

# Vermilion Advantage Feasibility Analysis

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# Executive Summary

Vermilion Advantage commissioned this feasibility study to assess the redevelopment and investment potential of the East Voorhees Street Corridor in Danville, Illinois, a historical industrial area with increased relevance in today's manufacturing and logistics sectors. The study reviews market trends, site readiness, workforce skills, infrastructure, incentives, and alignment with target industries to determine whether the corridor can effectively attract private investments, create jobs, and foster long-term economic growth. The findings are based on data analysis, stakeholder input, and site-level evaluations and are meant to guide immediate implementation and strategic positioning for the future.



## Corridor Context and Competitive Positioning

The East Voorhees Corridor benefits from a rare convergence of industrial assets that are increasingly valued by site selectors and industrial developers. Its core strengths include:

### Strategic location and access

- Less than two miles from Interstate 74 with direct frontage on IL-136
- Regional connectivity to Champaign-Urbana, Indianapolis, Peoria, and broader Midwest markets

### Multimodal transportation assets

- Active Norfolk Southern rail infrastructure supporting rail-served and transload uses
- Proximity to Vermilion Regional Airport, enabling corporate and specialized air access

### Industrial-grade infrastructure

- High-capacity electric, gas, water, sewer, and fiber systems suitable for modern industrial operations

Together, these assets position the corridor as a competitive secondary-market alternative for firms seeking lower operating costs, flexible sites, and speed-to-market advantages.

## Portfolio of Development Opportunities

Rather than relying on a single catalytic site, the corridor offers a diversified portfolio of properties that reduce market risk and expand the range of feasible users:

### Heatcraft Refrigeration Site

- ISO-certified, climate-controlled, move-in-ready manufacturing facility
- City-owned land with a privately owned building, enabling flexible deal structures
- Ideal for advanced manufacturing, precision assembly, and technology-enabled production

### Former Quaker Oats Site

- 43.88 acres of shovel-ready, industrial land
- Direct Norfolk Southern rail spur and heavy utility capacity
- Strong candidate for a multi-tenant industrial park or large single-user campus

### W&T Warehouse

- Large-format industrial building with value-add redevelopment potential
- Suitable for logistics, warehousing, and light industrial uses following reinvestment

### Norfolk Southern Rail Parcel

- Vacant, rail-adjacent land controlled by a Class I railroad
- Best suited for rail-dependent manufacturing, bulk materials, and transload operations

Collectively, these sites allow the corridor to accommodate a wide range of users while supporting phased, market-responsive development.

## Market Alignment and Target Industries Incentives and Public-Sector Leverage

The feasibility analysis finds strong alignment between corridor assets and several high-potential industry clusters already present or emerging in East Central Illinois, including:

- Food product and specialty manufacturing
- Metal and machinery manufacturing
- Nonmetallic and materials manufacturing
- Wholesaling, logistics, and distribution
- Select clean-tech, industrial services, and rail-served uses

These industries prioritize proximity to transportation, access to regional supply chains, reliable utilities, and affordable industrial real estate, qualities that the East Voorhees Corridor can credibly provide. The nearby presence of workforce and research assets, including Danville Area Community College and the University of Illinois Urbana-Champaign, further enhances the corridor's long-term competitiveness.

A defining feasibility advantage of the corridor is its ability to layer multiple incentives to improve project economics:

- Illinois Enterprise Zone benefits
- Local Tax Increment Financing (TIF)
- Property tax abatements and local incentives
- Federal Opportunity Zone eligibility






In addition, potential public ownership of key sites provides leverage to:

- Structure public-private partnerships
- Offer flexible pricing, ground leases, or build-to-suit arrangements
- Coordinate infrastructure investments and approvals

When strategically deployed, these tools can offset construction cost pressures and enhance returns for developers and end users alike.

## Key Challenges and Risk Factors





While overall feasibility is strong, the analysis identifies several constraints that must be actively managed:

-  Aging or obsolete building conditions on select sites
-  Fragmented ownership across portions of the corridor
-  Declining and aging local labor force without targeted talent strategies
-  Competition from larger or more established Midwest industrial markets
-  Construction cost inflation and rail-related development timelines

These factors do not undermine feasibility but underscore the importance of disciplined phasing, proactive workforce alignment, and realistic market positioning.

## Overall Feasibility Conclusion

This study concludes that the East Voorhees Street Corridor is viable and well-placed to attract industrial and logistics investments if approached with a coordinated, implementation-focused strategy. The corridor's combination of location, infrastructure, site variety, incentives, and workforce resources offers a solid foundation for redevelopment. Success will depend on:

-  Establishing clear corridor governance and project management
-  Advancing site readiness and designation efforts
-  Aligning workforce initiatives with target industries
-  Marketing the corridor as a unified, investment-ready district

With intentional effort and continuous teamwork, the East Voorhees Corridor can transform from a historic industrial zone into a future-oriented employment hub that boosts Danville's economic resilience and long-term growth.

# Introduction

## Scope of Work

The feasibility analysis for the East Voorhees Street Corridor was conducted to assess the area's potential to attract private investment, support targeted industries, and promote long-term economic growth. TPMA's scope combined data-driven analysis, stakeholder engagement, and site-specific feasibility testing to ensure findings were practical, aligned with market needs, and ready for implementation.

TPMA began with a discovery and baseline assessment that included a review of relevant plans, studies, policies, and economic development tools related to the East Voorhees Street Corridor, industrial and business park development, and applicable incentive, zoning, and regulatory frameworks. Working sessions with Vermilion Advantage leadership provided insight into existing business retention, expansion, and attraction efforts, as well as key assumptions, constraints, and opportunities. TPMA also compiled baseline data on economic conditions, demographic and labor force trends, business and industry dynamics, and transportation and infrastructure assets to establish a shared factual foundation.

Stakeholder engagement was a core component of the analysis. TPMA engaged a diverse group of stakeholders, including city and county leadership and staff, corridor and industrial property owners, workforce and training providers, developers, utilities, and business representatives. Engagement activities included in-person and virtual focus groups, one-on-one interviews, and targeted surveys. Inclusive engagement practices ensured broad representation, and stakeholder input was synthesized to identify market barriers, site readiness gaps, workforce challenges, and desired development outcomes for the corridor.

Building on this foundation, TPMA conducted a comprehensive feasibility and market analysis. A Target Industry Analysis identified sectors best aligned with the corridor's assets, workforce capacity, and market demand. Feasibility was evaluated across economic, technical, legal and regulatory, and environmental dimensions, along with an assessment of market, financial, workforce, and implementation risks. A workforce analysis assessed alignment between target industries and available labor, identified skills gaps and training needs, and evaluated existing education and workforce development programs.

The study culminated in a Target Business Engagement Strategy addressing business attraction, retention, and expansion, site-selection considerations, and workforce and incentive positioning. The final feasibility study synthesized analysis, stakeholder input, and market findings into a clear vision for the East Voorhees Street Corridor, identifying feasible redevelopment scenarios and site-specific opportunities to guide future investment and implementation efforts.

# Situational Analysis

The situational analysis will provide the contextual background of the East Voorhees corridor, Danville, and Vermilion County. It will include findings from the document and historical plan review, a summary of economic conditions, and input from key stakeholders.

## Historical Context

Danville is the county seat of Vermilion County and has long been a center of industry in east-central Illinois. From its early days, the city's growth was linked to natural resources: salt springs, coal deposits, and clay used for bricks and ceramics, which shaped its industrial base. Coal mining was an essential early industry, and the underlying "Danville Member" coal formation is named after the region where it was first discovered. As the 19th and early 20th centuries passed, Danville developed into a rail hub and manufacturing center, with factories producing metal goods, heavy machinery, ceramics, and food-processing equipment, among other products.

Over the past several years, Danville has faced both challenges and new initiatives in its industrial and economic sectors. A major recent setback occurred in 2024, when the Quaker Oats plant in Danville, one of the area's key employers, permanently shut down, resulting in the loss of over 500 jobs. This closure led to a rise in local unemployment, exceeding both state and national averages in 2024. In response to declines in traditional manufacturing and processing industries, the region has taken steps to diversify and rebuild. Local economic development groups like Vermilion Advantage have secured grants and technical assistance for recovery and resilience efforts, specifically targeting old industrial districts like the East Voorhees Street corridor, which has long been an industrial hub.



# Summary of Economic Conditions







## Methodology and Purpose

Understanding local economic conditions is essential for planning future growth and development. The qualitative data analysis conducted for this assessment analyzed several key data sets:

- Demographics and Socioeconomics
- Workforce Characteristics
- Industry Characteristics

Key findings from this analysis are presented in the following section. A complete analysis is available in Appendix A.

## Key Findings from the Summary of Economic Conditions

-  In recent decades, Vermilion County has experienced a consistent population decline. This population decline is projected to continue through 2030.
-  Household income in Vermilion County is considerably lower than the median household income at both the state and national levels.
-  Educational attainment rates in Vermilion County, particularly of bachelor's, graduate, and professional degrees, are considerably lower than both state and national averages.
-  17.4% of Vermilion County's residents fall below the poverty level, which is greater than the national poverty rate of 12.4%.
-  Between 2015 and 2024, the civilian labor force in Vermilion County has steadily declined, falling from 35,417 to 31,357 over the 10 years.
-  The overall net commuter level in the county is negative. 7,315 fewer workers travel into the county for employment than travel out of it.

-  Vermilion County is heavily reliant on public industries, including "Education and Hospitals (Local Government)," "Federal Government, Civilian," and other local government industries.
-  The largest private industries include "Restaurants and Other Eating Places," and various manufacturing and warehousing industries.
-  Vermilion County's most highly concentrated industry is "Grain and Oilseed Milling." The "Gambling Industries" (12.26) and "Apparel Accessories and Other Apparel Manufacturing" industries are the next most heavily concentrated industries.
-  The "Federal Government, Civilian" industry produces the highest GRP for Vermilion County. Other high-value industries include the "Grain and Oilseed Milling," "Education and Hospitals (Local Government)," and "Grocery and Related Product Merchant Wholesalers" industries.
-  The "Manufacturing," "Government," and "Wholesale Trade" industries export the largest share of their sales, indicating that these sectors are strongly connected to external markets.
-  Products or services from "Information," "Manufacturing," and "Mining, Quarrying, and Oil and Gas Extraction" industries are imported heavily to meet local demand.
-  The most common occupation in the county is "Laborers and Material Movers." The next-largest occupations by total workers are "Drivers/Sales Workers and Truck Drivers" and "Cashiers."
-  The "Home Health and Personal Care Aides" occupation is expected to realize the most growth from 2024 to 2034. Over the same period, "Drivers/Sales Workers and Truck Drivers" and "Customer Service Representatives" are expected to see nominal growth.

# Stakeholder Engagement

## Methodology

Stakeholder engagement was vital to the Vermilion Advantage Feasibility Study, focusing the analysis on local knowledge, market trends, and practical factors. TPMA engaged a diverse mix of public, private, nonprofit, educational, and industry stakeholders through a combination of in-person and virtual focus groups, one-on-one interviews, and targeted surveys. This approach encouraged inclusive participation and open discussions about challenges, opportunities, and priorities related to economic revitalization along the East Voorhees Street corridor and neighboring areas. The insights from stakeholder involvement were directly integrated into the feasibility analysis, target industry assessment, workforce evaluation, SWOT analysis, and final recommendations, ensuring the study's conclusions and strategies were both locally rooted and practically feasible.

## Key Findings

### Workforce and Talent

- Workforce readiness is mixed: many workers are capable, but a portion of residents are disengaged or underemployed.
- Participation in education and training is limited by socioeconomic barriers and low high school graduation rates.
- Wages remain lower due to past industrial closures, contributing to retention challenges.

### Education and Training Infrastructure

- Danville Area Community College (DACC) is a major asset – responsive, flexible, and effective at customized training.
- Strong educational connections to the University of Illinois support ag-tech, research, and advanced industry growth.
- Adult education, GED, and middle college programs are active but highlight deeper educational gaps in the community.

## Industrial, Agriculture, and Logistics Assets

- Robust agribusiness sector, including grain elevators, Growmark, biofuel capacity, and extensive farmland.
- Significant logistics strengths: interstate access, Class I railroads, and a growing airport authority.
- Advantageous industrial and warehouse lease costs support logistics and distribution growth.
- Need and opportunity exist for new transload facilities to handle grain and freight congestion.

## Business Climate and Economic Development

- Strong collaboration among city leadership, county partners, Vermilion Advantage, and education institutions.
- Opportunity Zone incentives on East Voorhees offer strong investment advantages.
- Recent rebranding efforts aim to improve community identity and external perception.

## Infrastructure and Utilities

- Adequate water, sewer, and power capacity for industrial development, though power reliability is a recurring concern.
- Natural gas supply is limited in certain industrial areas.
- Rail congestion and problematic grade crossings cause major mobility challenges.
- Longstanding flooding and stormwater issues require major infrastructure fixes.

## Perception, Branding and Image Challenges

- Negative internal and external perceptions hinder business attraction and growth.
- Crime reputation, blight, and “worst-enemy” local attitudes reinforce a negative cycle.
- Strong need to shift the narrative toward opportunities and strengths.

## Population and Demographic Trends

- Continued population loss affects funding levels for transit and community development.
- School system challenges drive families to live in surrounding communities.
- A significant portion of residents lack access to personal vehicles, increasing reliance on public transit.

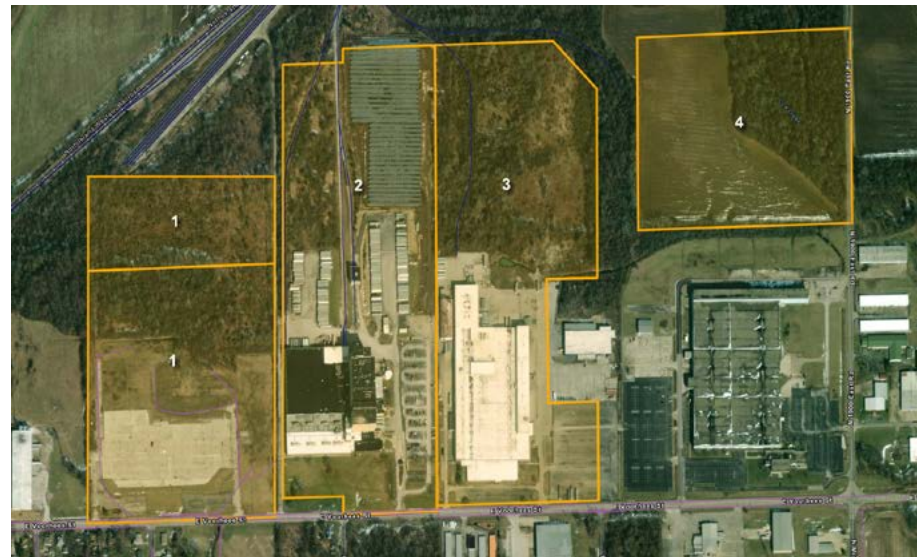
## Emerging Opportunities

- National onshoring and reshoring trends present major opportunities for manufacturing and logistics expansion.
- Competitive industrial lease rates can attract cost-focused firms.
- Proximity to the University of Illinois creates potential for ag-tech, high-tech, and research-driven growth.
- Redevelopment sites offer opportunities for new housing, commercial uses, or modern industrial development.

# Corridor Overview

## Vision for the East Voorhees Corridor

*“The East Voorhees Corridor will become a future-ready industrial and logistics district that leverages its rail access, Opportunity Zone advantages, and modern infrastructure to attract advanced manufacturing and supply-chain employers. Through strategic redevelopment and strong workforce partnerships, the corridor will evolve into a clean, connected, and investment-ready gateway that drives economic growth, supports high-quality jobs, and showcases Danville’s commitment to innovation and long-term prosperity.”*



## Brief Business Climate Overview

Danville offers a moderately competitive economic climate for industrial investment. The city’s total sales tax rate in 2025 is 9.25% — composed of a 6.25% Illinois state rate, a 0.25% Vermilion County surcharge, and a 2.75% city levy. On the property tax side, the median effective real estate rate in Danville is approximately 2.69% of market value, while Vermilion County averages around 2.53% effective. This is higher than the national average but typical for Illinois’ high-tax environment.<sup>1</sup>

From a cost and infrastructure perspective, Danville stands out as a prime location for industrial investment, particularly with an average industrial electricity rate of 8.83¢/kWh<sup>2</sup>. The region benefits from strong electric, gas, water, sewer, and telecom infrastructure. Manufacturing and logistics projects can also take advantage of a robust set of incentives, including the [Illinois Enterprise Zone](#), [EDGE Tax Credit](#), [High Impact Business Program](#), [REV Illinois](#), and local tools such as TIF, property tax abatements, and utility tax reductions. This mix of competitive operating costs, attractive incentives, and reliable infrastructure enhances the viability and long-term value of industrial investments in the East Voorhees Corridor.

<sup>1</sup> <https://taxfoundation.org/data/all/state/state-corporate-income-tax-rates-brackets/>  
<sup>2</sup> [https://www.eia.gov/electricity/annual/html/epa\\_02\\_10.html](https://www.eia.gov/electricity/annual/html/epa_02_10.html)

## Presentation of Key Sites

### Heatcraft Refrigeration

1625 E. Voorhees Street, Danville, Illinois

The Heatcraft Refrigeration Products facility at 1625 E. Voorhees Street is a high-quality, move-in-ready industrial property situated within Danville’s established east-side manufacturing corridor. Covering 34.78 acres, the property includes land owned by the City of Danville and a 200,000-square-foot ISO 9002-certified light-manufacturing building still owned by Heatcraft (Lennox International). This unique ownership arrangement creates a redevelopment environment where the city controls the land while Heatcraft owns the building. The facility remains one of the region’s strongest industrial assets due to its modern layout, full climate control, and high-quality infrastructure, all of which are suitable for technology-focused industrial tenants. Historically, the facility produced commercial refrigeration and HVAC equipment. Major remaining infrastructure components, such as equipment pads, assembly and testing areas, climate-control systems, loading docks, and electrical distribution systems, make the building attractive to manufacturers seeking rapid deployment. Since the land is owned by the city and the building by Heatcraft, redevelopment options may include negotiated ground leases, selling the building to a new user, or Heatcraft purchasing the land. For developers and investors, this provides a low-risk, municipally controlled land position combined with a high-quality industrial building, supporting either adaptive reuse or redevelopment depending on future negotiations.



Image © 2013 The News-Gazette. Used for informational purposes.

### Infrastructure and Access

#### TRANSPORTATION ACCESS

The property fronts East Voorhees Street (IL-136), a major industrial arterial. Located less than 2 miles from Interstate 74 (Exit 215), the site benefits from easy access to Champaign-Urbana, Indianapolis, Peoria, St. Louis, and the broader Midwest freight network. The industrial frontage supports Class 8 truck traffic and includes multiple entry points, wide turning radii, and loading infrastructure aligned with modern distribution or production needs.

#### RAIL PROXIMITY

While the site does not currently have an onsite rail spur, it sits adjacent to active Norfolk Southern freight lines. Nearby parcels offer potential for future rail-served extensions or transload facilities, adding long-term value for manufacturers or bulk-handling users.

## AIR SERVICE

The Vermilion Regional Airport (DNV) is crucial for attracting businesses to the East Voorhees Industrial Corridor. It offers dependable general aviation services, corporate air access, and is situated near major Midwest freight networks. Its 6,000-foot runway supports corporate jets, cargo operations, and business aviation, facilitating advanced manufacturing, distribution, and supplier activities. The airport's location, just minutes from key industrial sites and connected to U.S. 136, I-74, and regional logistics routes, enhances the corridor's competitiveness by reducing travel time for executives, technicians, and time-sensitive shipments.

## UTILITIES

- **Electricity and Gas:** Ameren Illinois provides three-phase electric service and medium-pressure natural gas infrastructure suitable for industrial operations.
- **Water and Sewer:** 10- to 12-inch mains supplied by the City of Danville offer strong pressure for manufacturing and fire-suppression needs.
- **Telecommunications:** Fiber, data, and voice connections support engineering, design, and R&D functions<sup>3</sup>.
- **Stormwater:** Existing NPDES-compliant detention and conveyance systems reduce future civil-engineering costs<sup>4</sup>.

<sup>3</sup> While site-specific test results are not published, Vermilion County supports business broadband access up to 1-5 Gb/s depending on provider and location. Site-specific validation is recommended.

<sup>4</sup> <https://www.epa.gov/npdes/npdes-permit-basics>

## Land Value Assumptions

Under a conservative estimate, the land portion of the Heatcraft site, owned by the City of Danville, is valued at approximately \$1.2 million, based on a land value of \$35,000 per acre. Since Heatcraft still owns the building, this valuation only reflects the land and assumes the building remains onsite. The mixed-ownership structure reduces the land's value compared to a fully consolidated industrial parcel, as any future buyer would need to negotiate interests in both the land and the building.

The \$35,000-per-acre estimate sits above the broad Danville market average due to the property's industrial zoning, utility capacity, modern infrastructure, and proximity to I-74. However, it remains a conservative estimate because the building's presence adds transactional complexity and limits full redevelopment flexibility that a clean site would provide<sup>5,6</sup>.

## Environmental and Site Condition

The Heatcraft site benefits from a favorable environmental status. The building holds a No Further Remediation (NFR) letter under Illinois EPA standards<sup>7</sup>, confirming that past environmental issues have been resolved. This significantly lowers regulatory risk and boosts confidence for industrial tenants or investors. Although parts of the site are within a 50-year floodplain, the City of Danville, as the landowner, is actively evaluating drainage and site design improvements and seeking federal funding opportunities to support long-term resilience.

<sup>5</sup> Costar.com

<sup>6</sup> These figures are meant to inform directional thinking and are not a formal appraised value.

