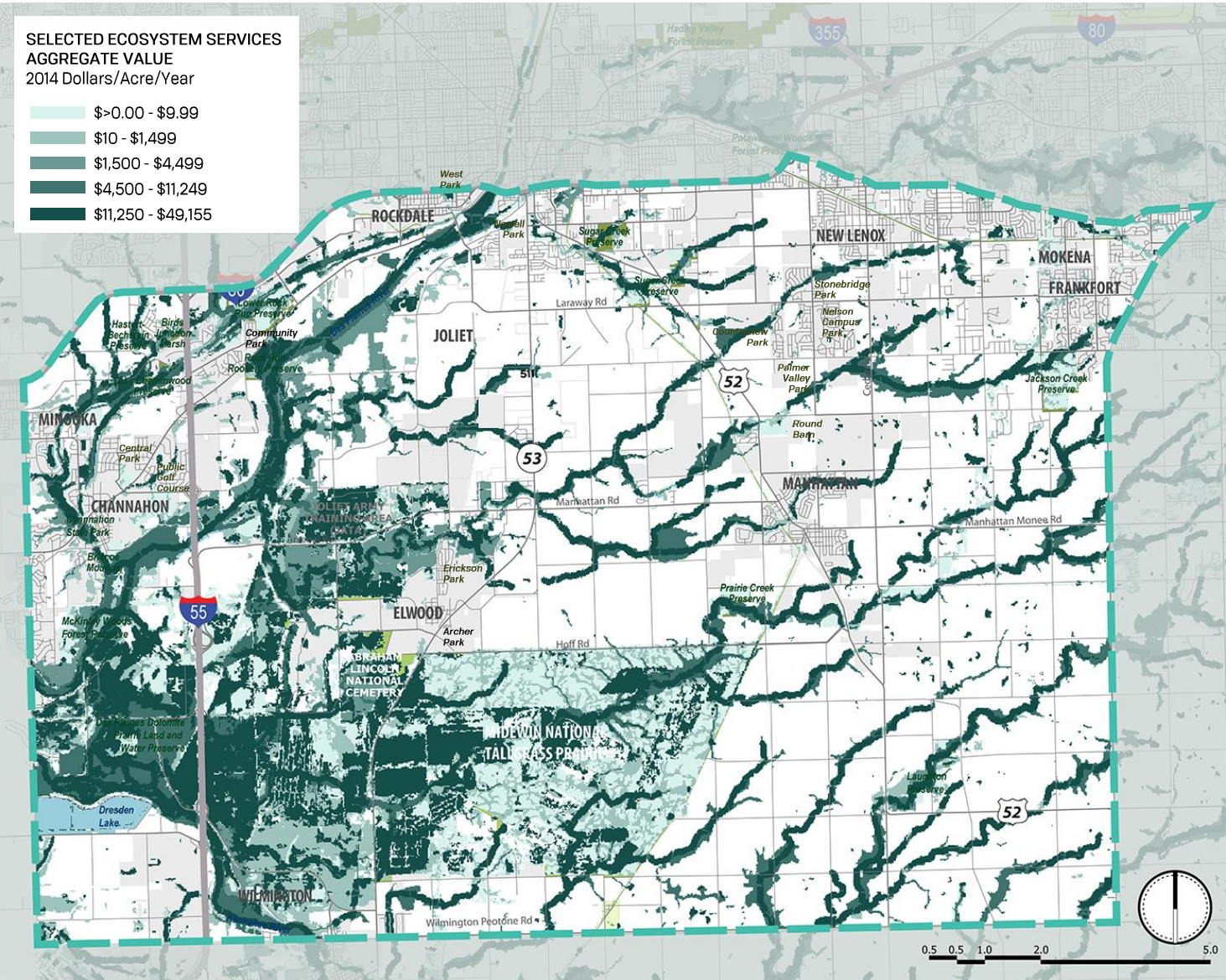
This map displays the urban flood susceptibility index developed by CMAP to identify priority areas across the region for flooding mitigation activities.¹

Just outside the Study Area, downtown Joliet seems to be the largest hotspot in terms of susceptibility to urban flooding. However, within the Study Area, every communities' downtown appears to have a higher susceptibility to urban flooding than other more open spaces. Some exceptions include areas that are near a river, stream, or lake.

¹Data sources: CMAP ON TO 2050 Layer: Flood Susceptibility Index, 2018.

Selected Ecosystem Services

REVISED JUNE 12, 2020



This map represents the combined economic value of four ecosystem services:

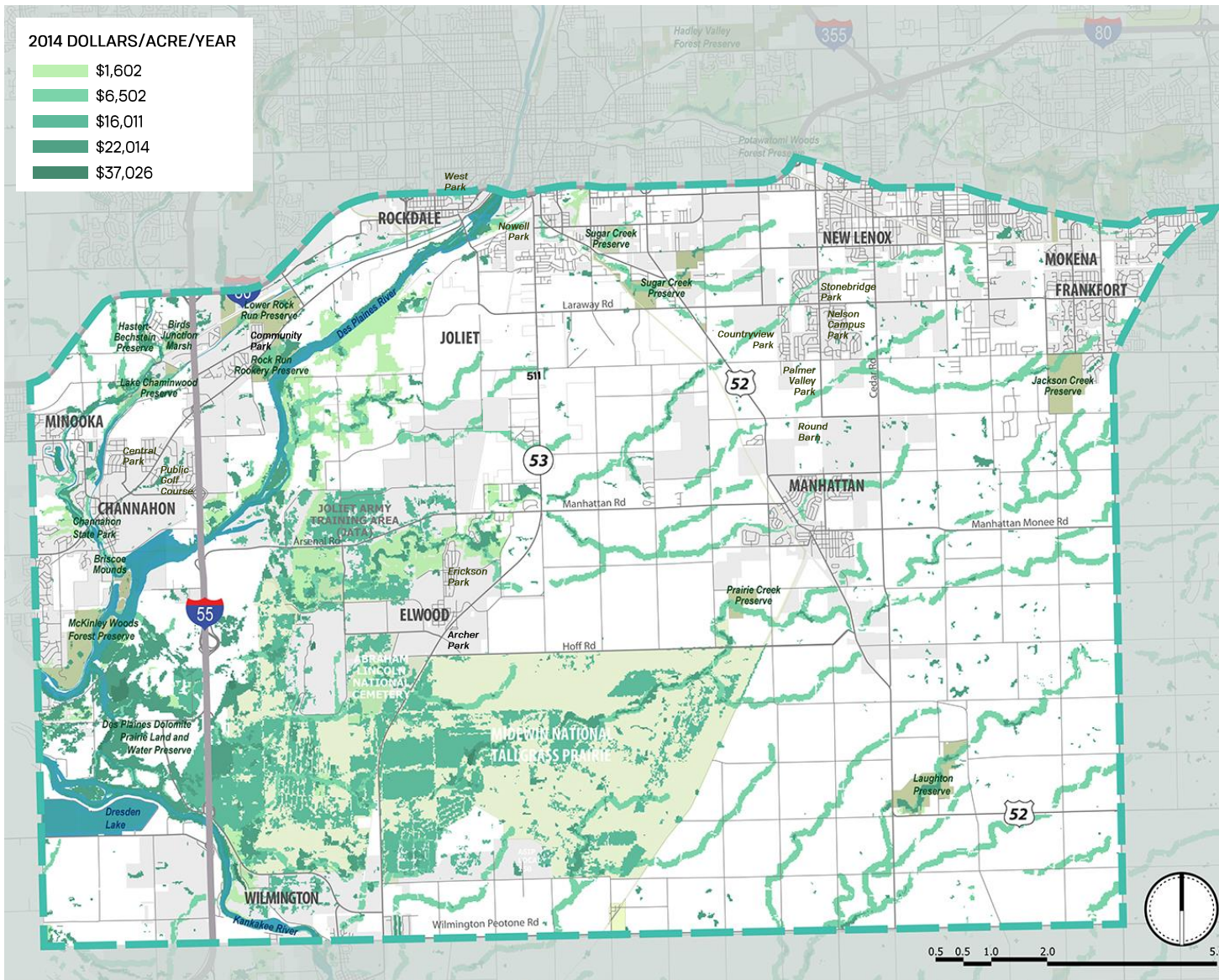
1. Water Flow Regulation/
Flood Control
2. Water Purification
3. Groundwater Recharge
4. Carbon Storage

These four services alone conservatively contribute more than \$6 billion per year in economic value to the 7-county CMAP region.

¹Data sources: Green Infrastructure Vision Data, 2015.

Water Flow Regulation / Flood Control

REVISED JUNE 12, 2020



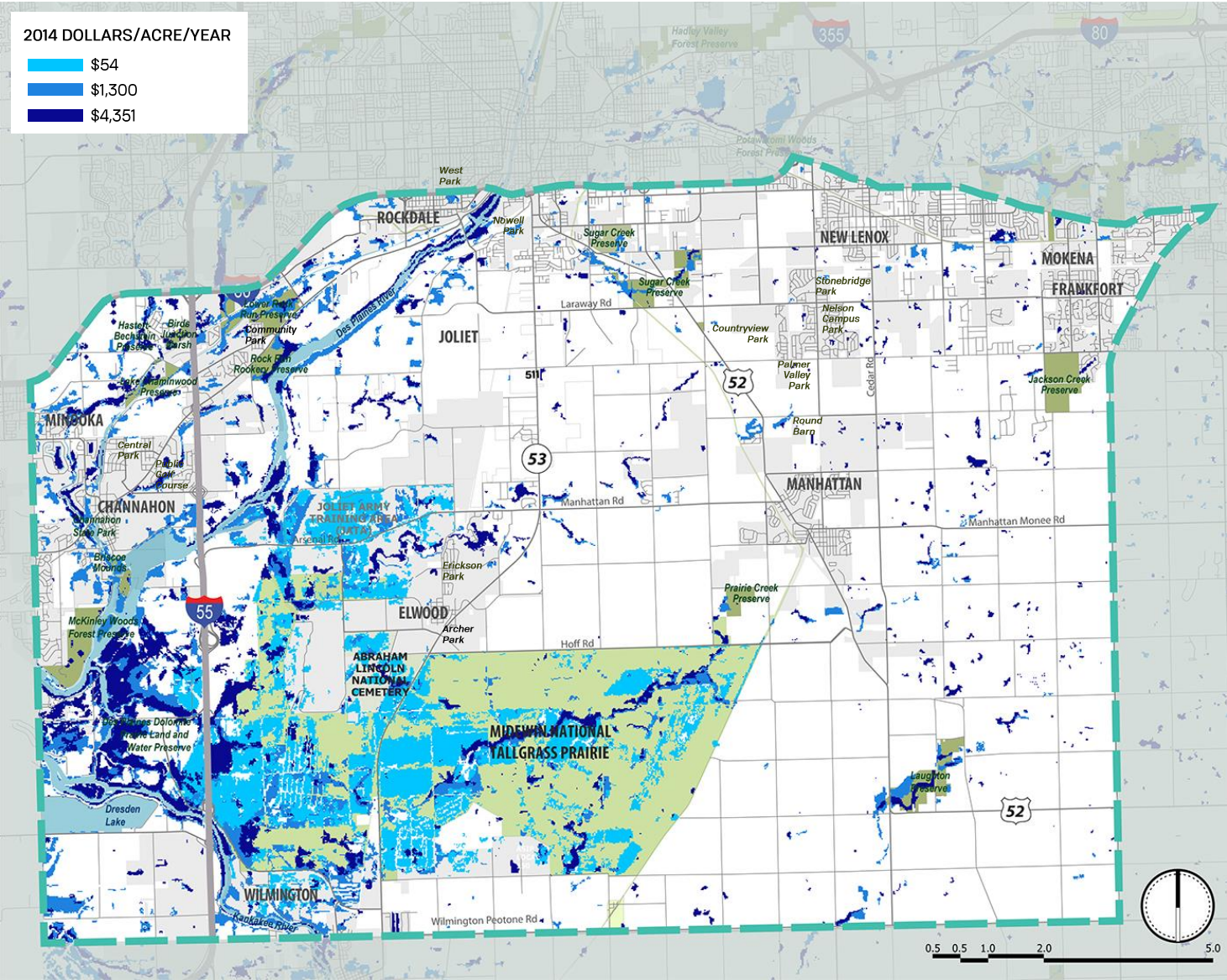
Part of the Green Infrastructure Vision, the Water Flow Regulation / Flood Control goal is to maintain water flow stability and protect areas against flooding (e.g., from storms).¹

The Land Use Study Area contributes to almost 9% of the CMAP region's Flood Control value. Flood Control makes up over 68% of the aggregate ecosystem services valued in the Study Area.

¹Data sources: Green Infrastructure Vision Data, 2015.

Water Purification

REVISED JUNE 12, 2020



Part of the Green Infrastructure Vision, the Water Purification goal is to maintain water quality sufficient for human consumption, recreational uses like swimming and fishing, and aquatic life.¹

The Land Use Study Area contributes to almost 6% of the CMAP region's Water Purification value. Water Purification makes up about 7% of the aggregate ecosystem services valued in the Study Area.

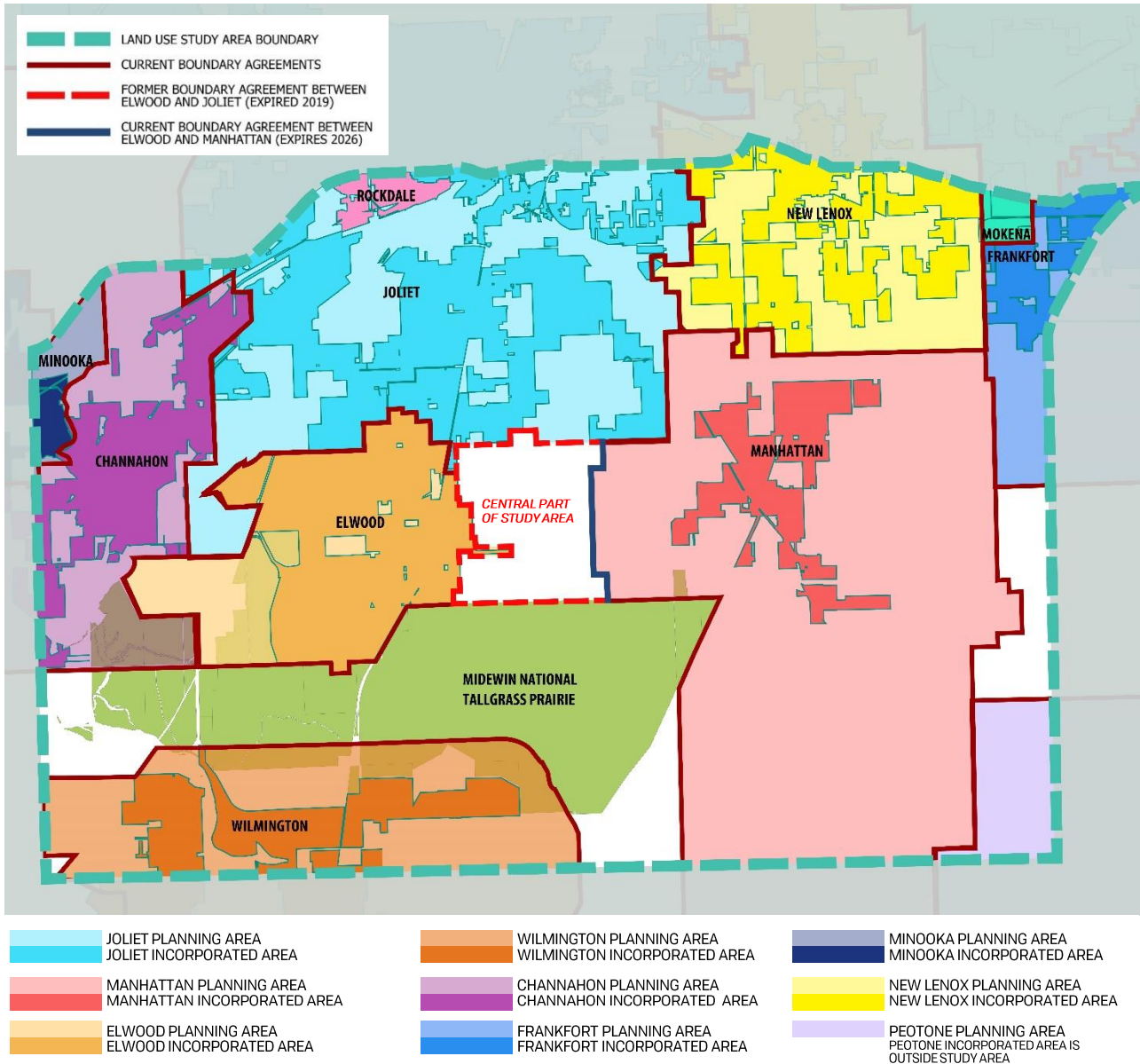
¹Data sources: Green Infrastructure Vision Data, 2015.

