



Innovation and Resiliency: Twin Pillars **Preserving A Legacy, Planning for Tomorrow**

ILSOY FUEL – Future Utilization and Efficiency in Logistics

Illinois Department of Transportation
Fall Planning Conference
September 3, 2026





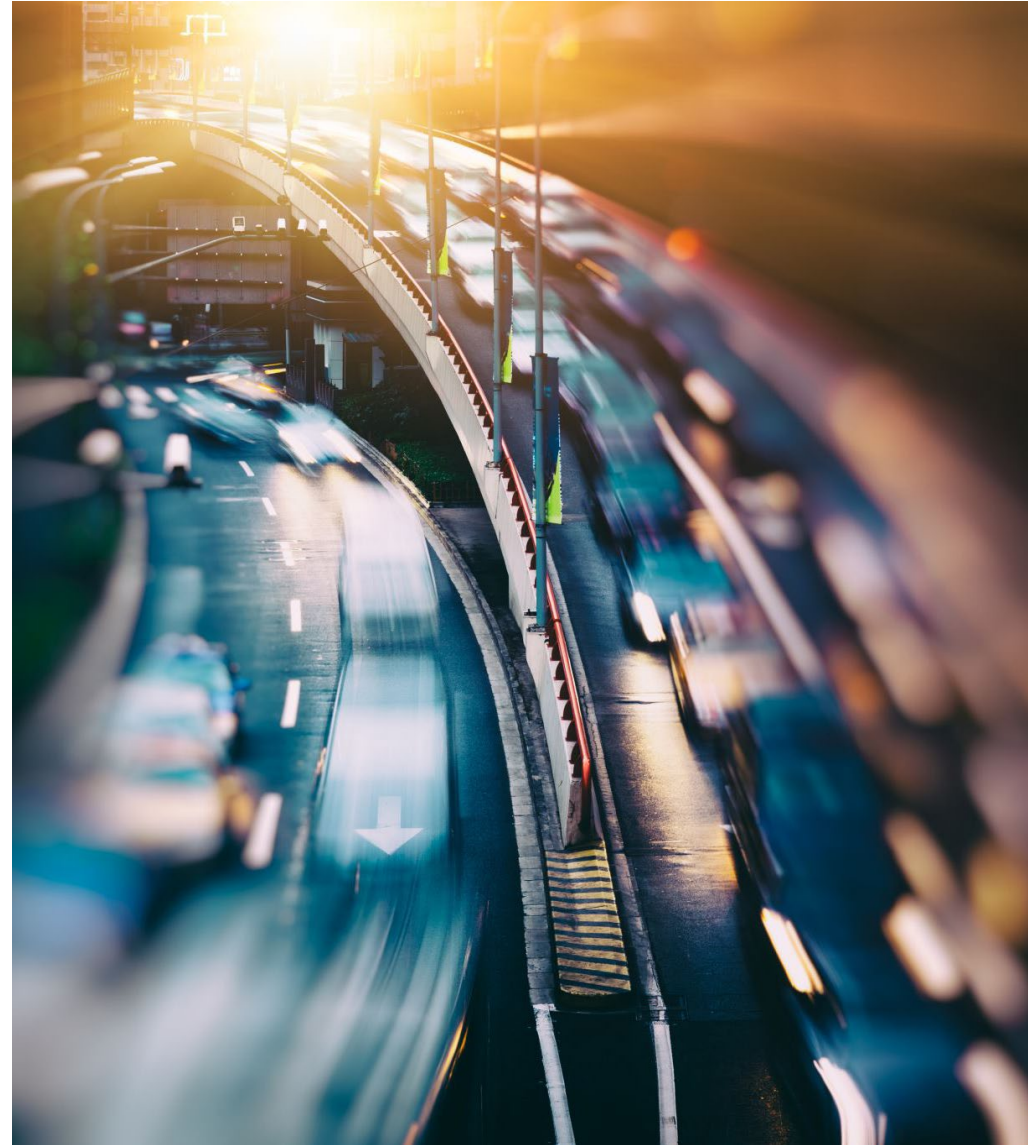
Overview

Future Utilization and Efficiency in Logistics

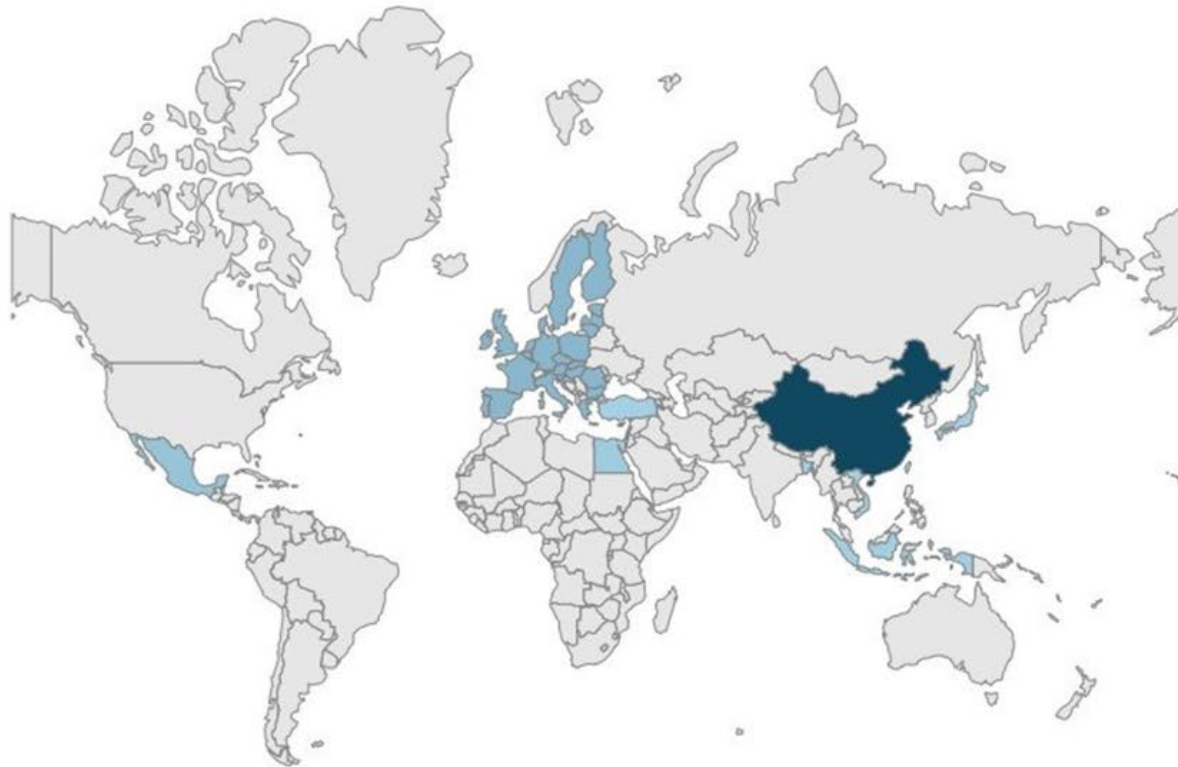
- Current Markets –
 - Critical Assets in Transition
 - Drivers of Change
- Transportation, Soy Markets, and New Uses
