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Kankakee County

LABOR MARKET ANALYSIS

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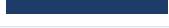
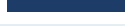
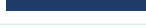
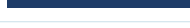


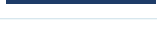




Kankakee County Labor Market Analysis

TABLE 1. Regional Overview, Kankakee County (2016)

KANKAKEE COUNTY	
Population	110,700
Jobs	46,000
Available Workforce	52,000
Earnings	\$47,400
COL Adjusted Average Earnings	\$48,500
Unemployed (10/2016)	3,200
Completions (2015)	2,900
GRP	\$4.1B
Exports	\$6.7B
Imports	\$7.2B

WAGES BY INDUSTRY

TABLE 2. Average Annual Wage by Industry, Kankakee County (2016)

NAICS	INDUSTRY	AVG. EARNINGS (2016)	
11	Crop and Animal Production	\$37,216	
21	Mining, Quarrying, and Oil and Gas Extraction	\$104,852	
22	Utilities	\$90,929	
23	Construction	\$56,898	
31	Manufacturing	\$80,961	
42	Wholesale Trade	\$62,096	
44	Retail Trade	\$28,902	
48	Transportation and Warehousing	\$55,213	
51	Information	\$44,170	
52	Finance and Insurance	\$55,515	
53	Real Estate and Rental and Leasing	\$41,366	
54	Professional, Scientific, and Technical Services	\$48,647	
55	Management of Companies and Enterprises	\$63,387	
56	Admin. & Support and Waste Mgmt. & Remediation Services	\$28,197	
61	Educational Services	\$27,299	
62	Health Care and Social Assistance	\$51,481	
71	Arts, Entertainment, and Recreation	\$17,038	
72	Accommodation and Food Services	\$16,349	
81	Other Services (except Public Administration)	\$26,855	
90	Government	\$55,432	

OCCUPATIONS

The highest-ranking occupations in Kankakee County are highlighted below. Of the top 20 largest occupations, six have a higher wage than \$15 per hour. Over the five-year period from 2011 to 2016, the largest employing occupations in Kankakee County accounted for 642 new jobs with all other production workers, heavy and tractor-trailer truck drivers, registered nurses, and office clerks the fastest growing of all occupations.

FIGURE 1. Highest Ranked Occupations and Wages, Kankakee County (2016)

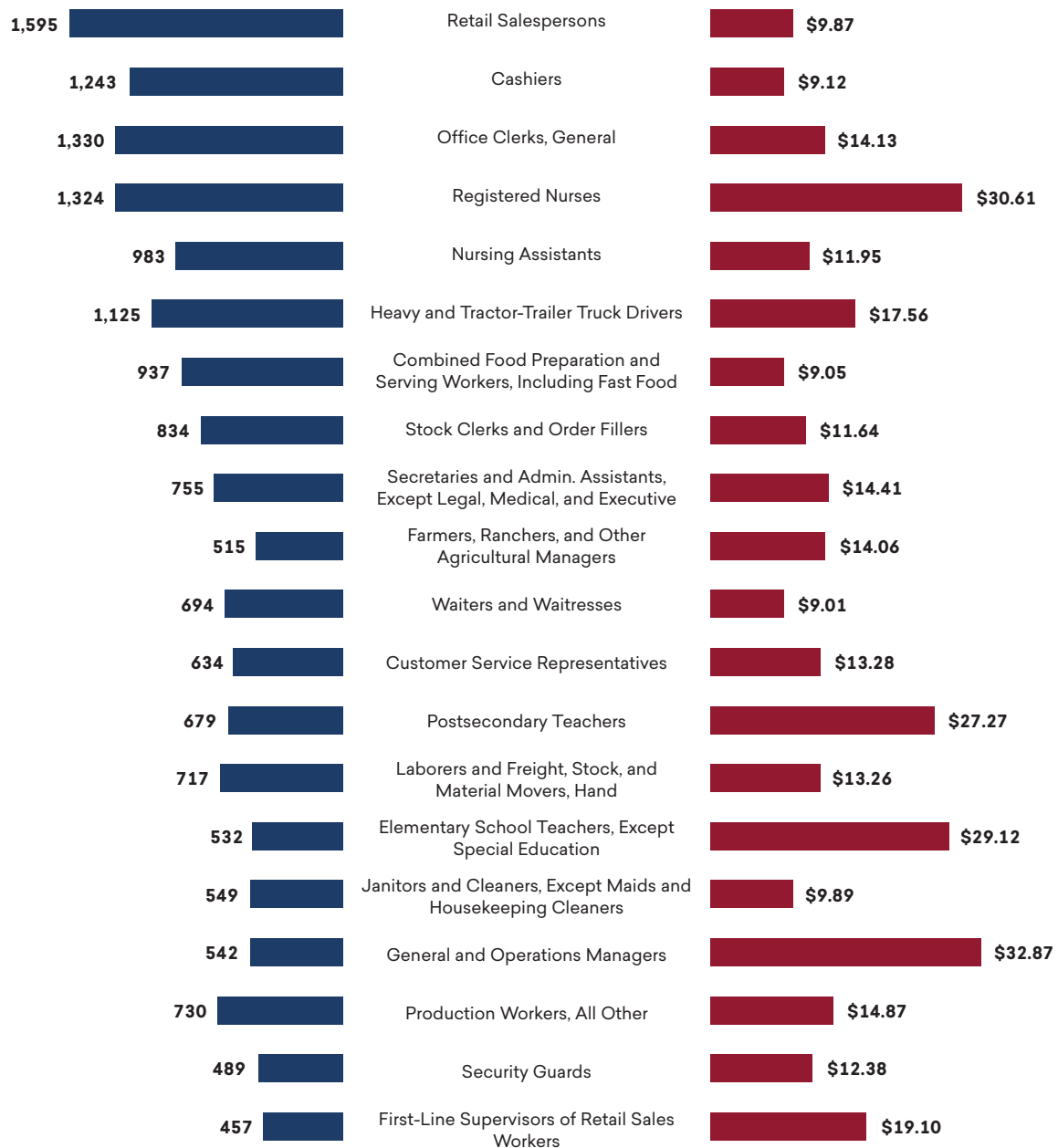


TABLE 3. Top 20 Occupations in Kankakee County, Ranked by 2016 Employment

OCCUPATION	2011 JOBS	2016 JOBS	CHANGE IN JOBS (2011-2016)	% CHANGE	2015 MEDIAN HOURLY EARNINGS
Retail Salespersons	1,702	1,595	-107	-6%	\$9.87
Cashiers	1,236	1,243	7	1%	\$9.12
Office Clerks, General	1,207	1,330	123	10%	\$14.13
Registered Nurses	1,158	1,324	166	14%	\$30.61
Nursing Assistants	1,018	983	-35	-3%	\$11.95
Heavy and Tractor-Trailer Truck Drivers	912	1,125	213	23%	\$17.56
Combined Food Preparation and Serving Workers, Including Fast Food	911	937	27	3%	\$9.05
Stock Clerks and Order Fillers	818	834	16	2%	\$11.64
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	708	755	47	7%	\$14.41
Farmers, Ranchers, and Other Agricultural Managers	708	515	-192	-27%	\$14.06
Waiters and Waitresses	677	694	18	3%	\$9.01
Customer Service Representatives	674	634	-40	-6%	\$13.28
Postsecondary Teachers	658	679	21	3%	\$27.27
Laborers and Freight, Stock, and Material Movers, Hand	646	717	70	11%	\$13.26
Elementary School Teachers, Except Special Education	533	532	-1	0%	\$29.12
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	532	549	17	3%	\$9.89
General and Operations Managers	507	542	34	7%	\$32.87
Production Workers, All Other	481	730	249	52%	\$14.87
Security Guards	474	489	15	3%	\$12.38
First-Line Supervisors of Retail Sales Workers	464	457	-6	-1%	\$19.10

FIGURE 2. Fastest Growing Occupations, Kankakee County (2011-2016)

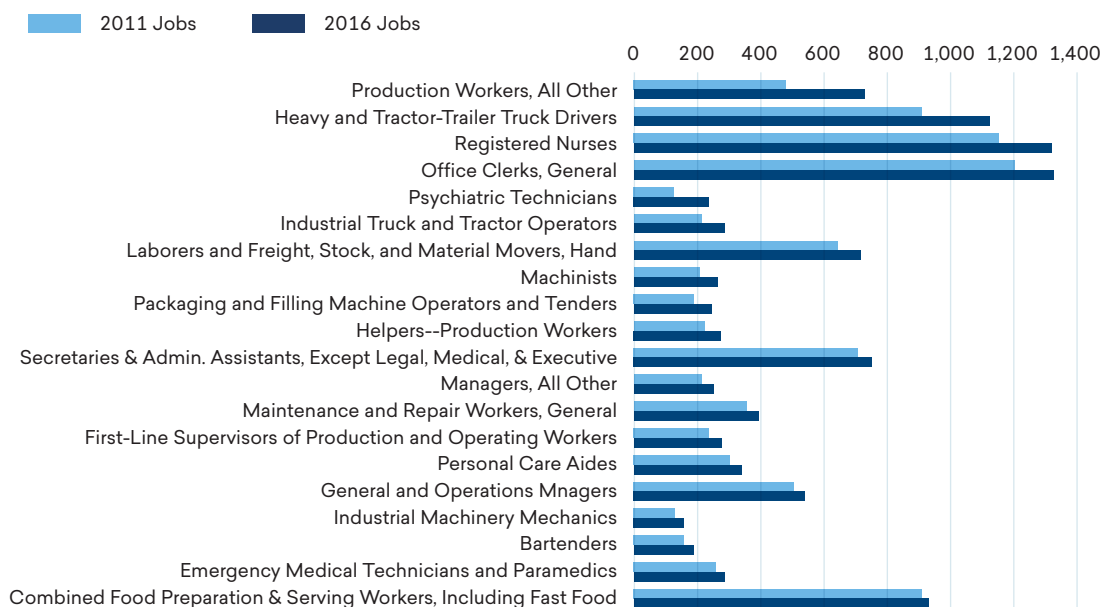


TABLE 4. Top 25 Fastest Growing Occupations in Kankakee County, Ranked by Job Growth

SOC	DESCRIPTION	2011	2016	2011-2016 % CHANGE	MEDIAN HOURLY EARNINGS
29-2053	Psychiatric Technicians	127	235	84.6%	\$18.31
51-9199	Production Workers, All Other	481	730	51.8%	\$14.87
53-7051	Industrial Truck and Tractor Operators	214	286	33.7%	\$13.50
29-1122	Occupational Therapists	82	108	31.4%	\$31.16
51-9111	Packaging and Filling Machine Operators and Tenders	190	247	30.3%	\$11.23
51-4041	Machinists	205	264	29.0%	\$18.33
15-1151	Computer User Support Specialists	101	127	26.4%	\$23.85
49-9041	Industrial Machinery Mechanics	128	161	26.0%	\$27.95
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	98	121	24.0%	\$24.71
11-3031	Financial Managers	85	106	24.0%	\$36.02
53-3032	Heavy and Tractor-Trailer Truck Drivers	912	1,125	23.4%	\$17.56
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	115	142	23.2%	\$22.31
51-9198	Helpers--Production Workers	223	274	22.9%	\$10.85
11-9199	Managers, All Other	212	255	20.3%	\$39.10
35-3011	Bartenders	158	189	19.0%	\$9.21
11-1011	Chief Executives	102	119	17.0%	\$69.23
41-2022	Parts Salespersons	101	118	16.7%	\$14.91
51-1011	First-Line Supervisors of Production and Operating Workers	238	273	14.9%	\$27.83
31-1011	Home Health Aides	145	167	14.8%	\$10.33
29-1141	Registered Nurses	1,158	1,324	14.4%	\$30.61
29-2011	Medical and Clinical Laboratory Technologists	161	183	13.1%	\$28.87
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	127	142	11.8%	\$28.98
43-6011	Executive Secretaries and Executive Administrative Assistants	189	211	11.7%	\$20.88
39-9021	Personal Care Aides	307	342	11.3%	\$13.59
49-9071	Maintenance and Repair Workers, General	357	396	11.1%	\$22.18

The table below provides a breakdown of number of residents by educational attainment level within each zip code in Kankakee County for the population age 25 years and over. The communities of Bourbonnais and Manteno have the largest share of this population earning a bachelor's degree or higher, 27% and 25%, respectively.

TABLE 5. Educational Attainment Level by Zip Code for the Population age 25 years and over, Kankakee County (2016)

	HIGH SCHOOL DIPLOMA, EQUIVALENT, OR LOWER	SOME COLLEGE OR ASSOCIATE'S DEGREE	BACHELOR'S DEGREE OR HIGHER
Kankakee County	46%	35%	19%
Bourbonnais	37%	37%	27%
Manteno	45%	30%	25%
Aroma Park	39%	42%	19%
Bradley	44%	38%	18%
Herscher	46%	37%	17%
Kankakee	52%	34%	15%
Saint Anne	50%	35%	15%
Grant Park	51%	35%	14%
Momence	51%	36%	13%
Bonfield	52%	36%	12%
Pembroke Township	57%	32%	11%
Buckingham	54%	36%	10%
Essex	55%	35%	10%
Reddick	54%	36%	10%
Union Hill	55%	36%	9%
Hopkins Park	0%	0%	0%

As shown in Table 6 on the next page, the entry-level requirement for many positions is a high school diploma or equivalent. (Note that these educational requirements reflect national averages and may differ from specific requirements of Kankakee County employers.) The top occupations requiring a bachelor's degree include managers, teachers, and accountants.