<sup>7</sup> <https://epa.illinois.gov/about-us/rules-reg.html>

## Building Condition

The 200,000-square-foot ISO 9002-certified building is fully climate-controlled, exceptionally well-maintained, and suitable for precision manufacturing, electronics assembly, food-equipment production, clean-tech fabrication, or R&D. The open floor plan supports a wide range of production layouts, and the building's mechanical, electrical, and HVAC systems provide a competitive advantage over typical vacant industrial shells. Because Heatcraft retains ownership of the building, potential users may pursue a building acquisition, long-term lease, or coordinated disposition through a city-facilitated redevelopment framework.

## Incentives and Designations

The land and building lie within a powerful stack of incentive overlays that materially improve ROI:

- **Tax Increment Financing (TIF) District** – supporting infrastructure or site-preparation cost reimbursement.
- **Property Tax Abatements** – available through the City and County for qualifying industrial investments.
- **Federal Opportunity Zone** – offering capital-gains tax advantages for qualifying equity.
- **Illinois Enterprise Zone** – providing sales-tax exemptions, utility-tax reductions, and investment tax credits.

Because the city owns the land, it has significant leverage to form public-private partnerships, structure ground leases, change zoning, or support redevelopment negotiations.

## Development Potential and Target Industries

With its high-quality industrial building, strong utilities, and municipally controlled land position, the Heatcraft site is ideal for:

- **Light and Advanced Manufacturing:** HVAC components, modular fabrication, precision assembly
- **Technology-Enhanced Production:** electronics, robotics, clean-tech, med-tech components
- **Logistics and Distribution:** specialized or climate-controlled warehousing
- **Industrial Services:** testing labs, prototyping centers, repair and calibration facilities

## Summary

The Heatcraft facility at 1625 E. Voorhees Street stands out as one of the most promising opportunities for industrial redevelopment in east-central Illinois. The unique ownership structure, where the city owns the land and Heatcraft owns the building, allows for flexible redevelopment negotiations while establishing the site as a high-quality, ISO-certified, climate-controlled industrial facility. Based on a conservative estimate of around \$1.2 million for the land alone, the property holds significant potential for advanced manufacturing, logistics, and innovation-driven industrial users. With strong incentive overlays, excellent utility infrastructure, and close proximity to I-74, the site is ideally positioned to attract next-generation employers to the East Voorhees industrial corridor.

## Quaker Oats

*1703 E. Voorhees Street, Danville, Illinois*

The Quaker Oats redevelopment site at 1703 E. Voorhees Street is one of the most significant industrial land opportunities currently available in east-central Illinois. Covering 43.88 acres of contiguous, industrial land, the property is located within Danville’s established east-side manufacturing corridor. Existing structures have recently been entirely demolished and graded, positioning the site for redevelopment.

The site, previously operated by PepsiCo’s Quaker Oats Division and, more recently, owned by Quaker Manufacturing LLC, is the subject of ongoing discussions regarding a potential acquisition by the City of Danville. This potential change could offer a major advantage for developers, as public ownership simplifies acquisition, streamlines incentives, and enables zoning updates. The city could be in a position to prepare the property for new vertical development, including site grading, debris removal, and environmental compliance efforts.



Demolition continues at the former Quaker Oats plant along East Voorhees Street in Danville. Photograph by Jennifer Bailey, © 2025 The News-Gazette.

### Infrastructure and Access

The site’s infrastructure profile is exceptional for new industrial development. Developers gain access to heavy municipal utilities, multimodal freight options, and a configurable land area suitable for both single-user footprints and multi-building industrial parks.

### TRANSPORTATION ACCESS

The property faces East Voorhees Street (IL-136), a major four-lane arterial that serves the industrial corridor. Situated approximately 1.8 miles from Interstate 74 (Exit 215), the site provides direct regional links to Champaign-Urbana, Indianapolis, Peoria, St. Louis, and the broader Midwest freight network. The road layout supports Class 8 truck access, making it perfect for high-volume warehousing, distribution, or food and beverage logistics.

## RAIL PROXIMITY

A Norfolk Southern rail spur runs directly onto the property, which is uncommon for sites of this size. Norfolk Southern has indicated interest in maintaining and supporting active rail service for future tenants. This enables onsite rail loading and unloading, dedicated unit-train operations, or transload services that can serve multiple tenants. Rail access greatly expands the project’s potential tenant base and enhances long-term value.

## AIR SERVICE

The Vermilion Regional Airport (DNV) is crucial for attracting businesses to the East Voorhees Industrial Corridor. It offers dependable general aviation services, corporate air access, and is situated near major Midwest freight networks. Its 6,000-foot runway supports corporate jets, cargo operations, and business aviation, facilitating advanced manufacturing, distribution, and supplier activities. The airport’s location, just minutes from key industrial sites and connected to U.S. 136, I-74, and regional logistics routes, enhances the corridor’s competitiveness by reducing travel time for executives, technicians, and time-sensitive shipments.

## UTILITIES

The property benefits from full municipal utility service, already sized for industrial operations:

- **Electricity and Gas:** Provided by Ameren Illinois with 12 kV three-phase distribution nearby, ample for modern production lines or advanced automation. Mid-pressure mains are capable of supporting large-scale manufacturing or food processing. Additionally, a 69kV subtransmission system runs along Voorhees Street.
- **Water:** 12-inch municipal main with intense system pressure, ideal for sanitation-heavy uses and fire suppression.
- **Sanitary Sewer:** 10-inch gravity sewer with confirmed capacity for industrial discharge.
- **Telecommunications:** Regional carriers provide fiber and broadband within the corridor<sup>8</sup>.
- **Stormwater:** Managed via existing systems, with planned upgrades to meet current Illinois EPA NPDES industrial standards.

## Land Value Assumptions

The conservative land-value estimate for the Quaker Oats site is approximately \$1.1 million, based on a \$25,000 per acre calculation, based on potential public ownership and intended for shovel-ready redevelopment. However, in this cautious estimate, we assume the buyer would cover preparation costs, infrastructure upgrade risks, and rail spur activation. The baseline of about \$23K–\$24K per acre for land listings in the Danville area supports this conservative figure<sup>9,10</sup>.

<sup>8</sup> While site-specific test results are not published, Vermilion County supports business broadband access up to 1–5 Gb/s depending on provider and location. Site-specific validation is recommended.

<sup>9</sup> Costar.com

<sup>10</sup> These figures are meant to inform directional thinking and are not a formal appraised value.

## Environmental and Site Condition

The City is currently undergoing a Phase I Environmental Site Assessment (ESA), which can be made available for public information. Also, the City is working with consultants to ensure all remaining subsurface materials are cleaned up or removed as required by Illinois EPA guidelines. When completed, the project will soon shift from a legacy industrial site into a clean, graded development platform ready for investor-led construction. Existing structures have been removed, helping avoid the costly challenges of adaptive reuse and site preparation, including foundation removal, regrading, and drainage improvements. The final result is a flexible industrial pad suitable for large-scale manufacturing, distribution centers, or multi-building industrial parks. The site is located in a 50-year floodplain. The city is budgeting for site redesign, with federal funding applications in process.

## Incentives and Designations

The Quaker Oats site is located within an area eligible for a powerful combination of local, state, and federal incentives—the same suite available to the nearby Heatcraft property.

- **Local Tax Increment Financing (TIF) District** – eligible for infrastructure cost reimbursement and property-tax increment capture.
- **Property Tax Abatements and Local Incentives** – Danville and Vermilion County routinely support industrial reinvestment with abatements tied to job creation or capital outlay.
- **Federal Opportunity Zone** – enables preferential capital-gains treatment for qualified investments.
- **Illinois Enterprise Zone** – offers sales-tax exemptions on building materials, utility-tax reductions, and investment tax credits.

These layered incentives significantly reduce upfront costs and enhance project ROI for industrial users or investors.

Potential City ownership of the site could provide additional leverage for negotiating land prices, structuring build-to-suit deals, facilitating public-private partnerships (P3s), and streamlining approval processes.

## Development Potential and Target Industries

With 43.88 acres, direct rail access, and heavy utilities, the site can accommodate a wide array of industrial and innovation-driven uses, either as a single-user industrial campus or a multi-tenant industrial park.

- **Food and Beverage Manufacturing** – the site’s historic use, utilities, and space configuration make it ideal for product processing, packaging, or cold-chain infrastructure.
- **Logistics and Distribution** – interstate access and rail spur greatly expand logistics potential.
- **Light and Advanced Manufacturing** – precision machining, assembly, or material processing operations.
- **Green and Sustainable Manufacturing** – component manufacturing for renewable energy; recycling and materials recovery operations; EV supply chain or clean-tech manufacturing.

## Summary

The Quaker Oats redevelopment site at 1703 E. Voorhees Street is one of the most valuable industrial opportunities in east-central Illinois. Covering 43.88 acres of contiguous industrial land with an active Norfolk Southern rail spur, full municipal utilities, and quick access to IL-136 and I-74, the site offers a rare combination of size, connectivity, and infrastructure. Potential public ownership by the City of Danville simplifies acquisition and enables flexible deal structures, while completed demolition and site preparation create a ready-to-develop environment. The property also falls within multiple incentive overlays, including TIF, Opportunity Zone, and Illinois Enterprise Zone, further enhancing project economics for investors and end users.

For industrial developers, logistics operators, food and beverage manufacturers, or green-industry companies, the site provides an accessible, high-potential platform that supports immediate project launches and long-term growth. With proper positioning and investment, the Quaker site could become a foundation for a next-generation industrial campus and spur renewed economic development throughout Danville’s east-side industrial corridor.

## W & T Warehouse

**1813 E. Voorhees Street, Danville, IL 61832**

The property at 1813 E. Voorhees Street is among the largest industrial facilities in the Danville area, offering 344,900 square feet on a 41.58-acre site. Built in 1957 with renovations in 1973, the building provides extensive space but is in poor condition and will require strategic reinvestment to meet modern industrial standards.

The building's size, property features, utilities, industrial zoning, and proximity to key transportation routes provide significant structural advantages. However, the building's age, ownership structure, and deferred maintenance create challenges that could lower acquisition costs while increasing the potential return on value-add opportunities for developers.

With the right redevelopment plan, the site could transform from a struggling legacy industrial property into a busy logistics, warehousing, or light manufacturing hub serving the eastern Illinois, western Indiana, and I-74 freight corridor markets.



Source: Loopnet listing for 1813 E. Voorhees Street, Danville, IL. Retrieved January 2026.

### Infrastructure and Access

The site's infrastructure provides a significant business benefit. The combination of access, land size, and utilities offers prospective tenants flexibility for logistics, storage, or light manufacturing.

### TRANSPORTATION ACCESS

The site is less than 1 mile from Illinois Route 1 and under 3 miles from Interstate 74, a major east-west freight corridor with regional links to Champaign-Urbana, Indianapolis, Peoria, St. Louis, and the broader Midwest freight network. This makes the site ideal for regional fulfillment or cross-docking operations. The existing road network supports heavy truck traffic, and Voorhees Street is a designated truck route, helping to reduce impacts on nearby land uses. Entry and exit points are simple, allowing easy movement for semi-trailers and providing flexibility for trailer storage, drop lots, or yard use.

## AIR SERVICE

The Vermilion Regional Airport (DNV) is crucial for attracting businesses to the East Voorhees Industrial Corridor. It offers dependable general aviation services, corporate air access, and is situated near major Midwest freight networks. Its 6,000-foot runway supports corporate jets, cargo operations, and business aviation, facilitating advanced manufacturing, distribution, and supplier activities. The airport's location, just minutes from key industrial sites and connected to U.S. 136, I-74, and regional logistics routes, enhances the corridor's competitiveness by reducing travel time for executives, technicians, and time-sensitive shipments.

## UTILITIES:

- **Electric and Gas:** Provided by Ameren Illinois, including 480-volt power suitable for a wide range of industrial uses. Natural Gas Heating and metal-halide lighting exist but will require modernization.
- **Water and Sewer:** Supplied by the City of Danville, with adequate capacity for warehousing and most light-manufacturing uses.
- **Telecommunications:** Regional carriers provide fiber and broadband within the corridor<sup>11</sup>.
- **Stormwater:** On-site stormwater management systems are already in place, lowering initial site development burden.

<sup>11</sup> While site-specific test results are not published, Vermilion County supports business broadband access up to 1-5 Gb/s depending on provider and location. Site-specific validation is recommended.

## Land Value Assumptions

In a conservative scenario for the W&T site, the land-only value is estimated at approximately \$625,000. The calculation is based on \$15,000 per acre. This estimate accounts for the poor condition of the existing building and assumes that it probably needs significant redevelopment or demolition, which reduces the land's value compared to a vacant lot. The industrial zoning and footprint provide some upside, but risk factors such as building condition, potential environmental issues, and less immediate "turnkey" readiness lead to a valuation of roughly \$15K per acre for this conservative estimate. Comparable sites in Danville, ranging from \$20K to \$25K per acre, support this conservative discount.<sup>12,13</sup>

## Environmental and Site Condition

Research indicates the site shows no signs of significant contamination. However, conducting a Phase I ESA is strongly recommended due to the age and unknown factors related to previous industrial activity. The site might be in a moderate-risk flood zone, so careful stormwater and drainage planning is essential during redevelopment. No hazardous materials are known, but older buildings may require remediation for asbestos, lead paint, or outdated electrical systems. The site is part of a 50-year floodplain. The city is budgeting for site redesign and has federal funding applications in progress.

## Building Condition

The 344,900 SF building is in poor condition, with outdated systems and deferred maintenance that are affecting smooth occupancy. Structural integrity, roof condition, slab strength, and mechanical systems will need detailed inspections. Because of its size, the building may require substantial capital investments, but there is also potential for increased rental value after modernization.

<sup>12</sup> Costar.com

<sup>13</sup> These figures are meant to inform directional thinking and are not a formal appraised value.

## Incentives and Designations

The site likely qualifies for a range of local, state, and possibly federal supports that could dramatically enhance project feasibility.

- **Local Tax Increment Financing (TIF) District** – eligible for infrastructure cost reimbursement and property-tax increment capture.
- **Property Tax Abatements and Local Incentives** – Danville and Vermilion County routinely support industrial reinvestment with abatements tied to job creation or capital outlay.
- **Federal Opportunity Zone** – enables preferential capital-gains treatment for qualified investments.
- **Illinois Enterprise Zone** – offers sales-tax exemptions on building materials, utility-tax reductions, and investment tax credits.

These layered incentives significantly reduce upfront costs and enhance project ROI for industrial users or investors.

## Development Potential and Target Industries

Given the site’s size, location, utilities, and condition, some uses are much more suitable than others. A savvy developer will target tenants and industries that match the site’s strengths while avoiding heavy capital or environmental commitments.

## Best-Fit Immediate Uses

These are uses that can operate effectively in a rehabilitated warehouse without requiring substantial structural changes:

- Large-format warehousing and distribution
- Logistics
- E-commerce fulfillment
- Specialty or climate-controlled storage, leveraging the conditioned space
- Equipment repair, fleet services, or refurbishing operations

## Moderate-Intensity Uses

- Light assembly or light manufacturing
  - Feasible with strategic upgrades to power distribution, HVAC, and interior layout.

Given the limited expansion potential of the existing footprint, traditional greenfield-style manufacturing is not ideal without significant reconfiguration or partial demolition.

## Summary

1813 E. Voorhees Street offers a classic value-add industrial opportunity. It is spacious, well-located, supported by utilities, and properly zoned, yet underused, outdated, and ready for repositioning. Developers willing to oversee building renovations, ownership negotiations, and site upgrades can unlock a valuable industrial asset. The property’s main selling points, 344,900 SF of space, 41.58 acres, quick access to I-1 and I-74, and existing utilities make it ideal for logistics, distribution, and light industrial tenants who increasingly seek affordable, well-connected markets outside major metros. This site may not attract risk-averse tenants or investors looking for turnkey Class-A space. However, for the right industrial developer, it offers an opportunity to transform a dated facility into a high-performing logistics hub within a strategic Midwest freight corridor.

## Norfolk Southern Property

### *PIN 18-34-539-002*

The Norfolk Southern-owned parcel identified as PIN 18-34-539-002 is situated within the larger East Voorhees manufacturing and logistics corridor but is not directly adjacent to the rail. Although the property is owned by Norfolk Southern Railway and consists of vacant land suitable for industrial development, there is no existing rail access on-site.

Preliminary review shows that other privately owned parcels lie between this site and the nearest active rail line, which limits direct access. Therefore, any future rail-served development would probably need to negotiate one or more off-site easements across neighboring properties to support a potential rail spur. The viability, cost, and timing of obtaining these easements are uncertain and would require additional due diligence, coordination with landowners, and detailed engineering analysis.

Norfolk Southern has indicated that the parcel may be considered for industrial development and, under the right conditions, could support users seeking Class I rail service. However, rail access should not be assumed. Any potential rail-served use would need to go through Norfolk Southern's internal industrial development process and depend on successfully resolving off-site access issues, engineering requirements, and third-party approvals.

## Infrastructure and Access

### Transportation Access

The parcel benefits from strong regional transportation connectivity due to its position near Danville's industrial spine and the broader U.S.-24/IL-1/IL-136 freight network. Although the land does not front a major arterial, it is in proximity to East Voorhees Street and less than a ten-minute drive to Interstate 74, which links to Champaign-Urbana, Indianapolis, Peoria, St. Louis, and the broader Midwest freight network. The surrounding road network accommodates commercial trucks, enabling efficient last-mile movement between the site and interstate distribution corridors. The parcel's adjacency to existing industrial users positions it well for manufacturing, warehousing, bulk-materials handling, and logistics uses.

### Rail Access

The defining feature of the site is its adjacency to active Norfolk Southern mainline rail infrastructure. This proximity makes it eligible for full rail-service development pending engineering review, safety clearances, operational alignment, and internal Norfolk Southern approvals. Norfolk Southern has outlined the following key considerations:

- Rail service is available, but new sidings, spurs, or customer tracks require 12-18+ months for design, engineering, and approvals.
- Norfolk Southern installs and maintains the track up to the point of switch, billed to the customer.
- The developer is responsible for all track construction beyond the switch.
- Leasing the land is often preferred by the railroad to maintain long-term network flexibility.

This process is typical of Class I rail development and ensures that infrastructure and operations meet long-term network safety and performance standards.

## Air Service

The Vermilion Regional Airport (DNV) is crucial for attracting businesses to the East Voorhees Industrial Corridor. It offers dependable general aviation services, corporate air access, and is situated near major Midwest freight networks. Its 6,000-foot runway supports corporate jets, cargo operations, and business aviation, facilitating advanced manufacturing, distribution, and supplier activities. The airport's location, just minutes from key industrial sites and connected to U.S. 136, I-74, and regional logistics routes, enhances the corridor's competitiveness by reducing travel time for executives, technicians, and time-sensitive shipments.

## Utilities

Because the parcel is currently unimproved, utility service availability varies and would require due diligence during concept development. However, utilities present in the immediate East Voorhees industrial corridor include:

- **Electricity:** Ameren Illinois, with nearby three-phase distribution.
- **Natural Gas:** Medium-pressure commercial lines in adjacent roadways.
- **Water:** Municipal water service is accessible within the surrounding industrial zones.
- **Sanitary Sewer:** Gravity mains located nearby, requiring extension to the parcel.
- **Telecommunications:** Regional carriers provide fiber and broadband within the corridor.

Utility extension costs would depend on the user's footprint, anticipated load, and facility configuration<sup>14</sup>.

<sup>14</sup> While site-specific test results are not published, Vermilion County supports business broadband access up to 1-5 Gb/s depending on provider and location. Site-specific validation is recommended.

## Land Value Assumptions

Under a conservative valuation scenario, the land value for the Norfolk Southern parcel is estimated at approximately \$600,000, based on approximately 30 acres at \$20,000 per acre. This accounts for the property's undeveloped state, the need for extensive site improvements, and the long lead times and costs involved in installing rail infrastructure. Comparable land in Danville typically lists at about \$23,000-\$24,000 per acre for non-rail, non-shovel-ready industrial parcels.<sup>15</sup> The conservative estimate considers both the added value of a rail-adjacent parcel and the infrastructure expenses required to activate rail service<sup>16</sup>.

## Environmental and Site Condition

The parcel is vacant and undisturbed, with no active structures or known environmental restrictions. Norfolk Southern did not report any prohibitions or legacy limitations on the site's development, but indicated that standard environmental due diligence, a Phase I ESA, wetlands screening, and soil testing would be necessary for any industrial project. The railroad imposes no restrictions on potential industrial uses, provided safety and rail-service requirements are met.

<sup>15</sup> Costar.com  
<sup>16</sup> These figures are meant to inform directional thinking and are not a formal appraised value.

## Development Requirements

Norfolk Southern has described several key steps that any developer must follow when pursuing a rail-served project:

- Entering Norfolk Southern’s industrial development intake process, which includes real estate, engineering, operating, and executive-level review.
- Finalizing a track cost estimate, prepared by Norfolk Southern engineering.
- Executing agreements related to:
  - rail service
  - easements and rights-of-way
  - land lease or purchase
  - customer track maintenance
- Allowing 12–18+ months for rail-related improvements from concept initiation to service readiness.

These requirements are standard for Class I rail development and help ensure alignment with long-term network planning.

## Incentives and Local Coordination

While the parcel itself does not carry incentive designations through Norfolk Southern, the surrounding area includes local and regional incentives accessible to private developers:

- **Local Tax Increment Financing (TIF) District** – eligible for infrastructure cost reimbursement and property-tax increment capture.
- **Property Tax Abatements and Local Incentives** – Danville and Vermilion County routinely support industrial reinvestment with abatements tied to job creation or capital outlay.
- **Federal Opportunity Zone** – enables preferential capital-gains treatment for qualified investments.
- **Illinois Enterprise Zone** – offers sales-tax exemptions on building materials, utility-tax reductions, and investment tax credits.

## Development Potential and Target Industries

Because the parcel is controlled by a Class I railroad and positioned for rail-served development, its most suitable uses include:

- Bulk commodity handling
- Metals processing and fabrication requiring inbound raw materials
- Agricultural products and ag-processing
- Construction materials and aggregates
- Transload and logistics operations
- Rail-dependent warehousing and distribution
- Manufacturing operations requiring heavy inbound feedstock

The site's ability to support rail spurs gives it a competitive advantage for industrial users with high transportation volume, heavy product flows, or specialized freight needs.