Moving Will County Land Use Study

Existing Land Use Policies

Existing County and Local Plans

REVISED JUNE 12, 2020



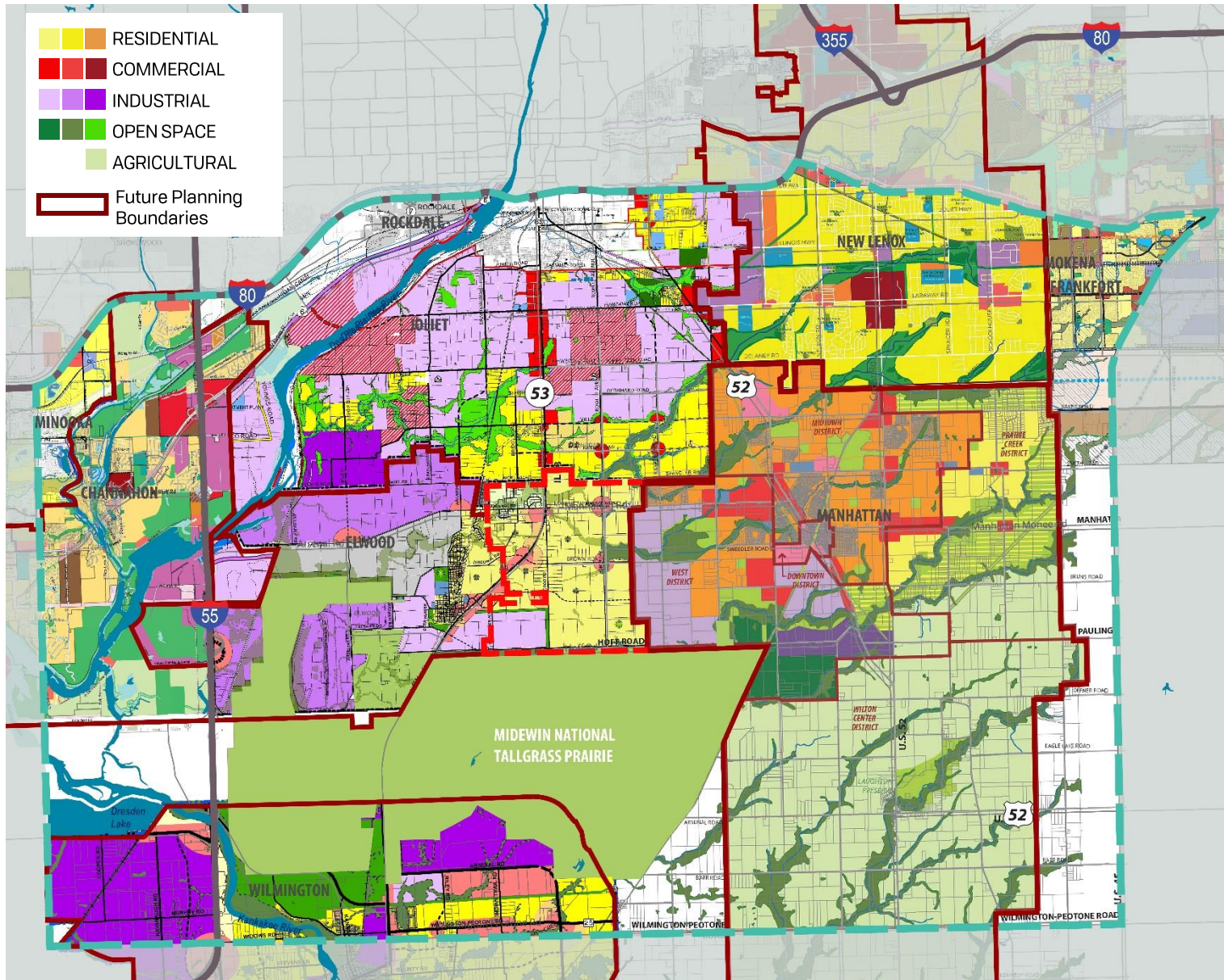
INCORPORATED AREAS

	AREA APPROX SQ. MI.	% OF STUDY AREA	REGULATING PLAN
STUDY AREA	242		
INCORPORATED AREA	75	31%	LOCAL MUNICIPAL ZONING
UNINCORPORATED AREA (TOTAL)	167	69%	SEE BELOW
UNINCORPORATED AREA OUTSIDE MUNICIPAL PLANNING AREA	18	8%	WILL COUNTY LMRP
UNINCORPORATED AREA WITHIN MUNICIPAL PLANNING AREA	148	61%	FUTURE LAND USE PLANS FROM MUNICIPAL COMPREHENSIVE PLANS

- Land Uses for the approximately 167 square miles of unincorporated land are regulated by both the Will County Land Resource Management Plan (LRMP) and local Comprehensive Plans.
- Many of these plans are over ten years old and do not adequately reflect the changing trends in housing, commercial and industrial markets.
- The "Central Part of the Study Area" currently has no local Land Use plan jurisdiction because of expired agreements between Elwood and Joliet.

Combined Local Future Land Use Maps

REVISED JUNE 12, 2020



- Significant land is allocated to low density housing and industrial uses.
- Commercial uses are generally envisioned along major arterials.
- Industrial uses are primarily along I-55, the Des Plaines River and the Intermodals.
- Agricultural uses are envisioned generally in the southeast part of the Study Area.
- All plans generally envision preserving creekways and floodplains.

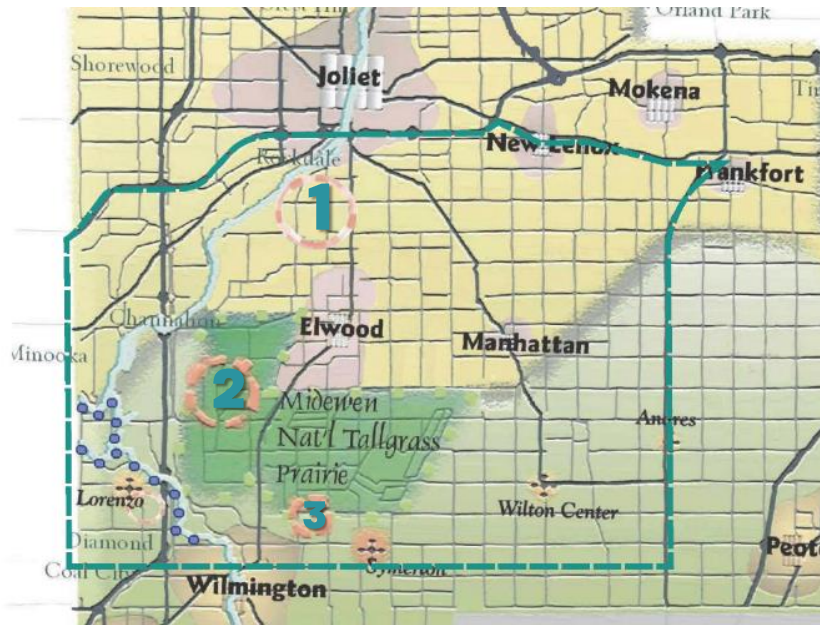
YEAR OF COMPREHENSIVE PLAN ADOPTION

- WILL COUNTY: 2002, 2011 UPDATE
- JOLIET: 2007
- ELWOOD: 2007
- MANHATTAN: 2007
- NEW LENOX: 2018
- MOKENA: 2002
- FRANKFORT: 2019
- WILMINGTON: 2008
- CHANNAHON: 2019
- MINOOKA: 2013
- ROCKDALE: NA

*This map is a compilation of all the plans listed above.

Comparison of County and Local Future Land Use Plans

REVISED JUNE 12, 2020



The 2002 Land Resource Management Plan (LRMP), last updated in 2011, guides future lands uses in unincorporated areas today.

Form Legend

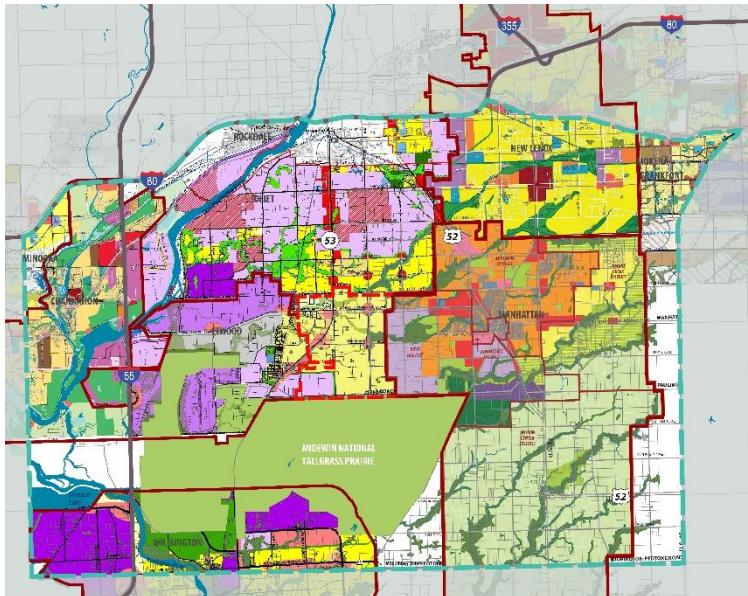


- All plans generally support the maintenance of rural and agricultural land uses in the south-east part of the Study Area.
- All plans emphasize the need to maintain and protect creeks and waterways.
- The three locations of “Projects of Regional Impact” in the County LMRP are consistent with current locations of the major Intermodal facilities and local industrial zoning:

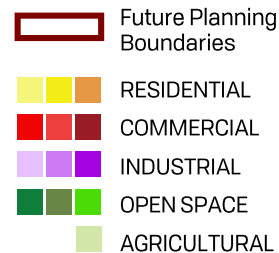
1. The Union Pacific Global IV Intermodal in Joliet
2. BNSF Logistics Park Chicago
3. Deer Run Industrial Park

- The LMRP’s “Suburban Community” designation for most of the Central Part of the Study Area, which is mostly unincorporated now, is consistent with the typical low-density single-family residential uses recommended in local plans.

- County or local plans do not identify any industrial or “Projects of Regional Impact” in the Central Area area.

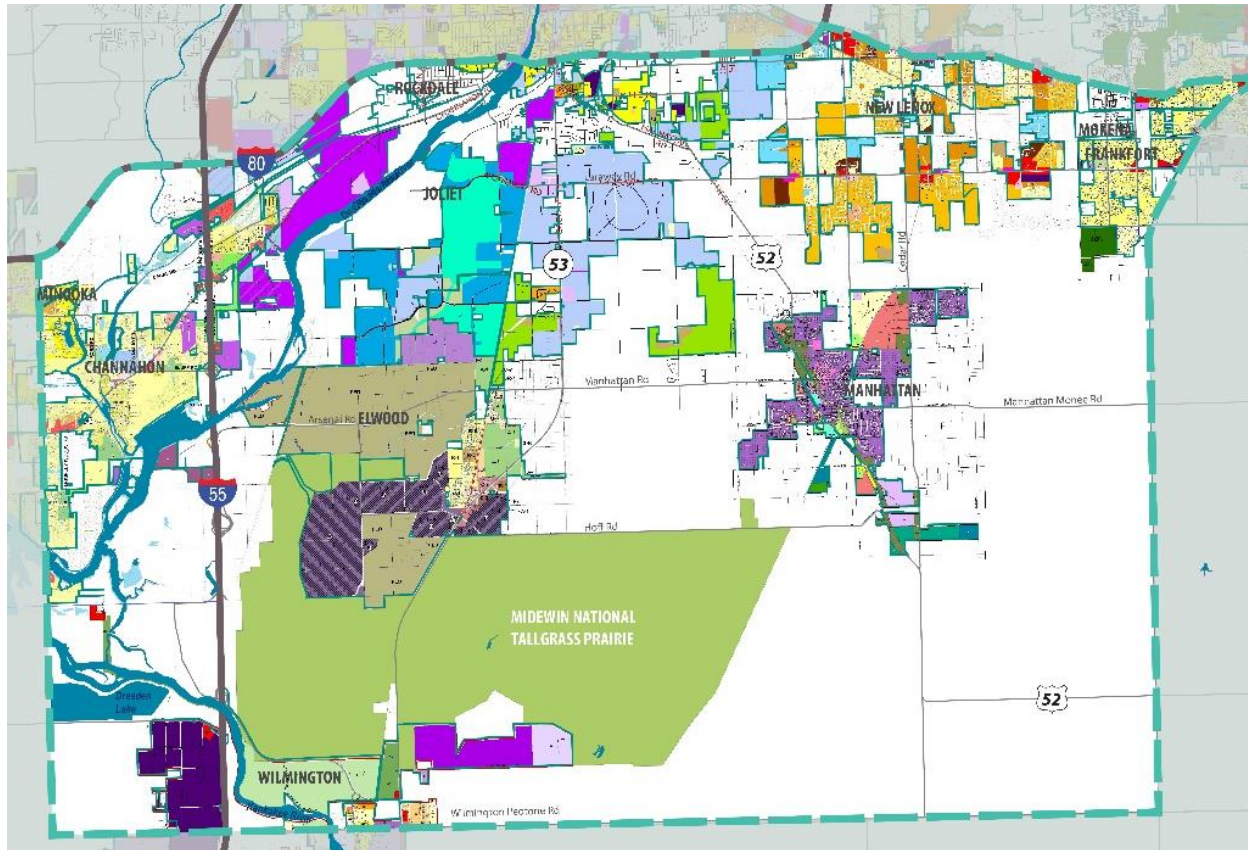


Map shows compiled local Future Land Use Plans



Compiled Existing Local Zoning for the Study Area

REVISED JUNE 12, 2020



JOLIET

- B-1 (Neighborhood Business Districts)
- B-2 (Central Business Districts)
- B-3 (General Business Districts)
- I-1 (Light Industrial Districts)
- I-2 (General Industrial Districts)
- R-1 (Single-Family Residential)
- R-1A (Single-Family Residential)
- R-1B (Single-Family Residential)
- R-2 (Single-Family Residential)
- R-2A (Single-Family Residential)
- R-3 (One and Two Family Residential)
- R-4 (Low Density Multi-Family Residential)
- R-5 (High Density Multi-Family Residential)
- R-B (Restricted Business Districts)
- I-TA (Intermodal Terminal – Intermodal Terminal)
- I-TB (Intermodal Terminal – Transport Equipment)
- I-TC (Intermodal Terminal – Industrial Park)

MANHATTAN

- A (Agricultural)
- CR (Conservation/Recreation)
- ER (Estate Residential)
- GR (General Residential)
- R1 (Single-Family Residence)
- R2 (Multi-Family Residence)
- R3 (Multi-Family Residence)
- R4 (Two-Family Residence)
- R5 (Multiple Family Residence)
- R6 (Residential Apartment)
- BPD (Business Park District)
- B1 (Local Shopping)
- B2 (Community Shopping)
- B3 (General Business)
- CBD (Central Business District)
- I1 (Limited Industrial)
- I2 (General Industrial)
- I3 (Heavy Industrial)

NEW LENOX

- AG (Agricultural Districts)
- C-1 (Neighborhood Shopping Districts)
- C-2 (Community Shopping Districts)
- C-3 (General Business Districts)
- C-4 (Automotive Service Districts)
- C-5 (Office/Transitional Districts)
- C-7 (Regional Shopping)
- E (Estate Residence Districts)
- H (Hospital)
- I-1 (Limited Industrial Districts)
- R (Single Family Residence)
- R-1 (Single Family Residence)
- R-2 (Single Family Residence)
- R-2A (Single Family Residence)
- R-3 (Multi-Family Residence)
- R-4 (Two-Unit Residence)
- R-5 (3- and 4-Unit Residence)
- R-6 (Multi-Family Residence)

ELWOOD

- A-1 (Agriculture)
- C-1 (Local Shopping)
- C-2 (Community Shopping)
- C-3 (Town Center Business District)
- I-1 (Office, Research, Light Industrial)
- I-2 (Light Industrial)
- I-3 (Heavy Industrial)
- I-4 (Large Scale Planned Industrial)
- G-R (General Residential)
- R-1 (Single-Family Residential)
- R-2 (Single- and Two-Family Residential)
- R-3 (Multi-Family Residential)
- R-4 (Single-Family Attached Residential)
- Federal Lands
- A (Intermodal and Related Uses)
- B (Industrial Park Uses)
- C (Residential Protection Zone)

MINOOKA

- A (Agricultural District)
- R1 (Single Family Detached Residence District)
- R1A (Single Family Residence District)
- R2 (Single Family Detached Residence District)
- R3 (Single Family Attached Residence District)
- R4 (Two Family Residence District)
- R4A (Two Family Residence District)
- R5 (Attached Single-Family Residence District)
- R6 (Multiple Family Residence District)
- B1 (Business District)
- B2 (Commercial District)
- M1 (Manufacturing District)
- M2 (Manufacturing District)
- Lowland Conservancy District