 - What Could We Do
 - What Should We Do
 - What Can Be Done with Practical Timetable and Resources

Transportation Infrastructure is Key

- Our Transportation system provides a competitive advantage in Global markets
- Future trade flows will shift as demand changes to new growing markets
- Infrastructure is a long lead time asset, so we need to be making investments today, to meet future needs



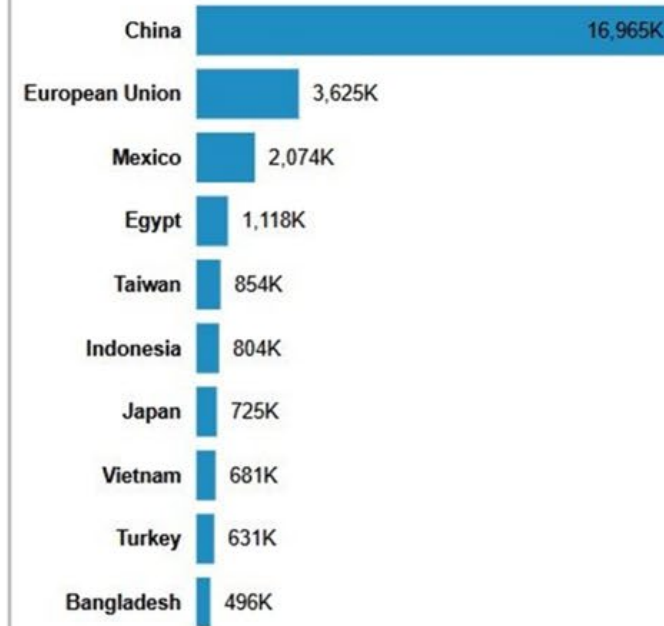
Top 10 Destination Markets for U.S. Whole Soybeans (MY 2024/25)