## Summary

The Norfolk Southern parcel (PIN 18-34-539-002) represents a notable industrial development opportunity within the East Voorhees corridor. The site is vacant, under single ownership, and benefits from proximity to established rail infrastructure and Norfolk Southern's industrial development process. With a flexible layout, an estimated land value of approximately \$600,000, and no major land-use restrictions, the property is well positioned for a range of industrial users, including manufacturing, logistics, and freight-oriented operations. While any future rail connectivity would require additional coordination and evaluation, continued collaboration among Norfolk Southern, Vermilion Advantage, and prospective developers will be important to fully realize the site's potential as part of the broader East Voorhees industrial ecosystem.



# Target Industry Analysis

*This section will identify high-potential industries for Vermilion County, particularly in the East Voorhees Corridor. This analysis will be informed by the situational analysis and consider the existing and potential properties within the corridor.*

## Introduction

Business retention, expansion, and attraction are vital parts of any strategic plan for economic growth. However, putting these efforts into action can be challenging. Communities need to decide which businesses to focus on and identify industries that best match their unique economic strengths. Conducting a target industry analysis helps answer these questions and supports wider economic development strategies. By basing these strategies on the competitive advantages of the local business ecosystem, Vermilion County can more effectively pursue sustainable growth and long-term prosperity.

This analysis centers on industry clusters – groups of related industries connected by shared knowledge, skills, inputs, and market demand.<sup>17</sup> The target clusters were identified through an iterative process that leveraged quantitative data to ensure that industry priorities reflect both Vermilion County’s existing assets and its desired business environment. These findings serve as the foundation for many of the strategic recommendations presented later in the report.



<sup>17</sup> Defining Clusters of Related Industries. Delgado, M., Porter, M. and Stern, S. National Bureau of Economic Research Working Paper 20375.

## Methodology

To identify high-potential industries to include in the target industry clusters, the project team analyzed Lightcast data at the 4-digit NAICS (North American Industry Classification System) code level. Four key questions guided this analysis.

- Do the industries fit with Vermilion County’s competitive advantages?
- Do the identified industries provide high-quality employment opportunities?
- Do the identified industries have the potential to grow?
- Do the identified industries address an unmet need, locally or in an external market?

A variety of statistical measures were used to evaluate each industry.<sup>18</sup> To be considered high-potential and included in a target cluster, an industry needed to meet most of the criteria above; exceptions are noted where applicable.

Based on this assessment, a set of target industry clusters was developed, including groups of industries determined to have high potential:

-  **Food Product & Apparel Manufacturing**
-  **Nonmetallic Manufacturing**
-  **Metal & Machinery Manufacturing**
-  **Wholesalers**
-  **Other**

No communities exist in an isolated market; Danville and Vermilion County are well connected to the broader regional business community. Therefore, data for these industries were collected at the regional level. The East Central Region, defined by the Illinois Department of Commerce and Economic Opportunity, includes Vermilion, Iroquois, Douglas, Champaign, Ford, and Piatt Counties. The following sections provide an overview of the key findings for each target industry cluster. For additional data on target industry clusters, see Appendix B.

<sup>18</sup> Employment concentration, measured by location quotient, was used for the first question. To answer the second question, the average annual earnings of a worker in each industry was compared to the overall average for the county. Projected job growth in the industry between 2024-2034 provided an answer to the third question. A variety of measures of industry sales and demand, both locally and in external markets, were used in considering the fourth question.

# Food Product and Apparel Manufacturing

The Food Product and Apparel Manufacturing cluster includes a variety of food processors, agriculture-related manufacturers, and smaller apparel and textile producers centered around county hubs such as Champaign-Urbana and Danville. Food processing has a strong local advantage: easy access to regional agriculture, transportation links for distribution, and a network of small- to mid-sized firms that produce everything from commodity food products to specialty, value-added items. The cluster is a key employer and contributes significantly to county-level output – manufacturing overall makes up a substantial part of economic activity in counties like Vermilion County and the broader East Central planning area.

Strengths of the cluster include its proximity to raw material supply chains, institutional support like regional workforce and economic development programs, and university partnerships, along with established logistics links. However, the region also faces common rural manufacturing challenges, such as aging workforces and recruitment gaps, competition from larger national firms, and the need for investments in automation and upskilling to advance along the value chain.

NAICS	Description	2024 Jobs	Average Earnings per Job
3115	DAIRY PRODUCT MANUFACTURING	219	\$66,902
3118	BAKERIES AND TORTILLA MANUFACTURING	1,307	\$77,784
3112	GRAIN AND OILSEED MILLING	1,245	\$99,826
3113	SUGAR AND CONFECTIONERY PRODUCT MANUFACTURING	98	\$50,160
3152	CUT AND SEW APPAREL MANUFACTURING	434	\$67,496
3116	ANIMAL SLAUGHTERING AND PROCESSING	559	\$83,090
3159	APPAREL ACCESSORIES AND OTHER APPAREL MANUFACTURING	37	\$67,017

Table 1: Food Product & Apparel Manufacturing Industries. Source: Lightcast 2025.3

The cluster is a major regional strength, with employment concentrated at five times the national average and generating over \$3.1 billion in exports in 2024. It also provides strong job quality, with average annual earnings of around \$73,000. Looking ahead, the sector is expected to keep growing, with more than 500 new jobs projected between 2024 and 2034, reinforcing its long-term economic significance to East Central Illinois.

**523**

JOBS PROJECTED TO BE ADDED BETWEEN 2024-2034

**5X**

HIGHER EMPLOYMENT CONCENTRATION THAN NATIONAL AVERAGE

**\$73,182**

AVERAGE ANNUAL EARNINGS

**\$3.1 B+**

EXPORTED SALES IN 2024

# Industrial Real Estate Trends in Food and Apparel Manufacturing

When considering industrial real estate for food and apparel manufacturing, three consistent themes emerge:

- **Facilities must meet specialized processing needs**—whether it's cold storage and sanitation for food, or flexibility and speed for apparel.
- **Location matters**, but for different reasons in food versus apparel: proximity to supply chains, utilities, labor, and regulatory environment all play a role.
- **Cost and complexity are increasing**, from permitting and infrastructure to equipment and compliance; these factors are becoming more significant in site selection decisions.

## Food Manufacturing

The industrial real estate market in the food-product manufacturing sector is driven by a growing emphasis on cold-chain infrastructure, sanitary design, and proximity to markets, as companies aim to shorten supply chains, enhance freshness, and meet increasingly stringent regulatory standards. For example, specialized food-processing and cold-storage facilities now require higher clear heights, stronger flooring, more utilities (especially for refrigeration and sanitation), and easy access to highways and distribution centers. Meanwhile, overall industrial demand is shifting toward users seeking durable manufacturing spaces rather than speculative warehouses, as shown by the slowdown in new supply and the increasing importance of purpose-built facilities.<sup>19,20</sup>

<sup>19</sup> <https://www.cbre.com/insights/reports/midwest-cold-storage-trends-2025>  
<sup>20</sup> <https://www.pwc.com/us/en/industries/financial-services/asset-wealth-management/real-estate/emerging-trends-in-real-estate-pwc-uli/property-type-outlook/industrial.html>

## Apparel Manufacturing

In apparel manufacturing, trends in industrial real estate are shifting toward near-shoring, quick-response production, automation, and smaller, more flexible spaces rather than large, mass-market factories. The U.S. apparel manufacturing market is expected to grow slowly, and domestic operations are increasingly focusing on premium, niche, sustainable, or technical garments rather than low-cost commodities. This means real estate users in apparel prefer smaller, high-flex buildings with good HVAC, daylighting, efficient layouts, and proximity to logistics or talent pools, rather than the large-block heavy manufacturing plants of the past. Therefore, real estate investors and developers targeting the apparel sector should emphasize adaptive reuse of light-industrial spaces or smaller, multi-tenant manufacturing parks instead of expecting large build-to-suit factories.<sup>21</sup>

<sup>21</sup> <https://www.kentleyinsights.com/clothing-manufacturing-market-report/>

## Nonmetallic Manufacturing

The Nonmetallic Manufacturing cluster in East Central Illinois is a smaller but strategically vital part of the local economy. It includes specialty chemicals, plastics and rubber products, and mineral-based materials. One company in Urbana (APL Engineered Materials, Inc.) produces high-purity salts and oxides used in lighting, energy, and nuclear markets; businesses that complement or advance those markets could be attracted to Vermilion County.

From a regional planning and workforce perspective, this cluster is identified as emerging in the East Central Economic Development Region’s WIOA plan. The plan emphasizes aligning training and business services to support demand-driven growth in these manufacturing sectors, helping firms in nonmetallic industries access skilled labor through career pathways, on-the-job training, and integrated workforce supports.

NAICS	Description	2024 Jobs	Average Earnings per Job
3212	VENEER, PLYWOOD, AND ENGINEERED WOOD PRODUCT MANUFACTURING	141	\$73,655
3219	OTHER WOOD PRODUCT MANUFACTURING	775	\$70,679
3251	BASIC CHEMICAL MANUFACTURING	263	\$124,124
3256	SOAP, CLEANING COMPOUND, AND TOILET PREPARATION MANUFACTURING	331	\$80,173
3261	PLASTICS PRODUCT MANUFACTURING	1,457	\$74,807
3279	OTHER NONMETALLIC MINERAL PRODUCT MANUFACTURING	150	\$83,465

Table 2: Nonmetallic Manufacturing Industries. Source: Lightcast 2025.3

The Nonmetallic Manufacturing cluster demonstrates both strong regional specialization and significant economic potential. It has an employment concentration more than double the national average, with workers earning an average annual salary of \$84,484. In 2024, the cluster generated over \$1.3 billion in exported sales. During the same period, more than \$453 million in local demand was met by imports, highlighting the potential to boost the local supply of specific products.

**\$84,484**  
AVERAGE ANNUAL EARNINGS

**2.3X**  
HIGHER EMPLOYMENT CONCENTRATION  
THAN NATIONAL AVERAGE

**\$1.3 B+**  
EXPORTED SALES IN 2024

**\$453 M+**  
LOCAL DEMAND MET BY IMPORTS IN  
2024

## Industrial Real Estate Trends in Nonmetallic Manufacturing

- **Sustainability and material efficiency dominate demand** – Nonmetallic mineral product manufacturers are increasingly focused on energy-intensive processes, recycling, and greener building materials, which in turn drive demand for modern, purpose-built industrial real estate with specialized utilities and environmental controls<sup>22</sup>.
- **Location and logistics matter for heavy and bulk products** – Many nonmetallic products carry high weight and low freight value relative to volume, so siting near raw materials, major transportation corridors, rail, and distribution gateways is a critical real estate factor<sup>23</sup>.
- **Adaptive reuse and consolidation of older facilities** – As technology advances and environmental or regulatory standards tighten, older plants are being upgraded or shut down, and new facilities are being designed or redeveloped to support increased automation, lower emissions, and enhanced utility and energy efficiency. This creates opportunities in industrial real estate for repositioned or newly developed manufacturing facility space.<sup>24</sup>

## Overview

The nonmetallic manufacturing sector continues to show strong demand, mainly driven by construction, infrastructure growth, and sustainability goals. With the market expected to grow significantly over the next decade, industrial real estate owners and developers face increasing challenges in creating facilities that meet this sector's technical needs. These needs include heavy floor loads, high ceilings, large yards for bulk materials, easy rail or truck access, and utilities capable of supporting high-heat or high-volume processes.<sup>25</sup>

For communities and developers evaluating industrial site investments, the real estate value proposition is changing. It is moving from speculative small-box logistics to strategic site preparedness for heavy-duty manufacturing. Properties with rail access, bulk-material yards, robust utility infrastructure, and adaptable layouts are becoming increasingly desirable. Additionally, older manufacturing parks are being repositioned or upgraded to match this trend, creating both risks and opportunities for developers. Risks include high capital costs, but opportunities exist through lower competition and a more specialized, loyal tenant base. In short, nonmetallic manufacturing may not be a glamorous growth sector, but it remains a vital field for industrial real estate, especially in secondary markets willing to invest in readiness.

<sup>22</sup> <https://www.anythingresearch.com/industry/Nonmetallic-Mineral-Product-Manufacturing>.

htm

<sup>23</sup> <https://www.eia.gov/todayinenergy/>

<sup>24</sup> <https://www.ibisworld.com/united-states/industry/mineral-product-manufacturing/562/>

<sup>25</sup> <https://www.eia.gov/todayinenergy/>

# Metal and Machinery Manufacturing

The region features a diverse advanced-manufacturing sector focused on metal fabrication, machining, heavy machinery, and electromechanical systems. Local companies produce everything from precision metal parts to industrial equipment and electronic subassemblies. This cluster benefits from the area’s mix of skilled workers, engineering expertise, and proximity to the University of Illinois, which encourages innovation and helps turn research into marketable products. Additionally, the region gains support from state and local economic development efforts, making manufacturing a key part of its economic identity.

From a workforce development perspective, East Central Illinois is using coordinated strategies under its regional WIOA plan to maintain and expand this industry cluster. The plan highlights employer-led sector initiatives, career pathway development, and work-based training to create a talent pipeline focused on machinery and metal manufacturing. Additionally, the region is utilizing advanced research through partnerships, with institutions like the University of Illinois contributing to sophisticated metal part manufacturing, including a new DoD-supported additive manufacturing center. This integrative approach helps strengthen both the current workforce and the future competitiveness of its metal and machinery manufacturers.

NAICS	Description	2024 Jobs	Average Earnings per Job
3315	FOUNDRIES	74	\$82,852
3321	FORGING AND STAMPING	413	\$67,909
3323	ARCHITECTURAL AND STRUCTURAL METALS MANUFACTURING	843	\$92,202
3324	BOILER, TANK, AND SHIPPING CONTAINER MANUFACTURING	153	\$90,025
3327	MACHINE SHOPS; TURNED PRODUCT; AND SCREW, NUT, AND BOLT MANUFACTURING	296	\$76,684
3331	AGRICULTURE, CONSTRUCTION, AND MINING MACHINERY MANUFACTURING	309	\$81,466
3333	COMMERCIAL AND SERVICE INDUSTRY MACHINERY MANUFACTURING	197	\$83,736
3334	VENTILATION, HEATING, AIR-CONDITIONING, AND COMMERCIAL REFRIGERATION EQUIPMENT MANUFACTURING	219	\$64,385
3336	ENGINE, TURBINE, AND POWER TRANSMISSION EQUIPMENT MANUFACTURING	76	\$105,785
3339	OTHER GENERAL PURPOSE MACHINERY MANUFACTURING	227	\$89,591
3341	COMPUTER AND PERIPHERAL EQUIPMENT MANUFACTURING	19	\$85,976
3344	SEMICONDUCTOR AND OTHER ELECTRONIC COMPONENT MANUFACTURING	111	\$141,561
3345	NAVIGATIONAL, MEASURING, ELECTROMEDICAL, AND CONTROL INSTRUMENTS MANUFACTURING	99	\$98,152
3351	ELECTRIC LIGHTING EQUIPMENT MANUFACTURING	10	\$110,932
3359	OTHER ELECTRICAL EQUIPMENT AND COMPONENT MANUFACTURING	42	\$100,053
3365	RAILROAD ROLLING STOCK MANUFACTURING	50	\$87,796

Table 3: Metal & Machinery Manufacturing Industries. Source: Lightcast 2025.3

The Metal and Machinery Manufacturing cluster in East Central Illinois is a specialized, high-value sector, with employment 1.5 times the national average. Workers in the cluster earn an average of \$90,801 annually, reflecting strong pay in skilled manufacturing. The sector generated over \$1.2 billion in exported sales in 2024 and is expected to grow, adding about 400 new jobs between 2024 and 2034.

**401**

JOB'S PROJECTED TO BE ADDED BETWEEN 2024-2034

**1.5X**

HIGHER EMPLOYMENT CONCENTRATION THAN NATIONAL AVERAGE

**\$90,801**

AVERAGE ANNUAL EARNINGS

**\$1.2 B+**

EXPORTED SALES IN 2024



# Industrial Real Estate Trends in Metal and Machinery Manufacturing

## RE-SHORING AND INVESTMENT IN ADVANCED MANUFACTURING DRIVE DEMAND FOR REAL ESTATE THAT SUPPORTS TOOL-FLOOR, AUTOMATION, AND HEAVY PROCESSES

Industrial real-estate decisions are increasingly driven by manufacturers bringing operations back to the U.S. and deploying more robotics, precision casting, CNC, and automated assembly units<sup>26,27</sup>.

## UTILITY AND INFRASTRUCTURE CAPACITY ARE BECOMING PRE-SCREENING CRITERIA FOR SITE SELECTION

Site-selection professionals are prioritizing sites where power, three-phase electric, high floor load capacity, heavy crane access, and yard areas are ready or easily upgradable.<sup>28</sup>

## FLEXIBILITY AND SMALLER-FOOTPRINT MANUFACTURING SPACES ARE GAINING GROUND ALONGSIDE LARGE FACTORIES

With more modular production lines and heightened emphasis on agility, developers are seeing demand for manufacturing spaces that blend office, R&D, prototyping, and production in smaller, well-served buildings rather than huge commodity manufacturing sheds.<sup>29</sup>

## Overview

In the metal and machinery manufacturing sector, industrial real estate trends are shifting from generic large space blocks to facilities designed for specific purposes, such as supporting heavy equipment, precision fabrication, automation cells, and integrated R&D. The resurgence of U.S. manufacturing, driven by reshoring and near-sourcing, is prompting manufacturers to look for sites with strong technical infrastructure and excellent logistics. Communities and developers need to improve their readiness by offering more than just square footage, providing tailored infrastructure, efficient layouts, and strategic locations.

From a real estate investment perspective, properties capable of supporting machinery-intensive manufacturing or metal fabrication are becoming more specialized and less interchangeable. Although warehouse and logistics assets still draw most attention, manufacturing-ready properties tend to require longer lease terms, higher capital investment, and more customized design. They also often present higher entry barriers, greater tenant loyalty, and fewer competing sites. Developers who can provide or adapt spaces with sufficient utilities, heavy-duty fit-outs, and flexible manufacturing layouts are well-positioned to meet this selective demand.<sup>30</sup>

<sup>26</sup> <https://www.naiop.org/research-and-publications/magazine/2024/summer-2024/business-trends/advanced-manufacturings-rapid-growth-finding-the-right-real-estate/>

<sup>27</sup> <https://www.deloitte.com/us/en/insights/industry/manufacturing-industrial-products/manufacturing-industry-outlook.html>

<sup>28</sup> <https://www.lightboxre.com/insight/power-is-driving-site-selection-for-industrial-real-estate-investors/>

<sup>29</sup> <https://rsmus.com/insights/industries/real-estate/industrial-real-estate-shifts-focus-in-us-and-canada.html>

<sup>30</sup> <https://www.deloitte.com/us/en/insights/industry/manufacturing-industrial-products/manufacturing-industry-outlook.html>

## Wholesalers

Wholesaling and distribution are vital components of East Central Illinois' regional economy, acting as the logistical core that links local manufacturers, farmers, and retailers to larger national and global markets. The region's central position, along with an established transportation infrastructure, supports a robust wholesale trade sector. This cluster includes merchant wholesalers of both durable and nondurable goods, from industrial machinery to consumer-packaged products, enabling local producers to distribute their goods beyond the immediate vicinity efficiently. Distribution hubs in this area strengthen the region's role as a trade and logistics center.

Regarding workforce and economic development, the East Central Economic Development Region's WIOA plan highlights trade, including wholesale, as a key component of its broader "Trade, Transportation, and Utilities" sector strategy. The plan emphasizes demand-driven training, work-based learning, and collaborative services between workforce boards and businesses to ensure that wholesale employers can access skilled workers. This coordinated effort aims to strengthen regional wholesale capacity, improve efficiency, and support the ongoing growth of the cluster, as it serves as a crucial link in the supply chains of the region's growing manufacturing and agricultural industries.

NAICS	Description	2024 Jobs	Average Earnings per Job
4233	LUMBER AND OTHER CONSTRUCTION MATERIALS MERCHANT WHOLESALERS	121	\$74,297
4237	HARDWARE, AND PLUMBING AND HEATING EQUIPMENT AND SUPPLIES MERCHANT WHOLESALERS	141	\$96,278
4238	MACHINERY, EQUIPMENT, AND SUPPLIES MERCHANT WHOLESALERS	1,093	\$93,850
4239	MISCELLANEOUS DURABLE GOODS MERCHANT WHOLESALERS	499	\$76,600
4244	GROCERY AND RELATED PRODUCT MERCHANT WHOLESALERS	1,236	\$77,789
4245	FARM PRODUCT RAW MATERIAL MERCHANT WHOLESALERS	502	\$82,220
4246	CHEMICAL AND ALLIED PRODUCTS MERCHANT WHOLESALERS	98	\$96,547
4247	PETROLEUM AND PETROLEUM PRODUCTS MERCHANT WHOLESALERS	347	\$98,670
4249	MISCELLANEOUS NONDURABLE GOODS MERCHANT WHOLESALERS	1,242	\$93,160

Table 4: Wholesaler Industries. Source: Lightcast 2025.3

The Wholesalers cluster in East Central Illinois is a key part of the regional economy, with employment 2.3 times the national average and average annual earnings of \$87,712. In 2024, the cluster produced over \$1.7 billion in exported sales and is expected to keep growing, with about 80 new jobs likely to be created between 2024 and 2034.