The following table shows the average annual openings for the top occupations within Kankakee County at each education level required for entry-level employment.



TABLE 6. Openings by Typical Entry Level of Education, Kankakee County (2016)

SOC	OCCUPATION DESCRIPTION	AVERAGE ANNUAL OPENINGS			EMPLOYMENT 2016		
		REPLACEMENT JOBS	NEW JOBS	TOTAL OPENINGS	TOTAL JOBS	% OF TOTAL JOBS	MEDIAN HOURLY WAGE
LESS THAN HIGH SCHOOL							
41-2031	Retail Salespersons	54	0	54	1,595	3.5%	\$9.87
41-2011	Cashiers	52	0	52	1,243	2.7%	\$9.12
35-3021	Combined Food Preparation & Serving Workers, Including Fast Food	30	4	35	937	2.0%	\$9.05
35-3031	Waiters & Waitresses	33	1	34	694	1.5%	\$9.01
53-7062	Laborers & Freight, Stock, & Material Movers, H&	21	12	33	717	1.6%	\$13.26
HIGH SCHOOL DIPLOMA OR EQUIVALENT							
43-9061	Office Clerks, General	29	5	34	1,330	2.9%	\$14.13
43-4051	Customer Service Representatives	16	7	23	634	1.4%	\$13.28
51-9199	Production Workers, All Other	15	5	20	730	1.6%	\$14.87
51-9111	Packaging & Filling Machine Operators & Tenders	9	9	18	247	0.5%	\$11.23
51-4041	Machinists	8	9	17	264	0.6%	\$18.33
SOME COLLEGE, NO DEGREE							
25-9041	Teacher Assistants	10	2	12	424	0.9%	\$12.01
15-1151	Computer User Support Specialists	2	4	5	127	0.3%	\$23.85
49-2011	Computer, Automated Teller, & Office Machine Repairers	0	0	1	13	0.0%	\$17.18
27-2011	Actors	0	0	0	3	0.0%	\$15.62
49-9081	Wind Turbine Service Technicians	0	0	0	1	0.0%	\$18.94
POSTSECONDARY NON-DEGREE AWARD							
53-3032	Heavy & Tractor-Trailer Truck Drivers	19	35	54	1,125	2.5%	\$17.56
31-1014	Nursing Assistants	22	0	22	983	2.1%	\$11.95
29-2061	Licensed Practical & Licensed Vocational Nurses	10	0	10	341	0.7%	\$23.29
51-1011	First-Line Supervisors of Production & Operating Workers	4	4	9	273	0.6%	\$27.83
29-2041	Emergency Medical Technicians & Paramedics	5	4	8	287	0.6%	\$13.31

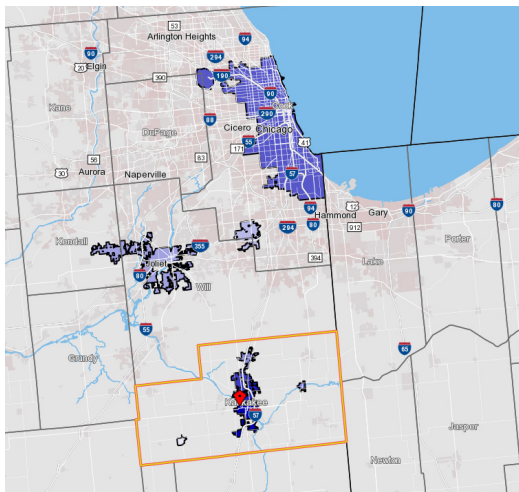
SOC	OCCUPATION DESCRIPTION	AVERAGE ANNUAL OPENINGS			EMPLOYMENT 2016		
		REPLACEMENT JOBS	NEW JOBS	TOTAL OPENINGS	TOTAL JOBS	% OF TOTAL JOBS	MEDIAN HOURLY WAGE
ASSOCIATE'S DEGREE							
29-1141	Registered Nurses	31	17	48	1,324	2.9%	\$30.61
29-2034	Radiologic Technologists	4	0	4	221	0.5%	\$25.81
25-2011	Preschool Teachers, Except Special Education	3	0	4	111	0.2%	\$13.86
29-2012	Medical & Clinical Laboratory Technicians	3	0	3	108	0.2%	\$17.35
31-2021	Physical Therapist Assistants	1	1	3	45	0.1%	\$25.21
BACHELOR'S DEGREE							
11-1021	General & Operations Managers	14	7	21	542	1.2%	\$32.87
25-2021	Elementary School Teachers, Except Special Education	12	2	14	532	1.2%	\$29.12
25-2031	Secondary School Teachers, Except Special & Career/ Technical Education	9	2	11	396	0.9%	\$32.76
25-3098	Substitute Teachers	8	2	10	431	0.9%	\$13.12
13-2011	Accountants & Auditors	5	5	9	182	0.4%	\$26.19
MASTER'S DEGREE							
11-9033	Education Administrators, Postsecondary	3	1	4	95	0.2%	\$36.41
11-9032	Education Administrators, Elementary & Secondary School	3	0	4	114	0.2%	\$43.18
29-1122	Occupational Therapists	2	1	3	108	0.2%	\$31.16
21-1015	Rehabilitation Counselors	3	0	3	141	0.3%	\$12.61
21-1014	Mental Health Counselors	1	1	2	57	0.1%	\$19.83
DOCTORAL OR PROFESSIONAL DEGREE							
25-1099	Postsecondary Teachers	12	9	21	679	1.5%	\$27.27
29-1123	Physical Therapists	2	3	5	82	0.2%	\$36.54
29-1069	Physicians & Surgeons, All Other	2	1	3	87	0.2%	\$121.98
29-1051	Pharmacists	2	0	2	103	0.2%	\$59.10
23-1011	Lawyers	1	1	2	78	0.2%	\$48.76



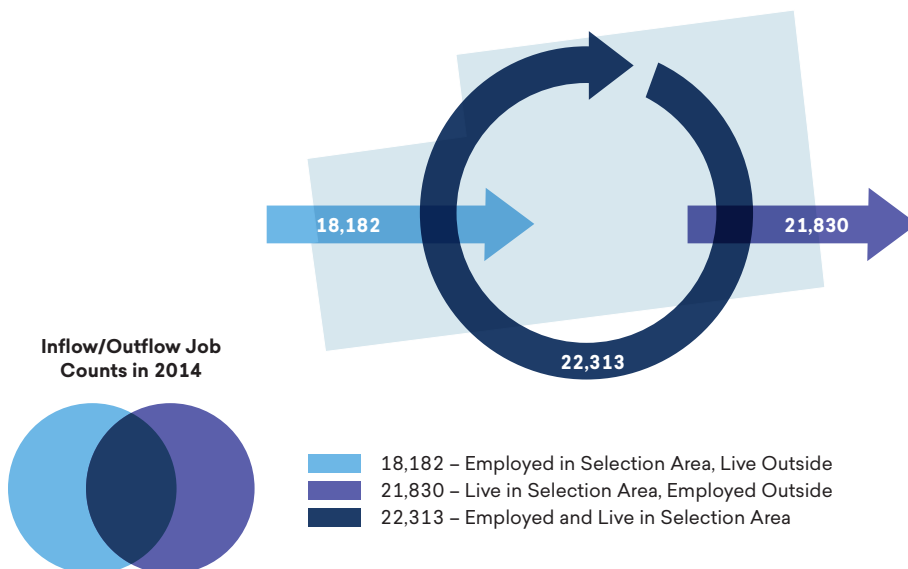
Commuting Patterns

Commuting data show a powerful view of the workforce and where labor supply is located. Approximately half Kankakee County residents commute outside the county for work. The map below shows the cities where Kankakee County residents work and are listed in the table.

TABLE 7. Where Kankakee County Residents Work (2014)



	2014	
	COUNT	SHARE
Kankakee city, IL	8,050	18.20%
Bradley village, IL	4,167	9.40%
Bourbonnais village, IL	3,556	8.10%
Chicago city, IL	2,841	6.40%
Momence city, IL	1,682	3.80%
Manteno village, IL	1,074	2.40%
Joliet city, IL	900	2.00%
Tinley Park village, IL	400	0.90%
Springfield city, IL	355	0.80%
Herscher village, IL	340	0.80%
All Other Locations	20,778	47.10%



Labor Availability

TABLE 8. Top 25 Occupations held by Residents of Kankakee County, 2016

SOC	DESCRIPTION	JOBS	AVAILABLE WORKFORCE	NET COMMUTERS	ANNUAL OPENINGS	MEDIAN HOURLY EARNINGS
41-2031	Retail Salespersons	1,595	1,760	(165)	54	\$9.87
41-2011	Cashiers	1,243	1,366	(123)	52	\$9.12
43-9061	Office Clerks, General	1,330	1,319	11	36	\$14.13
29-1141	Registered Nurses	1,324	1,278	46	50	\$30.61
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	717	1,228	(511)	35	\$13.26
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	937	1,067	(130)	36	\$9.05
53-3032	Heavy and Tractor-Trailer Truck Drivers	1,125	954	171	61	\$17.56
43-5081	Stock Clerks and Order Fillers	834	947	(113)	26	\$11.64
31-1014	Nursing Assistants	983	926	57	22	\$11.95
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	755	771	(16)	15	\$14.41
43-4051	Customer Service Representatives	634	760	(126)	24	\$13.28
35-3031	Waiters and Waitresses	694	742	(48)	35	\$9.01
11-1021	General and Operations Managers	542	723	(181)	22	\$32.87
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	549	717	(168)	16	\$9.89
51-9199	Production Workers, All Other	730	642	88	22	\$14.87
25-1099	Postsecondary Teachers	679	636	43	22	\$27.27
25-2021	Elementary School Teachers, Except Special Education	532	553	(21)	14	\$29.12
11-9013	Farmers, Ranchers, and Other Agricultural Managers	515	512	3	6	\$14.06
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	333	507	(174)	12	\$27.11
25-9041	Teacher Assistants	424	501	(77)	13	\$12.01
39-9021	Personal Care Aides	342	497	(155)	17	\$13.59
33-9032	Security Guards	489	497	(8)	8	\$12.38
41-1011	First-Line Supervisors of Retail Sales Workers	457	476	(19)	10	\$19.10
43-3031	Bookkeeping, Accounting, and Auditing Clerks	444	473	(29)	5	\$15.77
49-9071	Maintenance and Repair Workers, General	396	463	(67)	18	\$22.18



To analyze the current skills and occupations of the people residing within an area, we used data from the Census LEHD program coupled with Census' new Longitudinal Origin-Destination Employment Statistics (LODES) program and is then matched with occupational data using staffing patterns.

Available workforce data is based on where workers live in comparison to where they work. Table 8, on the previous page, provides a breakdown of occupations filled by residents of Kankakee County. Using O*Net's standardized scale, Table 9 provides a list of the top skills of Kankakee County residents based on the top 25 occupations.

TABLE 9. Top Skills of Residents, Kankakee County

TOP SKILLS
Clerical
Production and Processing
Biology
Administration and Management
Personnel and Human Resources
Therapy and Counseling
Customer and Personal Service
Computers and Electronics
Food production
Education and Training
Psychology
Geography
Sales and Marketing
Economics and Accounting
Public Safety and Security
Transportation
Mechanical
Mathematics
English Language

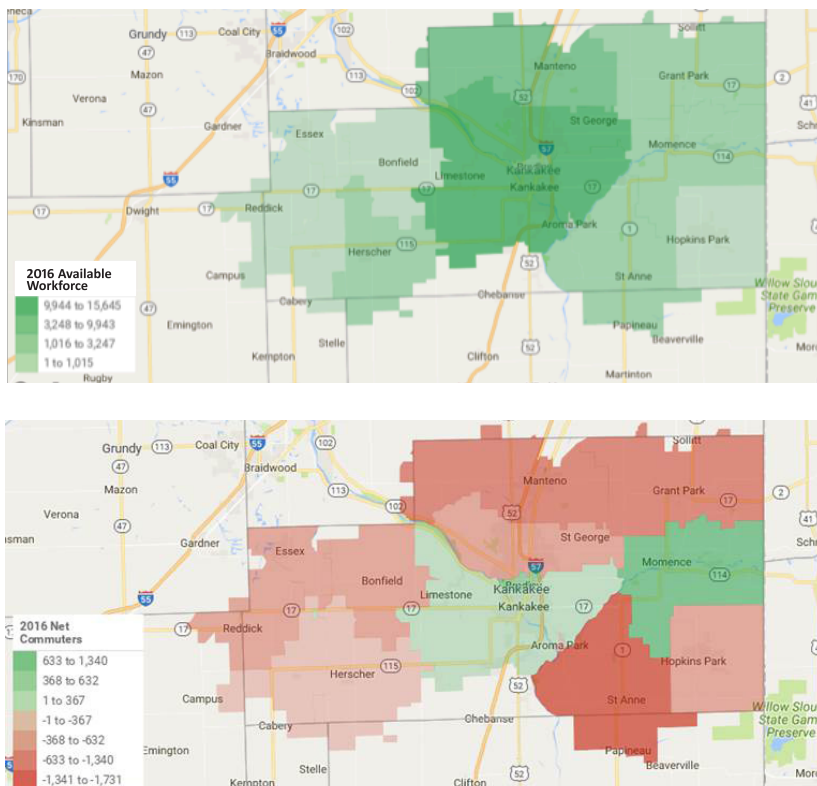


Labor Shed Analysis

Available workforce data is based on where workers live in comparison to where they work, whereas, net commuters are the minimum number of workers who commute in or out of the region to satisfy the regional numbers of jobs held. A positive number (shown in GREEN in the figure below) describes commuters entering a region, while a negative number (shown in RED) describes commuters leaving a region.