FRANKFORT

- Forest Preserve
- AG (Agricultural District)
- B1 (Local Business District)
- B2 (Community Business District)
- B3 (General Business District)
- B4 (Office District)
- H1 (Historic District)
- I1 (Limited Industrial District)
- I2 (General Industrial District)
- ER (Estate Residential District)
- R1 (Single Family Residential District)
- R2 (Single Family Residential District)
- R3 (Two-Family Residential District)
- R4 (Single Family Residential District)
- R5 (Multi-Family Residential District)

CHANNANAHON

- A-1 (Agricultural District)
- A-2 (Rural Residence)
- C-1 (Local Shopping)
- C-2 (Community Shopping)
- C-3 (General Business)
- C-4 (Automotive Service)
- C-5 (Office/Transitional)
- C-6 (Office and Research)
- C-7 (Day-Care and Professional Office)
- I-1 (Limited Industrial)
- I-2 (Intensive Industrial)
- PR (Park and Recreational)
- R-1 (Single-Family Residence)
- R-2 (Single-Family Residence)
- R-3 (Multi-Family Residence)
- TC (Town Center)

WILMINGTON

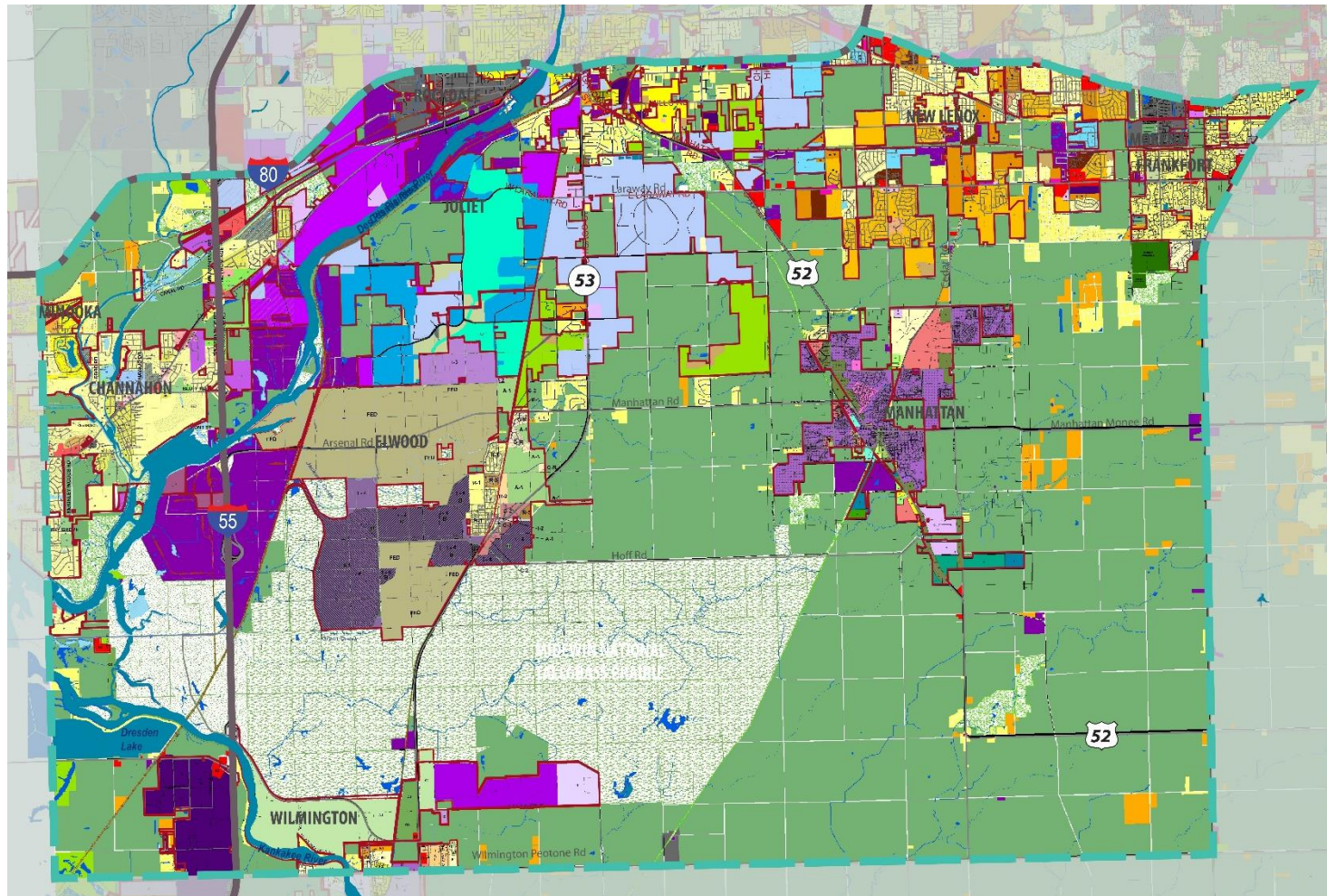
- A1 (Agricultural)
- ER (Estate Residential)
- GR (General Residential)
- R1 (Residential Single Family)
- R2 (Residential Single Family)
- R3 (Residential Two Family)
- R4 (Residential Single Family Attached)
- R5 (Residential Multi-Family)
- RG (Restricted Business)
- B1 (Neighborhood Commercial)
- B2 (Light Commercial)
- B2A (Central Commercial)
- B3 (General Commercial)
- I1 (Office, Research, Light Industrial)
- I2 (Light Industrial)
- I3 (Heavy Industrial)
- I4 (Large Scale Industrial)
- I5 (Large Scale Planned Industrial)

The predominant local zoning for municipal areas is single family residential with commercial nodes along major arterials. The City of Joliet is the only municipality in the Study Area with a majority of land zoned for industrial uses. Additionally, all incorporated areas in the Study Area have minimal land zoned for agricultural uses.

Data sources: Data from the Study Area Municipalities.

Combined County and Local Zoning Maps

REVISED JUNE 12, 2020



WILL COUNTY ZONING LEGEND

- Federal
- State
- Parks and Preserves
- MUNICIPALITY
- Agricultural Districts
- Outdoor Commercial
- Commercial Districts
- Industrial Districts
- Estate Residential Districts
- Single-Family Residential Districts
- Multi-Family Residential Districts

Please see legends for local zoning maps on previous page.

The above legend on this page is only for Will County Zoning.

- STUDY AREA
- MUNICIPAL BOUNDARIES

Will County Zoning

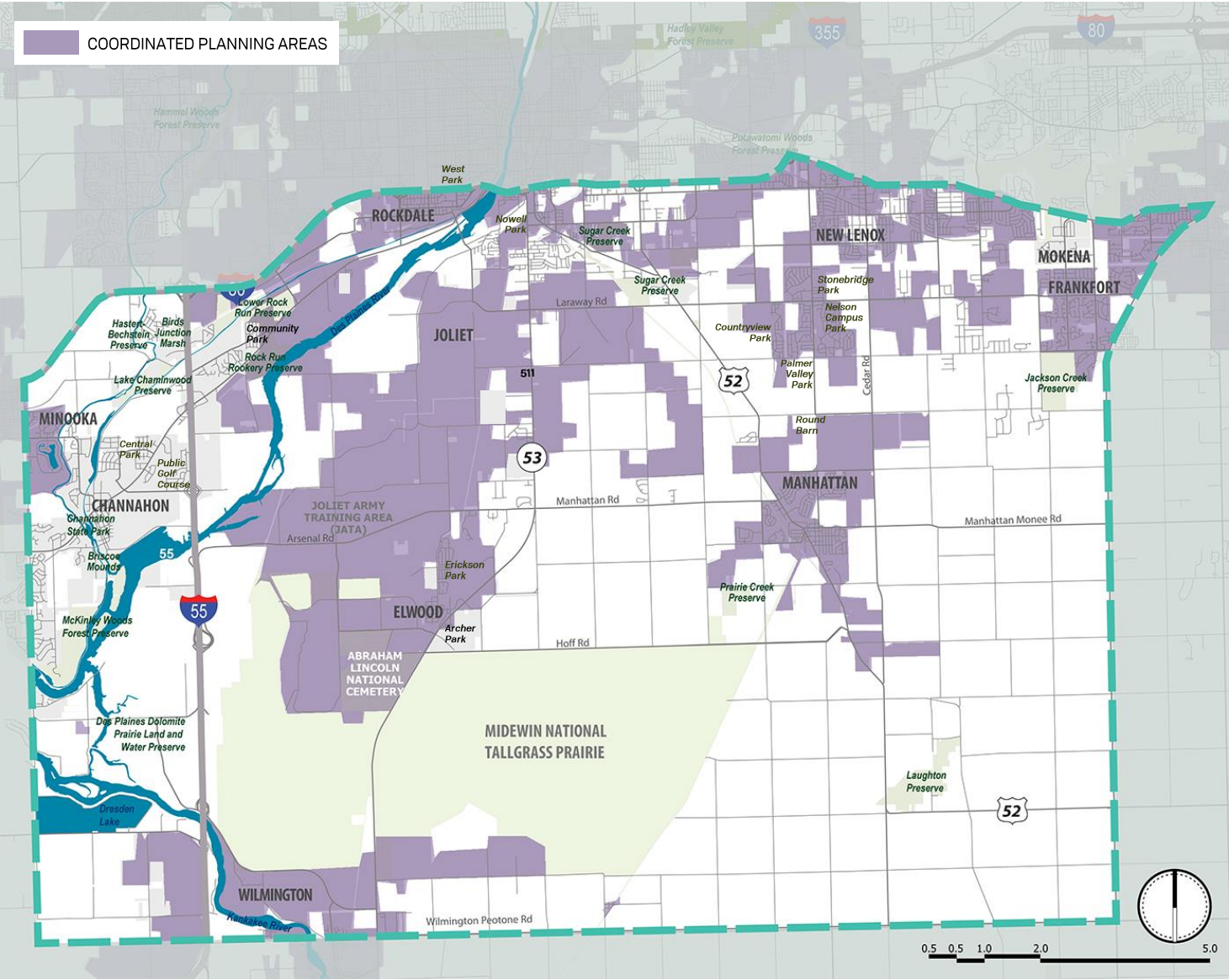
- Majority of unincorporated areas in the Study Area are zoned for agricultural uses.
- Small residential zoned areas are scattered in different parts of the Study Area.
- Industrial zoning is primarily along I-55 and the Des Plaines River.

Local Zoning

- Majority of incorporated areas in the Study Area are zoned for low density residential uses.
- There is minimal land zoned for Agricultural Use in local zoning maps.
- Industrial zoning is primarily along the interstates and around the Intermodal facilities.

Coordinated Planning Areas

REVISED JUNE 12, 2020



Coordinated Planning Areas have a significant amount of agricultural or natural lands, shown both within or adjacent to municipal boundaries.¹

As a strategy to protect these lands from development pressures as the region's population grows, particularly in locations near or adjacent to municipal boundaries, ON TO 2050 recommends including agricultural and natural lands in local and county plans to signal the importance of retaining these valuable assets. Communities are encouraged to reflect upon the contribution of farmland and natural resources to local and regional economies, ecosystems, and character.

Every community in the Study Area, except for Channahon, is considered a part of a Coordinated Planning Area.

Table 15: Total Square Miles of Coordinated Planning Areas in Study Area

	Sq. Mi.	% Total
Coordinated Planning Areas	65	26.8%
Land Use Study Area	243	

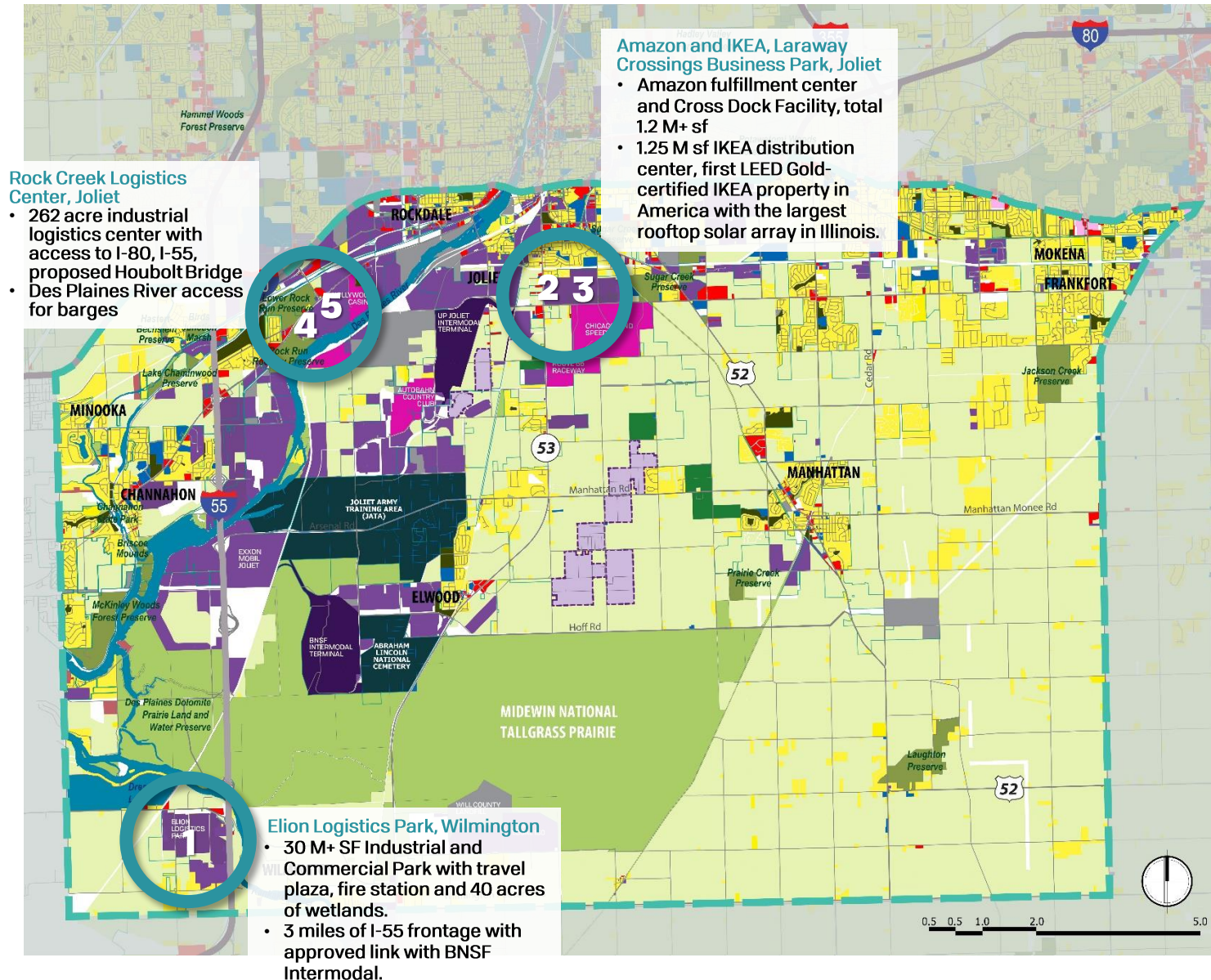
¹Data sources: CMAP ON TO 2050 Layer: Coordinated Planning Areas, 2018.

Moving Will County Land Use Study

Major Projects Planned, Approved or Underway

Major Projects Planned, Approved or Underway

REVISÉ JUNE 12, 2020



Major recent developments are predominantly related to industrial uses and include the following:

1. Elion/Ridgeport Logistics Park, Wilmington
2. Amazon Fulfillment Center
3. IKEA Distribution Center, Joliet
4. Rock Creek Logistics Center, Joliet
5. GP Transco new headquarters, Joliet

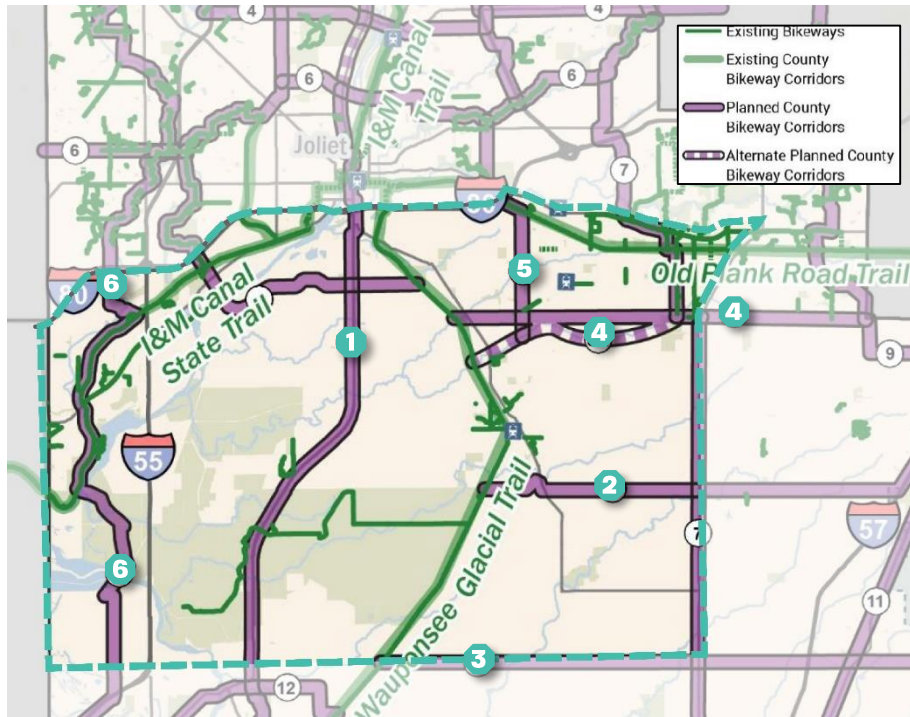
-
- RESIDENTIAL
- COMMERCIAL
- INDUSTRIAL/UTILITY
- OPEN SPACE
- AGRICULTURAL
- CIVIC/INSTITUTIONAL
- VACANT
- PROPOSED PROJECTS
6. PROPOSED NORTHPOINT DEVELOPMENT
7. PROPOSED TTX DEVELOPMENT
8. PROPOSED HARBOR FREIGHT DEVELOPMENT

No new major retail, commercial or residential development has been constructed or approved in the Study Area in recent years.