**80**

JOBS PROJECTED TO BE ADDED BETWEEN 2024-2034

**2.3X**

HIGHER EMPLOYMENT CONCENTRATION THAN NATIONAL AVERAGE

**\$87,712**

AVERAGE ANNUAL EARNINGS

**\$1.7 B+**

EXPORTED SALES IN 2024

## Industrial Real Estate Trends in Wholesalers

- **Outsourcing and third-party logistics growth** – Wholesalers are increasingly relinquishing warehousing and fulfillment operations to third-party logistics providers (3PLs) because of rising labor, transportation, and real-estate costs, which drives demand for high-quality distribution space.<sup>31</sup>
- **Flight to quality and location premium** – Distribution and wholesale operations are gravitating toward modern, well-located facilities within close reach of major markets and transportation nodes, rather than older, lower-spec space.<sup>32</sup>
- **Smaller, networked footprints and flexibility** – Instead of single massive warehouse blocks, wholesalers and their logistics partners are building networked regional footprints with multiple strategically placed sites to enable faster turnaround, reduced transit costs, and inventory flexibility.<sup>33</sup>

## Overview

In the wholesale and distribution sector, demand for industrial real estate is driven by broader supply chain trends. This includes increasing e-commerce activity, rising transportation costs, and the need for quicker, more responsive inventory management. Wholesalers and distributors face pressure to reduce delivery times, maintain leaner inventories, and adopt more flexible footprints. Consequently, space requirements are shifting toward modern distribution centers with efficient layouts, robust transportation access, high-dock ratios, and a network-oriented structure rather than a single large facility. This trend favors real estate assets that support modernization, excellent supply chain connectivity, and multi-modal access.

For developers and communities assessing industrial real estate opportunities, the wholesaler sector highlights the importance of location readiness, building specifications, and flexibility. Older warehouse parks with low clear heights, limited truck access, or outdated infrastructure face the risk of becoming obsolete. Conversely, regions capable of providing modern distribution spaces, enabling quick occupancy, and offering cost advantages are likely to attract consistent but quieter demand from wholesaling businesses. Especially in secondary markets, these advantages can create a strong value proposition for both tenants and investors.

<sup>31</sup> <https://www.cbre.com/insights/books/us-real-estate-market-outlook-2025/industrial>  
<sup>32</sup> <https://www.pwc.com/us/en/industries/financial-services/asset-wealth-management/real-estate/emerging-trends-in-real-estate-pwc-uli/property-type-outlook/industrial.html>  
<sup>33</sup> <https://www.cbre.com/insights/books/us-real-estate-market-outlook-2025/industrial>

## Other High-Potential Industries

In Vermilion County, various industries beyond manufacturing and wholesale can significantly boost local economic growth. Agriculture and forestry, along with utilities like electricity and natural gas distribution, form the backbone of the economy by supporting local employment and regional supply chains. Construction and specialized infrastructure services help maintain and expand the county’s transportation, industrial, and commercial assets, which, in turn, foster growth in other sectors such as manufacturing and wholesale trade. Transportation and warehousing are also vital, utilizing Vermilion County’s central location in East Central Illinois to connect goods and services to larger national and regional markets.

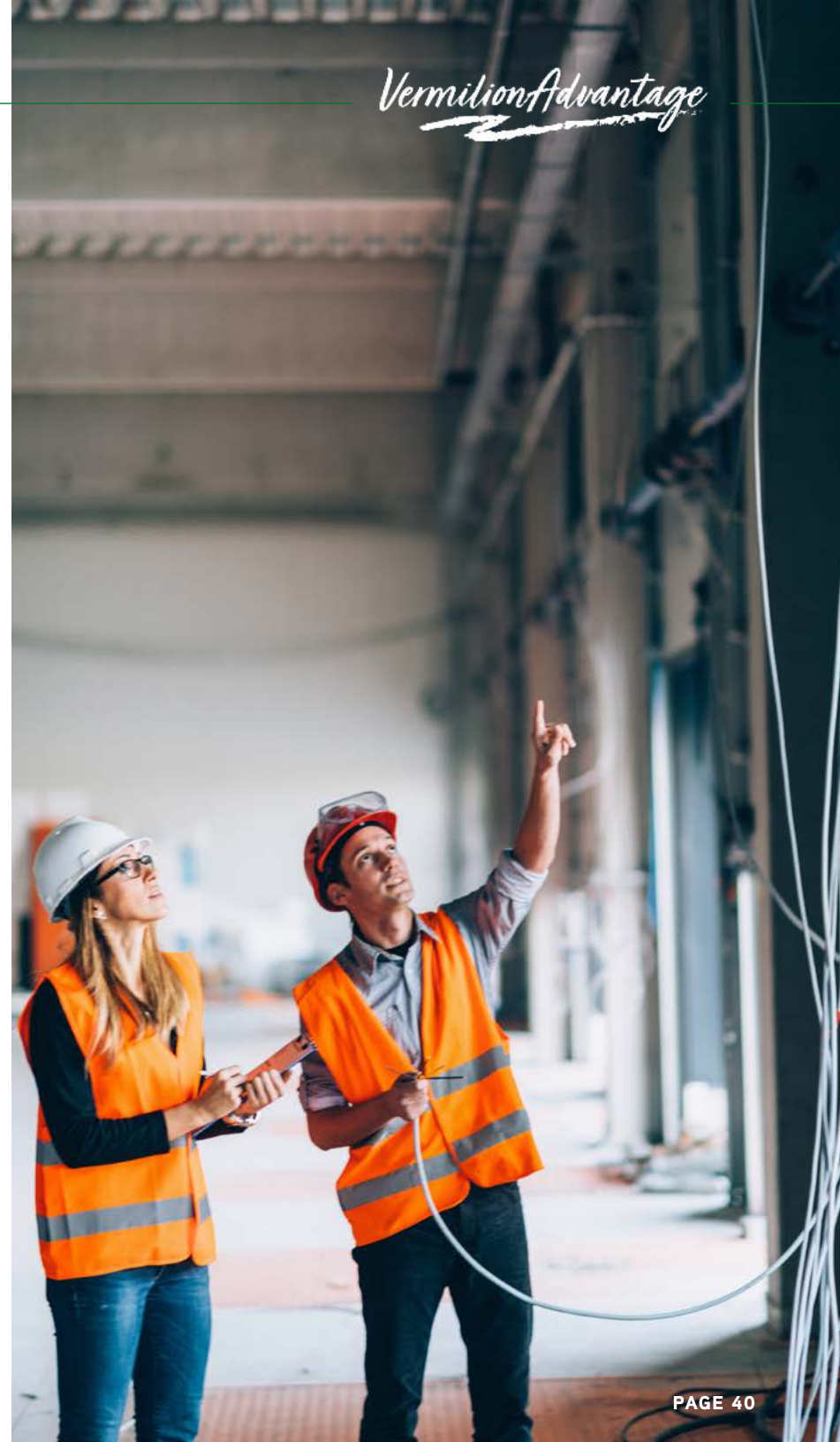
Other sectors, such as information and professional services, can enhance existing regional strengths. For example, the presence of technology and engineering service providers, including research, design, and consulting, can help local manufacturers adopt advanced production methods and boost operational efficiency. Similarly, waste management and environmental services contribute not only to public health and sustainability but also create local jobs and support compliance requirements for other industries. The creative and information-driven sectors, including media and telecommunications, can promote innovation and provide platforms for regional branding and marketing, further increasing the county’s competitiveness.

NAICS	Description	2024 Jobs	Average Earnings per Job
1151	SUPPORT ACTIVITIES FOR CROP PRODUCTION	391	\$78,081
2211	ELECTRIC POWER GENERATION, TRANSMISSION, AND DISTRIBUTION	286	\$180,174
2213	WATER, SEWAGE, AND OTHER SYSTEMS	154	\$79,455
2362	NONRESIDENTIAL BUILDING CONSTRUCTION	577	\$87,974
2373	HIGHWAY, STREET, AND BRIDGE CONSTRUCTION	565	\$128,058

NAICS	Description	2024 Jobs	Average Earnings per Job
2379	OTHER HEAVY AND CIVIL ENGINEERING CONSTRUCTION	92	\$80,028
2381	FOUNDATION, STRUCTURE, AND BUILDING EXTERIOR CONTRACTORS	849	\$74,171
2382	BUILDING EQUIPMENT CONTRACTORS	1,864	\$89,227
4862	PIPELINE TRANSPORTATION OF NATURAL GAS	55	\$126,813
4881	SUPPORT ACTIVITIES FOR AIR TRANSPORTATION	182	\$103,499
4921	COURIERS AND EXPRESS DELIVERY SERVICES	1,524	\$41,765
5121	MOTION PICTURE AND VIDEO INDUSTRIES	175	\$79,249
5162	MEDIA STREAMING DISTRIBUTION SERVICES, SOCIAL NETWORKS, AND OTHER MEDIA NETWORKS AND CONTENT PROVIDERS	131	\$83,981
5171	WIRED AND WIRELESS TELECOMMUNICATIONS (EXCEPT SATELLITE)	435	\$86,458
5182	COMPUTING INFRASTRUCTURE PROVIDERS, DATA PROCESSING, WEB HOSTING, AND RELATED SERVICES	366	\$123,704
5413	ARCHITECTURAL, ENGINEERING, AND RELATED SERVICES	805	\$95,215
5416	MANAGEMENT, SCIENTIFIC, AND TECHNICAL CONSULTING SERVICES	850	\$86,062
5417	SCIENTIFIC RESEARCH AND DEVELOPMENT SERVICES	457	\$101,470
5629	REMEDIATION AND OTHER WASTE MANAGEMENT SERVICES	212	\$66,141

Table 5: Other High-Potential Industries. Source: Lightcast 2025.3

When assessing which industries are best suited to support Vermilion County's economic growth, it is crucial to choose those that align with the regional economy and leverage local assets. This involves prioritizing industries that build on the county's current workforce skills, transportation systems, natural resources, and connections to nearby urban centers. By concentrating on sectors that integrate with the East Central Illinois economy, Vermilion County can establish a resilient, diversified economic foundation that promotes long-term job creation, higher wages, and broader prosperity for its residents.



# Workforce Analysis

This section will analyze current workforce trends based on the situational analysis. It will examine current training and educational assets relative to the identified target industries. It will identify labor force skills and gaps and analyze local and regional educational performance.

## Labor Force & Unemployment

The civilian labor force comprises all civilians aged 16 years and older who are actively seeking work, whether employed or unemployed. Between 2015 and 2024, the civilian labor force in Vermilion County steadily declined, falling from 35,417 to 31,357 over the 10-year period. The sharpest decline was between 2015 and 2020; between 2020 and 2024, labor force levels have remained relatively stable. The county's unemployment rate has generally fluctuated between 5% and 7.5% over the last ten years; the exception was 2020, when it spiked to 9.1%, likely spurred by the COVID-19 pandemic.

Labor Force & Unemployment Rate

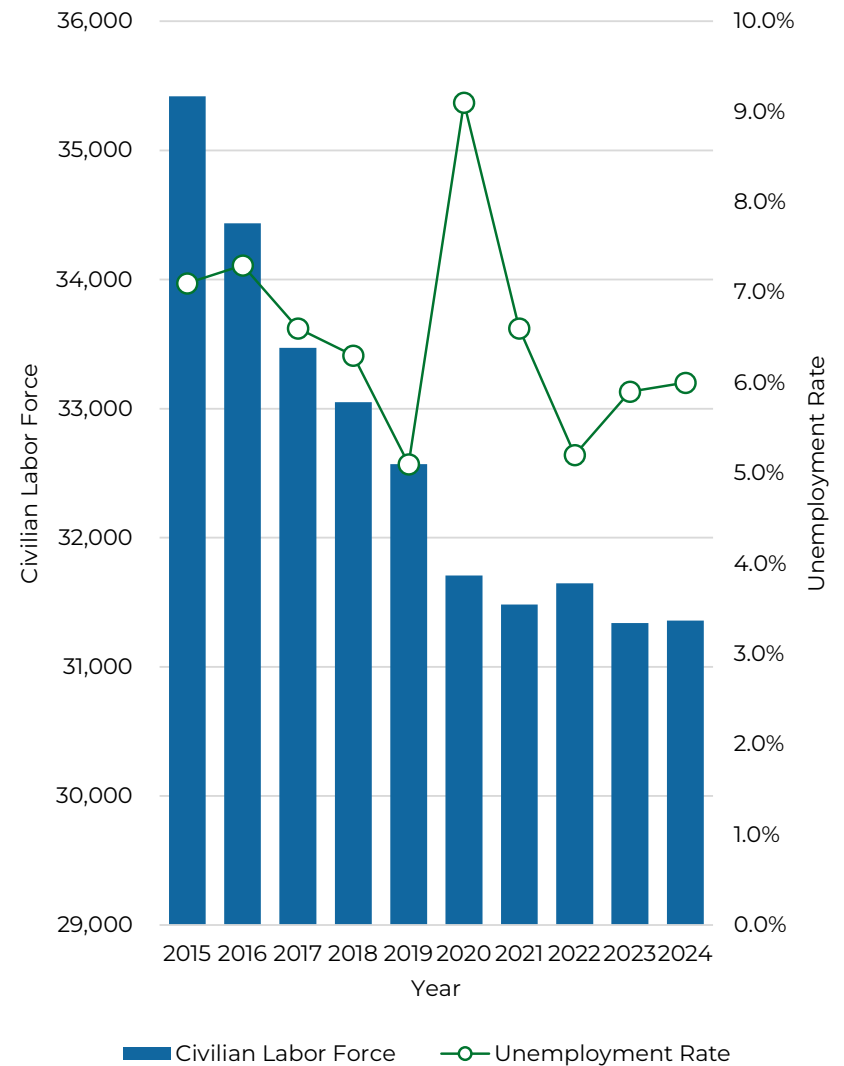


Figure 1: Vermilion County Labor Force & Unemployment Rate. Source: St. Louis Federal Reserve, 2025

## Local & Regional Education Institutions

In Table 6, program completions are listed for all educational institutions in the East Central Region. These completions include all certificates, bachelor’s degrees, master’s degrees, and doctoral degrees awarded through the institutions.

The data presented in the table are representative of the region, and the majority of program completions come from institutions outside of Vermilion County; the University of Illinois Urbana-Champaign is the largest of them. While the existence of regional educational assets is certainly a strength, many stakeholders noted that more local training programs could be important for attracting and retaining talent. Urbana and Champaign are not far from Danville and Vermilion County, but nevertheless, many young workers choose to remain in that larger, more urban area after completing their education. Efforts to recapture these workers could strengthen Vermilion County’s workforce.

Danville Area Community College (DACC) is a local educational institution, and it plays a central role in preparing residents for skilled employment. In 2024, there were 432 program completions across a variety of technical and career-focused programs. These offerings, including dual-credit pathways for high school students and workforce-aligned training in manufacturing, health sciences, and trades, directly supply local employers with job-ready talent. Similarly, Lakeview College of Nursing, also in Danville, addresses the county’s critical healthcare workforce needs; they produced 36 graduates in 2024 who contribute to hospitals, clinics, and long-term care facilities throughout the region.

Regional institutions that influence Vermilion County’s workforce include the University of Illinois Urbana-Champaign, mentioned previously, and Parkland College. Parkland College is located in Champaign and reported 1,406 program completions in 2024; this college provides training in advanced manufacturing, technology, and allied health fields that complement local economic clusters. The University of Illinois Urbana-Champaign, which boasted 17,384 completions in 2024, serves as a significant regional talent engine, producing graduates in engineering, business, computer science, and other high-demand fields. Together, these institutions create a dynamic workforce development environment, combining technical training, professional preparation, and higher education expertise to support Vermilion County’s economic competitiveness and growth capacity.

Institution	Location	Program Completions (2024)
DANVILLE AREA COMMUNITY COLLEGE	Danville	432
LAKEVIEW COLLEGE OF NURSING	Danville	36
PARKLAND COLLEGE	Champaign	1,406
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN	Champaign	17,384

Table 6: Program Completions by Institution. Source: Lightcast 2025.4

## Career and Technical Education and Other Workforce Training

There are numerous organizations and programs that provide programming and resources across the local workforce development system, including:

### Vermilion County Works

Vermilion County Works (VCW) is the WIOA Title I provider for Vermilion County, operating through Danville Area Community College. VCW delivers vocational and CTE programs in high-demand fields, including nursing, electronics, CDL training, medical assisting, and mechatronics. In addition to classroom training, VCW facilitates work-based experiences, transitional employment for those with barriers, and employer-focused on-the-job training programs that reimburse wages during training. Youth services include pre-employment training, internships, and placement, alongside supportive services such as childcare, transportation, and housing assistance for participants.

### East Central Illinois workNet (ECI workNet)

ECI workNet serves as the regional workforce development system for Champaign, Ford, Iroquois, Piatt, and Douglas counties (Vermilion County is omitted). Through a network of One-Stop centers, ECI workNet provides career counseling, labor market information, and job readiness support, such as resume and interview assistance. The organization administers Better Job Scholarships, which help eligible individuals cover tuition, books, tools, and other training-related expenses, and partners with employers to provide on-the-job training, wage reimbursements, and incumbent-worker training. ECI workNet also offers youth-focused programs that support paid internships, career readiness, and credential attainment for participants aged 16–24.

### Danville Area Community College (DACC)

DACC provides both academic and technical programs to support workforce development in Vermilion County. Its Illinois Works pre-apprenticeship program prepares participants for careers in construction trades, awarding college certificates and industry-recognized credentials, including OSHA and NCCER certifications. DACC also serves as the American Job Center operator, offering integrated workforce services in partnership with local agencies. Adult education programs include CNA and LPN/RN training, health-related certifications, and dual-credit College Express courses for high school students, allowing them to earn college credit while completing their CTE pathways.

## **Champaign County Regional Planning Commission (CCRPC) – Workforce & Talent Development**

CCRPC manages workforce development programs in Champaign, Ford, Iroquois, and Piatt counties. Its Employer & Business Services division assists local employers with customized training programs, on-the-job training reimbursements, incumbent-worker training, and rapid-response support during layoffs. CCRPC also collaborates with educational institutions and employers to build talent pipelines aligned with high-growth sectors, supporting career pathway education, youth work-readiness, and credential attainment to strengthen regional workforce capacity.

## **Education for Employment System #330 (EFE 330)**

EFE 330 is a K–12 CTE cooperative serving 14 school districts in Champaign, Ford, Piatt, and Douglas counties. It coordinates technical education across districts, provides curriculum support, and administers grants to expand program capacity. EFE 330 offers programs such as summer construction training, future educator initiatives, and career exploration platforms, such as Xello/Career Cruising. These efforts prepare high school students for postsecondary CTE programs and work-based learning opportunities while promoting equity and access in technical education.

## **Parkland College – Workforce Development**

Parkland College provides comprehensive post-secondary and adult workforce training across the region. Its Support for Workforce Training (SWFT) program offers scholarships for short-term certification programs in fields such as industrial maintenance, healthcare, logistics, and technology. Parkland administers registered and employer-led apprenticeships in areas like automotive collision repair, diesel technology, fiber optics, and warehouse operations. Adult education initiatives, including the Integrated Career and Academic Preparation System (ICAPS), provide pathway-based short-term training coupled with academic support. In contrast, continuing education courses offer industry-specific certifications to strengthen regional workforce skills.

## **Early College & Career Academy (ECCA)**

The Early College & Career Academy, a joint initiative of EFE 330 and Parkland College, allows high school juniors and seniors to take college-level CTE courses while still in their home schools. Program areas include automotive technology, construction trades, criminal justice, certified nurse assistant training, industrial technology, education, and precision agriculture. Students can earn 10–14 college credits per year and obtain industry-recognized credentials, helping them transition seamlessly into postsecondary education or directly into in-demand careers.

## Academic Program Specialties

Figure 2 presents the top academic program specialties in the region measured by total program completions (across all institutions) in 2024. Business-focused programs lead the region with 4,160 completions, followed by engineering (2,750) and computer and information sciences (2,357); this signals a robust STEM and business talent base.

Health professions account for a large share of completions; social sciences, agriculture and veterinary-related fields, mathematics, psychology, biological sciences, and interdisciplinary studies each add between 640 and 875 completions. Together, these numbers reflect a broad and well-distributed mix of educational specialties across the region.

Top Academic Program Specialties

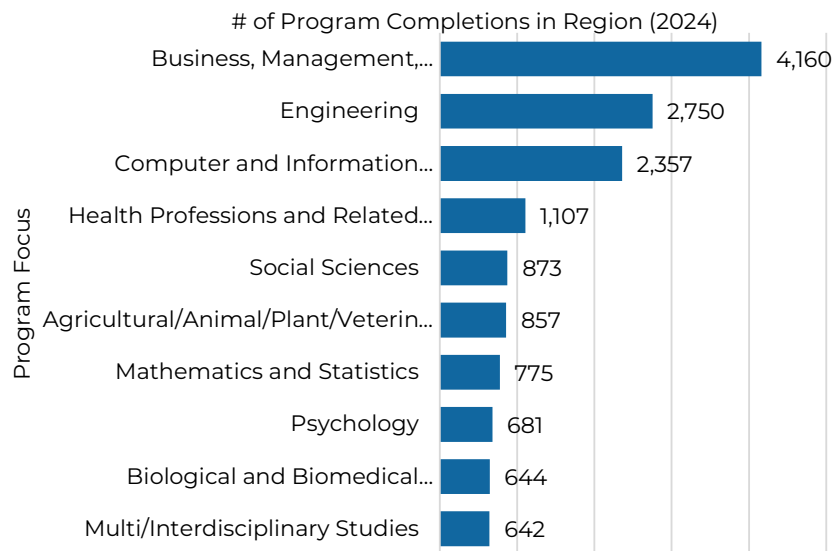


Figure 2: Top Academic Program Specialties. Source: Lightcast 2025.4

Next, the regional occupations with the most significant number of job openings in 2023–2024 are graphed. The first bar presented for each occupation is the total number of job openings estimated over the period. The second bar illustrates the number of those openings that are “replacement jobs,” or jobs vacated by individuals who are retiring, changing careers, or otherwise leaving the occupational field permanently. Employers generally rely upon recent graduates or inbound migrant workers to fill the replacement job openings.

The occupation with the most job openings is Food Preparation and Serving Related Occupations. Educational and administrative occupations are also among the professions with the most annual job openings. Of the occupations presented in the graph, between 60% and 90% of job openings are replacement jobs and will likely need to be filled by workers without prior experience in the occupation.