	JOBS	AVAILABLE WORKFORCE	NET COMMUTERS
Kankakee	45,972	51,971	-5,999
Grundy	20,076	29,587	-9,511
Livingston	14,950	17,346	-2,396

FIGURE 3. Net Commuters for all Occupations Residing in Kankakee County, by Zip Code (2016)



Net commuter data allow economic development professionals to understand which occupations and skills are leaving the area or vice versa. The top 25 largest occupations in Kankakee County are still losing about 1,280 residents to businesses outside the area.

The top occupations leaving the area for work elsewhere are laborers and material moving workers, general operations managers, sales representatives, janitors and cleaners, retail salespersons, and packers and packagers. Businesses in the area may have difficulty recruiting the more highly skilled workers amongst this group.

The jobs most people are commuting into the area for are heavy and tractor-trailer truck drivers, substitute teachers, production workers, and psychiatric technicians.

FIGURE 4. Top 25 Largest Occupations in Kankakee County, Net Commuters (2016)

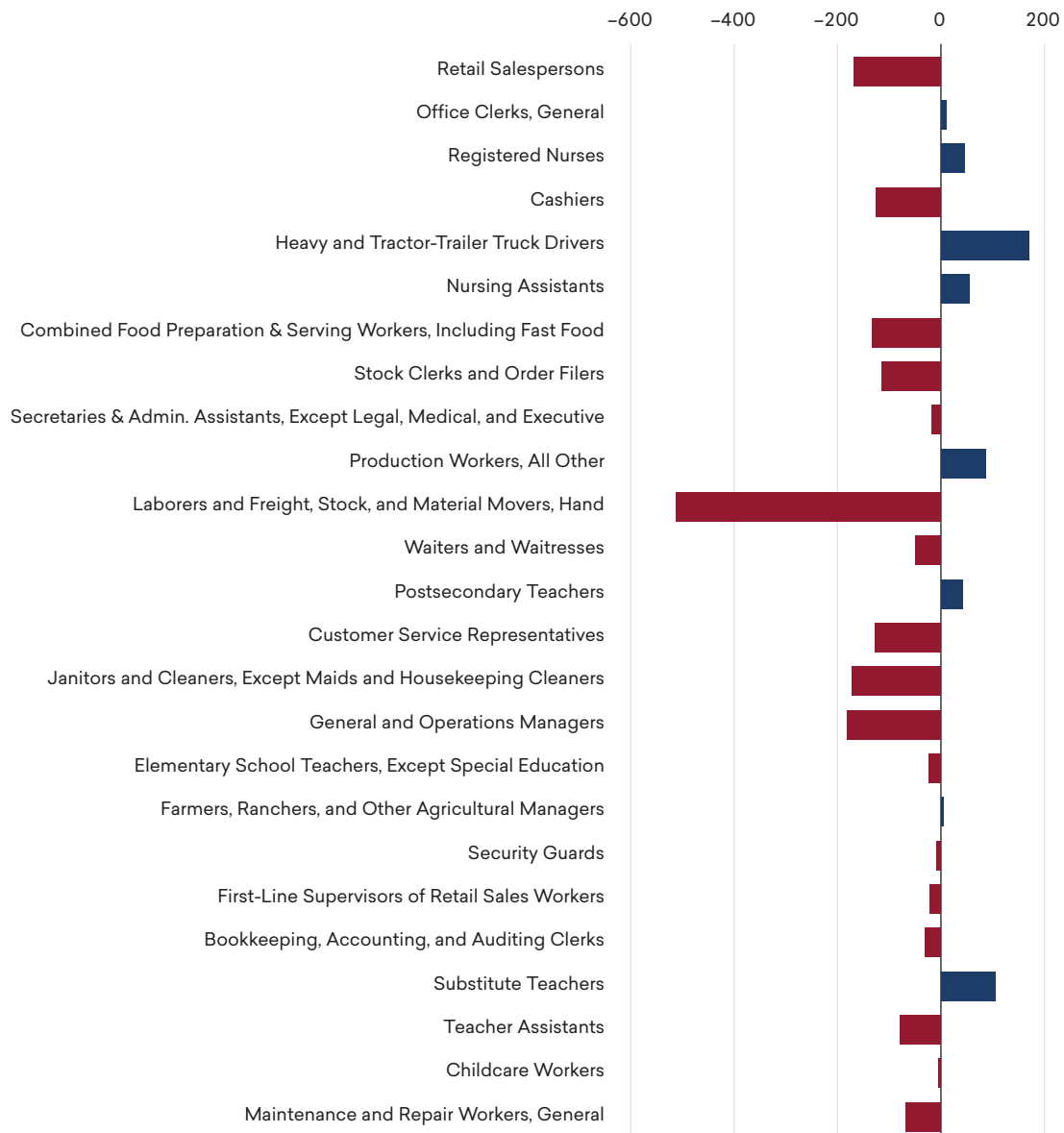


TABLE 10. Net Commuters by Occupation, Kankakee County (2016)

SOC	DESCRIPTION	2016 JOBS	2016 AVAILABLE WORKFORCE	2016 NET COMMUTERS	ANNUAL OPENINGS	MEDIAN HOURLY EARNINGS	2016 - 2026 CHANGE
	All Occupations	45,972	51,971	(5,999)	1,586	\$19.23	2,926
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	717	1,228	(511)	33	\$13.26	100
11-1021	General and Operations Managers	542	723	(181)	21	\$32.87	62
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	333	507	(174)	11	\$27.11	35
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	549	717	(168)	16	\$9.89	41
41-2031	Retail Salespersons	1,595	1,760	(165)	54	\$9.87	(61)
53-7064	Packers and Packagers, Hand	173	337	(164)	8	\$10.88	30
39-9021	Personal Care Aides	342	497	(155)	15	\$13.59	112
51-2092	Team Assemblers	166	314	(148)	9	\$17.74	50
53-3033	Light Truck or Delivery Services Drivers	183	315	(132)	5	\$12.07	17
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	937	1,067	(130)	35	\$9.05	36
43-4051	Customer Service Representatives	634	760	(126)	23	\$13.28	61
41-2011	Cashiers	1,243	1,366	(123)	52	\$9.12	(43)
31-1011	Home Health Aides	167	283	(116)	12	\$10.33	71
43-5081	Stock Clerks and Order Fillers	834	947	(113)	26	\$11.64	(29)
33-3051	Police and Sheriff's Patrol Officers	209	304	(95)	7	\$33.29	1
37-3011	Landscaping and Groundskeeping Workers	267	359	(92)	8	\$11.06	26
25-2022	Middle School Teachers, Except Special and Career/Technical Education	168	258	(90)	5	\$25.06	7
47-2061	Construction Laborers	287	371	(84)	5	\$17.15	(28)
39-9032	Recreation Workers	49	132	(83)	2	\$11.58	5
35-2014	Cooks, Restaurant	210	292	(82)	8	\$11.17	16
47-2111	Electricians	117	196	(79)	2	\$28.36	(11)
25-9041	Teacher Assistants	424	501	(77)	13	\$12.01	20

SOC	DESCRIPTION	2016 JOBS	2016 AVAILABLE WORKFORCE	2016 NET COMMUTERS	ANNUAL OPENINGS	MEDIAN HOURLY EARNINGS	2016 - 2026 CHANGE
53-7051	Industrial Truck and Tractor Operators	286	361	(75)	13	\$13.50	51
13-2011	Accountants and Auditors	182	254	(72)	10	\$26.19	37
49-9071	Maintenance and Repair Workers, General	396	463	(67)	17	\$22.18	53
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	142	119	23	6	\$22.31	32
29-2055	Surgical Technologists	93	70	23	2	\$19.47	7
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	230	207	23	14	\$9.12	0
25-2032	Career/Technical Education Teachers, Secondary School	74	48	26	2	\$26.15	0
29-2061	Licensed Practical and Licensed Vocational Nurses	341	313	28	10	\$23.29	(14)
43-3071	Tellers	150	119	31	6	\$12.11	(8)
51-9198	Helpers--Production Workers	274	243	31	12	\$10.85	22
43-9041	Insurance Claims and Policy Processing Clerks	97	65	32	9	\$17.63	54
21-1015	Rehabilitation Counselors	141	105	36	3	\$12.61	(15)
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	280	244	36	5	\$11.39	(146)
25-1099	Postsecondary Teachers	679	636	43	21	\$27.27	81
29-1141	Registered Nurses	1,324	1,278	46	48	\$30.61	149
29-2041	Emergency Medical Technicians and Paramedics	287	239	48	9	\$13.31	34
29-2011	Medical and Clinical Laboratory Technologists	183	135	48	5	\$28.87	3
31-1014	Nursing Assistants	983	926	57	22	\$11.95	(28)
29-2034	Radiologic Technologists	221	164	57	4	\$25.81	(3)
21-1093	Social and Human Service Assistants	293	232	61	7	\$22.49	13
29-2053	Psychiatric Technicians	235	164	71	4	\$18.31	17
51-9199	Production Workers, All Other	730	642	88	20	\$14.87	43
25-3098	Substitute Teachers	431	325	106	10	\$13.12	18
53-3032	Heavy and Tractor-Trailer Truck Drivers	1,125	954	171	54	\$17.56	300



Industry Cluster Analysis

The LWA 11 region can achieve economic success and growth by capitalizing on economic strengths, here categorized into similar industries called clusters. Industry cluster analysis highlights the strengths and weaknesses of each of those industries and shows where focus needs to be placed to encourage growth.

Each industry cluster is comprised of key industry sectors that have a high level of economic integration and interdependency. When analyzing these clusters, it is important to compare their regional concentration with the national average. This comparison reveals the industry cluster's relative concentration in the region, measured by location quotient (LQ; shows the industry's share of an area's employment relative to the national average—see more in the following section). Industries with high concentration (or LQ) are said to be specialized in a region.

In the LWA 11 region particularly, unique factors within the local economy allow each of the following private-sector clusters to have a strong concentration:

- Manufacturing
- Transportation, Warehousing, Distribution, and Logistics

These clusters were chosen by partners in the LWA 11 region. Each cluster represents areas for growth and diversification for the LWA 11 economy as well as opportunities for regional businesses to diversify their market base. Table 11 summarizes projected employment growth for each cluster specific to Kankakee County and corresponding concentration as measured by location quotient or LQ.

TABLE 11. Kankakee County Industry Cluster Performance Trends

INDUSTRY CLUSTER	EMPLOYMENT		GROWTH		LOCATION QUOTIENT		CURRENT AVERAGE EARNINGS
	2011	2016	2011-2016 CHANGE	2011-2016 % CHANGE	2011	2016	
Manufacturing	4,849	5,715	866	18%	1.34	1.56	\$80,961
Transportation, Warehousing, Distribution, and Logistics	4,140	4,734	594	14%	1.34	1.44	\$58,655

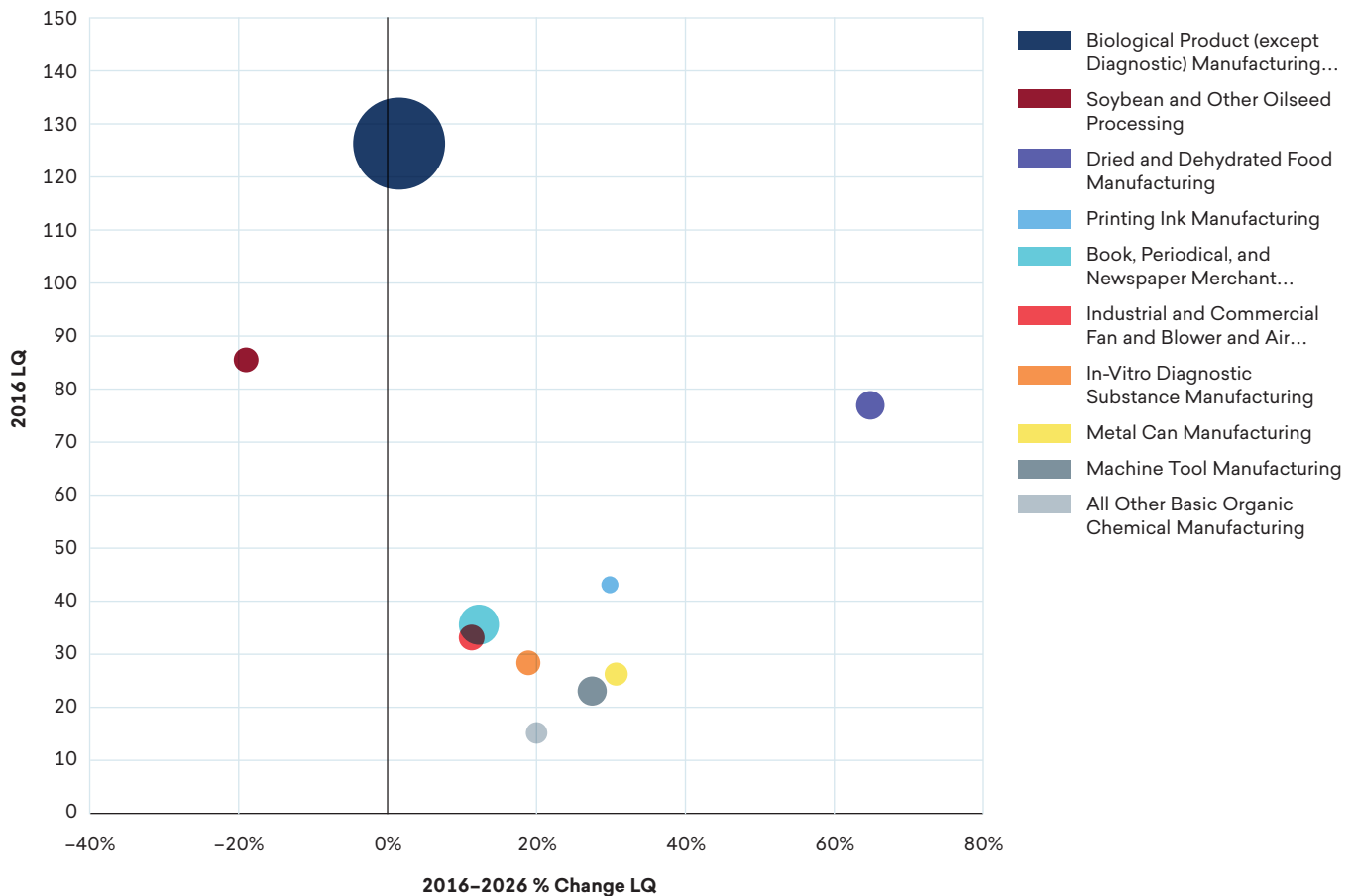


LOCATION QUOTIENTS

Location Quotients are useful for studying the composition of jobs in an area relative to the national concentration. In other words, a location quotient shows the industry's share of an area's employment relative to the national average. For example, a location quotient of 2.0 indicates that an industry accounts for twice the share of employment in the area than it does nationally, and a location quotient of 0.5 indicates that the area's share of employment in the industry is only half the national share. As illustrated in Figure 5, biological product manufacturing has an extremely high concentration—127.8 LQ. This means that for the size of the economy of Kankakee County, biological product manufacturing is more than 127 times more concentrated than would be expected in another economy of similar size.