Existing and Planned Trails

REVISED JUNE 12, 2020

FUTURE DISTINCT BIKEWAY CORRIDORS MAP, FPDWC



According to the Forest Preserve District of Will County (FPDWC) and the Will County Division of Transportation's 2016 Will County Bikeway map, the following corridors were identified as major Distinct Bikeway Corridors within the Study Area:

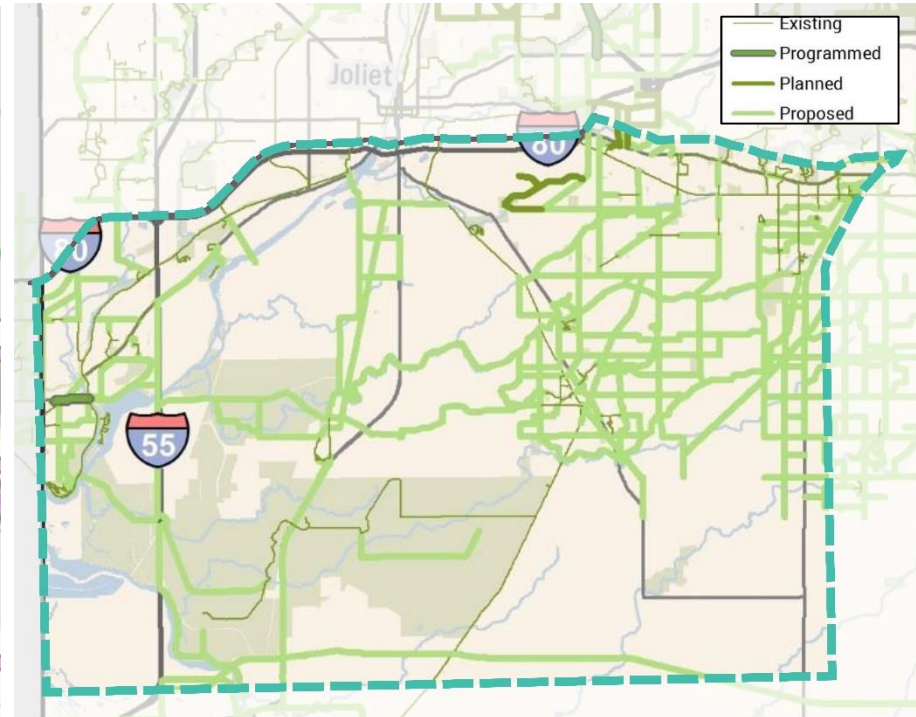
Existing bikeway corridors

- Wauponee Glacial Trail
- I & M Canal Trail
- Trails in the Midwin National Tallgrass Prairie.

Future planned bikeway corridors:

1. IL 53 Bikeway Corridor
2. Trail along Hoff Road
3. Trail along Wilmington Peotone Road
4. Trail along Steger Road
5. Trail along Gougar Road
6. DuPage River Trail Extension

FUTURE LOCAL BIKEWAYS MAP, FPDWC



Future Local Bikeways

Significant local trails are programmed, planned or proposed to create stronger east-west connections and introduce trails along major creekways.

Planned future Bike Corridors are primarily on major transportation arterials. Potential impacts of truck traffic on these corridors would need to be discussed with the FPDWC.

Moving Will County Land Use Study

Summary of Existing Challenges and Major Opportunity Areas

Summary of Potential Land Use Impacts: West of IL 53

REVISED JUNE 12, 2020

Impacts on the Des Plaines River and the quality of life of the Rockdale Community which is already surrounded by industrial uses

Impacts on Des Plaines River and Cedar Creek as new industrial uses add more impervious coverage. Impacts of potential increase in truck traffic on I & M Canal Trail and existing and planned trails.

Current industrial and freight related uses are primarily concentrated to the west of IL 53 along the Des Plaines River, I-80 and I-55.

There could be critical impacts on surrounding areas if freight related uses continue to grow towards the east and west without a cohesive plan followed by both the County and Local Municipalities. These critical impacts include:

- Impacts on water supply, watersheds, wetlands, prime soils, impervious coverage, drainage, wildlife habitat, historic and cultural landmarks, archaeological assets, air quality and health, farmland, historically significant farm structures, generational farms and agricultural income
- Impacts on the long-term tourism potential around Route 66 and other major destinations
- Impacts on FPDWC planned Bike Corridors that are primarily on major transportation arterials
- Impacts on Jackson Creek as a potential greenway and trail corridor as identified by the LMRP and the FPDWC Bike Plan
- Impacts on long term costs for extension and maintenance of public infrastructure

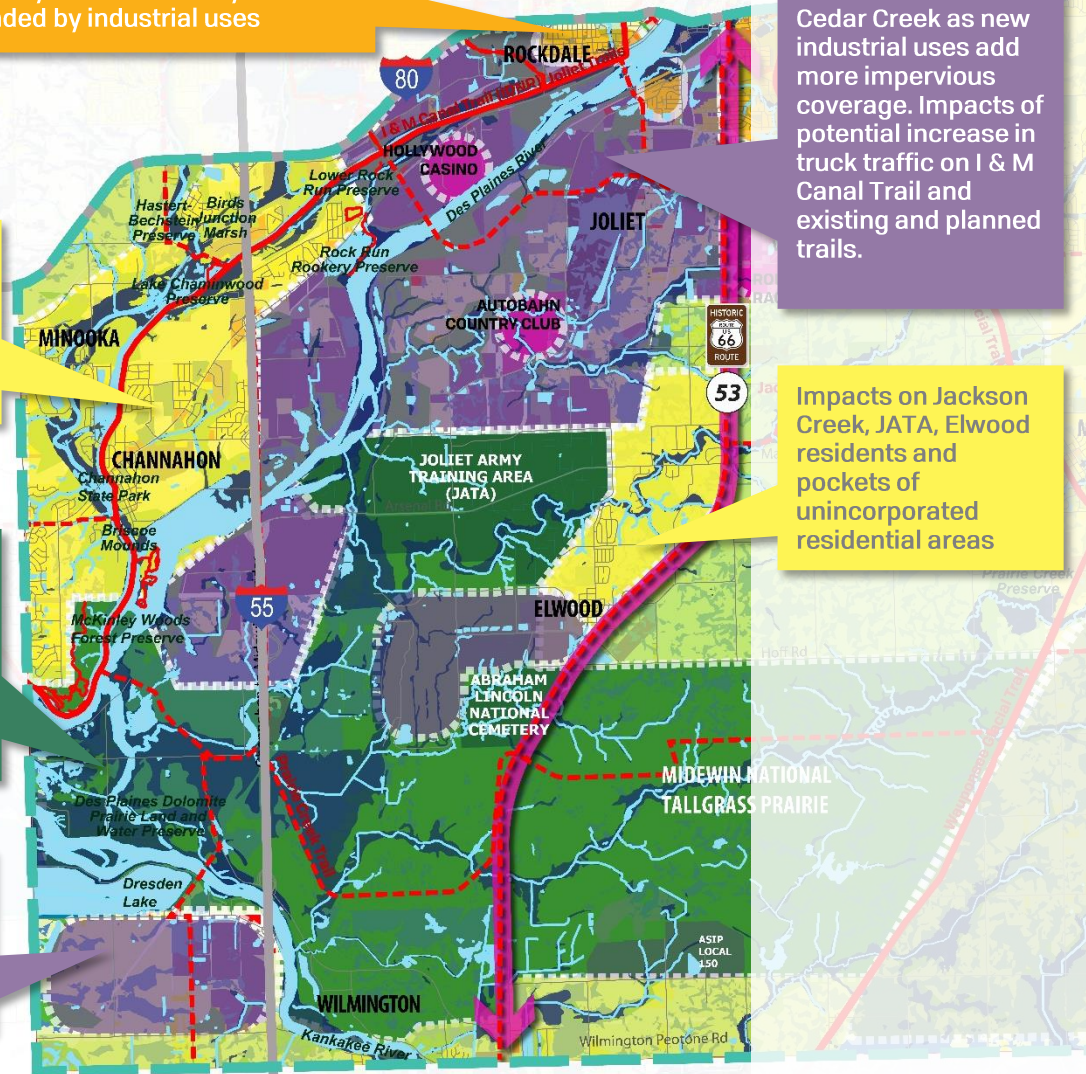
Map shows these critical land use impacts on areas west of IL 53. See following page for impacts on areas east of IL 53.

Impacts on the DuPage River waterway and the quality of life of Channahon and Minooka residents

Impacts on Jackson Creek, JATA, Elwood residents and pockets of unincorporated residential areas

Impacts on major natural resources like the Midewin, JATA, IDNR preserves, waterways, bird and fish habitats

Impacts on the Kankakee River, Dresden Lake, the Midewin and IDNR preserves



Summary of Potential Land Use Impacts: East of IL 53

REVISED JUNE 12, 2020

Impacts on Sugar Creek and existing old residential areas south of I-80 that are now surrounded by industrial uses. There has been minimal public or private investment in these areas in recent years.

Impacts on long-term tourism potential and existing recreational anchors along Route 66 /IL 53

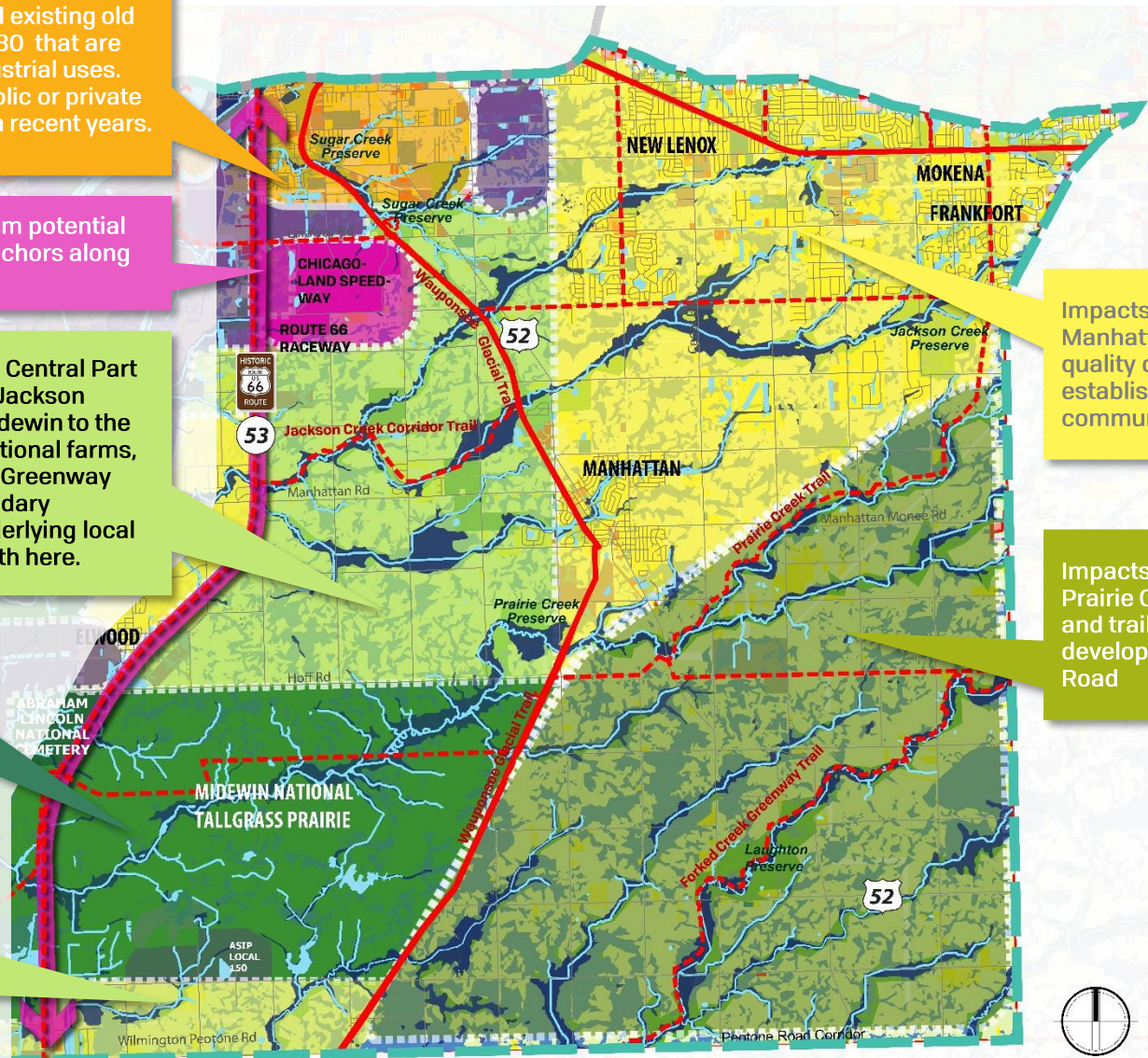
impacts on resources in the Central Part of the Study Area including Jackson Creek, Manhattan Creek, Midewin to the south, farmland and generational farms, and planned Jackson Creek Greenway and Trail. With expired boundary agreements, there is no underlying local land use plan to guide growth here.