World Total

30,242,906

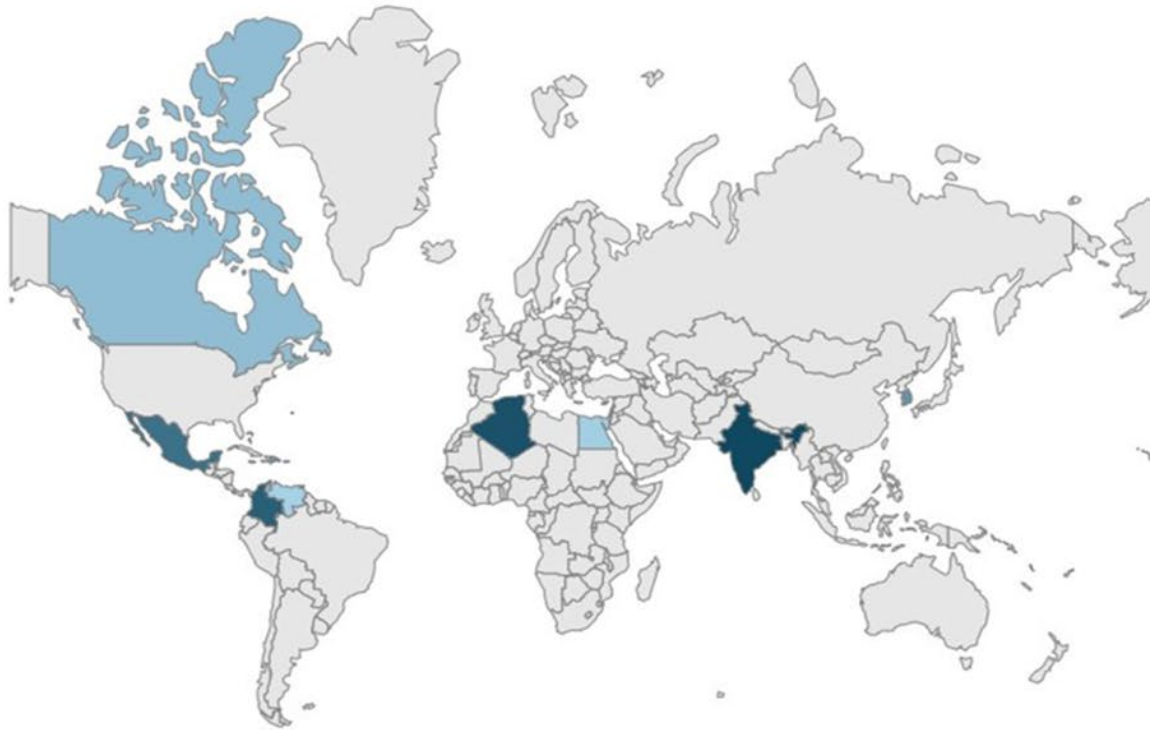
Accumulated Volume within MY (MT)



Data source: USDA/GATS. Full MY runs from Oct-Sep.

Top 10 markets determined from MY exports. *Data for MY 24/25 includes October through December values.