Figure 5 shows the location quotient for the top 10 highest ranked industries in Kankakee County, graphed by 2016 LQ and projected LQ growth. The industries located in the upper right quadrant are emerging and can be seen as an economic development opportunity for this area.

FIGURE 5. Location Quotient of Top 10 Highest Ranked Industries in Kankakee Count*



* Bubble size represents 2016 jobs in each region

INDUSTRY CLUSTER DESCRIPTION

The following sections profile the Manufacturing and Transportation, Warehousing, Distribution, and Logistics clusters in Kankakee County. Each profile has a description of the industry cluster, including revenues and employment. The profiles each also have a labor and a supply chain analysis. The labor gap analysis examines the supply (the availability of qualified applicants) and the demand (jobs needed to be filled by employers) for labor by using labor market information to analyze recent employment trends, the occupational composition by industry, and the education pipeline of the available workforce. The supply chain analysis shows the demand for an industry cluster's goods and services coupled with information on the cluster supply chain (the purchases made by companies in the cluster).

The first figure shown in each cluster description is a map of the county's region that shows cluster jobs by zip code. The next graphic is a table that highlights employment trends for the cluster, illustrating which cluster sectors have been hiring, which sectors have been shedding jobs, and generally where cluster employment is located in the area. The last figure in each cluster description is a chart showing year-over-year cluster employment changes compared with state and national trends.

Data is used to provide a descriptive component of what has happened, what is currently happening, and what is projected to happen within any given industry cluster, industry sector, or occupation. This data can also be evaluated from varying perspectives to provide a larger context of economic understanding. For example, geographically specific data can better displace regional effects when compared with a larger geography (e.g., state or nation) and indicate whether a region may have a comparative advantage in any particular sector.

Each of the following metrics provided for the labor market gap analysis or supply chain analysis offers a different perspective of industry performance, the regional fit, or the economic ripple effects of cluster activity.

The tables for each industry cluster contain the following data:

- Historical job growth and current size
- Future job growth projection
- Industry concentration (location quotient)
- Job multiplier effects
- Industry average wage
- Establishments

Historical Job Growth and Current Size measures the current employment and past employment by industry sector. It also measures whether an industry has been growing or declining.

Future Job Growth Projection incorporates the historical growth and performance of an industry and as well as factoring in the growth expectations of an industry at a larger geographic scale (i.e., state, nation, or even global expectations). Industry projection rates are based on past trends carried forward and published projections from state and federal sources.

Industry Concentration (Location Quotient) compares the concentration of employment in an industry in a region with employment in the same industry for similar regions across the nation. The national average is set to 1.0. As explained in the Location Quotient section above, any industry with a concentration greater than 1.0 is considered to have high concentration.

Job Multiplier Effects indicates the importance of a job to the regional economy. For example, if a single job has a multiplier of 3, then this one job supports two other jobs in the regional economy due to an indirect or induced effect.

Industry Average Wage is based on industry staffing patterns and the average occupational wage associated with that staffing pattern. The average wage indicates the quality of jobs in a region.

Establishments provides the current and historic number of establishments in the region. A change in establishments can be a factor in determining the stage of an industry. For example, if the number of establishments declined while job numbers themselves remained strong, the industry might be consolidating.

LABOR MARKET ANALYSIS

One table is provided for each labor market analysis section for each cluster. It lists the top 25 occupations for the sector, the wages, the number of people employed in each occupation within the cluster, and the total number employed in each occupation in all industries within the county. This provides an understanding of the share of employment the cluster has within the county and LWA 11 region, and an assessment of the competition the cluster faces from other companies within the region for finding qualified employees.

SUPPLY CHAIN ANALYSIS

Three distinct topics (quantified in three tables) are discussed for each supply chain analysis. These analyses evaluate each cluster's economic performance in the county to provide insights into regional strengths, weaknesses, and opportunities for growth.

The first table shows the total demand for each industry sector within a given cluster. This is the demand by Kankakee County residents and businesses for the products and/or services produced by that industry sector—regardless of whether the products or services are actually produced within the county. Furthermore, the table shows how much of local demand is met by companies within the region and how much of local demand is met by importing from other regions. This comparison helps determine opportunities to expand local businesses' shares of local demand. For example, if only 10% of regional demand for a product is being met by regional companies, this table will quantify the value of the remaining 90% of demand that could be met by regional companies. (Note that the data for goods or services imported into the region does not include foreign imports.)

The second table shows the supply chain for each industry cluster. This table shows the purchases made by Kankakee County companies in the industry cluster according to product or service. These purchases are used to run a company and include everything from services to consumable supplies to capital investment in manufacturing equipment. The table also shows how much of the cluster's supply chain need is met by the companies inside the county and how much is imported.

The final table shows total cluster sales, both inside and outside the county. This is useful for understanding how much revenue a cluster is bringing into the area through its sales of goods or services outside of the region. Industries that predominately export their products bring new money into the economy, which in turn drives other regional businesses.



Manufacturing

Manufacturing industries typically offer competitive wages, contribute handsomely to a region’s gross regional product (GRP), and offer career pathways for workers with a wide variety of education and skills, including many middle-skill jobs.

Figure 6 compares the 2016 job distribution for the manufacturing cluster throughout Kankakee County with the minimum number of manufacturing workers who commute in or out of the region to satisfy manufacturing jobs held. A positive number (shown in GREEN in the figure below) describes commuters entering a region, while a negative number (shown in RED) describes commuters leaving a region.

The City of Bradley had the largest number of manufacturing jobs in 2016 (1,807), followed by the cities of Kankakee and Momence, 1,270 and 1,265, respectively. However, most of the residents working in production occupations live in Kankakee and Bourbonnais. There are approximately 14,700 classified production occupations jobs in Kankakee County (although there are only 5,715 manufacturing jobs) and 17,000 Kankakee residents who are classified under a production occupation. This means that roughly 2,320 Kankakee County residents commute elsewhere to find work because there are not enough jobs in their field within the county.

FIGURE 6. Manufacturing Cluster Job Distribution and Net Commuters for Kankakee County Residents working in Manufacturing Occupations (2016)

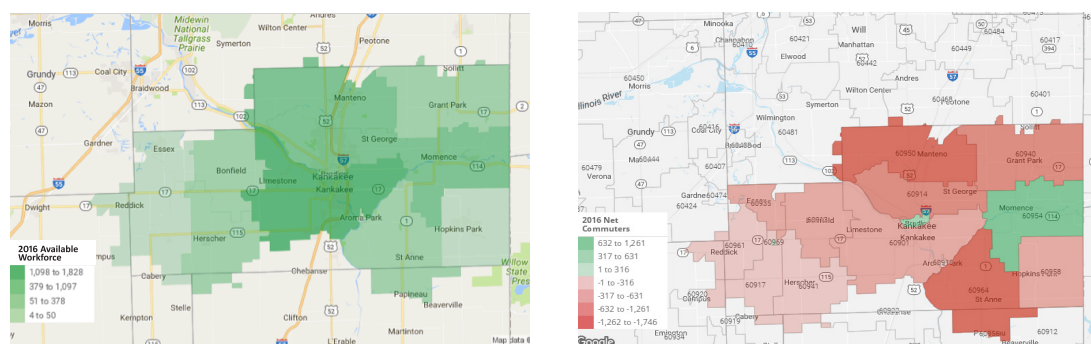


Table 12 below provides an overview for each of the individual industry sectors that comprise the manufacturing cluster in Kankakee County. Included are historic, current, and projected employment; historic and projected compound annual growth rate; historic and current employment concentration (LQ); average earnings; total sales; gross regional product (GRP); historic and current payroll establishments (businesses); and jobs multipliers (multiplier effect). The table is sorted largest to smallest by 2016 employment.

TABLE 12. Manufacturing Sector, Kankakee County

NAICS	INDUSTRY SECTOR	EMPLOYMENT			COMPOUND ANNUAL GROWTH RATE		CONCENTRATION (LQ)		AVERAGE EARNINGS	TOTAL SALES	GROSS REGIONAL PRODUCT (GRP)	PAYROLLED ESTABLISHMENTS		JOBS MULTIPLIER
		2011	2016	2021	2011-2016	2016-2021	2011	2016	2016	2016	2016	2011	2016	2016
325414	Biological Product (except Diagnostic) Manufacturing	840	1,139	1,297	6.3%	2.6%	104.08	126.29	\$107,941	\$953,617,386	\$590,899,983	1	1	1.72
311611	Animal (except Poultry) Slaughtering	493	583	724	3.4%	4.4%	11.31	14.71	\$58,386	\$343,784,102	\$55,175,735	3	3	1.43
331110	Iron and Steel Mills and Ferroalloy Manufacturing	303	363	411	3.7%	2.5%	10.88	14.67	\$91,004	\$336,847,146	\$61,114,720	2	2	1.79
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	258	292	336	2.5%	2.8%	31.03	33.49	\$38,606	\$38,918,428	\$16,546,212	1	1	1.14
333517	Machine Tool Manufacturing	162	274	326	11.0%	3.5%	14.73	23.18	\$83,420	\$54,618,472	\$27,405,685	4	4	1.23
311423	Dried and Dehydrated Food Manufacturing	115	258	390	17.6%	8.6%	35.63	77.28	\$89,403	\$180,286,450	\$30,750,502	1	1	1.65
311224	Soybean and Other Oilseed Processing	295	214	196	-6.2%	-1.7%	113.21	85.59	\$80,551	\$399,202,722	\$21,322,792	1	1	2.75
325413	In-Vitro Diagnostic Substance Manufacturing	69	205	268	24.2%	5.4%	11.62	28.74	\$92,590	\$101,623,733	\$49,898,522	2	2	1.53
325199	All Other Basic Organic Chemical Manufacturing	0	169	203	---	3.8%	0.00	15.30	\$100,239	\$377,554,784	\$56,399,878	0	1	2.45
325510	Paint and Coating Manufacturing	165	169	157	0.5%	-1.4%	14.52	14.46	\$84,782	\$97,991,766	\$32,329,404	2	2	1.40
326199	All Other Plastics Product Manufacturing	217	163	131	-5.5%	-4.3%	2.72	1.91	\$50,059	\$42,497,218	\$11,074,646	4	4	1.26
332431	Metal Can Manufacturing	139	153	175	1.9%	2.8%	22.11	26.39	\$67,212	\$65,018,134	\$13,615,684	1	1	1.34
332710	Machine Shops	130	146	179	2.3%	4.2%	1.55	1.74	\$48,482	\$17,341,876	\$8,024,242	12	14	1.15
333111	Farm Machinery and Equipment Manufacturing	<10	120	144	---	3.6%	0.13	6.80	\$59,595	\$39,731,222	\$13,037,395	2	2	1.27
325211	Plastics Material and Resin Manufacturing	253	114	82	-14.8%	-6.3%	15.47	6.74	\$121,335	\$193,835,812	\$42,797,779	1	1	2.23
326113	Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	76	110	114	7.5%	0.9%	6.59	9.53	\$88,024	\$64,399,914	\$16,783,051	1	1	1.50
325910	Printing Ink Manufacturing	44	108	122	19.8%	2.4%	15.10	43.08	\$73,187	\$42,554,947	\$15,499,544	2	3	1.29
321920	Wood Container and Pallet Manufacturing	17	88	101	39.7%	2.7%	0.97	4.73	\$86,726	\$30,199,629	\$10,311,844	4	3	1.33
337214	Office Furniture (except Wood) Manufacturing	0	80	118	---	8.2%	0.00	11.77	\$75,462	\$26,920,324	\$8,624,708	0	1	1.33
332321	Metal Window and Door Manufacturing	18	77	115	34.3%	8.4%	1.16	4.41	\$60,161	\$17,405,811	\$5,455,427	2	1	1.26
322230	Stationery Product Manufacturing	<10	76	52	---	-7.5%	0.03	13.91	\$57,731	\$20,100,718	\$6,558,949	1	1	1.23
312111	Soft Drink Manufacturing	25	71	98	23.0%	6.6%	1.14	3.18	\$115,124	\$62,624,722	\$12,598,736	1	1	1.75
311919	Other Snack Food Manufacturing	19	70	103	29.6%	8.2%	1.81	6.04	\$66,572	\$49,407,622	\$16,745,835	1	1	1.50
311211	Flour Milling	52	52	24	0.3%	-14.2%	13.43	12.88	\$64,022	\$45,530,548	\$6,562,957	2	2	1.89
332312	Fabricated Structural Metal Manufacturing	36	50	63	7.2%	4.4%	1.48	1.91	\$70,992	\$14,919,496	\$4,413,683	1	1	1.37
	Totals for Manufacturing in Kankakee County	4,849	5,715	6,469	3.3%	2.5%	1.34	1.56	\$80,961	\$3,828,879,081	\$1,203,032,456	117	120	N/A
	Totals for Manufacturing in LWA 11 Region	8,414	9,352	10,215	2.1%	1.8%	1.34	1.45	\$81,069	\$5,883,073,964	\$1,745,760,440	238	236	N/A
	Totals for All Kankakee County Industries	44,091	45,972	47,759	0.8%	0.8%	0.72	0.88	\$47,358	\$8,623,310,357	\$3,685,530,409	2,523	2,464	N/A