Job Openings & Replacement Jobs

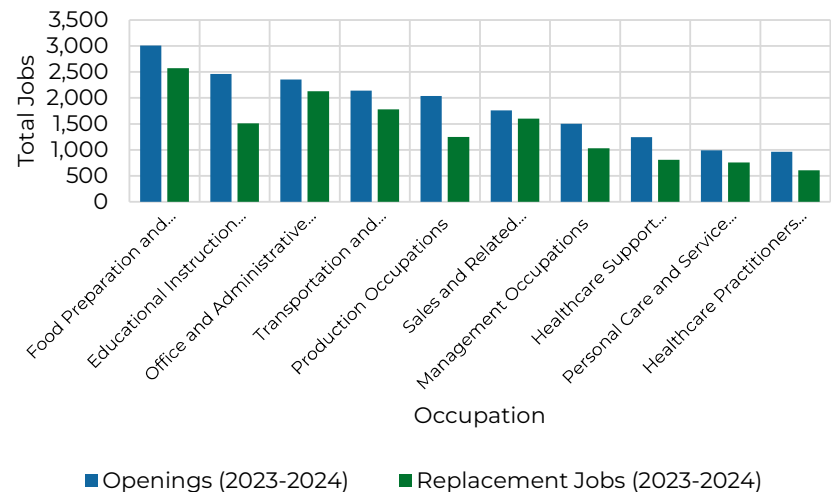


Figure 3: Job Openings and Replacement Jobs. Source: Lightcast 2025.4

# SWOT Analysis

The situational and workforce analyses, including a historical document review, an economic conditions summary, and stakeholder feedback, will inform the SWOT Analysis. The SWOT analysis will focus specifically on the East Voorhees Corridor and Vermilion County's ability to attract the identified target industries.

## Strengths

### Concentration of Complementary Industrial Assets

Four properties offer a balanced portfolio: move-in-ready manufacturing (Heatcraft), large-format warehouse space (W&T), shovel-ready industrial land (Quaker), and rail-owned greenspace (Norfolk Southern). Together, the corridor provides options for light manufacturing, advanced manufacturing, logistics, food processing, and rail-served heavy industry.

### Exceptional Multimodal Transportation Access

Proximity to Interstate 74 provides quick access to regional population centers, including Champaign, Bloomington, Peoria, and Indianapolis. The property has frontage on IL-136/Voorhees Street, a major four-lane industrial arterial. Norfolk Southern rail spur and adjacent property offer logistics advantages unmatched by other secondary Midwest markets.

### Strong Utility Infrastructure Across Sites

All parcels have access to Ameren Illinois electric and gas services, featuring high-capacity three-phase power. They also include 12-inch water mains, 10-inch sewer lines, fire flow, and stormwater systems that meet NPDES standards<sup>34</sup>. Fiber telecom availability supports R&D, advanced manufacturing, and modern logistics.

### Overlapping Incentives Reduce Investment Costs

Properties are situated within combinations of the Enterprise Zone, Tax Increment Financing (TIF), and Federal Opportunity Zone (OZ) designations. Incentive stacking greatly reduces capital expenses, tenant improvement costs, and operational costs, making project economics highly competitive.

### City Ownership of Key Strategic Parcels (Heatcraft and Quaker Oats)

Public ownership of the Heatcraft site and the potential public ownership of the Quaker site reduce acquisition barriers, support P3 structures, and facilitate flexible deal-making with developers aiming for large-scale redevelopment.

<sup>34</sup> <https://www.epa.gov/npdes/npdes-regulations>

## Weaknesses

### Building Conditions and Capital Needs

The W&T Warehouse is in poor shape and needs significant capital investment to modernize. Heatcraft is ready for move-in but may require upgrades based on tenant requirements.

### Fragmented Ownership Across the Corridor

Three of the four sites are privately owned or owned by railroads, which can slow down or complicate corridor-wide master planning. The W&T site has an owner who is difficult or unmotivated, creating potential negotiation hurdles.

### Workforce Availability Challenges

Vermilion County faces a declining labor force and aging population, necessitating proactive talent strategies to sustain substantial industrial growth. Without targeted initiatives, recruiting for advanced manufacturing could be constrained.

### Market Conditions

Danville is not a primary industrial market, which could lead to slower lease-up timelines for speculative development. Rent levels (research indicates between \$3 and \$6 per square foot.<sup>35</sup>) restrict the feasibility of costly redevelopment unless incentives or anchor tenants offset the expense.

## Opportunities

### Branded Industrial District

Branding Voorhees Street as a unified logistics and manufacturing district establishes a competitive identity similar to other secondary-market Midwest industrial parks. There is an opportunity to position Danville as the region's leading rail and interstate logistics hub.

### Growing Demand for Secondary Market Logistics

E-commerce growth and reshoring trends drive high demand for affordable, well-connected industrial spaces outside major metro areas. Danville provides low operating costs and strategic proximity to Illinois and Indiana markets.

### Rail Access

Few Midwest communities have shovel-ready rail-served development sites like Quaker and existing rail-ready industrial buildings. These properties can be attractive to a number of sub-industries identified in the Target Industry Analysis.

### Multi-Tenant Industrial Park

The Quaker site could become the anchor development for a multi-building industrial park. Heatcraft and W&T could support build-to-suit, adaptive reuse, or multi-tenant light industrial.

### Public-Private Partnerships

City-owned land and attractive incentives could lead to master development agreements, discounted land sales, infrastructure cost-sharing agreements, and joint marketing and business attraction efforts.

## Threats

### Competition from Midwestern Industrial Markets

More established markets like Champaign, Indianapolis, and Chicago may attract prospects with more modern building stock and a larger regional workforce.

### Rail-Related Constraints

Rail improvements, service agreements, easement negotiations, or scheduling requirements could delay redevelopment or restrict specific uses. Rail-served developments incur higher capital expenditures, which may challenge feasibility if tenant demand weakens.

### Workforce Pipeline Challenges

Without coordinated talent investments, large employers may perceive workforce availability as insufficient for multi-plant or high-growth operations.

### Construction Cost Inflation

High construction and materials costs may challenge the financial viability of speculative redevelopment, particularly for the Quaker site, which requires new vertical construction.

### Ownership Uncertainty

If private owners are slow to engage, it may delay corridor-wide planning or recruitment.



# Strategic Recommendations

The strategic framework will outline strategies and tactics to address any gaps in the feasibility of attracting outside investment to the East Voorhees Corridor. It will examine economic, technical, political, and environmental obstacles to the properties and the corridor, and outline strategies to overcome them.

## Establish an East Voorhees Industrial Corridor Governance Structure and Project Management Team

### Tactics:



Include key representatives from the City of Danville, Vermilion County, Vermilion Advantage, the Regional Planning Commission, Danville Community College, Norfolk Southern, and other utility providers.

- Develop a decision-making process to activate the strategies outlined in this report.



Engage state and federal elected officials and advocate for appropriations to support site readiness.



Collaborate with the Project Management Team to prepare grant applications, including support for redevelopment and modernization:

- EDA Public Works
- USDOT Reconnecting Communities
- EPA Brownfields Cleanup Grants
- Illinois Department of Commerce and Economic Opportunity



Consider elevating this structure to the long-term corridor management entity. Consider creating a nonprofit or public authority to manage tenant recruitment, tenant relations, property management, and maintenance.

## Establish Property Ownership and Legal Structuring Strategies

### Tactics:



Engage the City of Danville on the Heatcraft and Quaker Oats properties. Develop model Public-Private Partnership structures. Consider:

- Structures for ground lease, acquisition, disposition, or redevelopment.
- Pricing models for build-to-suit, sale, or long-term lease agreements.
- Industrial park design guidelines.



Engage W&T Enterprises and Norfolk Southern. Discussions should include:

- Negotiations for the acquisition of the W&T property or agreement on redevelopment through a Memorandum of Understanding.
- Discussions with the Norfolk Southern Industrial Development team to understand track layout and build-out costs.



Collaborate with the Project Management Team to develop a Request for Information and/or Request for Proposals for a master developer.

## Pursue Appropriate Site Designation to Catalyze Site Selection Awareness

### Tactics:



Complete all outstanding property due diligence required to submit competitive site designation applications. This could include:

- Additional Phase 1 assessments
- Topography surveys
- Geotechnical surveys and assessments
- Wetlands, endangered species, and historical concurrences evaluations
- Utility capacity evaluations
- Preliminary engineering analysis of site pads of varying sizes
- Traffic and parking requirements
- Zoning amendments



Pursue Vetted Site designation through the Illinois Economic Development Corporation.

- Consider applying for funding through the Illinois Regional Site Readiness Program.<sup>36</sup>



Investigate the Site Selectors Guild REDI Site Designation<sup>37</sup>. If appropriate, pursue REDI designation to enhance awareness and recognition of the industrial corridor.

36  
37

Application timeline of 10/30/25 through 3/31/2026 up to \$1.5 million  
<https://siteselectorsguild.com/about/redi-sites/>

## Establish and Activate a Corridor Incentive Stack

### Tactics:



Develop deal models combining the various tax incentives available to investors and developers, including:

- Enterprise Zone benefits
- TIF reimbursement
- Property and equipment tax abatements
- Qualified Opportunity Zone investments
- Illinois state tax incentive programs



Develop and launch an incentive toolkit for potential investors and developers.



Communicate and collaborate with local and regional elected officials, increasing the likelihood of continued tax incentive offerings.



## Position Vermilion and Danville as a “Ready Workforce” Region

### Tactics:



Create industry-specific workforce profiles for target industry sectors. Consider including (data presented in this report):

- Occupational concentrations for manufacturing, food processing, and logistics.
- Wage competitiveness vs. other regional Tier 2 and Tier 3 communities.
- Commuter-shed labor availability.
- Veteran and adult-learner talent pools.



Partner with DACC, Vermilion County Works, and local unions to expand apprenticeship opportunities. Apprenticeship pathways could include:

- Industrial maintenance
- Automation technician
- CNC and machining
- Food processing operators
- CDL and warehouse logistics



Work with Danville Community College (DACC) to expand or refine programs in:

- Industrial Maintenance Technology
- Mechatronics and Automation
- CDL/CDL-A and logistics management
- Food safety, quality control, and OSHA training
- Welding, machining, and metal fabrication
- Electrical and HVAC



Collaborate with DACC and Vermilion Works to refine workforce concierge services for existing and potential new industry partners. Services could include:

- Recruiting
- Screening
- Job postings
- Training grant utilization





# Business Marketing and Attraction Strategy

*This section will outline strategies and tactics for Vermilion Advantage to identify key employers in the identified target industries. It will present well-established best practices to market both the community and the corridor to outside investors. In certain instances, it will identify key industry trade associations, trade shows, conferences, site selection firms, and significant industry employers.*

Communities that provide strong workforce pipelines, shovel-ready industrial sites, streamlined permitting, and predictable regulatory environments consistently perform better in national location analyses. Beyond infrastructure and workforce, decision-makers also consider quality-of-life factors, regional cost structures, and the presence of existing industry clusters to reduce operational risk and accelerate ramp-up. Additionally, corporate location teams assess several “strategic differentiators” that can tip the scales in favor of one market over another. These include incentive packages, supply chain connectivity with major customers or suppliers, and speed-to-market advantages.

## Understanding Site Selectors and Corporate Decision Makers

Site selection firms and corporate decision-makers evaluate a wide range of factors when choosing locations for manufacturing, logistics, data-driven, and professional or technical operations. They prioritize fundamental aspects such as:

-  **labor availability;**
-  **skill alignment;**
-  **proximity to multimodal transportation;**
-  **and access to reliable, competitively priced utilities.**

## Marketing to Site Selectors and Corporate Decision Makers

### Establish a Unified Corridor Identity and Marketing Platform

#### Tactics:



Brand the East Voorhees Corridor as the region's premier interstate- and rail-connected industrial district.

- Utilize the vision statement prepared for this report.
- Incorporate the full portfolio of sites, including Heatcraft, Quaker, W&T Warehouse, and Norfolk Southern.
- Promote the corridor's unmatched strengths: I-74 access, rail connectivity, multiple incentive overlays, strong utilities, and a broad portfolio of industrial options.



Develop a unified digital and print marketing package including site sheets, drone footage, 3D massing concepts, and combined utility and infrastructure maps.

- Create a single landing page on the Vermilion Advantage website showcasing all four properties. Including downloadable photos, videos, and key contact information.
- Consider creating industry-specific investment pitch decks.
- Prioritize food processing, logistics, advanced manufacturing, nonmetallic materials manufacturing, and rail-served users.

## Launch Targeted Marketing to Site Selectors and Brokers Specializing in Food Processing, Advanced Manufacturing, Logistics, and Rail-Served Operations

### Tactics:



Consider adopting a customer relations management system to track potential leads and prospects.



Consider launching a LinkedIn campaign highlighting the corridor.



Begin outbound messaging, utilizing collateral from the digital and print marketing kit, to the list of relevant site selection firms:



Host quarterly networking events with regional utility providers. Use these meetings to better understand designation processes and to collaborate to advertise the industrial corridor through their project pipelines.

- [Biggins Lacy Shapiro & Co.](#)
- [PLG Consulting](#)
- [Ginovus](#)
- [KSM Location Advisors](#)
- [McGuire Sponsel](#)
- [Webster & Associates](#)
- [Vista Site Selection LLC](#)
- [BDO – Site Selection & Incentives Practice](#)
- [Newmark](#)
- [Deloitte](#)
- [Ernst and Young](#)
- [KPMG](#)



Create a target industry conference attendance list. Some considerations should include:

- [IAMC Professional Forums](#): The premier relationship-building event for corporate real estate executives and industrial companies.
- [CoreNet Global Summit](#): Broad commercial real estate and corporate location strategy audience, great for brand visibility and networking.
- [Area Development Consultants Forum](#): Highly targeted setting to interact with site selectors actively working on manufacturing and logistics projects.
- [MODEX](#): Significant logistics, warehousing, and automation presence. Excellent for promoting logistics-ready and rail-adjacent sites.
- [International Production and Processing Expo](#): The country's largest food processing manufacturing expo. High value for food and beverage recruitment.
- [Select USA Investment Summit](#): The largest event for attracting international manufacturing and FDI prospects. Particularly relevant for identifying advanced manufacturing and clean-tech leads, and projects that require rail access.
- [PackExpo International](#): This premier packaging and processing show attracts tens of thousands of decision-makers across food, beverage, and advanced manufacturing industries.
- [FABTECH](#): North America's Largest Metal Forming, Fabricating, Welding, and Finishing Event.
- [Council of Supply Chain Management Professionals EDGE Conference](#): Top-tier supply chain event with strong crossover with industrial site selection, distribution, and regional logistics.
- [RailTrends Conference](#): premier two-day intelligence summit for the rail industry—bringing together senior leaders from finance, operations, government, investment, marketing, and beyond



Identify and build relationships with target industry corporate headquarters in regional Tier 1 markets, including Chicago, Indianapolis, Columbus, and St. Louis.



Consider hosting annual site 'familiarization tours' for key site selection consultants, brokers, and corporate decision makers.

# Appendix

## Appendix A: Additional Data for Situational Analysis

### Demographics & Socioeconomics

#### Population Projection

In recent decades, Vermilion County has experienced a consistent population decline. In 2000, the county's population was estimated at 83,919; by 2023, it had fallen to 71,652, a decrease of 12,267 people (14.6%) over the 23-year period. Population projections from two data-modeling companies, Lightcast and Environmental Research Systems, Inc. (Esri), are included in the graph. Both projections are very closely aligned and indicate that the county's population is expected to continue to shrink through 2030.

A shrinking population can have far-reaching impacts on the local economy. Efforts to expand the workforce or attract new businesses can be hindered without the resident base to support them. By developing a deliberate and sustainable growth strategy, the county can better position itself for long-term economic stability and prosperity.

Vermilion County Historical & Projected Population Change

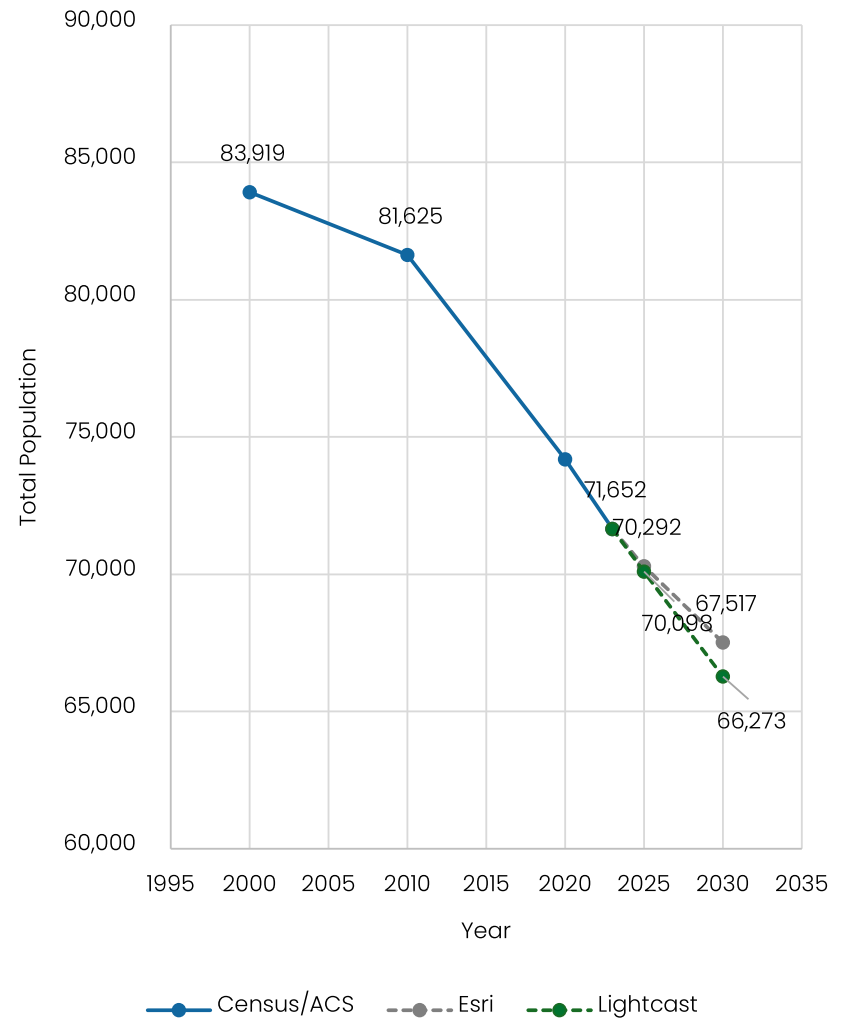


Figure : Vermilion County Historical & Projected Population Change. Sources: US Census (2000, 2010, 2020); ACS 2023 1-Year Estimates; Lightcast 2025.3; Esri, 2025

## Age Distribution

In 2023, the median age of Vermilion County residents was 41.7 years. Over the last ten years, this figure has increased slightly; in 2013, the county’s median age was 40.3 years. This shift in the age demographic is reflected in Figure . Over the 10-year period, the share of the population over the age of 65 years increased by about 4.3 percentage points. Correspondently, the share of the population under the age of 25 years decreased marginally, by about 1.8 percentage points. This shift in the age demographic is happening across the country; as the Baby Boomer generation – which includes people born between 1946 and 1964 – ages, a greater share of the national population is comprised of people aged 65 years and older. An older population can affect various aspects of the local economy, such as the workforce, healthcare systems, and housing market.

Age Distribution

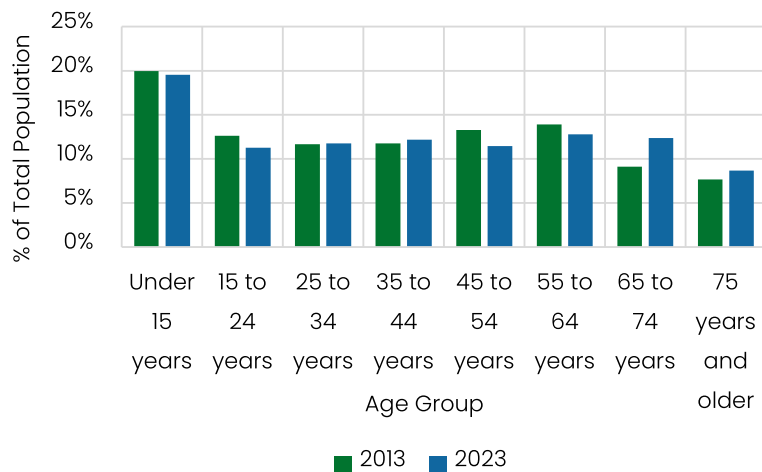


Figure : Vermilion County Age Distribution. Source: ACS 2023 1-Year Estimates

## Race

The majority of Vermilion County’s population is “White alone”; 77.21% of the population falls into this category. The next most common racial group is “Black or African American alone,” which comprises 14.05% of the population. Individuals identifying as “Two or More Races” make up 5.42% of the population, and members of the “Hispanic or Latino” ethnic group comprise 5.14%. The “Some Other Race alone” (2.22%), “Asian alone” (0.78%), “American Indian and Native Alaskan alone” (0.32%), and “Native Hawaiian and Other Pacific Islander alone” (0.01%) collectively make up about 3.32% of the total population.