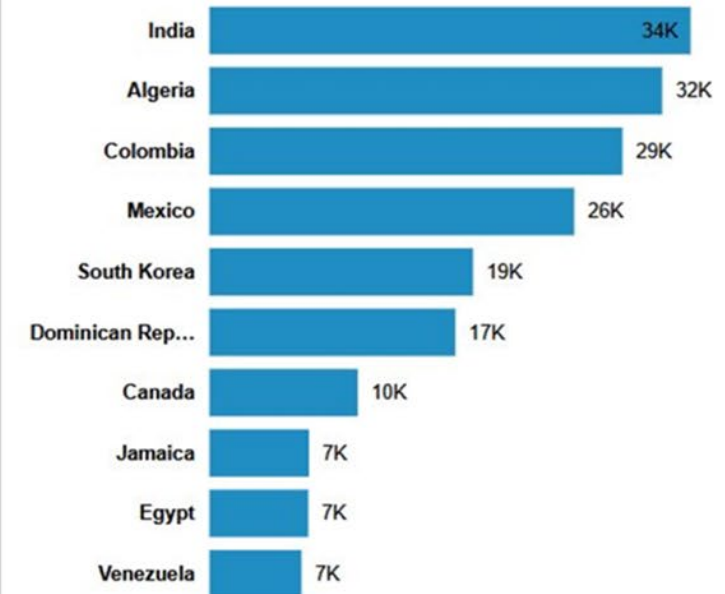
Top 10 Destination Markets for U.S. Soybean Oil (MY 2024/25)



World Total

195,659

Accumulated Volume within MY (MT)

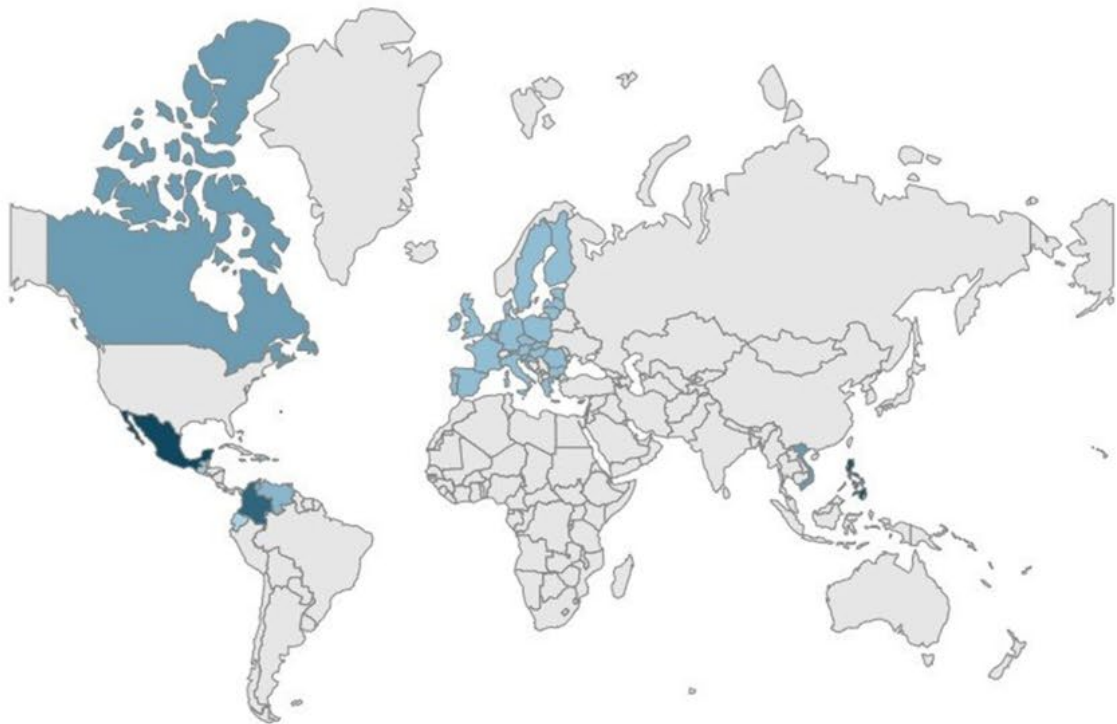


Data source: USDA/GATS. Full MY runs from Oct-Sep.

Top 10 markets determined from MY exports. *Data for MY 24/25 includes October through December values.