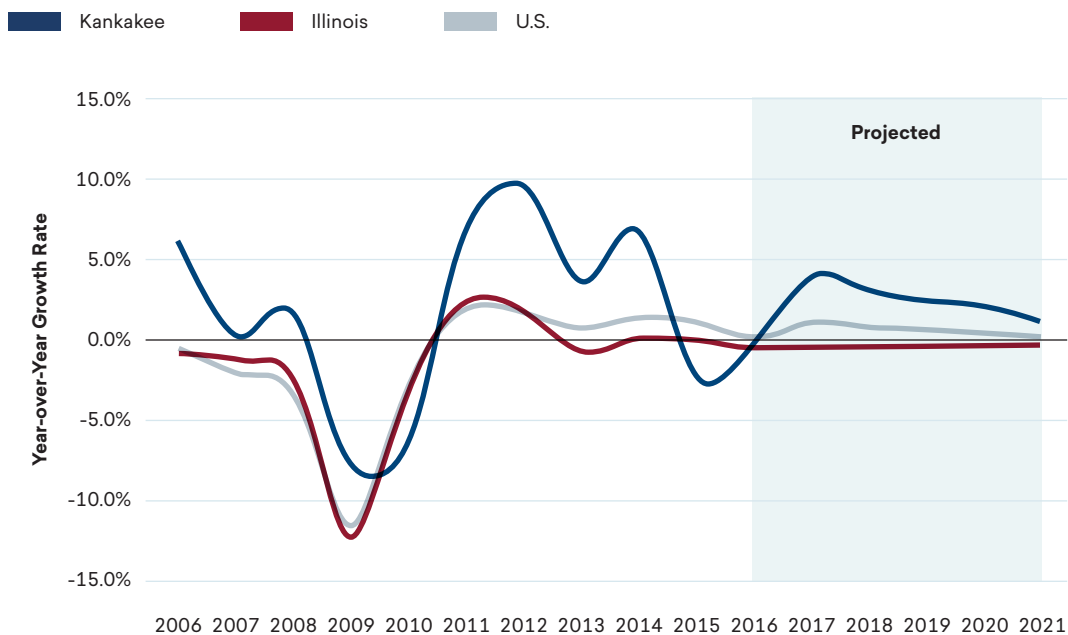
The manufacturing cluster accounted for 5,715 jobs and 120 establishments in 2016, more than 12% of the total employment and less than 5% of total establishments in Kankakee County. Employment in Kankakee County’s manufacturing cluster accounts for 61% of the total LWA 11 region. Overall employment for this cluster is 1.5 times more concentrated in Kankakee County than would be expected based on national employment averages. As a whole, the cluster experienced strong job growth over the last five years (over 3% annual growth) and is expected to slow by an average of 2.5% each year for the next five years. Going forward, this cluster has potential to continue to grow and diversify.

Total sales for all companies in this cluster were over \$3.8 billion (44% of total industry sales in the county) and contributed more than \$1 billion to the region’s gross regional product (nearly one-third of total GRP) in 2016—signifying a valuable economic engine in this region.

A significant contributor to the growth, size, and value of this cluster is biological product (except diagnostic) manufacturing. The industry added 300 jobs over the last five years, growing at an annual rate of approximately 6%, and generated one-quarter of total manufacturing sales while contributing roughly 16% to the area’s regional product.

The remaining industries comprising the manufacturing cluster in Kankakee County added 566 jobs to company payrolls. Combined, the manufacturing cluster in Kankakee County outperformed the state and nation over the past decade and is projected to continue on this path, albeit, at a slower pace. See Figure 7 below for manufacturing employment trends.

FIGURE 7. Manufacturing Employment Trends and Projections, Year-over-Year Employment Growth



LABOR MARKET ANALYSIS

Table 13 lists the top 25 occupations in Kankakee County's manufacturing cluster. These occupations account for 60% of all cluster employment. The table provides the number of people employed by occupation in the cluster, and the number of people employed in that occupation in all industries in the region. This indicates the level of competition employers may face from industries outside the cluster when hiring for key occupations.

The occupation with the most jobs in the manufacturing cluster is all other production workers at 491 jobs. This occupation comprises nearly 9% of the cluster's total jobs. However, there are approximately 735 other production workers employed in the county, meaning the cluster employs most of these workers, at a median wage of \$14.87 per hour.

TABLE 13. Largest Occupations in Manufacturing, Kankakee County

SOC	DESCRIPTION	EMPLOYED IN INDUSTRY		CHANGE	% OF INDUSTRY CLUSTER TOTAL JOBS	EMPLOYED IN ALL INDUSTRIES IN COUNTY	INDUSTRY CLUSTERS % OF ALL INDUSTRY JOBS	MEDIAN HOURLY EARNINGS
		2011	2016	2011-2016	2016	2016	2016	
51-9199	Production Workers, All Other	337	491	154	8.6%	735	66.8%	\$14.87
51-9111	Packaging and Filling Machine Operators and Tenders	172	234	62	4.1%	247	94.9%	\$11.23
51-1011	First-Line Supervisors of Production and Operating Workers	198	234	36	4.1%	277	84.4%	\$27.83
51-4041	Machinists	175	229	54	4.0%	268	85.5%	\$18.33
51-9198	Helpers--Production Workers	181	217	36	3.8%	274	79.3%	\$10.85
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	134	154	20	2.7%	746	20.7%	\$13.26
49-9071	Maintenance and Repair Workers, General	115	140	25	2.5%	409	34.2%	\$22.18
43-9061	Office Clerks, General	114	136	22	2.4%	1353	10.1%	\$14.13
49-9041	Industrial Machinery Mechanics	103	134	31	2.4%	165	81.5%	\$27.95
51-2092	Team Assemblers	145	134	(11)	2.4%	169	79.4%	\$17.74
43-5071	Shipping, Receiving, and Traffic Clerks	102	119	17	2.1%	276	43.1%	\$13.21
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	107	118	11	2.1%	147	80.5%	\$18.27
53-7051	Industrial Truck and Tractor Operators	95	118	23	2.1%	286	41.3%	\$13.50
11-1021	General and Operations Managers	99	114	15	2.0%	558	20.4%	\$32.87
13-1199	Business Operations Specialists, All Other	69	102	33	1.8%	380	26.8%	\$30.94
51-4121	Welders, Cutters, Solderers, and Brazers	87	95	8	1.7%	137	69.4%	\$16.36
51-3023	Slaughterers and Meat Packers	77	92	15	1.6%	93	98.7%	\$14.32
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	68	75	7	1.3%	390	19.3%	\$27.11
43-4051	Customer Service Representatives	66	75	9	1.3%	659	11.4%	\$13.28
17-2112	Industrial Engineers	69	74	5	1.3%	82	90.7%	\$43.30
53-7064	Packers and Packers, Hand	62	71	9	1.2%	177	40.3%	\$10.88
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	60	68	8	1.2%	75	91.2%	\$13.35
11-9199	Managers, All Other	48	67	19	1.2%	510	13.1%	\$39.10
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders	56	65	9	1.1%	68	95.3%	\$19.19
43-5081	Stock Clerks and Order Fillers	47	60	13	1.1%	843	7.2%	\$11.64

SUPPLY CHAIN ANALYSIS

Table 14 provides a picture about the total demand in Kankakee County by all Kankakee County residents and businesses for products made by companies in the manufacturing cluster—worth a total of \$1.7 billion in the area. In Table 14, we see that the companies in these sectors meets nearly 21% of regional demand for their products, while the region imports 80% of regional needs for these products. This would seem to indicate potential markets for local suppliers. Particularly, those industries generating large demand and importing most of their product, including (but not limited to):

- Light Truck and Utility Vehicle Manufacturing
- Pharmaceutical Preparation Manufacturing
- Meat Processed from Carcasses
- Automobile Manufacturing
- Plastics Product Manufacturing

TABLE 14. Manufacturing Regional Demand Met by Kankakee County Companies (2016)

NAICS	INDUSTRY SECTOR	2016 DEMAND				TOTAL DEMAND	% OF TOTAL DEMAND
		SATISFIED IN-REGION	% SATISFIED IN-REGION	SATISFIED OUT-OF REGION (IMPORTS)	% SATISFIED OUT-OF-REGION (IMPORTS)		
325414	Biological Product (except Diagnostic) Manufacturing	\$78,642,632	97.6%	\$1,968,756	2.4%	\$80,611,387	4.7%
325199	All Other Basic Organic Chemical Manufacturing	\$45,163,623	76.9%	\$13,546,337	23.1%	\$58,709,960	3.4%
336112	Light Truck and Utility Vehicle Manufacturing	\$0	0.0%	\$49,630,778	100.0%	\$49,630,778	2.9%
325412	Pharmaceutical Preparation Manufacturing	\$0	0.0%	\$48,227,083	100.0%	\$48,227,083	2.8%
331110	Iron and Steel Mills and Ferroalloy Manufacturing	\$33,465,437	70.9%	\$13,725,081	29.1%	\$47,190,518	2.7%
311611	Animal (except Poultry) Slaughtering	\$36,115,543	77.6%	\$10,417,789	22.4%	\$46,533,332	2.7%
311612	Meat Processed from Carcasses	\$343,813	0.7%	\$45,770,261	99.3%	\$46,114,074	2.7%
325211	Plastics Material and Resin Manufacturing	\$22,965,551	53.5%	\$19,925,106	46.5%	\$42,890,657	2.5%
336111	Automobile Manufacturing	\$0	0.0%	\$24,124,075	100.0%	\$24,124,075	1.4%
326199	All Other Plastics Product Manufacturing	\$5,616,563	25.0%	\$16,876,261	75.0%	\$22,492,825	1.3%
311224	Soybean and Other Oilseed Processing	\$20,232,042	96.6%	\$716,957	3.4%	\$20,948,998	1.2%
311225	Fats and Oils Refining and Blending	\$0	0.0%	\$19,270,475	100.0%	\$19,270,475	1.1%
311615	Poultry Processing	\$0	0.0%	\$17,699,129	100.0%	\$17,699,129	1.0%
311421	Fruit and Vegetable Canning	\$0	0.0%	\$16,327,902	100.0%	\$16,327,902	0.9%
311930	Flavoring Syrup and Concentrate Manufacturing	\$523,190	3.2%	\$15,763,469	96.8%	\$16,286,659	0.9%
325411	Medicinal and Botanical Manufacturing	\$0	0.0%	\$15,178,389	100.0%	\$15,178,389	0.9%
322211	Corrugated and Solid Fiber Box Manufacturing	\$0	0.0%	\$14,557,251	100.0%	\$14,557,251	0.8%
312111	Soft Drink Manufacturing	\$11,348,172	81.0%	\$2,668,590	19.0%	\$14,016,762	0.8%
325193	Ethyl Alcohol Manufacturing	\$0	0.0%	\$13,719,539	100.0%	\$13,719,539	0.8%
323111	Commercial Printing (except Screen and Books)	\$749,966	5.7%	\$12,335,598	94.3%	\$13,085,565	0.8%
332431	Metal Can Manufacturing	\$12,805,376	99.0%	\$125,695	1.0%	\$12,931,070	0.8%
311221	Wet Corn Milling	\$0	0.0%	\$12,615,213	100.0%	\$12,615,213	0.7%
312120	Breweries	\$1,015,734	8.1%	\$11,459,745	91.9%	\$12,475,479	0.7%
334111	Electronic Computer Manufacturing	\$0	0.0%	\$11,593,830	100.0%	\$11,593,830	0.7%
325620	Toilet Preparation Manufacturing	\$243,503	2.1%	\$11,209,740	97.9%	\$11,453,243	0.7%
	Totals for Manufacturing in Kankakee County	\$356,545,629	20.7%	\$1,365,056,129	79.3%	\$1,721,601,758	100.0%
	Totals for Manufacturing in LWA 11 Region	\$569,168,444	17.8%	\$2,635,957,909	82.2%	\$3,205,126,354	100.0%
	Totals for All Kankakee Industries	\$1,894,773,013	20.8%	\$7,195,929,245	79.2%	\$9,090,702,257	100.0%

Table 15 shows the economic development opportunity to build up the region's supply chain supporting manufacturing companies. This table shows the goods and services that companies within the manufacturing cluster buy to use in making their products.