Impacts on the Midewin, Prairie Creek, Forked Creek and bird and fish habitats

Impacts on farmlands, Forked Creek and existing residential pockets

Impacts on Jackson and Manhattan Creeks and quality of life of established residential communities

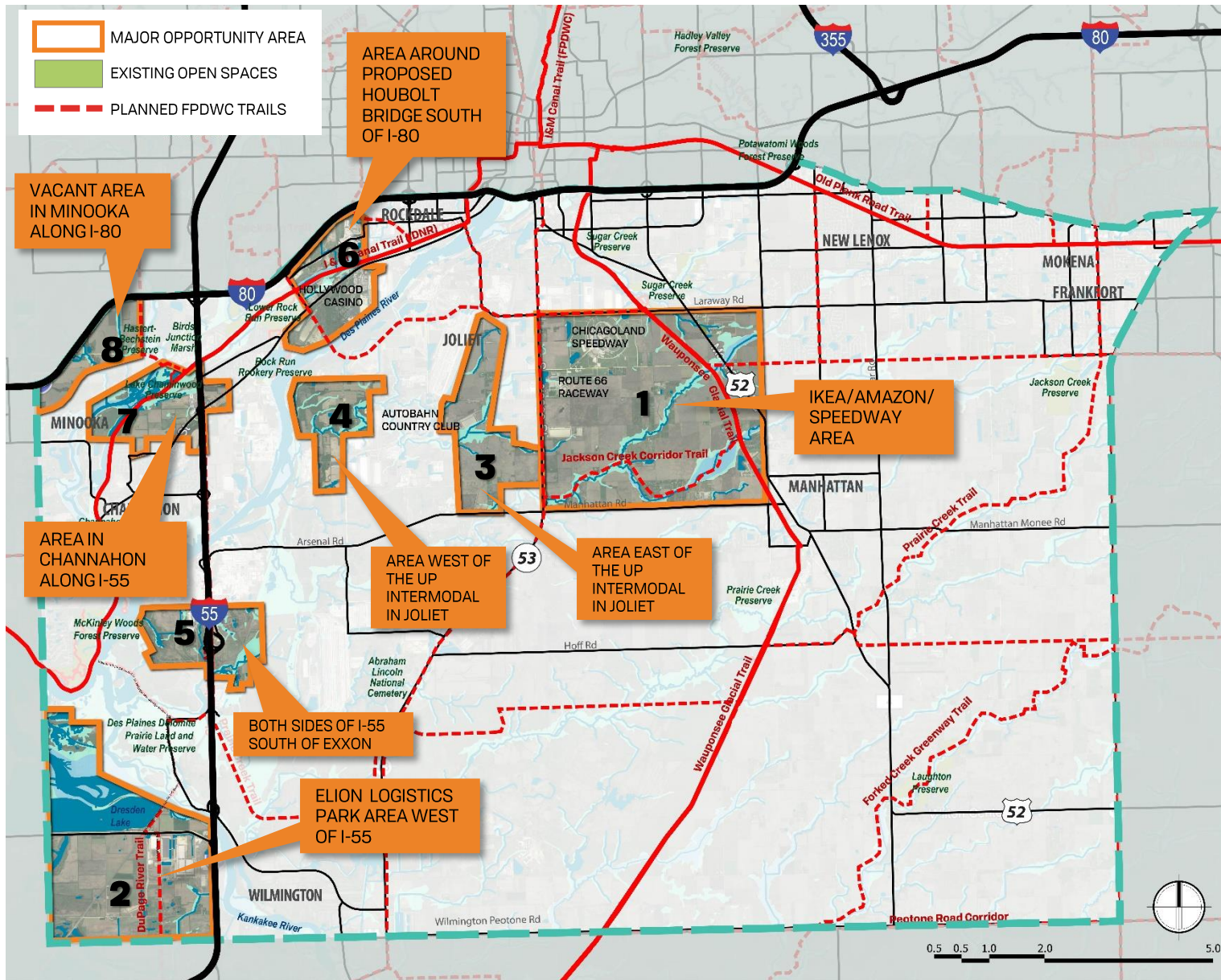
Impacts on Forked and Prairie Creeks, farmland and trails of potential development along Hoff Road



0.5 0.5 1.0 2.0 5.0

Major Opportunity Areas

REVISED JUNE 12, 2020



8 Major Opportunity Areas are suggested based on the following criteria:

- PROXIMITY TO MAJOR TRANSPORTATION CORRIDORS, INCLUDING I-55, I-80 AND IL 53.
- PROXIMITY TO MAJOR ECONOMIC ANCHORS
- SIGNIFICANT CONTIGUOUS LAND FOR NEW DEVELOPMENT AND INFILL OPPORTUNITIES
- PROXIMITY TO EXISTING MUNICIPAL INCORPORATED AREAS AND EXISTING INFRASTRUCTURE
- POTENTIAL TO PROTECT WATERWAYS INCLUDING JACKSON CREEK, DES PLAINES RIVER AND DUPAGE RIVER
- OPPORTUNITIES TO IMPLEMENT FPDWC PLANNED TRAIL CORRIDORS, INCLUDING THE IL 53, JACKSON CREEK AND DUPAGE RIVER TRAIL CORRIDORS

The table on the following page shows in greater detail how these opportunity areas meet these eight criteria.

Major Opportunity Areas: Criteria Table

REVISED JUNE 12, 2020

CRITERIA	OPPORTUNITY AREAS							
	1	2	3	4	5	6	7	8
PROXIMITY TO MAJOR TRANSPORTATION CORRIDORS, INCLUDING I-55, I-80 AND IL 53.	Highway: IL-53, US-52 Roadways: Laraway Rd, Manhattan Rd, Schweitzer Rd	Highway: I-55 Roadways: River Rd, Lorenzo Rd	Highway: IL-53 Roadways: Laraway Rd, Manhattan Rd/Arsenal Rd	Highway: none Roadways: Arsenal Rd	Highway: I-55 Roadways: Arsenal Rd	Highway: I-80 Roadways: Channahon Rd	Highway: I-55 Roadways: Eames St	Highway: I-80 Roadways: Ridge Rd, River Rd
PROXIMITY TO MAJOR ECONOMIC ANCHORS	Laraway Crossing Business Park Amazon and IKEA Distro Centers Chicagoland Speedway Route 66 Raceway	Elion/Ridgeport Logistics Park	UP Intermodal nearby	UP Intermodal nearby	CenterPoint Intermodal nearby	Hollywood Casino & Hotel		
SIGNIFICANT CONTIGUOUS LAND FOR NEW DEVELOPMENT AND INFILL OPPORTUNITIES	8,877 AC, 14 SQ-MI*	5,530 AC, 8.6 SQ MI*	1,990 AC, 3.0 SQ MI*	1,229 AC, 2.0 SQ MI*	1,550 AC, 2.4 SQ MI*	1,586 AC, 2.5 SQ MI*	1,674 AC, 2.4 SQ MI*	936 AC, 1.5 SQ MI*
PROXIMITY TO EXISTING MUNICIPAL INCORPORATED AREAS AND EXISTING INFRASTRUCTURE	Joliet, Manhattan	Wilmington	Joliet, Elwood	Joliet,	Elwood	Joliet	Channahon	Minooka
POTENTIAL TO PROTECT WATERWAYS INCLUDING JACKSON CREEK, DES PLAINES RIVER AND DUPAGE RIVER	Sugar Creek Preserve, Jackson Creek, Sugar Creek	Des Plaines Dolomite Prairie, McKinley Woods, Des Plaines River, Dresden Lake, Kankakee River	Des Plaines River	Des Plaines River, Cedar Creek	Des Plaines Dolomite Prairie and Midewin nearby, Des Plaines River	Rock Run and Rock Run Rookery nearby, Des Plaines River, DuPage River	Lake Chaminwood Preserve, DuPage River	Hastert-Bechstein Preserve nearby, DuPage River
OPPORTUNITIES TO IMPLEMENT FPDWC PLANNED TRAIL CORRIDORS	IL 53 Bikeway Corridor, Trail along Steger Road, Trail along Gougar Road	DuPage River Trail			Channahon to Midewin Corridor	Laraway to Rock Run Trail		

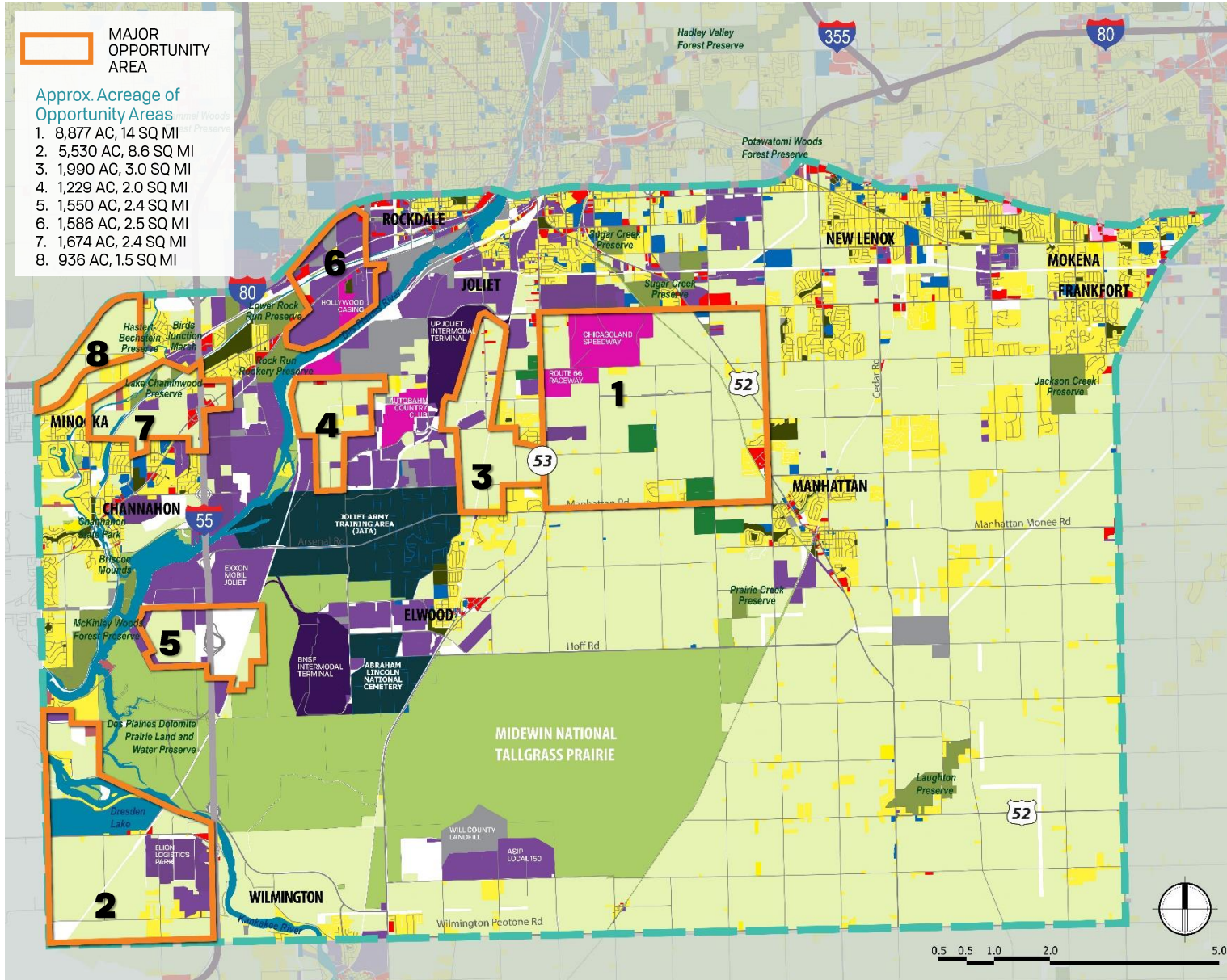
*Approximate overall acreage, will need to be refined as Opportunity Areas are analyzed in greater detail.

Note: The truck routing ECR has identified several key corridors for additional study. Some of these potential corridors intersect with the Land Use areas of opportunity and will be reflected as the truck routing study evolves.

Opportunity Areas 1 and 2 offer the most land, over 14,000 acres total, for new development around major anchors, transportation corridors, natural resources and planned trails. These two areas are suggested as “High Impact Areas of Near Term Change” (see page 37) to be developed in greater detail in future tasks.

Opportunity Areas: Existing Land Uses and Acreage

REVISED JUNE 12, 2020

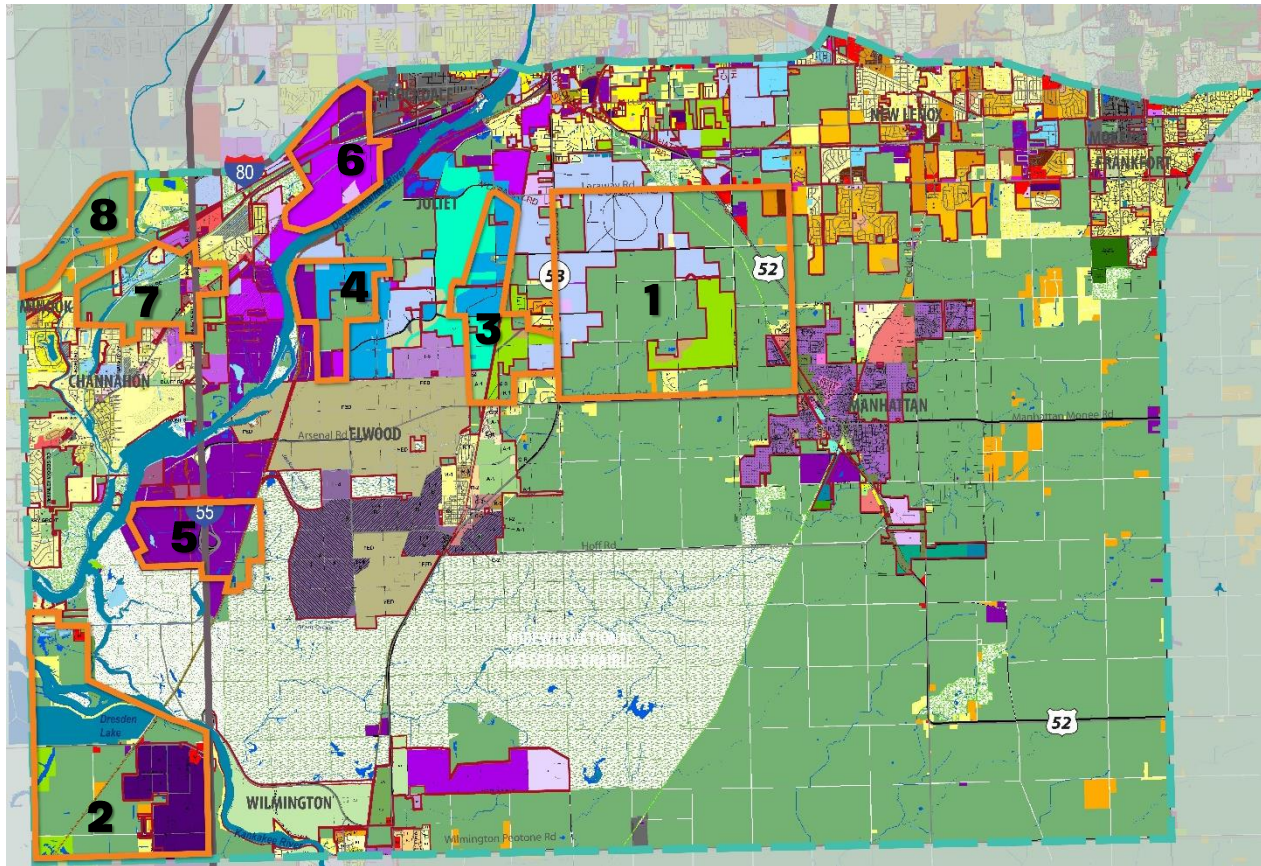


OPPORTUNITY AREAS 1 THROUGH 6 ARE NEAR EXISTING INTERMODAL FACILITIES AND MAJOR INDUSTRIAL ANCHORS. VACANT, INFILL AND FARMED PARCELS IN THESE AREAS OFFER SIGNIFICANT OPPORTUNITIES FOR NEW DEVELOPMENT.

OPPORTUNITY AREAS 7 & 8 ARE PRIMARILY FARMLAND TODAY AND OFFER OPPORTUNITIES TO ATTRACT NEW DEVELOPMENT ALONG I-80 AND I-55.

Opportunity Areas on Combined Zoning Map

REVISED JUNE 12, 2020



JOLIET

- B-1 (Neighborhood Business Districts)
- B-2 (Central Business Districts)
- B-3 (General Business Districts)
- I-1 (Light Industrial Districts)
- I-2 (General Industrial Districts)
- R-1 (Single-Family Residential)
- R-1A (Single-Family Residential)
- R-1B (Single-Family Residential)
- R-2 (Single-Family Residential)
- R-2A (Single-Family Residential)
- R-3 (One and Two Family Residential)
- R-4 (Low Density Multi-Family Residential)
- R-5 (High Density Multi-Family Residential)
- R-B (Restricted Business Districts)
- I-TA (Intermodal Terminal – Intermodal Terminal)
- I-TB (Intermodal Terminal – Transport Equipment)
- I-TC (Intermodal Terminal – Industrial Park)

MANHATTAN

- A (Agricultural)
- CR (Conservation/Recreation)
- ER (Estate Residential)
- GR (General Residential)
- R1 (Single-Family Residence)
- R2 (Multi-Family Residence)
- R3 (Multi-Family Residence)
- R4 (Two-Family Residence)
- R5 (Multiple Family Residence)
- R6 (Residential Apartment)
- BPD (Business Park District)
- B1 (Local Shopping)
- B2 (Community Shopping)
- B3 (General Business)
- CBD (Central Business District)
- I1 (Limited Industrial)
- I2 (General Industrial)
- I3 (Heavy Industrial)

NEW LENOX

- AG (Agricultural Districts)
- C-1 (Neighborhood Shopping Districts)
- C-2 (Community Shopping Districts)
- C-3 (General Business Districts)
- C-4 (Automotive Service Districts)
- C-5 (Office/Transitional Districts)
- C-7 (Regional Shopping)
- E (Estate Residence Districts)
- H (Hospital)
- I-1 (Limited Industrial Districts)
- R (Single Family Residence)
- R-1 (Single Family Residence)
- R-2 (Single Family Residence)
- R-2A (Single Family Residence)
- R-3 (Multi-Family Residence)
- R-4 (Two-Unit Residence)
- R-5 (3- and 4-Unit Residence)
- R-6 (Multi-Family Residence)

ELWOOD

- A-1 (Agriculture)
- C-1 (Local Shopping)
- C-2 (Community Shopping)
- C-3 (Town Center Business District)
- I-1 (Office, Research, Light Industrial)
- I-2 (Light Industrial)
- I-3 (Heavy Industrial)
- I-4 (Large Scale Planned Industrial)
- G-R (General Residential)
- R-1 (Single-Family Residential)
- R-2 (Single- and Two-Family Residential)
- R-3 (Multi-Family Residential)
- R-4 (Single-Family Attached Residential)
- Federal Lands
- A (Intermodal and Related Uses)
- RG (Industrial Park Uses)
- C (Residential Protection Zone)

Unincorporated parcels within the opportunity areas are generally zoned by the County for agricultural and industrial use.