Race & Ethnicity

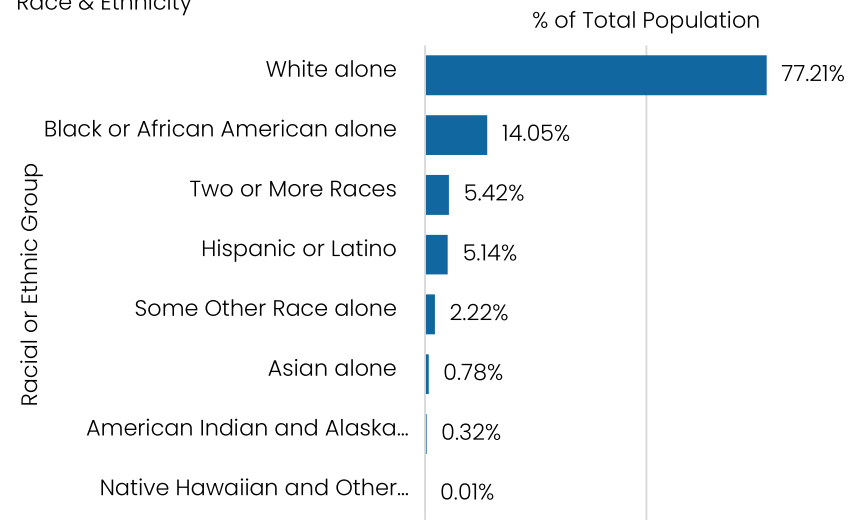


Figure : Race & Ethnicity in Vermilion County. Source: ACS 2023 1-Year Estimates

## Household Income

Household income in Vermilion County is relatively evenly distributed. In 2023, the median household income was \$46,507; this is considerably lower than the median household income for both the state (\$80,306) and nation (\$77,719). Approximately one quarter (25.1%) of Vermilion County households earn less than \$25,000, annually. In contrast, 19.5% of households earn over \$100,00 per year. The remaining 55.4% of households earn between \$25,000 and \$100,000, annually. That households on either end of the financial spectrum comprise substantial portions of Vermilion County's population indicate the need for services and programs to serve a diversity of households, lifestyles, and community members.

Household Income

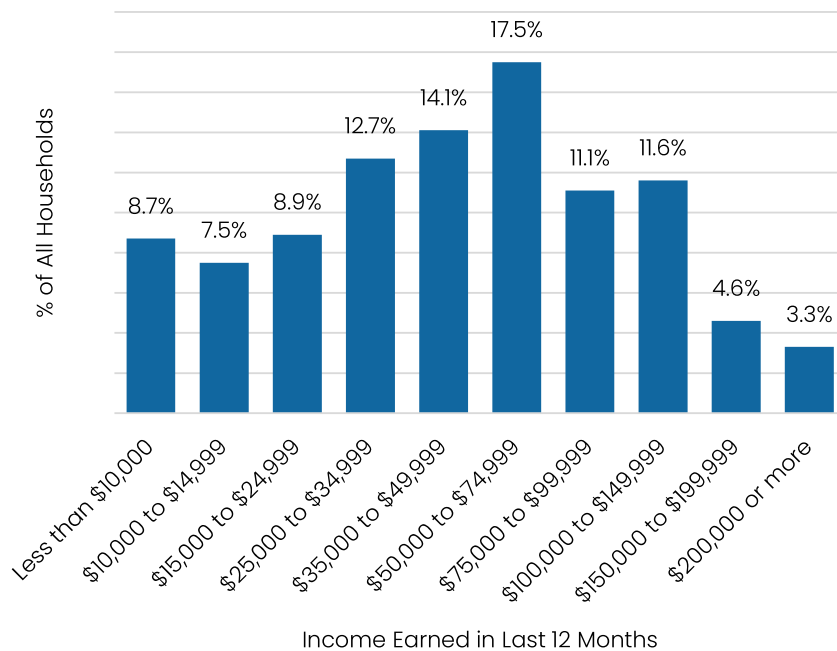


Figure : Vermilion County Household Income. Source: ACS 2023 1-Year Estimates

## Educational Attainment

Educational attainment rates are provided for Vermilion County and the State of Illinois. In both Vermilion County and the rest of the state, approximately 90–91% of residents over the age of 25 years have earned a high school diploma or an equivalent certificate. In Vermilion County, 16.6% of residents have attained a bachelor's degree, and 7.3% have attained a graduate or professional degree. These levels of educational attainment are considerably lower than those at the state level, where 38.3% of the population (25 years and older) has earned a bachelor's degree and 15.5% has earned a graduate or professional degree. In some cases, low levels of educational attainment can limit the ability to attract certain industries – particularly those that rely on workers with specialized skills or advanced knowledge typically gained through a four-year or graduate degree. However, many other industries prioritize employees with practical experience, trade certifications, or alternative qualifications, meaning that lower formal education rates do not always present a significant challenge.

Educational Attainment

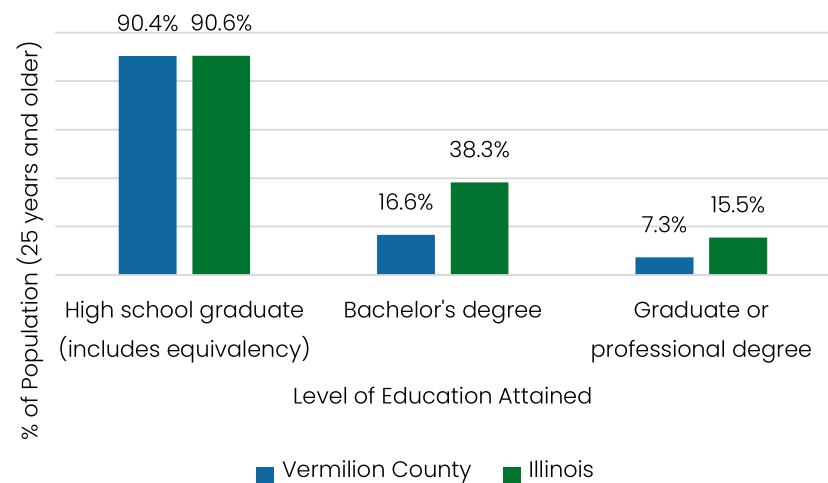


Figure : Educational Attainment. Source: ACS 2023 1-Year Estimates

## Poverty Rates

Poverty thresholds are established annually by the U.S. Census Bureau and vary based on household composition and size. In 2023, approximately 17.4% of Vermilion County’s residents fell below the poverty level, which is greater than the national poverty rate of 12.4%. As can be seen in Figure 6, individuals with lower educational attainment are more likely to experience poverty; 43.5% of people without a high school degree are below the poverty level, while the same is true for only 5.6% of people with a bachelor’s degree or higher. An effort to increase the employability of working-age individuals in the region through upskilling and workforce development could be one method, among others, to reduce poverty levels in the county.

Poverty Status by Educational Attainment

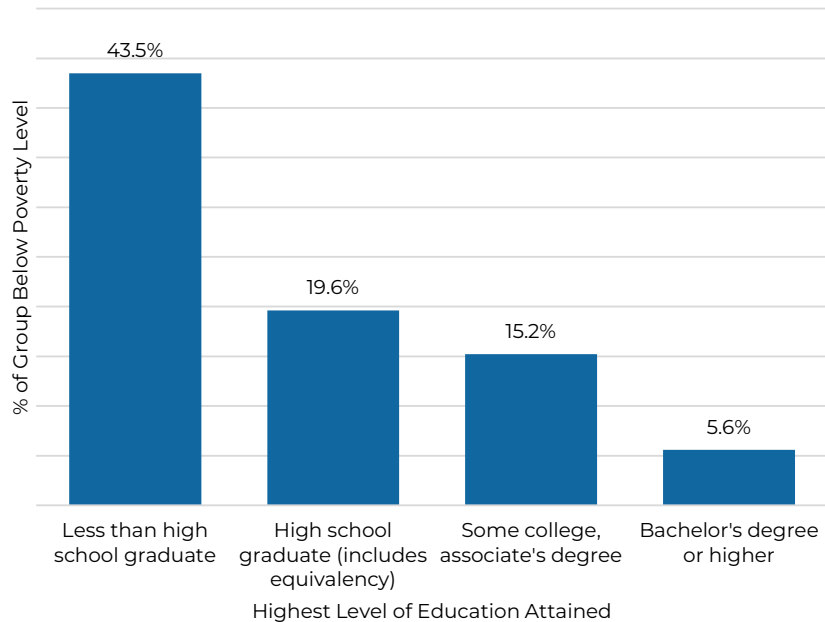


Figure : Vermilion County Poverty Status by Educational Attainment. Source: ACS 2023 1-Year Estimates



# Workforce & Industry

## Commuting Patterns

In Figure 10, net commuting patterns are mapped across the region. Counties shaded blue send more workers into Vermilion County than they receive, and counties shaded red receive more workers from Vermilion County than they send. While many counties in the region – especially more rural counties – send workers into Vermilion County, the overall net commuter level in the county is negative. In 2024, it was estimated that 8,267 workers traveled into the county for work while 15,581 traveled out of it; in other words, 7,315 fewer workers travel into the county for employment than travel out of it.

Importantly, although these workers are described as ‘traveling’ from one county to another for work, they could be remotely employed and working from home. Remote or hybrid workers likely comprise many of the jobs reported in counties far from Vermilion County. It is not unusual for large shares of a local workforce to be attracted to more urban economic hubs, but a targeted approach to local business retention, expansion, and attraction could help retain resident workers and bolster the local economy.

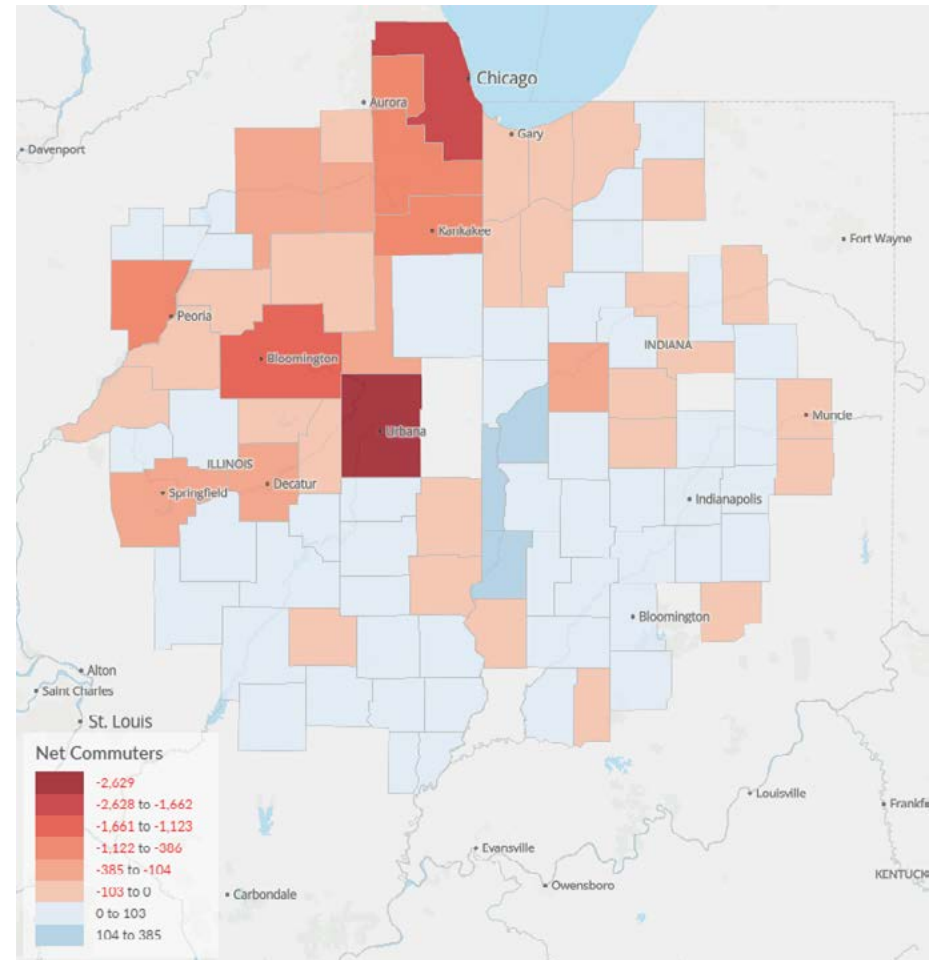


Figure : Net Commuters. Source: Lightcast 2025.3

In Table 7, the top ten counties sending workers into Vermilion County are provided; in Table 8, the top ten counties to which Vermilion County resident workers are traveling are provided. For a complete list of inbound commuter origins and outbound commuter destinations, see the appendix.

County of Origin	# of Workers Entering Vermilion County
Champaign County, IL	1,684
Cook County, IL	1,097
Fountain County, IN	555
Iroquois County, IL	452
Will County, IL	297
Vermillion County, IN	291
Vigo County, IN	245
Coles County, IL	240
Warren County, IN	224
DuPage County, IL	216

Table 7: Top Ten Counties Sending Workers into Vermilion County. Source: Lightcast 2025.3

Destination County	# of Workers Leaving Vermilion County
Champaign County, IL	4,312
Cook County, IL	2,759
McLean County, IL	1,268
Will County, IL	735
Peoria County, IL	623
DuPage County, IL	602
Kankakee County, IL	578
Fountain County, IN	442
Iroquois County, IL	407
Sangamon County, IL	347

Table 8: Top Ten Counties into which Vermilion County Workers Travel. Source: Lightcast 2025.3

## Top Industries by Employment

In this report, industries are categorized by 4-digit North American Industry Classification System (NAICS) codes. Federal agencies use these codes to categorize industries across the country for the collection and analysis of economic data. In 2024, an estimated 28,323 individuals were employed in Vermilion County. Figure displays the top ten industries in Vermilion County by total employment, as well as the average annual earnings per job of a worker in each industry.

The “Education and Hospitals (Local Government)” industry is the largest, employing 2,377 workers in 2024. The “Restaurants and Other Eating Places” industry employs 1,694 workers, and the “Federal Government, Civilian” industry, which includes non-military members of the federal government, employs 1,449 workers. Other local government, manufacturing, and warehousing industries are also major employers within the local economy. The average annual earnings of workers in these industries vary widely.

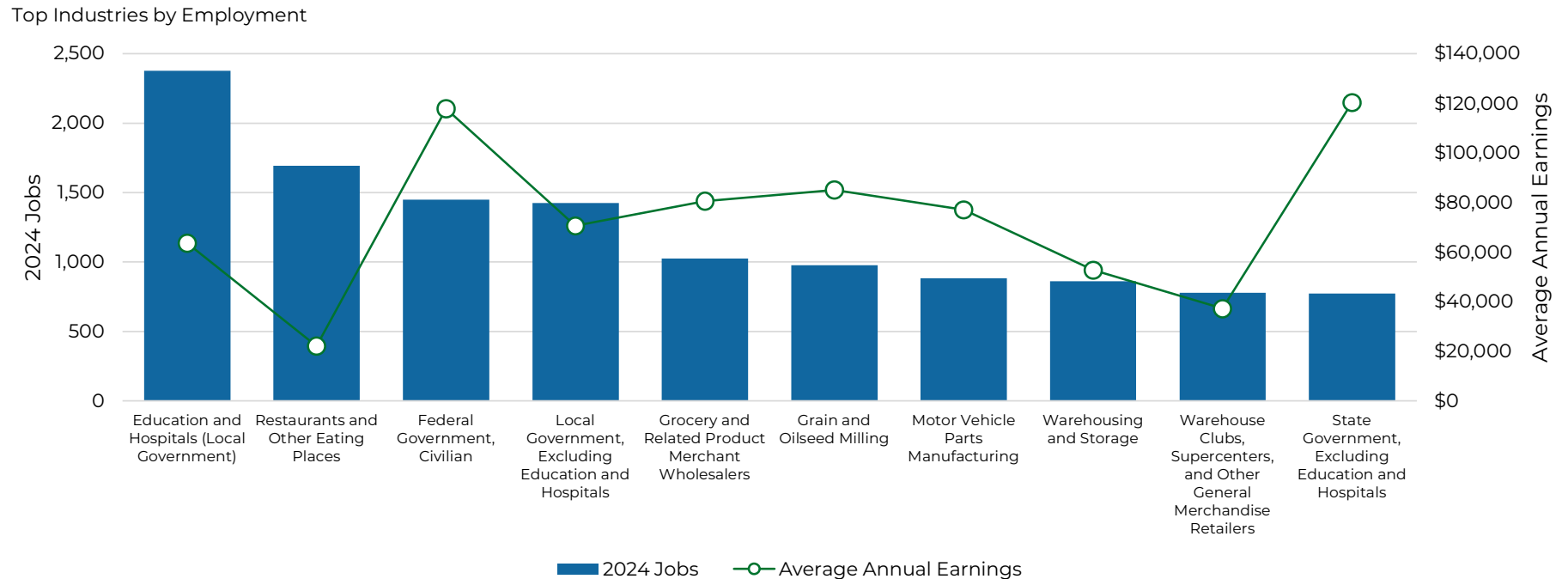


Figure 11: Top Industries by Employment in Vermilion County. Source: Lightcast 2025.3

## Fastest-Growing Industries

Between 2024 and 2034, many local industries are projected to realize substantial growth. The “Individual and Family Services” industry is anticipated to grow the most, adding 304 new jobs over the ten-year period. The industry with the second-largest expected growth is “Depository Credit Intermediation,” projected to add 226 jobs. The “Offices of Physicians” and “Business Support Services” industries follow closely and are projected to add 223 and 222 new jobs, respectively. Several of these growing industries are not among the largest in the county but are nevertheless projected to grow considerably over the next ten years. This is a positive indicator of growing industry diversity in Vermilion County, which is important for maintaining a healthy economy.

Fastest-Growing Industries

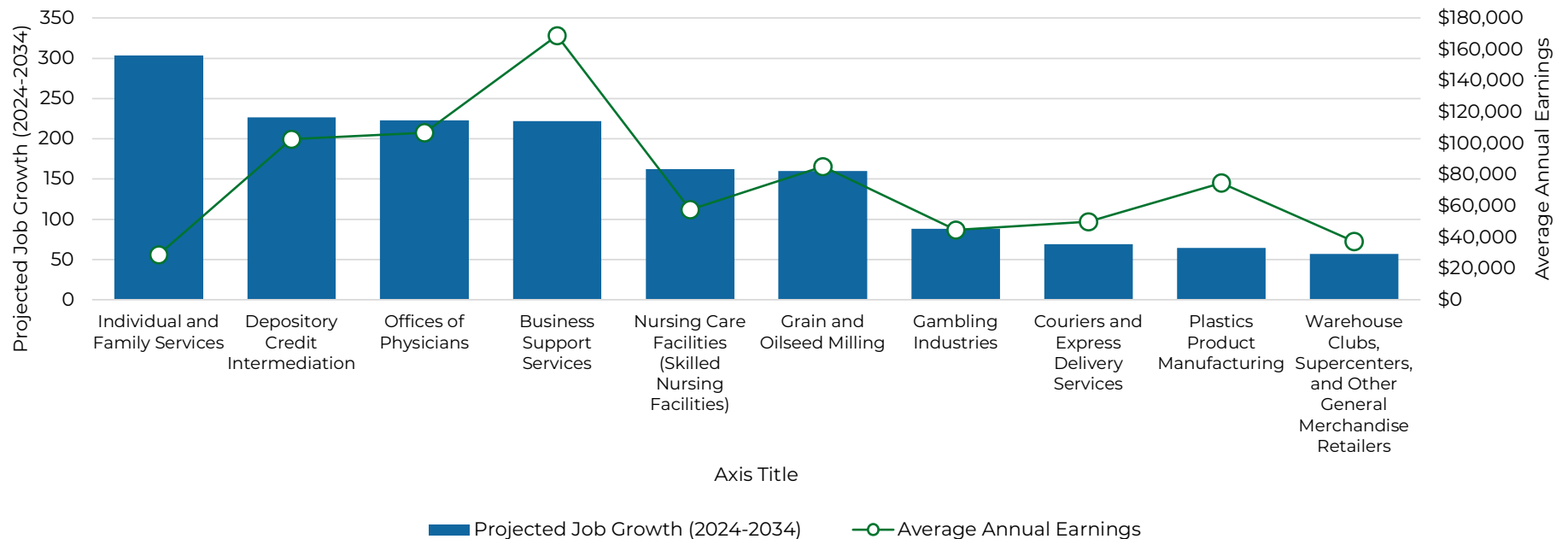


Figure 12: Fastest-Growing Industries in Vermilion County. Source: Lightcast 2025.3

## Highly Concentrated Industries

Employment concentration measures the share of jobs within an industry relative to similar areas across the country, using a location quotient. An average location quotient equals 1. If an industry has a location quotient of 1, its employment count matches the national average for other areas of similar size. If the quotient is greater than one, the industry has a higher-than-average concentration of jobs in the county; if it's less than one, the job concentration in that industry is relatively low. Highly concentrated industries tend to be more competitive because other parts of the region likely rely on them to meet demand, making these industries often useful for generating revenue beyond the county's borders.

Vermilion County's most concentrated industry is "Grain and Oilseed Milling," with an employment concentration of 88.78. This shows that this industry is 88.78 times more concentrated in Vermilion County than the national average. The "Gambling Industries" (12.26) and "Apparel Accessories and Other Apparel Manufacturing" (11.64) industries are the next most concentrated. As reflected by their high employment concentrations, several manufacturing and wholesale industries significantly contribute to the local economy.