Approximately 20% of manufacturing supply needs are met within the area, while the remaining 80% are purchased from outside. In total, the value of the manufacturing supply chain for Kankakee County manufacturers is \$2.1 billion. Most imported supplies are manufactured goods rather than services, although wholesale trade and transportation and warehousing services have significant levels of demand supplied from outside the region.

TABLE 15. Manufacturing Supply Chain, Kankakee County (2016)

NAICS	PURCHASES FROM	2016 PURCHASES				TOTAL PURCHASES	% OF TOTAL PURCHASES
		IN-REGION PURCHASES	% IN-REGION PURCHASES	IMPORTED PURCHASES	% IMPORTED PURCHASES		
31	Manufacturing	\$271,566,570	31.3%	\$594,809,046	68.7%	\$866,375,616	41.2%
11	Crop and Animal Production	\$26,076,597	6.3%	\$385,196,407	93.7%	\$411,273,004	19.5%
42	Wholesale Trade	\$44,589,326	17.2%	\$215,078,490	82.8%	\$259,667,816	12.3%
55	Management of Companies and Enterprises	\$6,336,096	4.2%	\$145,645,795	95.8%	\$151,981,890	7.2%
48	Transportation and Warehousing	\$32,991,499	24.6%	\$101,181,345	75.4%	\$134,172,845	6.4%
54	Professional, Scientific, and Technical Services	\$6,683,315	9.9%	\$61,023,128	90.1%	\$67,706,443	3.2%
21	Mining, Quarrying, and Oil and Gas Extraction	\$163,919	0.4%	\$45,448,027	99.6%	\$45,611,946	2.2%
53	Real Estate and Rental and Leasing	\$3,656,495	11.2%	\$29,094,296	88.8%	\$32,750,791	1.6%
56	Administrative and Support and Waste Management and Remediation Services	\$5,345,949	18.0%	\$24,397,026	82.0%	\$29,742,976	1.4%
22	Utilities	\$4,222,913	15.6%	\$22,826,912	84.4%	\$27,049,825	1.3%
52	Finance and Insurance	\$3,293,004	13.4%	\$21,199,373	86.6%	\$24,492,377	1.2%
51	Information	\$1,874,439	10.9%	\$15,292,672	89.1%	\$17,167,111	0.8%
44	Retail Trade	\$3,638,409	34.8%	\$6,808,183	65.2%	\$10,446,592	0.5%
72	Accommodation and Food Services	\$3,102,311	34.7%	\$5,828,688	65.3%	\$8,930,999	0.4%
81	Other Services (except Public Administration)	\$2,453,739	30.6%	\$5,557,556	69.4%	\$8,011,295	0.4%
23	Construction	\$1,136,080	21.9%	\$4,055,017	78.1%	\$5,191,096	0.2%
71	Arts, Entertainment, and Recreation	\$182,748	11.3%	\$1,433,983	88.7%	\$1,616,732	0.1%
90	Government	\$302,739	27.0%	\$816,667	73.0%	\$1,119,406	0.1%
61	Educational Services	\$263,662	24.5%	\$813,064	75.5%	\$1,076,726	0.1%
62	Health Care and Social Assistance	\$274,443	42.0%	\$379,655	58.0%	\$654,099	0.0%
	Totals for Manufacturing in Kankakee County	\$418,154,255	19.9%	\$1,686,885,330	80.1%	\$2,105,039,584	100.0%
	Totals for Manufacturing in LWA 11 Region	\$569,168,444	17.8%	\$2,635,957,909	82.2%	\$3,205,126,354	100.0%
	Totals for All Kankakee County Industries	\$847,913,774	20.7%	\$3,241,440,487	79.3%	\$4,089,354,259	100.0%



Table 16 shows the types of manufactured products purchased by Kankakee County manufacturing companies.

TABLE 16. Manufacturing Manufactured Products Supply Chain, Kankakee County (2016)

NAICS	PURCHASES FROM	2016 PURCHASES				TOTAL PURCHASES	% OF TOTAL PURCHASES
		IN-REGION PURCHASES	% IN-REGION PURCHASES	IMPORTED PURCHASES	% IMPORTED PURCHASES		
325	Chemical Manufacturing	\$156,514,209	41.4%	\$221,364,319	58.6%	\$377,878,527	32.5%
311	Food Manufacturing	\$62,398,336	27.5%	\$164,324,740	72.5%	\$226,723,075	19.5%
331	Primary Metal Manufacturing	\$33,417,611	34.7%	\$62,971,262	65.3%	\$96,388,873	8.3%
332	Fabricated Metal Product Manufacturing	\$21,695,071	27.3%	\$57,640,908	72.7%	\$79,335,979	6.8%
324	Petroleum and Coal Products Manufacturing	\$0	0.0%	\$75,014,843	100.0%	\$75,014,843	6.5%
326	Plastics and Rubber Products Manufacturing	\$9,953,211	17.5%	\$46,922,498	82.5%	\$56,875,709	4.9%
322	Paper Manufacturing	\$1,577,371	3.7%	\$41,221,318	96.3%	\$42,798,690	3.7%
336	Transportation Equipment Manufacturing	\$1,671,620	4.0%	\$40,287,141	96.0%	\$41,958,761	3.6%
333	Machinery Manufacturing	\$6,406,150	19.1%	\$27,084,631	80.9%	\$33,490,782	2.9%
327	Nonmetallic Mineral Product Manufacturing	\$3,950,103	14.1%	\$24,023,716	85.9%	\$27,973,818	2.4%
334	Computer and Electronic Product Manufacturing	\$286,873	1.3%	\$21,641,313	98.7%	\$21,928,186	1.9%
321	Wood Product Manufacturing	\$1,333,618	7.2%	\$17,061,193	92.8%	\$18,394,810	1.6%
339	Miscellaneous Manufacturing	\$88,046	0.5%	\$16,726,920	99.5%	\$16,814,966	1.4%
323	Printing and Related Support Activities	\$665,809	5.2%	\$12,220,375	94.8%	\$12,886,184	1.1%
335	Electrical Equipment, Appliance, and Component Manufacturing	\$636,726	5.0%	\$12,096,614	95.0%	\$12,733,341	1.1%
312	Beverage and Tobacco Product Manufacturing	\$3,321,381	38.8%	\$5,246,167	61.2%	\$8,567,548	0.7%
337	Furniture and Related Product Manufacturing	\$332,724	6.0%	\$5,258,773	94.0%	\$5,591,497	0.5%
313	Textile Mills	\$649,161	16.5%	\$3,273,431	83.5%	\$3,922,593	0.3%
314	Textile Product Mills	\$268,453	18.1%	\$1,216,581	81.9%	\$1,485,034	0.1%
315	Apparel Manufacturing	\$67,748	10.7%	\$566,565	89.3%	\$634,312	0.1%
316	Leather and Allied Product Manufacturing	\$15,143	15.3%	\$84,150	84.7%	\$99,293	0.0%
	Totals for Manufacturing Purchases in Kankakee County	\$305,249,363	26.3%	\$856,247,458	73.7%	\$1,161,496,821	100.0%
	Totals for Manufacturing Purchases in LWA 11 Region	\$454,455,262	19.9%	\$1,832,709,214	80.1%	\$2,287,164,476	100.0%
	Totals for All Kankakee County Industries	\$847,913,774	20.7%	\$3,241,440,487	79.3%	\$4,089,354,259	100.0%

Table 17 shows the amount of goods sold by Kankakee County companies both inside and outside the region. These companies sell over \$3.8 billion of products, of which nearly \$3.5 billion is sold outside Kankakee County, thus bringing substantial revenues into the region.

TABLE 17. Kankakee County Manufacturing Companies' Sales in Region and Exported Out of Region

NAICS	PURCHASES FROM	2016 PURCHASES				TOTAL PURCHASES	% OF TOTAL PURCHASES
		IN-REGION PURCHASES	% IN-REGION PURCHASES	IMPORTED PURCHASES	% IMPORTED PURCHASES		
325414	Biological Product (except Diagnostic) Manufacturing	\$78,642,632	8.2%	\$874,974,754	91.8%	\$953,617,386	24.9%
311224	Soybean and Other Oilseed Processing	\$20,232,042	5.1%	\$378,970,680	94.9%	\$399,202,722	10.4%
325199	All Other Basic Organic Chemical Manufacturing	\$45,163,623	12.0%	\$332,391,161	88.0%	\$377,554,784	9.9%
311611	Animal (except Poultry) Slaughtering	\$36,115,543	10.5%	\$307,668,559	89.5%	\$343,784,102	9.0%
331110	Iron and Steel Mills and Ferroalloy Manufacturing	\$33,465,437	9.9%	\$303,381,709	90.1%	\$336,847,146	8.8%
325211	Plastics Material and Resin Manufacturing	\$22,965,552	11.8%	\$170,870,260	88.2%	\$193,835,812	5.1%
311423	Dried and Dehydrated Food Manufacturing	\$2,688,893	1.5%	\$177,597,557	98.5%	\$180,286,450	4.7%
325413	In-Vitro Diagnostic Substance Manufacturing	\$6,315,811	6.2%	\$95,307,922	93.8%	\$101,623,733	2.7%
325510	Paint and Coating Manufacturing	\$6,762,129	6.9%	\$91,229,637	93.1%	\$97,991,766	2.6%
332431	Metal Can Manufacturing	\$12,805,375	19.7%	\$52,212,759	80.3%	\$65,018,134	1.7%
326113	Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing	\$6,177,341	9.6%	\$58,222,573	90.4%	\$64,399,914	1.7%
312111	Soft Drink Manufacturing	\$11,348,172	18.1%	\$51,276,550	81.9%	\$62,624,722	1.6%
333517	Machine Tool Manufacturing	\$1,777,465	3.3%	\$52,841,007	96.7%	\$54,618,472	1.4%
311919	Other Snack Food Manufacturing	\$5,093,469	10.3%	\$44,314,153	89.7%	\$49,407,622	1.3%
311211	Flour Milling	\$3,826,323	8.4%	\$41,704,225	91.6%	\$45,530,548	1.2%
325910	Printing Ink Manufacturing	\$806,488	1.9%	\$41,748,459	98.1%	\$42,554,947	1.1%
326199	All Other Plastics Product Manufacturing	\$5,616,564	13.2%	\$36,880,654	86.8%	\$42,497,218	1.1%
333111	Farm Machinery and Equipment Manufacturing	\$3,587,817	9.0%	\$36,143,405	91.0%	\$39,731,222	1.0%
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	\$2,856,255	7.3%	\$36,062,173	92.7%	\$38,918,428	1.0%
321920	Wood Container and Pallet Manufacturing	\$2,279,862	7.5%	\$27,919,767	92.5%	\$30,199,629	0.8%
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	\$4,803,476	16.3%	\$24,682,963	83.7%	\$29,486,439	0.8%
337214	Office Furniture (except Wood) Manufacturing	\$1,577,886	5.9%	\$25,342,438	94.1%	\$26,920,324	0.7%
322230	Stationery Product Manufacturing	\$664,903	3.3%	\$19,435,815	96.7%	\$20,100,718	0.5%
311824	Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	\$1,998,645	10.3%	\$17,457,880	89.7%	\$19,456,525	0.5%
332321	Metal Window and Door Manufacturing	\$1,536,905	8.8%	\$15,868,906	91.2%	\$17,405,811	0.5%
332710	Machine Shops	\$2,467,954	14.2%	\$14,873,922	85.8%	\$17,341,876	0.5%
327120	Clay Building Material and Refractories Manufacturing	\$1,803,832	11.3%	\$14,088,994	88.7%	\$15,892,826	0.4%
333120	Construction Machinery Manufacturing	\$1,097,487	7.2%	\$14,133,895	92.8%	\$15,231,382	0.4%
332312	Fabricated Structural Metal Manufacturing	\$2,217,420	14.9%	\$12,702,076	85.1%	\$14,919,496	0.4%
	Totals for Manufacturing in Kankakee County	\$356,545,639	9.3%	\$3,472,333,452	90.7%	\$3,828,879,081	100.0%
	Totals for Manufacturing in LWA 11 Region	\$528,049,793	9.0%	\$5,355,024,174	91.0%	\$5,883,073,964	100.0%
	Totals for All Kankakee County Industries	\$1,885,666,553	21.9%	\$6,737,643,837	78.1%	\$8,623,310,357	100.0%



Transportation, Warehousing, Distribution, and Logistics

The transportation, warehousing, distribution, and logistics (TWDL) cluster is a combination of two industry classes: transportation and warehousing and wholesale trade.

Figure 8 compares the 2016 job distribution for the TWDL cluster throughout Kankakee County with the minimum number of TWDL workers who commute in or out of the region to satisfy TWDL jobs held. A positive number (shown in GREEN in the figure below) describes commuters entering a region, while a negative number (shown in RED) describes commuters leaving a region.

The City of Kankakee had the largest number of TWDL jobs in 2016 (2,003), followed by the cities of Manteno and Momence, 880 and 675, respectively. Most of the residents working in production occupations live in Morris, Minooka, and Coal City. There are approximately 6,700 classified production occupations jobs in Grundy County (although there are only 1,365 manufacturing jobs) and 9,900 Grundy County residents who are classified under a production occupation. This means that roughly 3,200 Grundy County residents commute elsewhere to find work because there are not enough jobs in their field within the county.