SOY

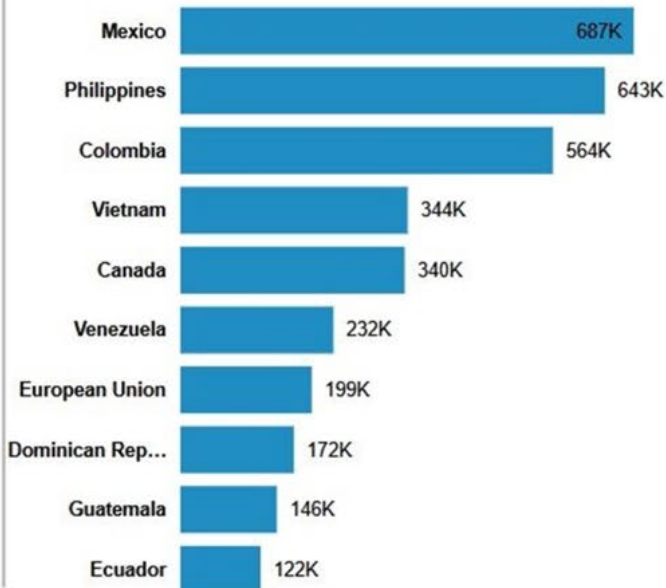
Top 10 Destination Markets for U.S. Soybean Meal (MY24/25)



World Total

4,383,557

Accumulated Volume within MY (MT)



Data source: USDA/GATS. Full MY runs from Oct-Sep.
Top 10 markets determined from MY exports. Data for MY 24/25 includes October through December values.



Global Markets Are Changing

A Growing World

Over the next decade, **the global population is projected to increase by 11%**

This is expected to be a major driver of **increased protein consumption globally**, which is estimated to grow by 15% by 2031 per the OECD report.

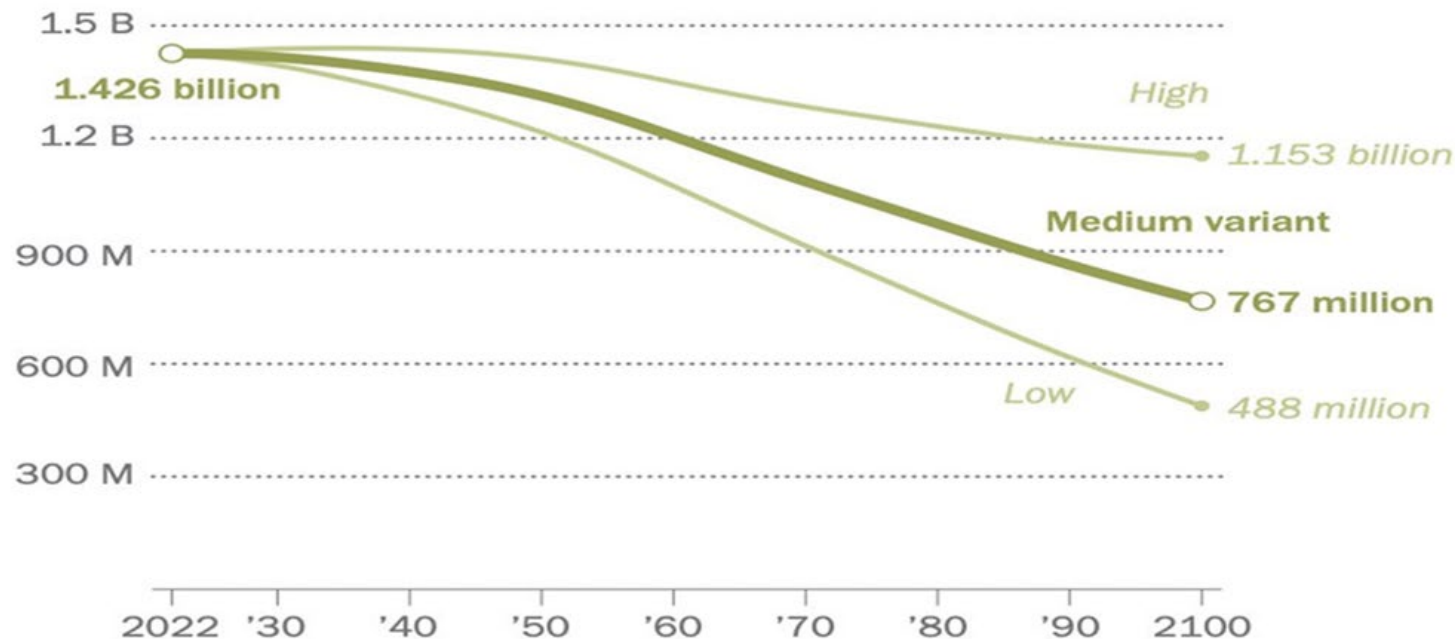
Organization for Economic Cooperation and Development (OECD) - Food and Agriculture Organization 2022 Agricultural Outlook Report.