Incorporated parcels within the opportunity areas are regulated by local municipal zoning, and generally include agricultural, industrial, residential and commercial uses.

MINOOKA

- A (Agricultural District)
- R1 (Single Family Detached Residence District)
- R1A (Single Family Residence District)
- R2 (Single Family Detached Residence District)
- R3 (Single Family Attached Residence District)
- R4 (Two Family Residence District)
- R4A (Two Family Residence District)
- R5 (Attached Single-Family Residence District)
- R6 (Multiple Family Residence District)
- B1 (Business District)
- B2 (Commercial District)
- M1 (Manufacturing District)
- M2 (Manufacturing District)
- Lowland Conservancy District

FRANKFORT

- Forest Preserve
- AG (Agricultural District)
- B1 (Local Business District)
- B2 (Community Business District)
- B3 (General Business District)
- B4 (Office District)
- H1 (Historic District)
- I1 (Limited Industrial District)
- I2 (General Industrial District)
- ER (Estate Residential District)
- R1 (Single Family Residential District)
- R2 (Single Family Residential District)
- R3 (Two-Family Residential District)
- R4 (Single Family Residential District)
- R5 (Multi-Family Residential District)

CHANNANON

- A-1 (Agricultural District)
- A-2 (Rural Residence)
- C-1 (Local Shopping)
- C-2 (Community Shopping)
- C-3 (General Business)
- C-4 (Automotive Service)
- C-5 (Office/Transitional)
- C-6 (Office and Research)
- C-7 (Day-Care and Professional Office)
- I-1 (Limited Industrial)
- I-2 (Intensive Industrial)
- PR (Park and Recreational)
- R-1 (Single-Family Residence)
- R-2 (Single-Family Residence)
- R-3 (Multi-Family Residence)
- TC (Town Center)

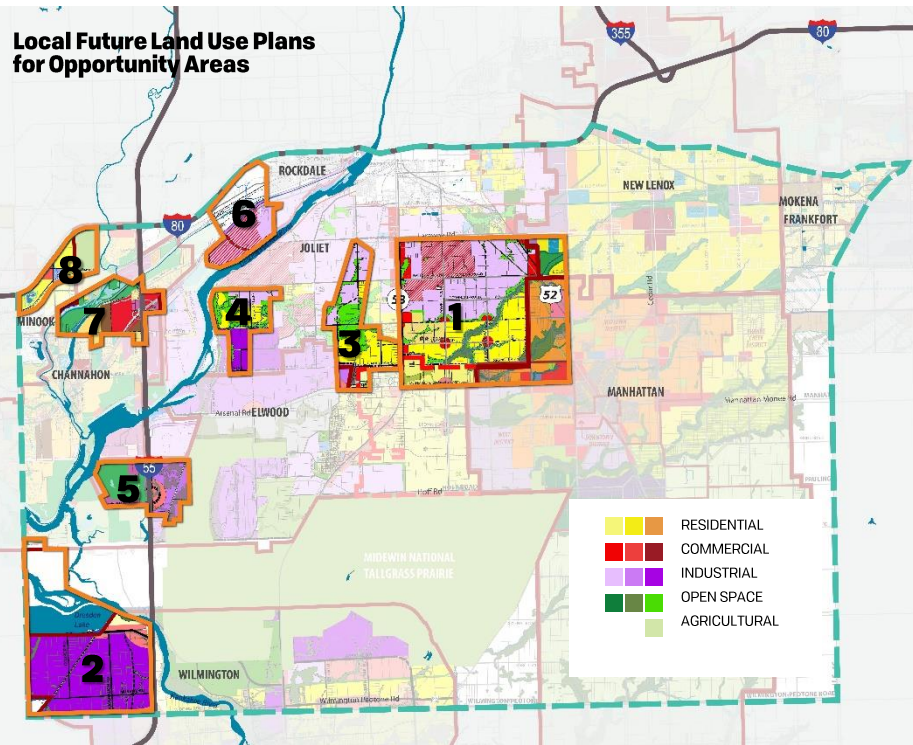
WILMINGTON

- A1 (Agricultural)
- ER (Estate Residential)
- GR (General Residential)
- R1 (Residential Single Family)
- R2 (Residential Single Family)
- R3 (Residential Two Family)
- R4 (Residential Single Family Attached)
- R5 (Residential Multi-Family)
- RG (Restricted Business)
- B1 (Neighborhood Commercial)
- B2 (Light Commercial)
- B2A (Central Commercial)
- B3 (General Commercial)
- I1 (Office, Research, Light Industrial)
- I2 (Light Industrial)
- I3 (Heavy Industrial)
- I4 (Large Scale Industrial)
- I5 (Large Scale Planned Industrial)

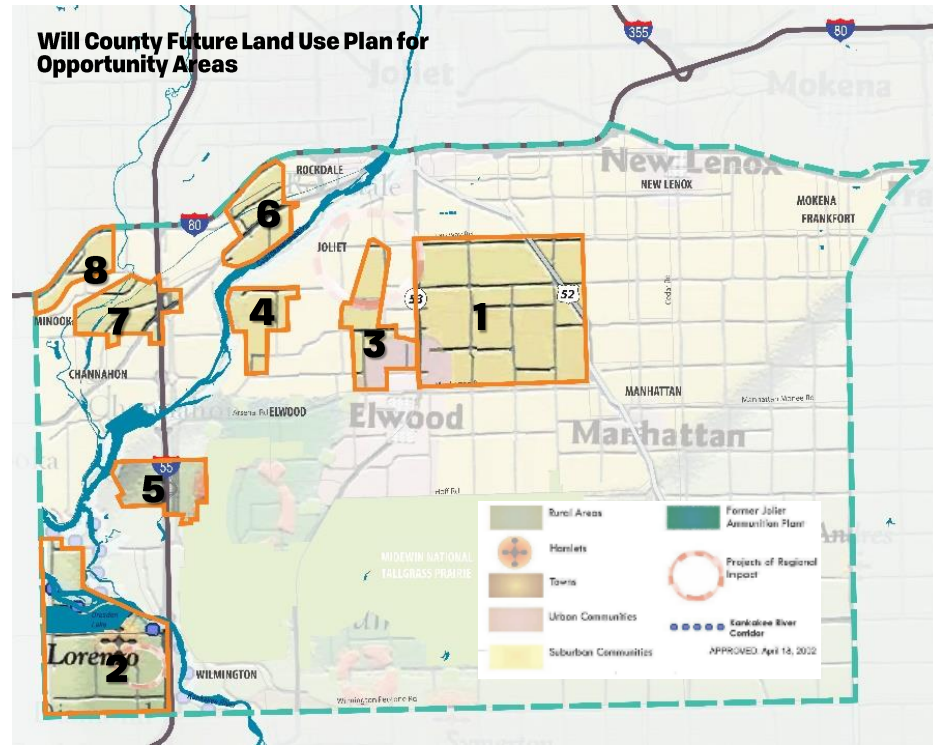
Opportunity Areas: Existing Local and County Land Use Plans

REVISED JUNE 12, 2020

Local Future Land Use Plans for Opportunity Areas



Will County Future Land Use Plan for Opportunity Areas



OPPORTUNITY AREA	MUNICIPAL JURISDICTION	LOCAL FUTURE LAND USE DESIGNATION	COUNTY FUTURE LAND USE DESIGNATION
AREA 1	CITY OF JOLIET AND VILLAGE OF MANHATTAN	INDUSTRIAL AND COMMERCIAL USES CONCENTRATED IN THE NORTHWEST PART. RESIDENTIAL USES FOR THE REMAINING AREAS TO THE SOUTH AND EAST.	SUBURBAN COMMUNITIES
AREA 2	CITY OF WILMINGTON		RURAL AREAS, PROJECT OF REGIONAL IMPORT
AREA 3	CITY OF JOLIET AND VILLAGE OF ELWOOD	INDUSTRIAL AND RESIDENTIAL USES	SUBURBAN COMMUNITIES, URBAN COMMUNITIES
AREA 4	CITY OF JOLIET	INDUSTRIAL AND RESIDENTIAL USES	SUBURBAN COMMUNITIES
AREA 5	VILLAGE OF ELWOOD	INDUSTRIAL, COMMERCIAL	RURAL AREAS
AREA 6	CITY OF JOLIET	INDUSTRIAL, RECREATIONAL	SUBURBAN COMMUNITIES
AREA 7	VILLAGE OF CHANNAHON	REGIONAL COMMERCIAL AND RESIDENTIAL, MINIMAL INDUSTRIAL	SUBURBAN COMMUNITIES
AREA 8	VILLAGE OF MINOOKA	INDUSTRIAL, COMMERCIAL AND RESIDENTIAL	SUBURBAN COMMUNITIES

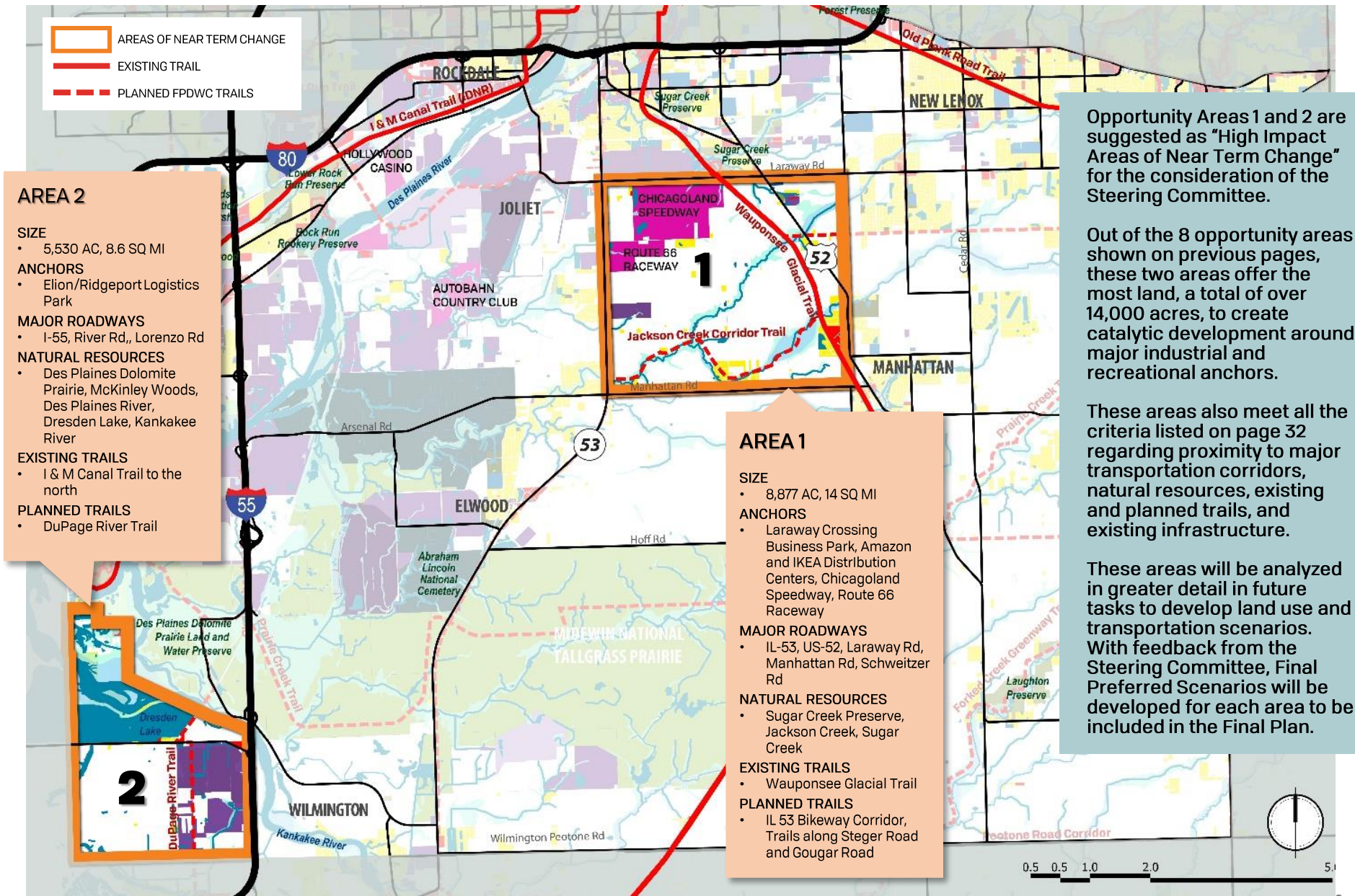
Most Opportunity Areas were generally envisioned by current plans to have multiple land uses.

Current market trends have the potential to shift these areas to predominantly single use industrial.

Data sources: Will County Land Use Department; Study Area Municipal Data.

High Impact Areas for Near Term Change

REVISED JUNE 12, 2020



Moving Will County Land Use Study

Market Analysis

Existing Market Conditions Executive Summary

REVISED JUNE 12, 2020

Industrial

The Land Use Study Area grew in population and households since 2010. This mirrors trends in the County and communities.

Median ages in the Study Area, County, and communities have risen. This may reflect the aging “Baby Boomer” generation, inflow of older people, outflow of younger people, or a combination. This does not indicate the Study Area lacks families or people of all ages.

The Study Area’s median income exceeds Will County’s, but incomes vary within communities (some lower, some higher).

Will County is growing at a faster rate than the Chicago region. Massive industrial growth drives the real estate industry in Will County and the Land Use Study. Most is new construction, including speculative buildings topping 1 million square feet.

The industrial inventory increased steadily year-on-year and approaches 200 million square feet countywide. The Land Use Study Area comprises over 50 million square feet – almost 30%. It has nearly doubled over 10 years.

For years, the market was able to absorb (fill) most new buildings, so construction picked up in response. As a result, many more new buildings were completed than could be absorbed in 2017-2018, increasing vacancy. Vacancy has fallen as companies move in and expand.

Retail

Will County’s retail grew little over the past decade despite a growing population. The Study Area has added little since 2014. However, the vacancy rate has remained stable since then.

While some locations are thriving, the bricks-and-mortar retail market is difficult across the region and the nation.

Amazon = decline of physical stores + rise of massive warehouses.

Office

Will County’s office vacancy decreased steadily since 2010 while the Study Area’s mostly increased, though it improved since 2018. Office development is not a major force in the Land Use Study Area.

Residential New Construction

Since 2013, residential new construction increased every year, notably in Manhattan and Channahon. Most newly permitted housing units have been single-family.

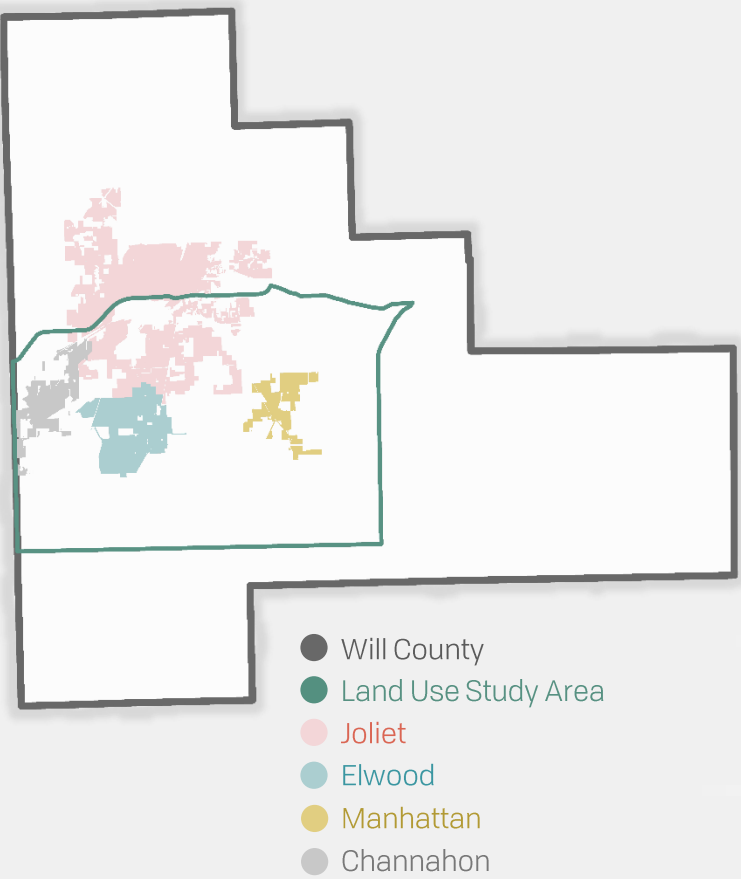
New subdivisions are not anticipated in the large volumes seen prior to the Great Recession (the crash of an overheated housing market).