FIGURE 8. TWDL Cluster Job Distribution and Net Commuters for Kankakee County Residents working in TWDL Occupations (2016)

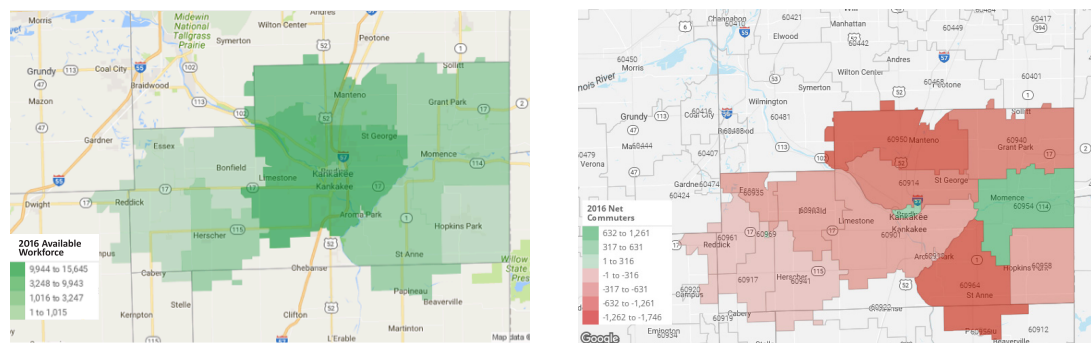


Table 18 below provides an overview for each of the individual industry sectors that comprise the TWDL cluster in Kankakee County. Included are historic, current, and projected employment; historic and projected compound annual growth rate; historic and current employment concentration (LQ); average earnings; total sales; gross regional product (GRP); historic and current payroll establishments (businesses); and jobs multipliers (multiplier effect). The table is sorted largest to smallest by 2016 employment.

TABLE 18. TWDL Sector, Kankakee County

NAICS	INDUSTRY SECTOR	EMPLOYMENT			COMPOUND ANNUAL GROWTH RATE		CONCENTRATION (LQ)		AVERAGE EARNINGS	TOTAL SALES	GROSS REGIONAL PRODUCT (GRP)	PAYROLLED ESTABLISHMENTS		JOBS MULTIPLIER
		2011	2016	2021	2011-2016	2016-2021	2011	2016	2016	2016	2016	2011	2016	2016
484121	General Freight Trucking, Long-Distance, Truckload	581	848	1,070	7.9%	4.8%	3.29	4.73	\$52,567	\$136,557,106	\$54,098,846	32	29	1.20
424920	Book, Periodical, and Newspaper Merchant Wholesalers	393	437	431	2.1%	-0.2%	25.20	35.86	\$34,988	\$44,357,642	\$29,642,491	1	1	1.19
493110	General Warehousing and Storage	81	319	437	31.7%	6.5%	0.49	1.43	\$54,820	\$38,103,967	\$22,263,343	4	5	1.19
482110	Rail transportation	262	302	330	2.9%	1.8%	3.77	4.15	\$86,980	\$99,638,312	\$47,126,430	0	0	1.37
424490	Other Grocery and Related Products Merchant Wholesalers	223	280	334	4.6%	3.6%	3.33	4.22	\$77,549	\$63,424,850	\$42,603,767	7	6	1.43
488510	Freight Transportation Arrangement	306	234	157	-5.2%	-7.7%	5.16	3.48	\$37,950	\$24,428,433	\$11,247,664	2	5	1.17
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	202	221	245	1.8%	2.1%	5.91	6.38	\$72,387	\$46,593,322	\$31,253,368	5	6	1.41
484110	General Freight Trucking, Local	243	211	189	-2.8%	-2.2%	2.80	2.30	\$55,406	\$36,943,495	\$14,621,196	43	39	1.18
423510	Metal Service Centers and Other Metal Merchant Wholesalers	177	190	201	1.4%	1.2%	5.10	5.19	\$61,560	\$33,853,087	\$22,721,176	6	5	1.35
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	127	150	179	3.4%	3.5%	3.61	3.70	\$54,258	\$24,871,078	\$9,804,698	2	5	1.20
485410	School and Employee Bus Transportation	128	127	125	-0.1%	-0.3%	2.29	2.21	\$14,275	\$3,727,726	\$2,166,074	6	5	1.04
484122	General Freight Trucking, Long-Distance, Less Than Truckload	45	124	175	22.5%	7.2%	0.65	1.60	\$67,829	\$24,904,547	\$9,850,874	5	9	1.25
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	77	118	140	8.8%	3.6%	2.82	3.93	\$54,955	\$19,764,139	\$13,259,392	6	6	1.32
492110	Couriers and Express Delivery Services	86	103	75	3.7%	-6.2%	0.57	0.61	\$37,422	\$11,075,972	\$5,777,814	2	3	1.12
484220	Specialized Freight (except Used Goods) Trucking, Local	82	83	101	0.4%	3.9%	1.27	1.25	\$61,432	\$15,109,509	\$5,971,346	17	18	1.22
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	74	76	85	0.5%	2.4%	2.51	2.50	\$47,286	\$10,617,117	\$7,112,697	8	8	1.27
485210	Interurban and Rural Bus Transportation	29	72	104	19.5%	7.7%	5.21	12.99	\$40,571	\$5,928,852	\$3,432,671	1	1	1.12
424710	Petroleum Bulk Stations and Terminals	<10	54	74	---	6.7%	0.91	5.44	\$71,930	\$11,634,400	\$7,753,567	2	1	1.41
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	27	52	61	13.9%	3.2%	0.63	1.09	\$84,752	\$13,013,574	\$8,739,744	3	5	1.49
425120	Wholesale Trade Agents and Brokers	84	48	28	-10.4%	-10.7%	0.34	0.19	\$81,328	\$20,749,801	\$13,957,710	17	15	1.50
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	10	41	61	32.4%	8.1%	0.17	0.70	\$161,922	\$20,951,929	\$14,080,304	3	3	1.96
423830	Industrial Machinery and Equipment Merchant Wholesalers	27	41	48	8.8%	3.4%	0.30	0.45	\$59,856	\$7,945,491	\$5,341,291	4	3	1.34
424510	Grain and Field Bean Merchant Wholesalers	53	35	27	-7.9%	-5.0%	3.62	2.44	\$52,076	\$6,266,943	\$4,179,290	5	3	1.34
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	150	35	14	-25.4%	-16.9%	7.86	1.83	\$108,676	\$10,907,637	\$7,305,886	2	4	1.60
486210	Pipeline Transportation of Natural Gas	33	35	18	0.9%	-11.8%	3.99	3.99	\$176,873	\$14,146,239	\$8,502,274	1	1	1.81
	Totals for TWDL in Kankakee County	4,140	4,734	5,178	2.7%	1.8%	1.34	1.44	\$58,138	\$846,363,204	\$467,483,616	253	252	N/A
	Totals for TWDL in LWA 11 Region	6,928	8,087	9,076	3.1%	2.3%	1.29	1.40	\$60,453	\$1,533,126,670	\$871,158,315	505	505	N/A
	Totals for All Kankakee County Industries	44,091	45,972	47,759	0.8%	0.8%	0.72	0.88	\$47,358	\$8,623,310,357	\$3,685,530,409	2,523	2,464	N/A



The TWDL cluster accounted for 4,734 jobs and 252 establishments in 2016, more than 10% of the total employment and 10% of total establishments in Kankakee County. Employment in Kankakee County's TWDL cluster accounts for 58% of the total LWA 11 region. Overall employment for this cluster is 1.4 times more concentrated in Kankakee County than would be expected based on national employment averages.

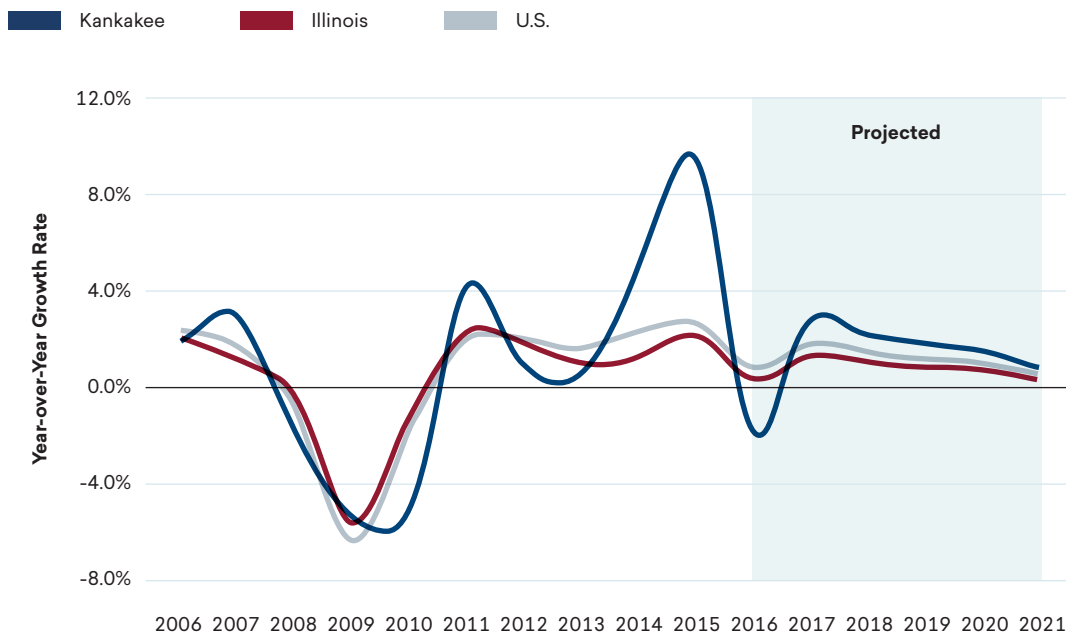
As a whole, the cluster experienced strong job growth over the last five years (2.7% annual growth) compared to all industries and is expected to slow by an average of 1.8% each year for the next five years.

Total sales for all companies in this cluster were over \$846 million (10% of total industry sales in the county) and contributed more than \$467 million to the region's gross regional product (nearly 13% of total GRP) in 2016.

A significant contributor to the growth, size, and value of this cluster is general freight trucking, long-distance, truckload. The industry added 267 jobs over the last five years while general warehousing and storage added 238. Combined, the two industries generated one-fifth of total TWDL sales while contributing roughly 2% to the area's regional product.

The TWDL cluster in Kankakee County outperformed the state and nation over the past five years but has kept pace, historically, and is projected to smooth out over the next five years. See Figure 9 below for TWDL employment trends.

FIGURE 9. TWDL Employment Trends and Projections, Year-over-Year Employment Growth



LABOR MARKET ANALYSIS

Table 19 lists the top 25 occupations in Kankakee County's TWDL cluster. These occupations account for 60% of all cluster employment. The table provides the number of people employed by occupation in the cluster, and the number of people employed in that occupation in all industries in the region. This indicates the level of competition employers may face from industries outside the cluster when hiring for key occupations.

The occupation with the most jobs in the TWDL cluster is all other production workers at 491 jobs. This occupation comprises nearly 9% of the cluster's total jobs. However, there are approximately 735 other production workers employed in the county, meaning the cluster employs most of these workers, at an average wage of \$14.87 per hour. This cluster may have a difficult time Laborers and freight, stock, and material movers (hand)

TABLE 19. Largest Occupations in TWDL, Kankakee County

SOC	DESCRIPTION	EMPLOYED IN INDUSTRY		CHANGE	% OF INDUSTRY CLUSTER TOTAL JOBS	EMPLOYED IN ALL INDUSTRIES IN COUNTY	INDUSTRY CLUSTERS % OF ALL INDUSTRY JOBS	MEDIAN HOURLY EARNINGS
		2011	2016	2011-2016	2016	2016	2016	
53-3032	Heavy and Tractor-Trailer Truck Drivers	803	1,005	202	21.2%	1,259	79.8%	\$17.56
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	291	360	69	7.6%	746	48.2%	\$13.26
43-9061	Office Clerks, General	226	254	28	5.4%	1,353	18.8%	\$14.13
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	218	223	5	4.7%	390	57.2%	\$27.11
43-5081	Stock Clerks and Order Fillers	133	172	39	3.6%	843	20.4%	\$11.64
53-7051	Industrial Truck and Tractor Operators	83	126	43	2.7%	286	44.2%	\$13.50
43-4051	Customer Service Representatives	106	121	15	2.6%	659	18.4%	\$13.28
11-1021	General and Operations Managers	107	116	9	2.4%	558	20.7%	\$32.87
53-3033	Light Truck or Delivery Services Drivers	96	105	9	2.2%	224	47.1%	\$12.07
53-3022	Bus Drivers, School or Special Client	105	104	(1)	2.2%	161	64.8%	\$16.64
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	79	100	21	2.1%	148	67.7%	\$22.31
43-5071	Shipping, Receiving, and Traffic Clerks	80	96	16	2.0%	276	34.8%	\$13.21
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	81	88	7	1.9%	797	11.1%	\$14.41
43-3031	Bookkeeping, Accounting, and Auditing Clerks	84	83	(1)	1.8%	485	17.2%	\$15.77
43-5032	Dispatchers, Except Police, Fire, and Ambulance	63	70	7	1.5%	92	75.8%	\$14.36
53-4031	Railroad Conductors and Yardmasters	48	55	7	1.2%	56	98.4%	\$30.41
43-1011	First-Line Supervisors of Office and Administrative Support Workers	50	53	3	1.1%	309	17.0%	\$22.32
53-3031	Driver/Sales Workers	51	53	2	1.1%	130	40.3%	\$10.74
51-9199	Production Workers, All Other	46	52	6	1.1%	735	7.1%	\$14.87
53-4011	Locomotive Engineers	44	51	7	1.1%	51	99.2%	\$31.26
13-1199	Business Operations Specialists, All Other	37	44	7	0.9%	380	11.7%	\$30.94
53-7064	Packers and Packers, Hand	37	44	7	0.9%	177	24.9%	\$10.88
49-9071	Maintenance and Repair Workers, General	31	37	6	0.8%	409	9.2%	\$22.18
53-1031	First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	33	35	2	0.7%	52	67.8%	\$26.25
41-2022	Parts Salespersons	30	32	2	0.7%	118	27.4%	\$14.91