Highly Concentrated Industries

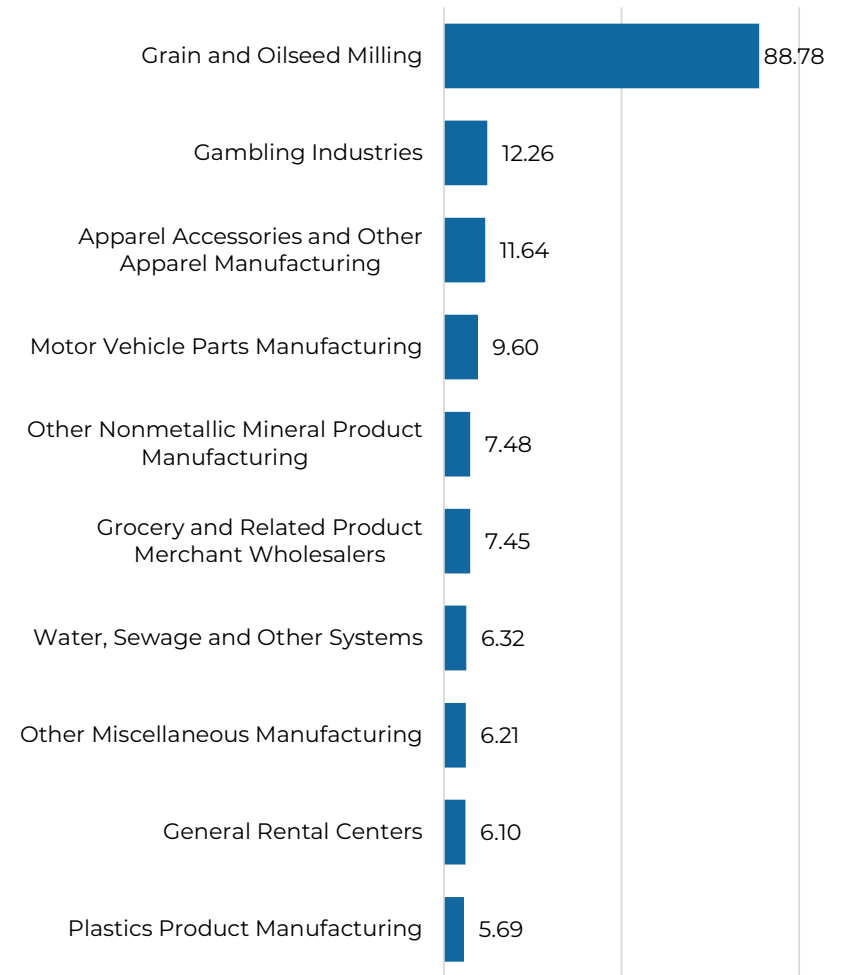


Figure 13: Highly Concentrated Industries in Vermilion County. Source: Lightcast 2025.3

## Top Industries by Gross Regional Product (GRP)

Gross Regional Product (GRP) represents the total market value of all goods and services produced within a specific geographic region. GRP functions similarly to Gross Domestic Product (GDP), but GDP measures industry output at a national level while GRP describes a more localized region.

The “Federal Government, Civilian” industry produces the highest GRP for Vermilion County, with a value of more than \$237 million in 2024. Other high-value industries include the “Grain and Oilseed Milling” (\$198M), “Education and Hospitals (Local Government)” (\$151M), and “Grocery and Related Product Merchant Wholesalers” (\$142M) industries.

Top Industries by GRP

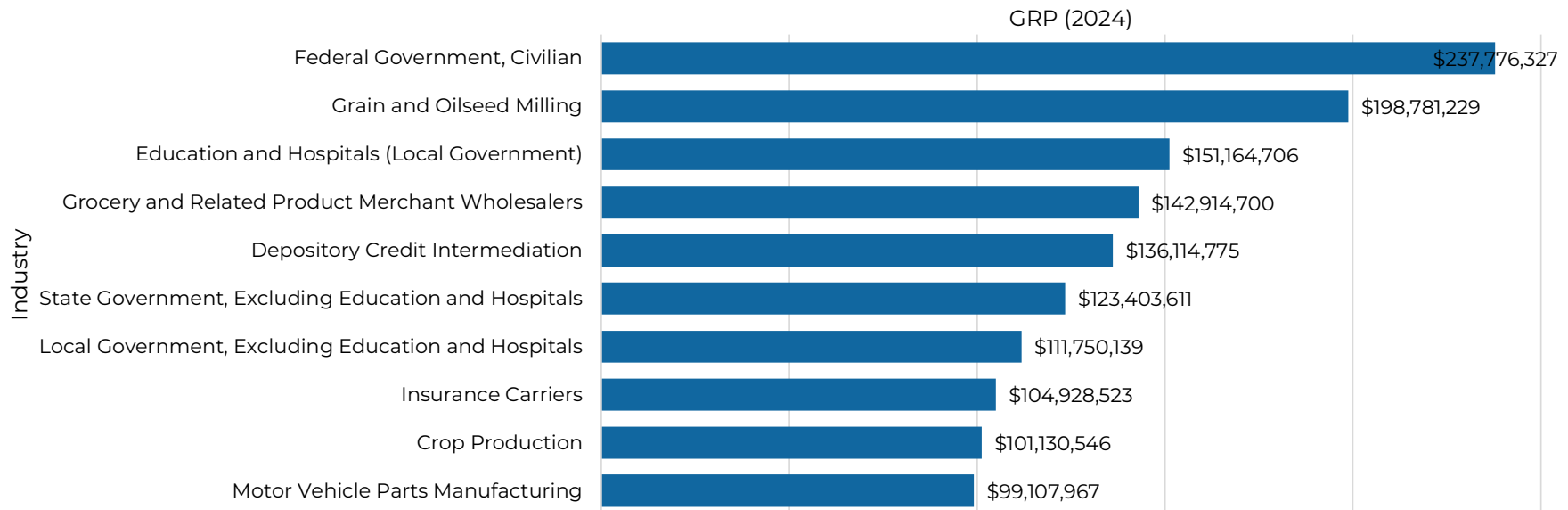


Figure 14: Top Industries by GRP in Vermilion County. Source: Lightcast 2025.3

## Exported & In-Region Sales

To provide a comprehensive picture of Vermilion County industries' sales, industries in Figure 15 are provided at the 2-digit-NAICs level, which are more general industry descriptions than the 4-digit-level descriptions used up to this point. In Figure 15, every industry's in-region sales are measured against their exported sales.

The "Manufacturing," "Government," and "Wholesale Trade" industries export the largest share of their sales, indicating that these sectors are strongly connected to external markets. These industries play an important role in bringing revenue from external markets into the local economy; as export-oriented industries, they signal a competitive advantage of Vermilion County businesses. In contrast, industries such as "Accommodation and Food Services," "Educational Services," and "Construction" industries rely heavily on local demand, as much of their sales occur within the region.

An analysis of both in-region and export sales helps distinguish industries that rely primarily on local demand from those that generate revenue through external markets. The support of industries with strong export potential – particularly those already making significant exported sales – could help direct additional revenue into the region.

Exported & In-Region Sales by Industry

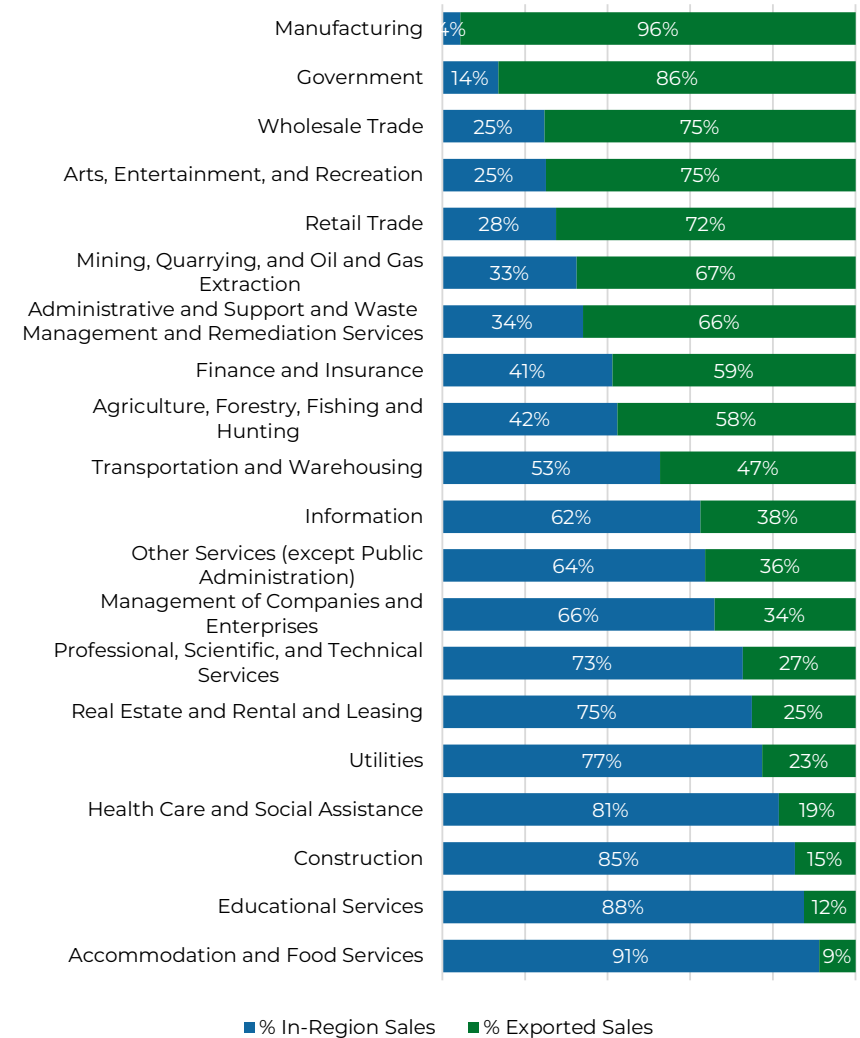


Figure 15: Exported & In-Region Sales by Industry in Vermilion County. Source: Lightcast 2025.3

## Demand Met In-Region & Imports

Whereas Figure 15 measures the sales made by local industries, Figure 16 measures the demand of the local market. Specifically, Figure 16 measures the percentage of demand met by local business (in Vermilion County) next to the demand met by imports. Products or services from “Information,” “Manufacturing,” and “Mining, Quarrying, and Oil and Gas Extraction” industries are imported heavily to meet local demand, suggesting opportunities for local growth or investment in these sectors. In contrast, demand for the products or services from industries such as “Other Services (except Public Administration),” “Accommodation and Food Services,” and “Health Care and Social Assistance” industries are largely met in-region, indicating strong local supply chains or service provision.

A gap between local supply and demand across several industries indicates significant opportunities to grow the regional economy by building local capacity. By expanding production, services, and business activity – particularly in sectors with high unmet local demand – the region could reduce its dependence upon imports and retain more economic value within the community.

Demand Met In-Region and Imports by Industry

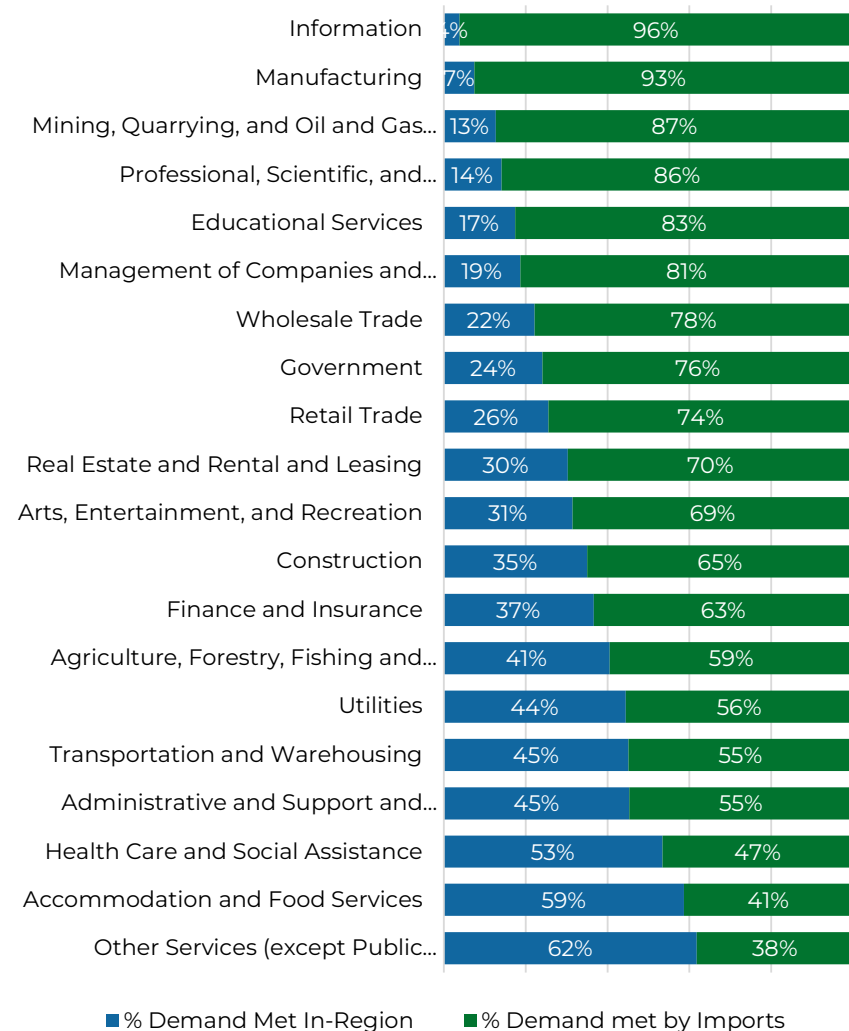


Figure 16: Demand Met In-Region & Imports in Vermilion County. Source: Lightcast 2025.3

## Top Occupations by Employment

While industry data provides information about businesses in Vermilion County, occupational data describe the workers within those businesses. Occupations analyzed below are classified using the federal 4-digit Standard Occupational Classification (SOC) system.

Figure 15 ranks the top occupations in Vermilion County by the total number of workers. To enhance the analysis, the figure also displays average annual earnings for each occupation along the secondary axis. The most common occupation in the county is “Laborers and Material Movers,” which describes 1,834 workers and provides median annual earnings of \$38,343. The next-largest occupations by total workers are “Drivers/Sales Workers and Truck Drivers” and “Cashiers,” with median annual earnings of roughly \$47,353 and \$30,866, respectively.

Top Occupations by Employment

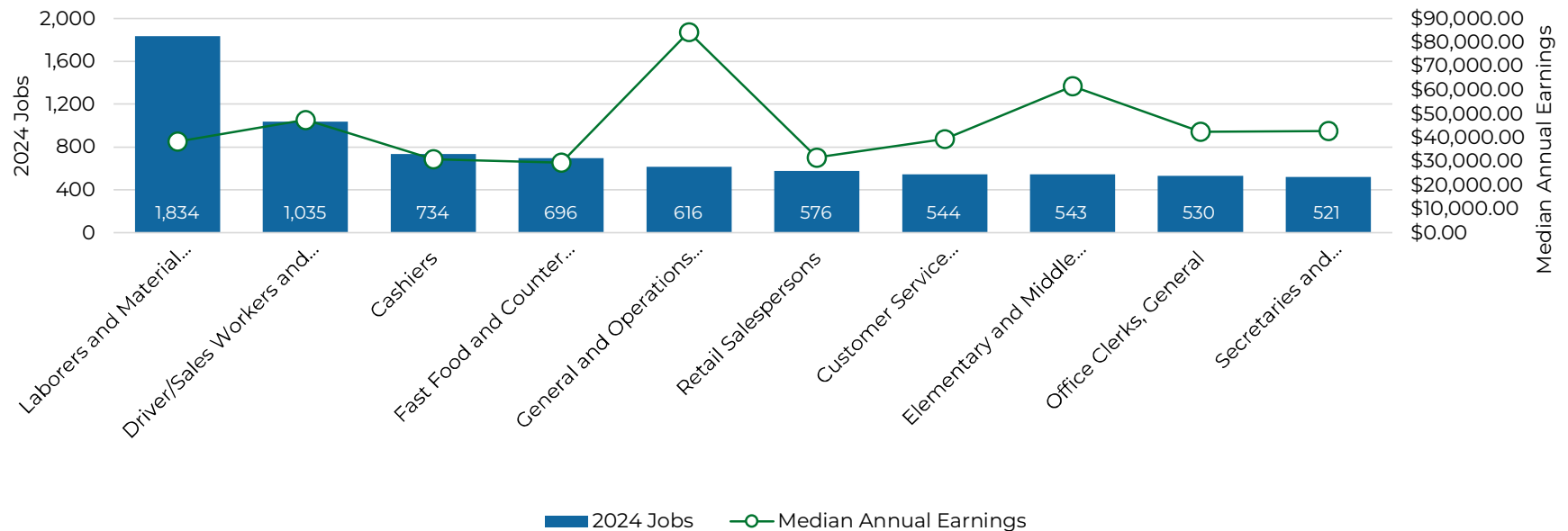


Figure 17: Top Occupations by Employment in Vermilion County. Source: Lightcast 2025.3

## Fastest-Growing Occupations

The “Home Health and Personal Care Aides” occupation is expected to realize the most growth from 2024 to 2034, with a projected increase of 243 jobs. Over the same period, “Drivers/Sales Workers and Truck Drivers” and “Customer Service Representatives” are expected to grow by 55 and 51 jobs, respectively. Additionally, occupations related to healthcare, retail, and financial are among the fastest-growing in the county. As industry diversification increases, it is likely that local business will need to attract a more diverse workforce to support their operations.

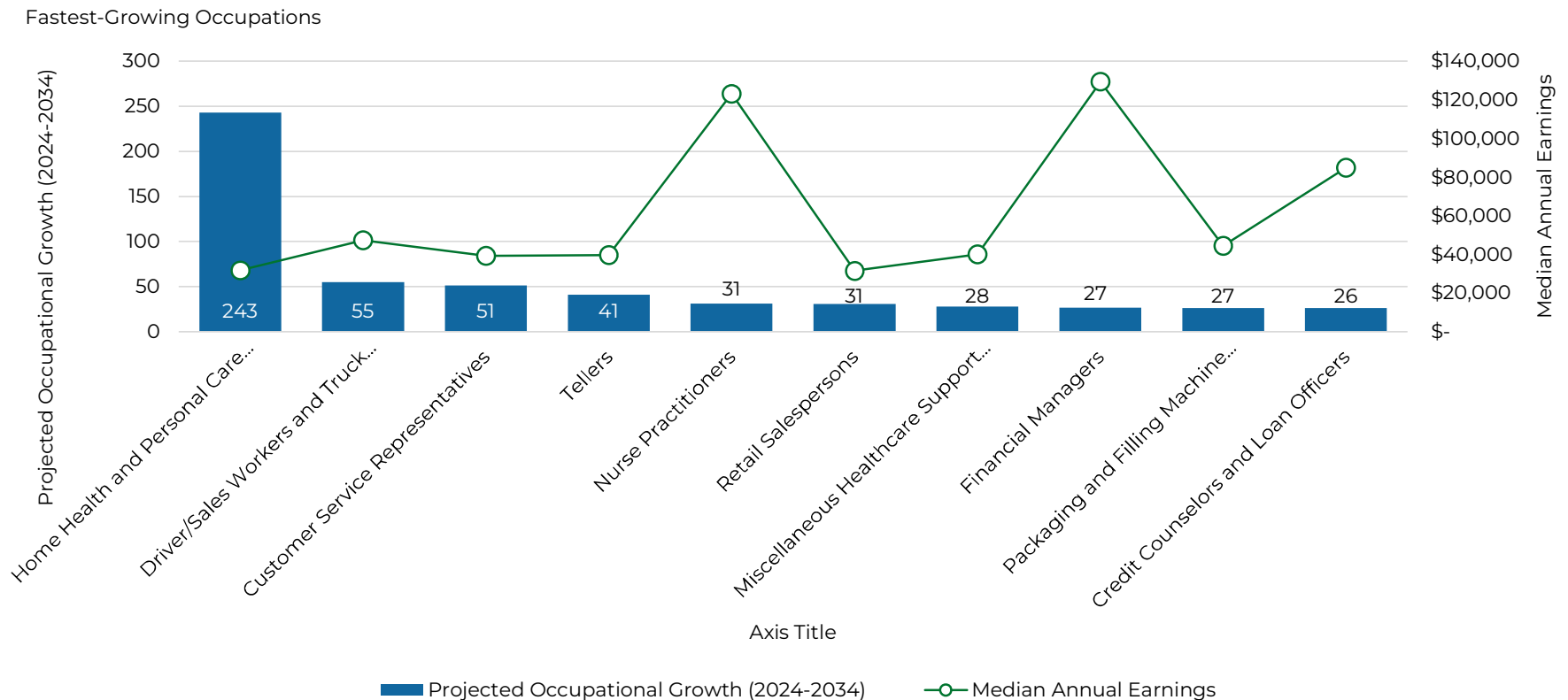


Figure 18: Fastest-Growing Occupations in Vermilion County. Source: Lightcast 2025.3

# Appendix B: Additional Data for Target Industries

## Food Product & Apparel Manufacturing

### Sales & Demand

Projected Job Growth (2024-2034)

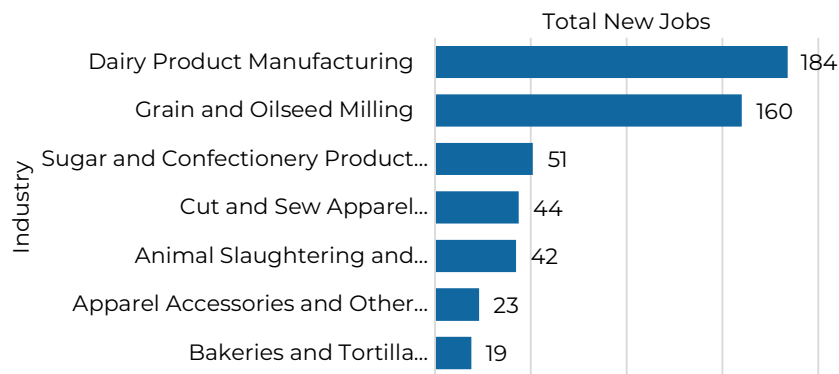


Figure : Food Product & Apparel Manufacturing Industries: Projected Job Growth. Source: Lightcast 2025.3

Employment Concentration



Figure : Food Product & Apparel Manufacturing Industries: Employment Concentration. Source: Lightcast 2025.3

Total Value (2024)