Employment

The number of jobs has grown in the Study Area by 47% since 2008. The number in transportation/logistics has increased 66%. Nonetheless, a majority (59%) of jobs located in the Study Area are not industrial. Only 14% of all employees both live and work within the Land Use Study Area.

Demographics Land Use Study Area, County, and Communities

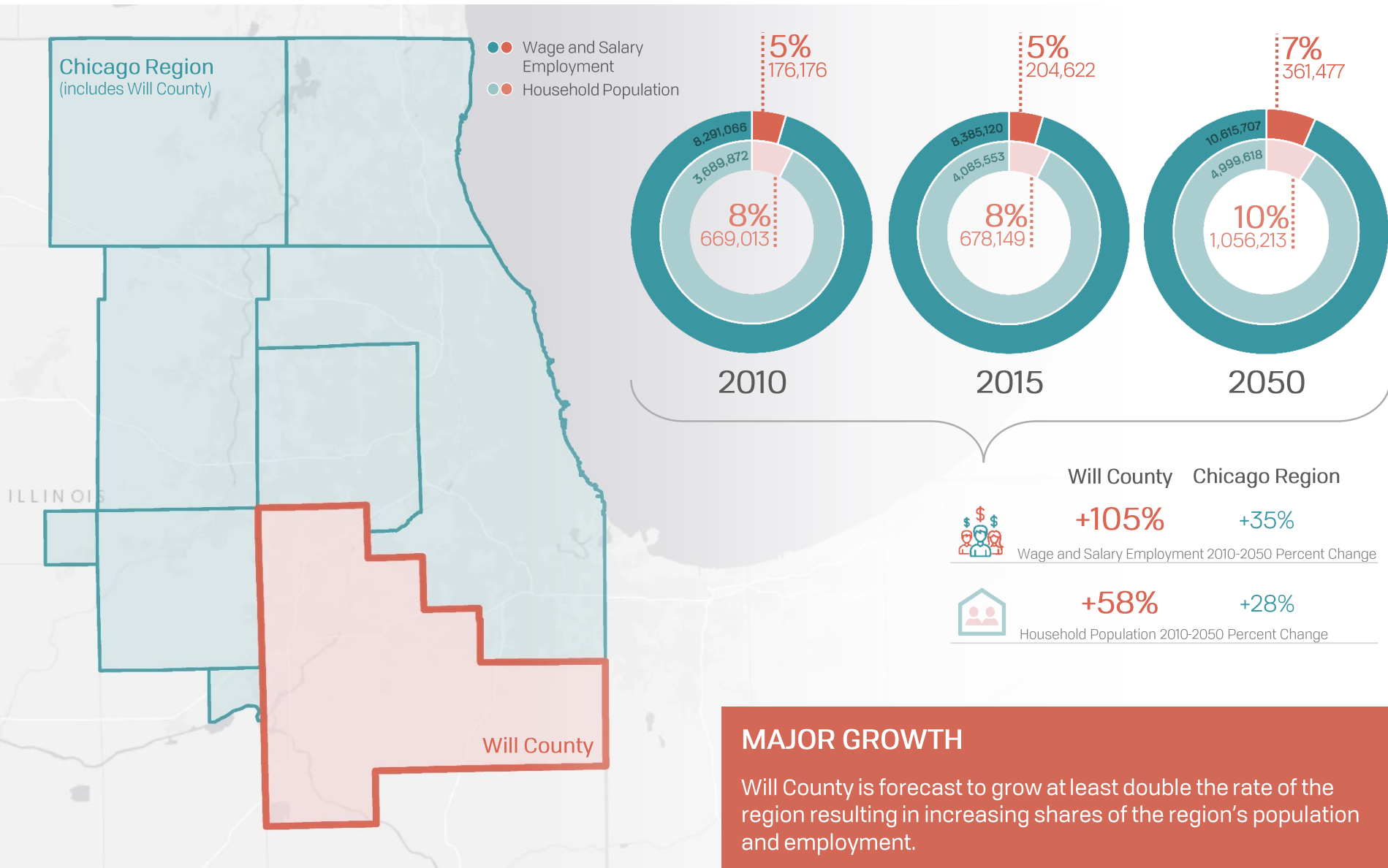
REVISED JUNE 12, 2020



		Will County	Land Use Study Area	City of Joliet	Village of Elwood	Village of Manhattan	Village of Channahon
 Population	2010	677,560	70,348	147,160	2,282	7,051	12,515
	2019	706,224	75,815	151,671	2,382	8,327	13,215
	2024	725,533	79,332	154,637	2,453	8,777	13,560
 Households	2010	225,256	23,683	47,915	882	2,360	4,008
	2019	235,135	25,649	49,164	935	2,786	4,254
	2024	241,806	26,856	50,082	967	2,940	4,369
 Housing Units	2010	237,501	24,841	51,180	926	2,462	4,176
	2019	248,412	26,851	52,910	968	2,890	4,419
	2024	259,519	28,483	54,824	1,017	3,085	4,613
 Vacant Housing Units	2010	12,245	1,158	3,265	44	102	168
	2019	13,277	1,202	3,746	33	104	165
	2024	17,713	1,627	4,742	50	145	244
 Median Age	2010	35.4	37.2	31.7	37.9	31.2	35.9
	2019	36.9	38.9	33.2	40.5	35.4	37.9
	2024	37.4	39.5	33.4	39.8	34.0	37.7
 Median Household Income	2019	\$83,997	\$90,843	\$65,943	\$75,366	\$92,268	\$94,221
	2024	\$93,045	\$100,811	\$75,444	\$90,788	\$104,682	\$103,257

ON TO 2050 Will County Population and Employment Projections

REVISED JUNE 12, 2020



Market Trends Industrial

REVISED JUNE 12, 2020

WILL COUNTY

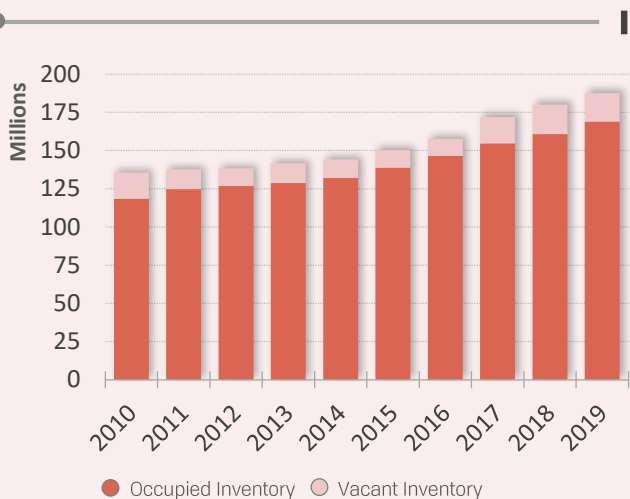
INDUSTRIAL GROWTH

County's industrial inventory grew significantly since 2009:

+105%

Due to land availability and highway access, the County's share of the region's industrial inventory was up from 2009:

+4%



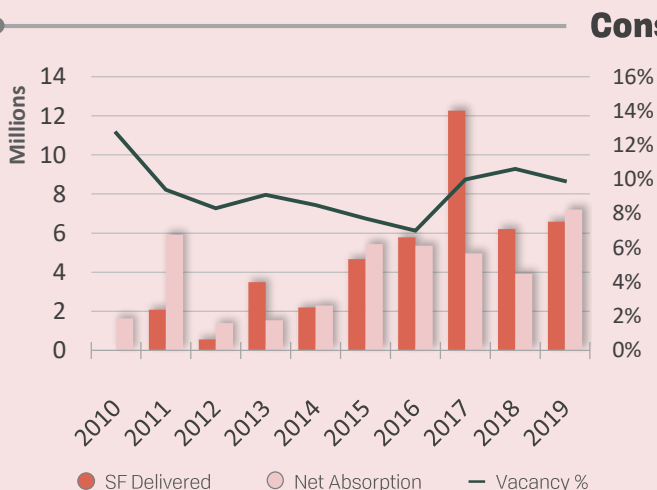
MASSIVE CONSTRUCTION IN 2007

2017 deliveries spike led to 2018 vacancy rate increase to:

+3.6%

By 2019, vacancy dropped to **9.9%** as the new space was absorbed.

Will County's vacancy rate is still much higher than the Chicago region's (3.6%) as of 3rd quarter 2019.



LAND USE STUDY AREA

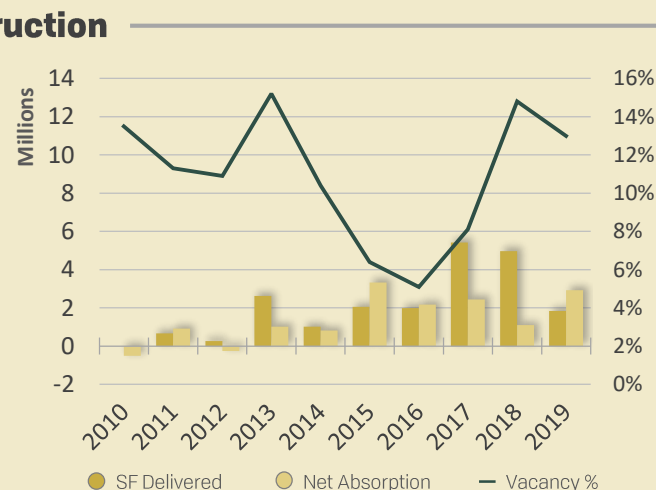
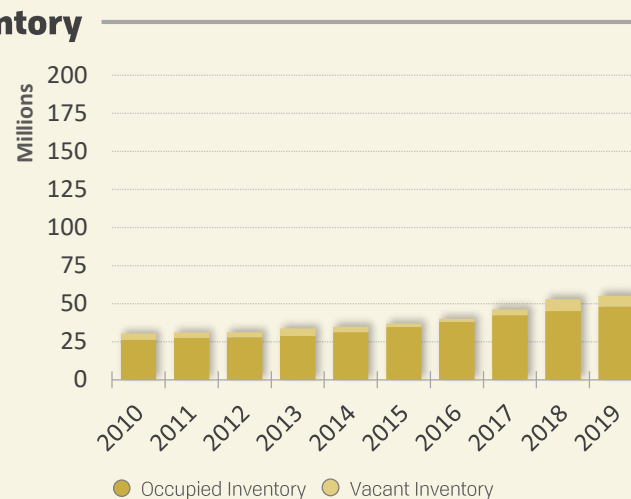
MASSIVE GROWTH

The Land Use Study Area accounts for

29% of the County's industrial inventory, a **+22%** increase from 2010.

Over 10 years, the Study Area's inventory has grown:

+82%



DELIVERIES PEAK IN 2017-2018

The vacancy rate increased sharply from 2016 to 2018 as new space was delivered onto the market.

The market added over 10 million SF in 2017-2018 but absorbed only **34%** of the space.

By 2019, deliveries slowed as new space filled. Vacancy rate fell from 2018:

-1.8%

Market Trends Retail

REVISED JUNE 12, 2020

WILL COUNTY

LITTLE GROWTH

Vacancy rate was decreasing steadily until 2017 but increased to **6%** in 2019 from a low of 4.8%.

Factors include growth of e-commerce resulting in store closings nationwide.



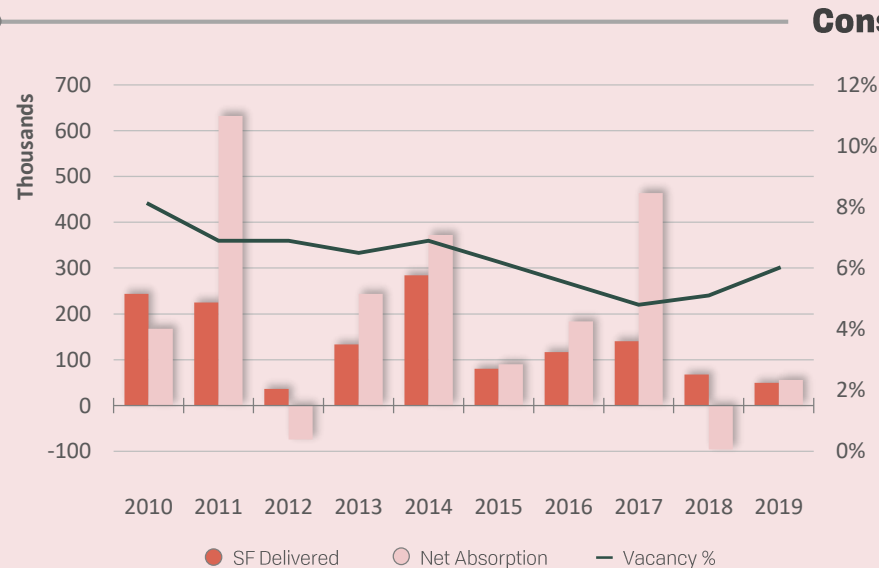
Limited new retail construction in the Chicago region over the past 10 years compared to earlier decades.

Inventory barely grew over past 10 years despite population growth, reflecting the slowdown in the retail industry overall since the recession.

Minimal or negative absorption in past 2 years.



Inventory grew by 1.2 million SF, totaling over 35 million SF in 2019. As of Q3 2019, 2.1 million SF were vacant.

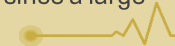


Source: CoStar

LAND USE STUDY AREA

NO SIGNIFICANT GROWTH IN 5 YEARS

Minimal or negative absorption since 2016. Almost no growth in new retail space since a large spike in 2014.

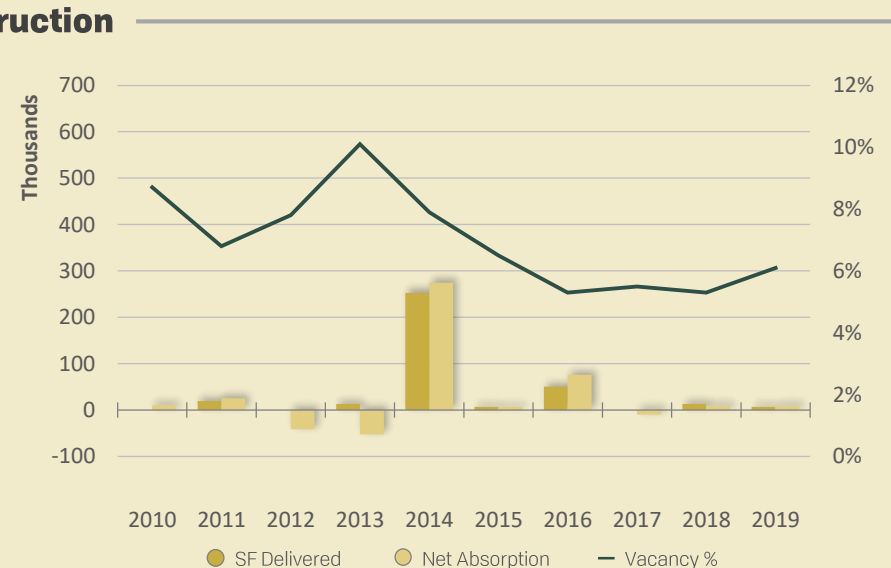


Vacancy rate is comparable to that of Will County.



Inventory grew by 347,000 SF from 2010-2019 to 2.8 million SF. As of Q3 2019, 168,000 SF were vacant.

Vacancy rate has been stable since 2015 as the space delivered in 2014 was absorbed.



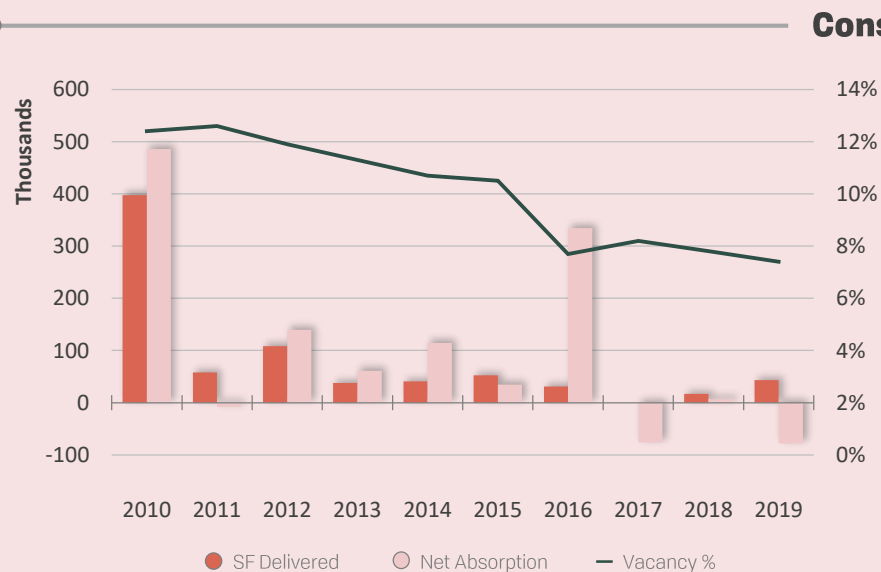
WILL COUNTY

VACANCY IMPROVEMENT

Vacancy rate trended downward almost every year, ending 2019 at **7.4%**, its lowest in a decade.