SUPPLY CHAIN ANALYSIS

Table 20 provides a picture about the total demand in Kankakee County by all Kankakee County residents and businesses for products made by companies in the TWDL cluster—worth a total of \$893 million in the area. In Table 20, we see that the companies in these sectors meets nearly 19% of regional demand for their products, while the region imports 81% of regional needs for these products. This would seem to indicate potential markets for local suppliers. Particularly, those industries generating large demand and importing most of their product, including (but not limited to):

- Wholesale Trade Agents and Brokers
- Rail Transportation
- Computer and Computer Peripheral Equipment and Software Merchant Wholesalers
- Industrial Machinery and Equipment Merchant Wholesalers

TABLE 20. TWDL Regional Demand Met by Kankakee County Companies (2016)

NAICS	INDUSTRY SECTOR	2016 DEMAND				TOTAL DEMAND	% OF TOTAL DEMAND
		SATISFIED IN-REGION	% SATISFIED IN-REGION	SATISFIED OUT-OF-REGION (IMPORTS)	% SATISFIED OUT-OF-REGION (IMPORTS)		
425120	Wholesale Trade Agents and Brokers	\$639,403	0.6%	\$105,401,430	99.4%	\$106,040,834	11.9%
482110	Rail transportation	\$11,592,619	22.7%	\$39,501,996	77.3%	\$51,094,614	5.7%
484121	General Freight Trucking, Long-Distance, Truckload	\$18,023,819	37.4%	\$30,201,561	62.6%	\$48,225,380	5.4%
481111	Scheduled Passenger Air Transportation	\$81,109	0.2%	\$36,683,270	99.8%	\$36,764,379	4.1%
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	\$5,813,138	17.5%	\$27,345,854	82.5%	\$33,158,992	3.7%
423830	Industrial Machinery and Equipment Merchant Wholesalers	\$4,042,863	14.8%	\$23,271,023	85.2%	\$27,313,885	3.1%
424210	Drugs and Druggists' Sundries Merchant Wholesalers	\$503,530	1.9%	\$26,182,247	98.1%	\$26,685,777	3.0%
492110	Couriers and Express Delivery Services	\$2,710,659	10.5%	\$23,226,891	89.5%	\$25,937,550	2.9%
484110	General Freight Trucking, Local	\$3,646,331	14.5%	\$21,505,777	85.5%	\$25,152,108	2.8%
493110	General Warehousing and Storage	\$8,666,875	35.2%	\$15,938,883	64.8%	\$24,605,758	2.8%
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	\$9,306,342	41.1%	\$13,347,979	58.9%	\$22,654,322	2.5%
484122	General Freight Trucking, Long-Distance, Less Than Truckload	\$5,076,571	22.9%	\$17,070,646	77.1%	\$22,147,217	2.5%
484220	Specialized Freight (except Used Goods) Trucking, Local	\$4,611,665	27.5%	\$12,131,071	72.5%	\$16,742,736	1.9%
424410	General Line Grocery Merchant Wholesalers	\$498,687	3.1%	\$15,814,990	96.9%	\$16,313,676	1.8%
423690	Other Electronic Parts and Equipment Merchant Wholesalers	\$0	0.0%	\$16,043,916	100.0%	\$16,043,916	1.8%
424490	Other Grocery and Related Products Merchant Wholesalers	\$11,367,563	73.8%	\$4,025,320	26.2%	\$15,392,883	1.7%
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	\$4,718,241	31.3%	\$10,356,989	68.7%	\$15,075,230	1.7%
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	\$1,941,781	17.1%	\$9,408,435	82.9%	\$11,350,216	1.3%
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	\$8,544,814	77.7%	\$2,458,805	22.3%	\$11,003,619	1.2%
424690	Other Chemical and Allied Products Merchant Wholesalers	\$732,269	6.8%	\$9,996,228	93.2%	\$10,728,497	1.2%
488510	Freight Transportation Arrangement	\$5,181,734	48.4%	\$5,515,394	51.6%	\$10,697,128	1.2%
423510	Metal Service Centers and Other Metal Merchant Wholesalers	\$4,359,145	44.6%	\$5,406,874	55.4%	\$9,766,019	1.1%
423990	Other Miscellaneous Durable Goods Merchant Wholesalers	\$975,189	10.0%	\$8,772,131	90.0%	\$9,747,320	1.1%
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	\$7,707,824	85.9%	\$1,264,860	14.1%	\$8,972,685	1.0%
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	\$1,579,637	18.4%	\$7,006,931	81.6%	\$8,586,569	1.0%
	Totals for TWDL in Kankakee County	\$169,106,655	18.9%	\$724,278,265	81.1%	\$893,384,920	100.0%
	Totals for TWDL in LWA 11 Region	\$280,636,932	17.2%	\$1,347,014,436	82.8%	\$1,627,651,369	100.0%
	Totals for All Kankakee Industries	\$1,894,773,013	20.8%	\$7,195,929,245	79.2%	\$9,090,702,257	100.0%

Table 21 show the economic development opportunity to build up the region’s supply chain supporting TWDL companies. This table shows the goods and services that companies within the TWDL cluster buy to use in making their products or providing their services. Roughly 15% of TWDL supply needs are met within the area, while the remaining 85% are purchased from outside. This demonstrates a strong possibility for Kankakee County companies to find new customers within this industry cluster.

In total, the value of the TWDL supply chain for Kankakee County is \$347 million. Most imported supplies are manufactured goods rather than services, although transportation and warehousing services, management services, and professional services have significant levels of demand supplied from outside the region.

TABLE 21. TWDL Supply Chain, Kankakee County (2016)

NAICS	PURCHASES FROM	2016 PURCHASES				TOTAL PURCHASES	% OF TOTAL PURCHASES
		IN-REGION PURCHASES	% IN-REGION PURCHASES	IMPORTED PURCHASES	% IMPORTED PURCHASES		
48	Transportation and Warehousing	\$14,242,140	21.0%	\$53,458,368	79.0%	\$67,700,508	19.5%
31	Manufacturing	\$3,343,072	5.2%	\$61,149,585	94.8%	\$64,492,657	18.6%
53	Real Estate and Rental and Leasing	\$8,122,515	20.9%	\$30,778,032	79.1%	\$38,900,546	11.2%
42	Wholesale Trade	\$5,282,014	17.2%	\$25,478,019	82.8%	\$30,760,034	8.9%
52	Finance and Insurance	\$3,892,360	12.8%	\$26,623,609	87.2%	\$30,515,969	8.8%
54	Professional, Scientific, and Technical Services	\$2,659,573	9.8%	\$24,482,079	90.2%	\$27,141,652	7.8%
55	Management of Companies and Enterprises	\$987,938	4.2%	\$22,709,785	95.8%	\$23,697,723	6.8%
56	Administrative and Support and Waste Management and Remediation Services	\$4,169,050	18.5%	\$18,309,173	81.5%	\$22,478,222	6.5%
51	Information	\$1,395,247	13.3%	\$9,132,200	86.7%	\$10,527,446	3.0%
90	Government	\$1,948,128	27.0%	\$5,255,250	73.0%	\$7,203,378	2.1%
44	Retail Trade	\$1,769,893	32.6%	\$3,656,459	67.4%	\$5,426,352	1.6%
81	Other Services (except Public Administration)	\$1,521,235	30.0%	\$3,548,211	70.0%	\$5,069,446	1.5%
23	Construction	\$830,956	21.9%	\$2,965,936	78.1%	\$3,796,892	1.1%
72	Accommodation and Food Services	\$855,123	35.8%	\$1,534,132	64.2%	\$2,389,255	0.7%
22	Utilities	\$179,300	7.6%	\$2,179,333	92.4%	\$2,358,634	0.7%
21	Mining, Quarrying, and Oil and Gas Extraction	\$87,181	5.5%	\$1,485,998	94.5%	\$1,573,179	0.5%
71	Arts, Entertainment, and Recreation	\$99,139	6.9%	\$1,329,532	93.1%	\$1,428,671	0.4%
61	Educational Services	\$169,803	20.4%	\$661,194	79.6%	\$830,997	0.2%
62	Health Care and Social Assistance	\$174,596	38.8%	\$275,724	61.2%	\$450,320	0.1%
11	Crop and Animal Production	\$23,646	5.9%	\$374,154	94.1%	\$397,800	0.1%
	Totals for TWDL in Kankakee County	\$51,752,907	14.9%	\$295,386,772	85.1%	\$347,139,679	100.0%
	Totals for TWDL in LWA 11 Region	\$90,342,587	14.8%	\$521,058,472	85.2%	\$611,401,059	100.0%
	Totals for All Kankakee County Industries	\$847,913,774	20.7%	\$3,241,440,487	79.3%	\$4,089,354,259	100.0%



Table 22 show the amount of goods and services sold by Kankakee County companies both inside and outside the region. These companies sell approximately \$846 million of products and services, of which \$677 million is sold outside Kankakee County, thus bringing additional revenues into the region.

TABLE 22. Kankakee County TWDL Companies' Sales in Region and Exported Out of Region

NAICS	PURCHASES FROM	2016 PURCHASES				TOTAL PURCHASES	% OF TOTAL PURCHASES
		IN-REGION PURCHASES	% IN-REGION PURCHASES	IMPORTED PURCHASES	% IMPORTED PURCHASES		
484121	General Freight Trucking, Long-Distance, Truckload	\$18,023,819	13%	\$118,533,287	87%	\$136,557,106	16.1%
482110	Rail transportation	\$11,592,619	12%	\$88,045,693	88%	\$99,638,312	11.8%
424490	Other Grocery and Related Products Merchant Wholesalers	\$11,367,563	18%	\$52,057,287	82%	\$63,424,850	7.5%
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	\$7,707,824	17%	\$38,885,498	83%	\$46,593,322	5.5%
424920	Book, Periodical, and Newspaper Merchant Wholesalers	\$2,398,710	5%	\$41,958,932	95%	\$44,357,642	5.2%
493110	General Warehousing and Storage	\$8,666,875	23%	\$29,437,092	77%	\$38,103,967	4.5%
484110	General Freight Trucking, Local	\$3,646,330	10%	\$33,297,165	90%	\$36,943,495	4.4%
423510	Metal Service Centers and Other Metal Merchant Wholesalers	\$4,359,145	13%	\$29,493,942	87%	\$33,853,087	4.0%
484122	General Freight Trucking, Long-Distance, Less Than Truckload	\$5,076,571	20%	\$19,827,976	80%	\$24,904,547	2.9%
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	\$8,544,814	34%	\$16,326,264	66%	\$24,871,078	2.9%
488510	Freight Transportation Arrangement	\$5,181,734	21%	\$19,246,699	79%	\$24,428,433	2.9%
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	\$9,306,343	44%	\$11,645,586	56%	\$20,951,929	2.5%
425120	Wholesale Trade Agents and Brokers	\$639,403	3%	\$20,110,398	97%	\$20,749,801	2.5%
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	\$5,605,811	28%	\$14,158,328	72%	\$19,764,139	2.3%
484220	Specialized Freight (except Used Goods) Trucking, Local	\$4,611,665	31%	\$10,497,844	69%	\$15,109,509	1.8%
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	\$5,813,137	40%	\$8,809,867	60%	\$14,623,004	1.7%
486210	Pipeline Transportation of Natural Gas	\$1,095,342	8%	\$13,050,897	92%	\$14,146,239	1.7%
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	\$4,718,241	36%	\$8,295,333	64%	\$13,013,574	1.5%
424710	Petroleum Bulk Stations and Terminals	\$2,790,521	24%	\$8,843,879	76%	\$11,634,400	1.4%
492110	Couriers and Express Delivery Services	\$2,710,659	24%	\$8,365,313	76%	\$11,075,972	1.3%
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	\$3,448,158	32%	\$7,459,479	68%	\$10,907,637	1.3%
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	\$1,691,145	16%	\$8,925,972	84%	\$10,617,117	1.3%
423220	Home Furnishing Merchant Wholesalers	\$2,719,817	31%	\$6,049,242	69%	\$8,769,059	1.0%
423830	Industrial Machinery and Equipment Merchant Wholesalers	\$4,042,863	51%	\$3,902,628	49%	\$7,945,491	0.9%
423840	Industrial Supplies Merchant Wholesalers	\$2,396,307	35%	\$4,383,978	65%	\$6,780,285	0.8%
	Totals for TWDL in Kankakee County	\$169,106,656	20%	\$677,256,549	80%	\$846,363,204	100.0%
	Totals for TWDL in LWA 11 Region	\$280,636,925	18.3%	\$1,252,489,738	81.7%	\$1,533,126,670	100.0%
	Totals for All Kankakee County Industries	\$1,885,666,553	21.9%	\$6,737,643,837	78.1%	\$8,623,310,357	100.0%