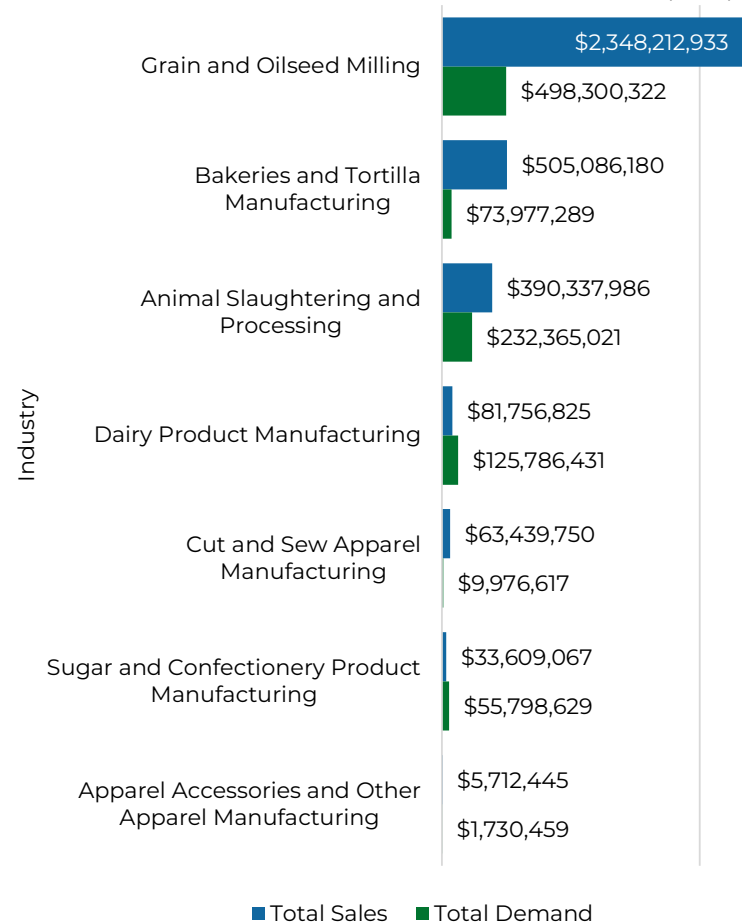


Figure : Food Product & Apparel Manufacturing Industries: Sales and Demand. Source: Lightcast 2025.3

# Nonmetallic Manufacturing

Projected Job Growth (2024-2034)

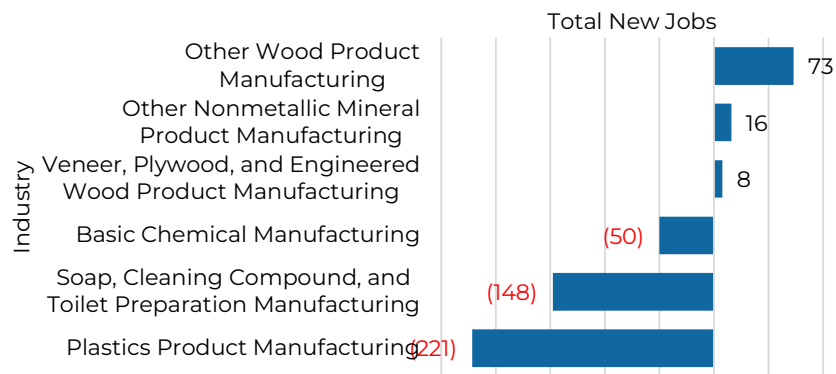


Figure : Nonmetallic Manufacturing Industries: Projected Job Growth. Source: Lightcast 2025.3

Employment Concentration

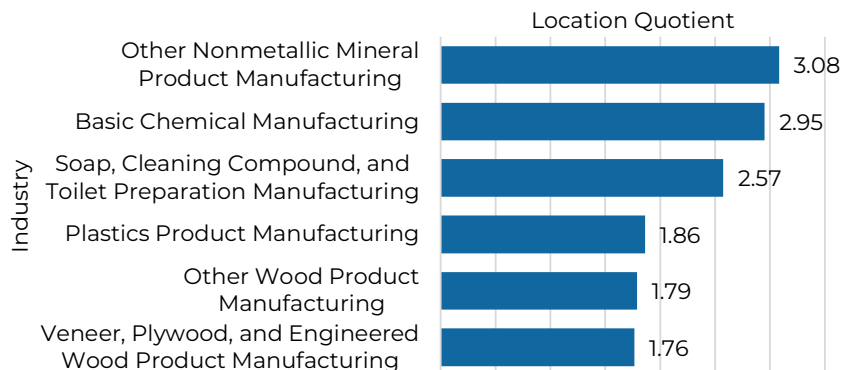


Figure : Nonmetallic Manufacturing Industries: Employment Concentration. Source: Lightcast 2025.3

Sales & Demand

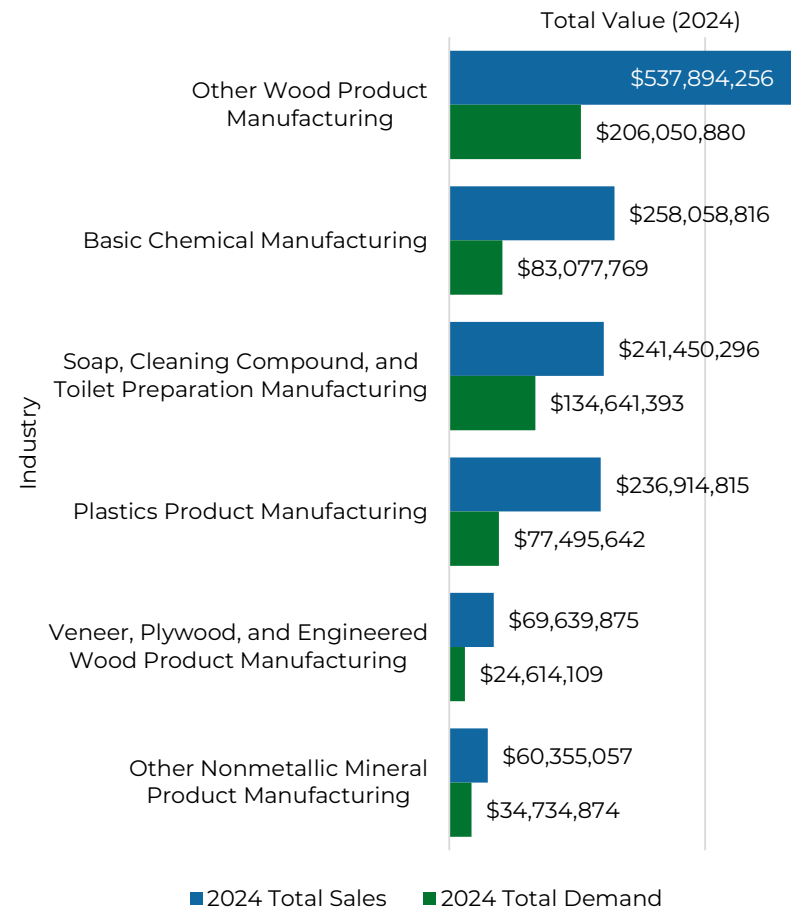


Figure : Nonmetallic Manufacturing Industries: Sales and Demand. Source: Lightcast 2025.3

# Metal & Machinery Manufacturing

Projected Job Growth (2024-2034)

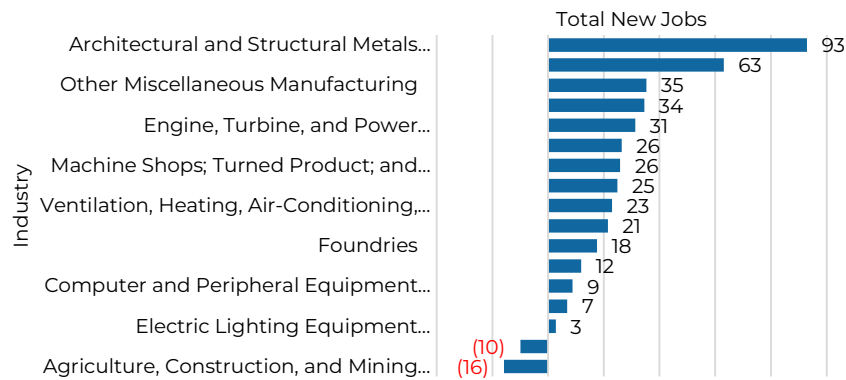


Figure : Metal and Machinery Manufacturing Industries: Projected Job Growth. Source: Lightcast 2025.3

Employment Concentration

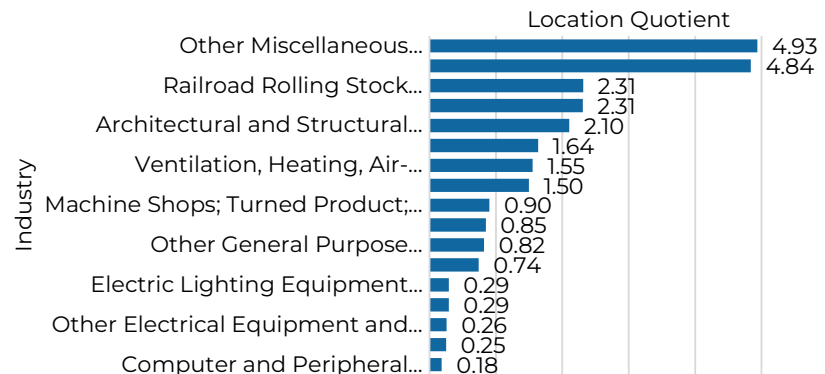


Figure : Metal and Machinery Manufacturing Industries: Employment Concentration. Source: Lightcast 2025.3

Sales & Demand

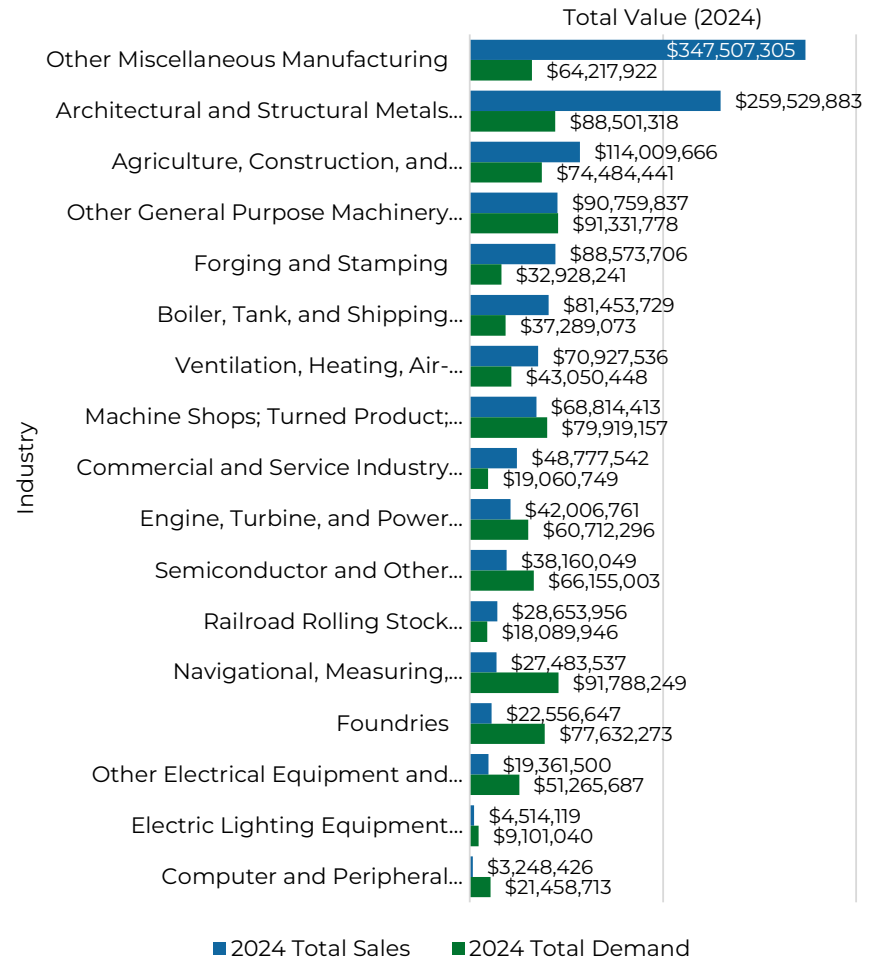


Figure : Metal and Machinery Manufacturing Industries: Sales and Demand. Source: Lightcast 2025.3

# Wholesalers

Projected Job Growth (2024-2034)

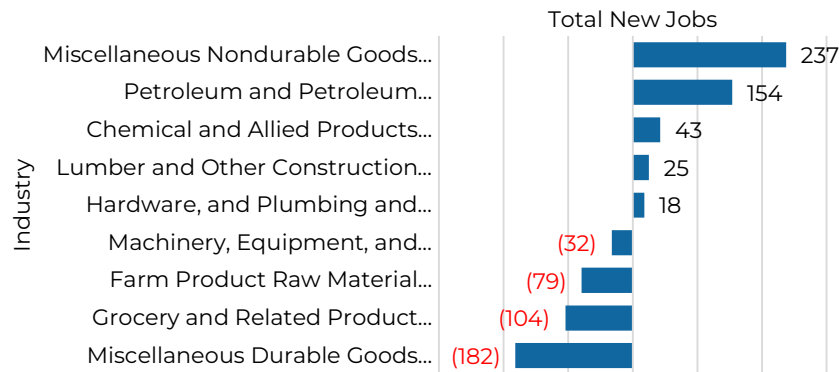


Figure : Wholesaler Industries: Projected Job Growth. Source: Lightcast 2025.3

Employment Concentration

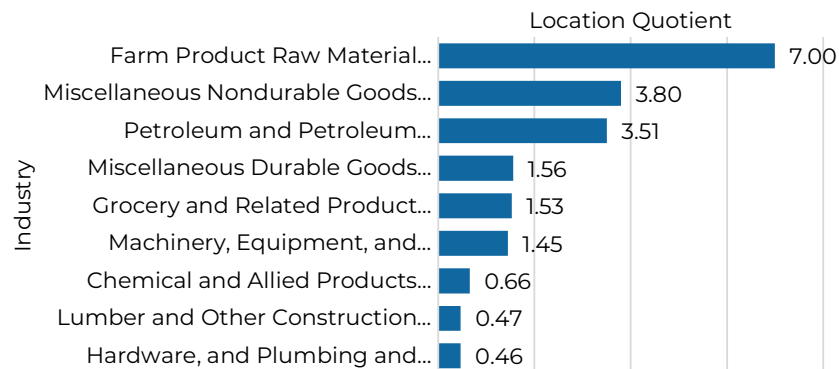


Figure : Wholesaler Industries: Employment Concentration. Source: Lightcast 2025.3

Sales & Demand

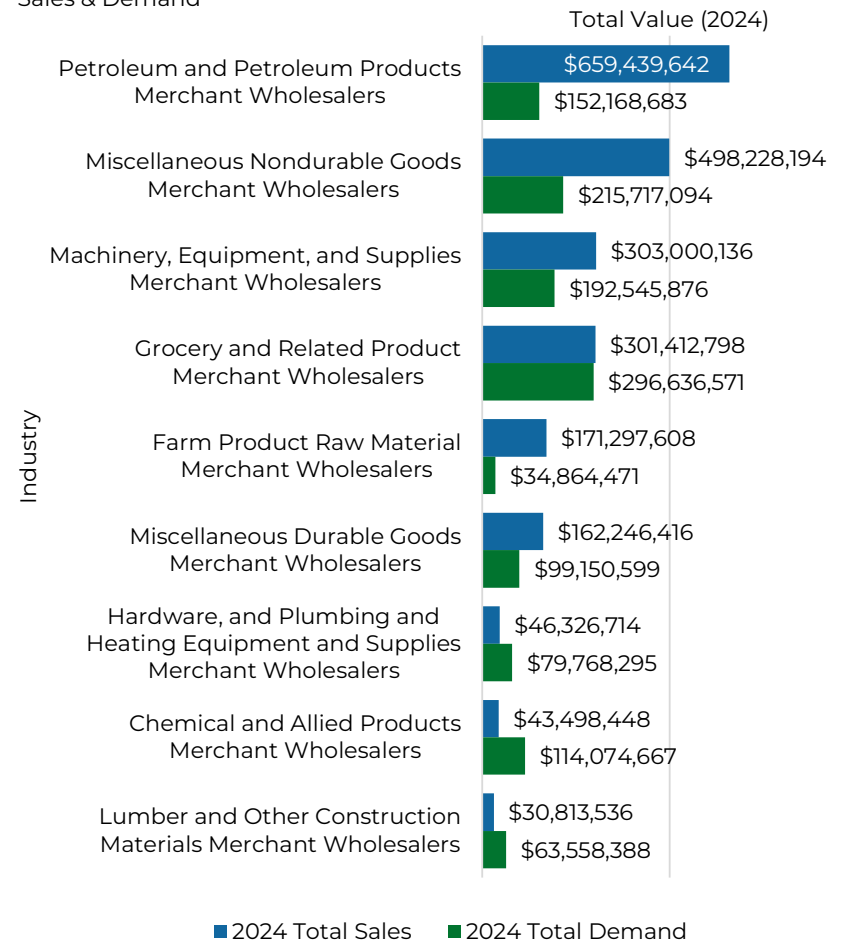


Figure : Wholesaler Industries: Sales and Demand. Source: Lightcast 2025.3

## Other High-Potential Industries

Projected Job Growth (2024-2034)

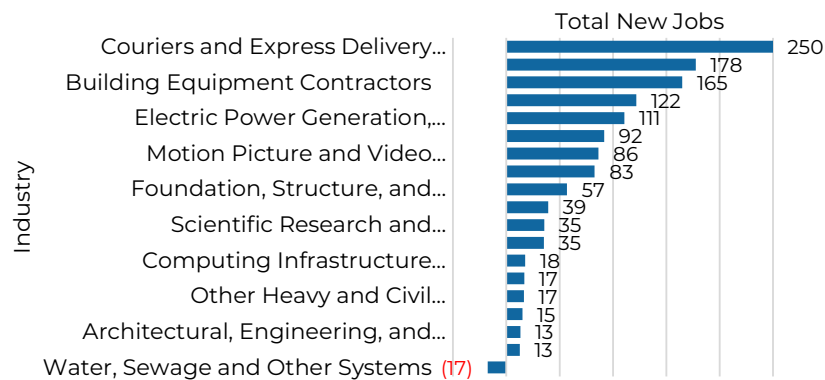


Figure : Other High-Potential Industries: Projected Job Growth. Source: Lightcast 2025.3

Employment Concentration

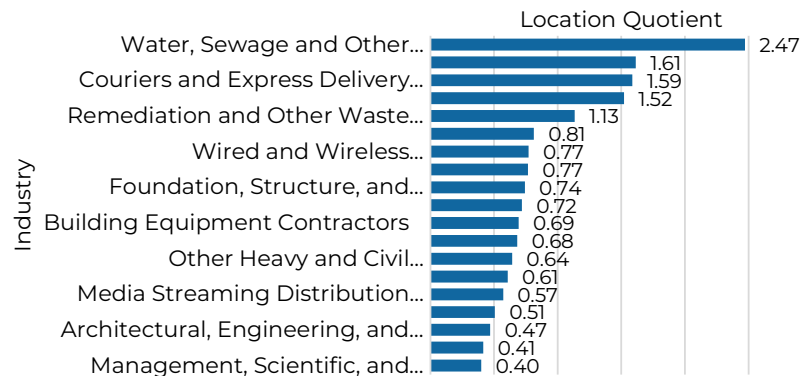


Figure : Other High-Potential Industries: Employment Concentration. Source: Lightcast 2025.3

Sales & Demand

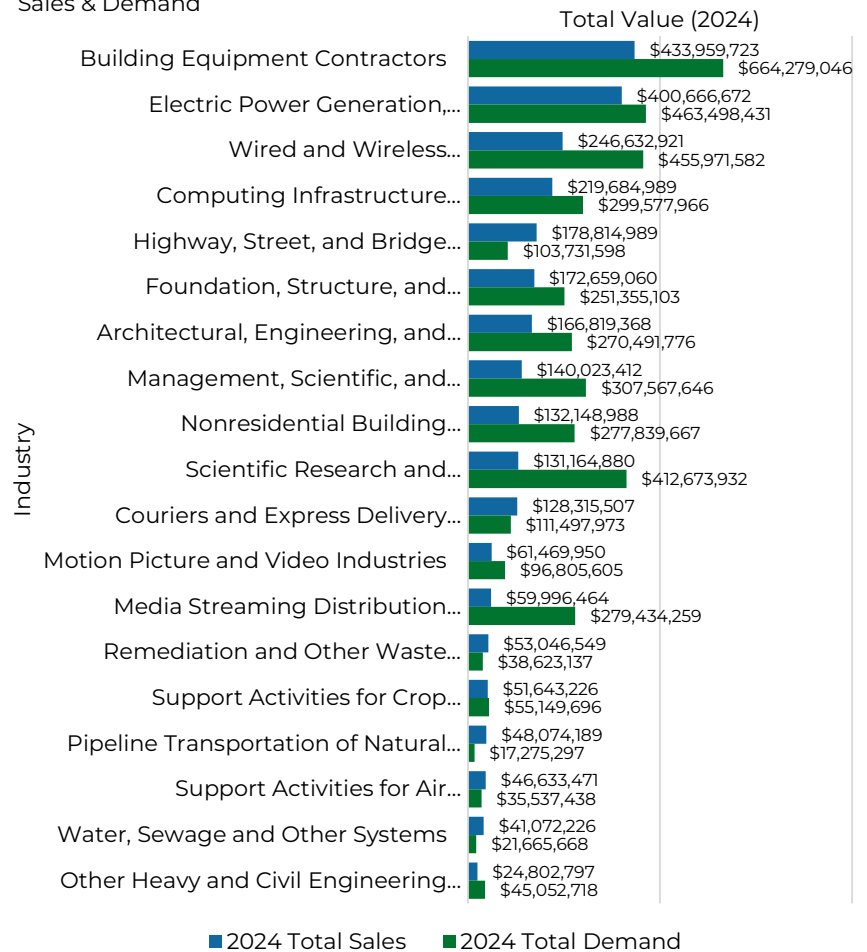


Figure : Other High-Potential Industries: Sales and Demand. Source: Lightcast 2025.3