Will County accounts for a relatively small share of the Chicago suburban office inventory – about 12%. However, the vacancy rate is significantly better than many of the suburban Chicago sub-markets.



LAND USE STUDY AREA

SEE-SAW ABSORPTION

Vacancy rose from 2012-2014 and did not decrease until 2016 due to new deliveries in 2012-2013 that were largely absorbed.

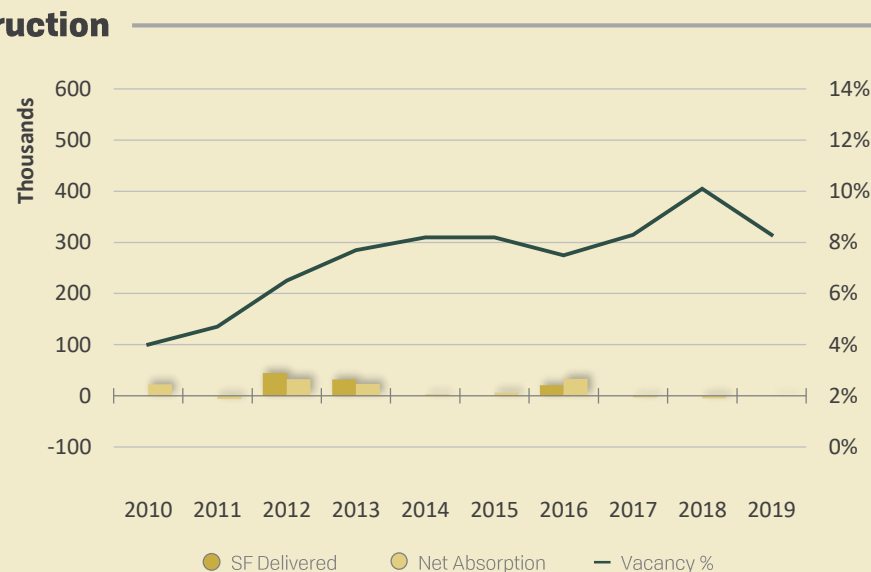


Inventory grew by 99,000 SF to 609,000 in 2019. As of Q3 2019, 50,000 SF were vacant.



Vacancy rate now trending down from 10.1% in 2018 to 8.3% in 2019.

Negative absorption in subsequent years countered strong numbers in 2016.



Market Trends New Residential Construction

REVISED JUNE 12, 2020

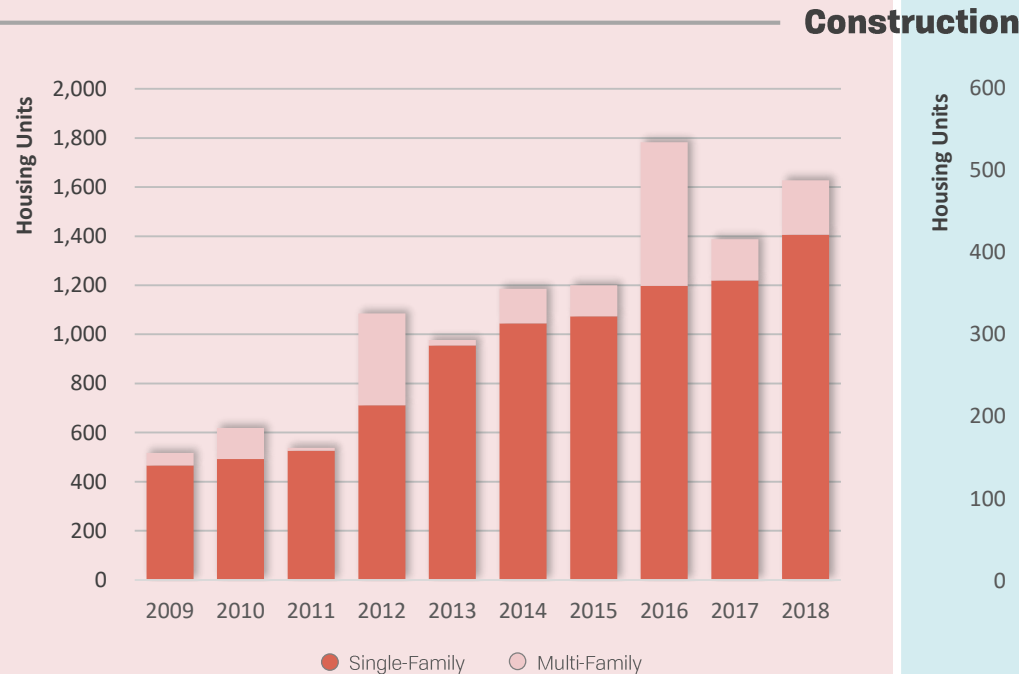
WILL COUNTY

INCREASING ACTIVITY POST-RECESSION



Steady construction since 2014 peaking in 2016 at almost 1,800 units.

Little multi-family construction except in 2016.



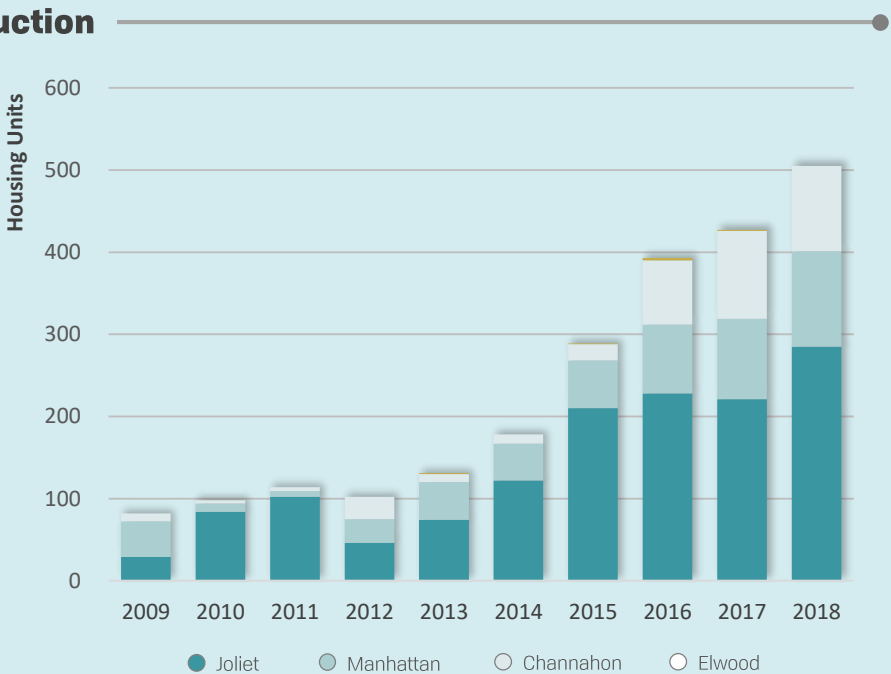
LAND USE STUDY AREA MUNICIPALITIES

INCREASING ACTIVITY POST-RECESSION



All new residential construction was in Joliet, Manhattan and Channahon.

Study Area communities accounted for 31% of county's residential construction in 2018.

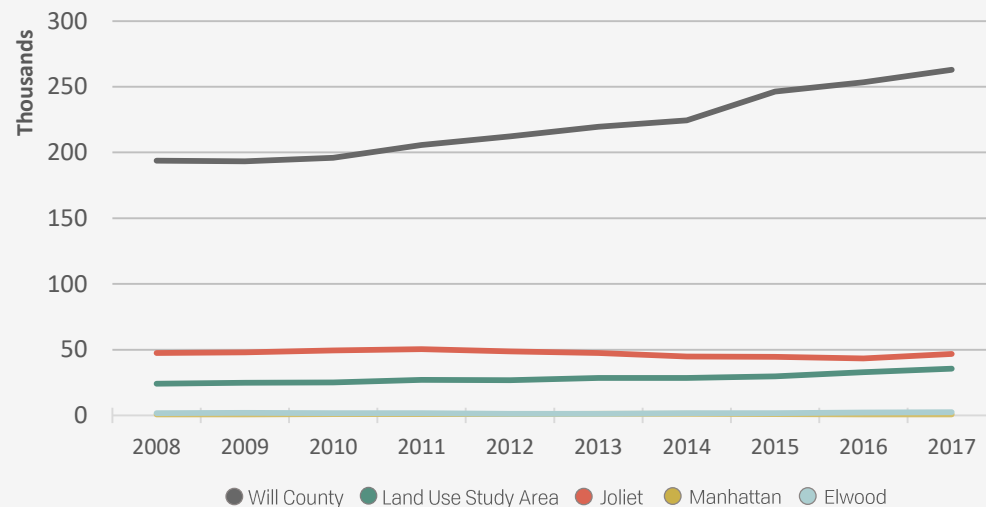


Source: U.S. Census Bureau, Building Permits Survey.

Industrial Jobs

REVISED JUNE 12, 2020

ALL JOBS LOCATED IN WILL COUNTY



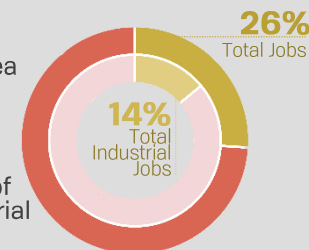
OVERALL GROWTH

- +36%** growth in Will County
- +47%** growth in Study Area
- +34%** growth in City of Joliet
- 2%** decrease in Village of Elwood

Study Area has a much higher share of industrial jobs compared to the County:

41% vs **22%**

Study Area accounts for 14% of County's total jobs but 26% of its industrial jobs.



WILL COUNTY

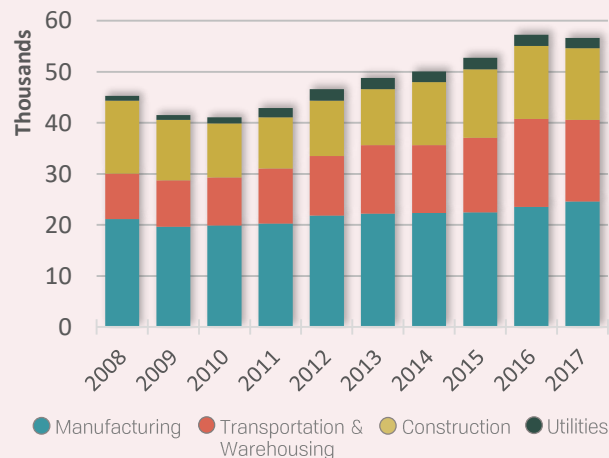
INDUSTRIAL GROWTH

Increase since 2010 with a slight decrease between 2016 and 2017.

Manufacturing remains the largest sector though transportation and warehousing registered the strongest gains since 2010.

- 78%** of total jobs are non-industrial
- 42%** of all employees live in the county

Industrial Jobs



LAND USE STUDY AREA

STEADY GROWTH

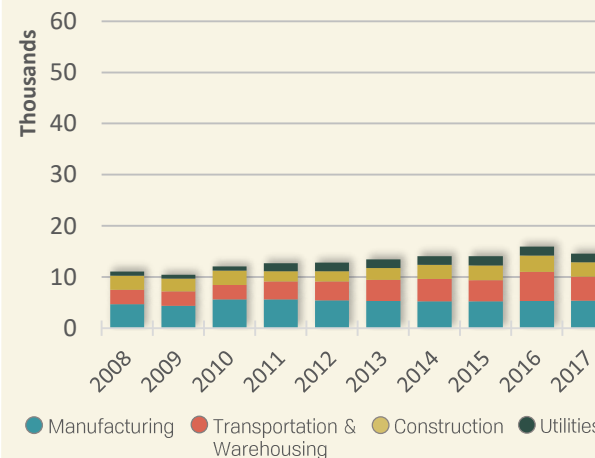
Steady industrial employment growth since 2009 with a spike in 2016.

- +66%** in transportation & logistics jobs
- 4%** in manufacturing jobs

14% of all employees live and work in the Study Area

50% of total jobs are non-industrial*

*Since 2014, they've increased at a greater rate than industrial jobs.



Study Area Communities Industrial Jobs

REVISED JUNE 12, 2020

JOLIET

MID-DECADE GROWTH

Overall decline of **-6%** since 2008 but picked up in 2016-17 to almost 7,000 jobs.

While manufacturing jobs decreased during this period, transportation and warehousing jobs doubled.

Despite its industrial reputation, **86%** of Joliet's almost 47,000 jobs are non-industrial.

Largest single sector is health care.

24% of all employees live in Joliet.

ELWOOD

SIGNIFICANT GROWTH SINCE 2012

+90% employment increase since 2012

+200% growth in manufacturing

+50% growth in transportation & warehousing

2% of all employees live in Elwood

Non-industrial employment small but growing since 2017.

MANHATTAN

DECREASE

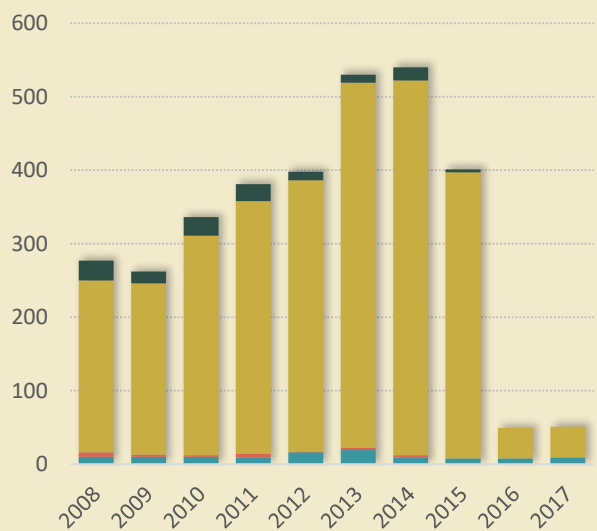
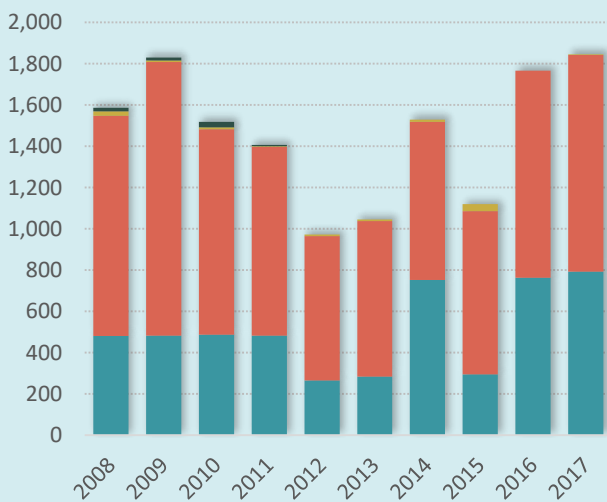
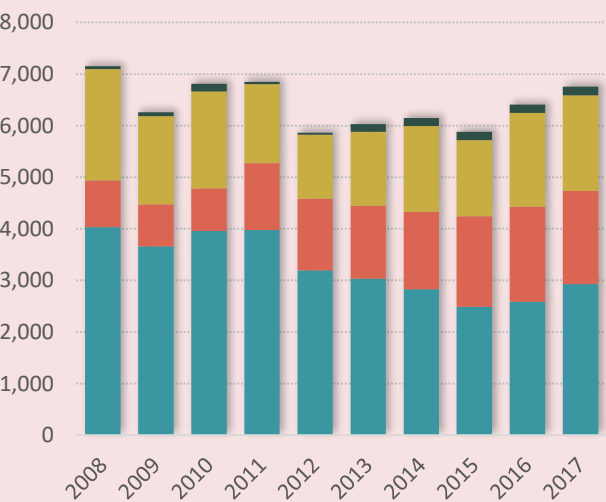
Minimal industrial employment other than construction. Major drop-off since 2014.

Increase in employment fueled by construction occurring from 2008-2014.

+35% increase in non-industrial employment.

28% of employees live in Manhattan.

Industrial Jobs Located in the Community



Study Area Communities Jobs Held by Residents

REVISED JUNE 12, 2020

JOLIET

STEADY GROWTH SINCE 2010

- +26%** increase in non-industrial employment
- +4%** growth in manufacturing
- +62%** growth in transportation & warehousing
- 36%** work less than 10 miles from home

ELWOOD

OVERALL GROWTH

- Large increase between 2010-2011 with slight decline since 2014.
- Decrease in manufacturing. Increase in transportation and warehousing.
- 75%** of employment is non-industrial accounts
- 31%** work within 10 miles of home

MANHATTAN

LARGE GROWTH SINCE 2009

- Among industrial sectors, largest increase in construction.
- +69%** increase in non-industrial employment
- 30%** work less than 10 miles from home

Jobs Held by Residents in the Community