Demographics is Destiny

China's population is likely to fall below a billion people before 2100

Number of people, by variant

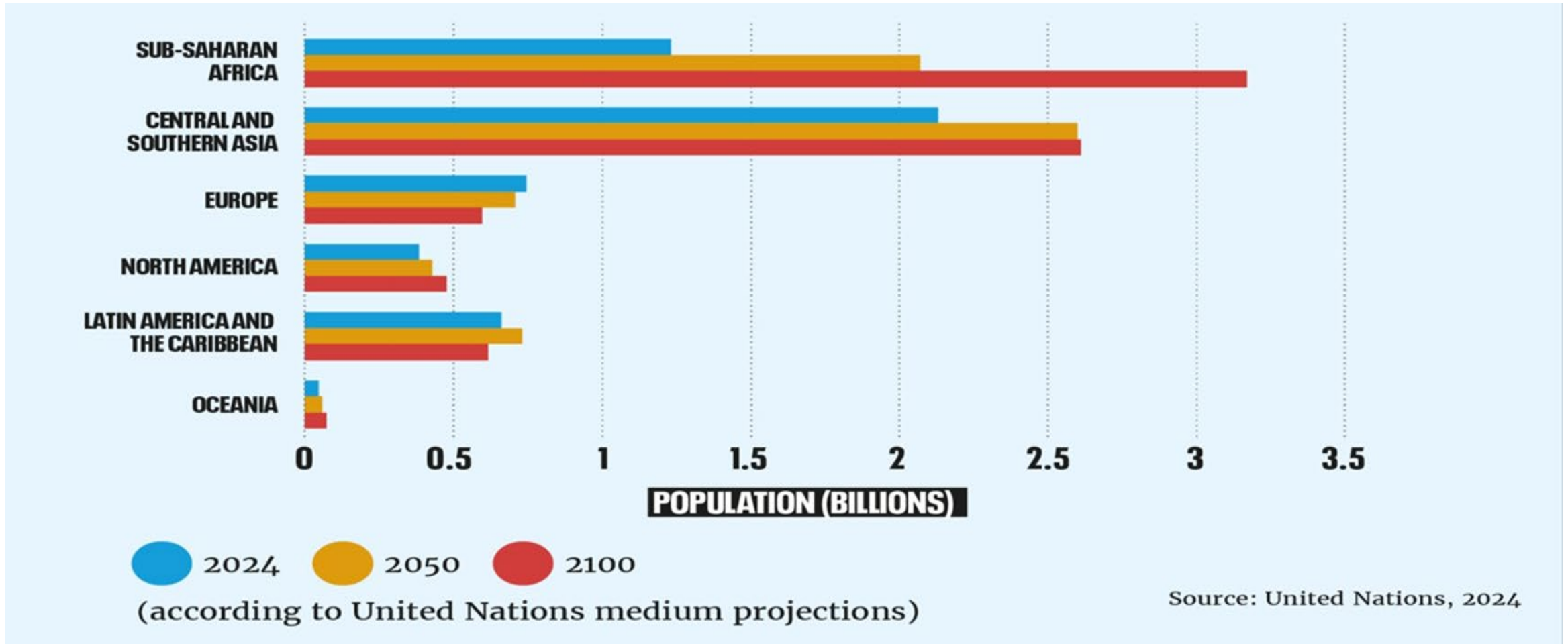


Note: May differ from national census figures. The medium variant is the middle-of-the-road estimate provided by the UN; high and low variant scenarios involve total fertility being 0.5 births above or below the medium scenario, respectively.

Source: UN Population Division's World Population Prospects: The 2022 Revision.

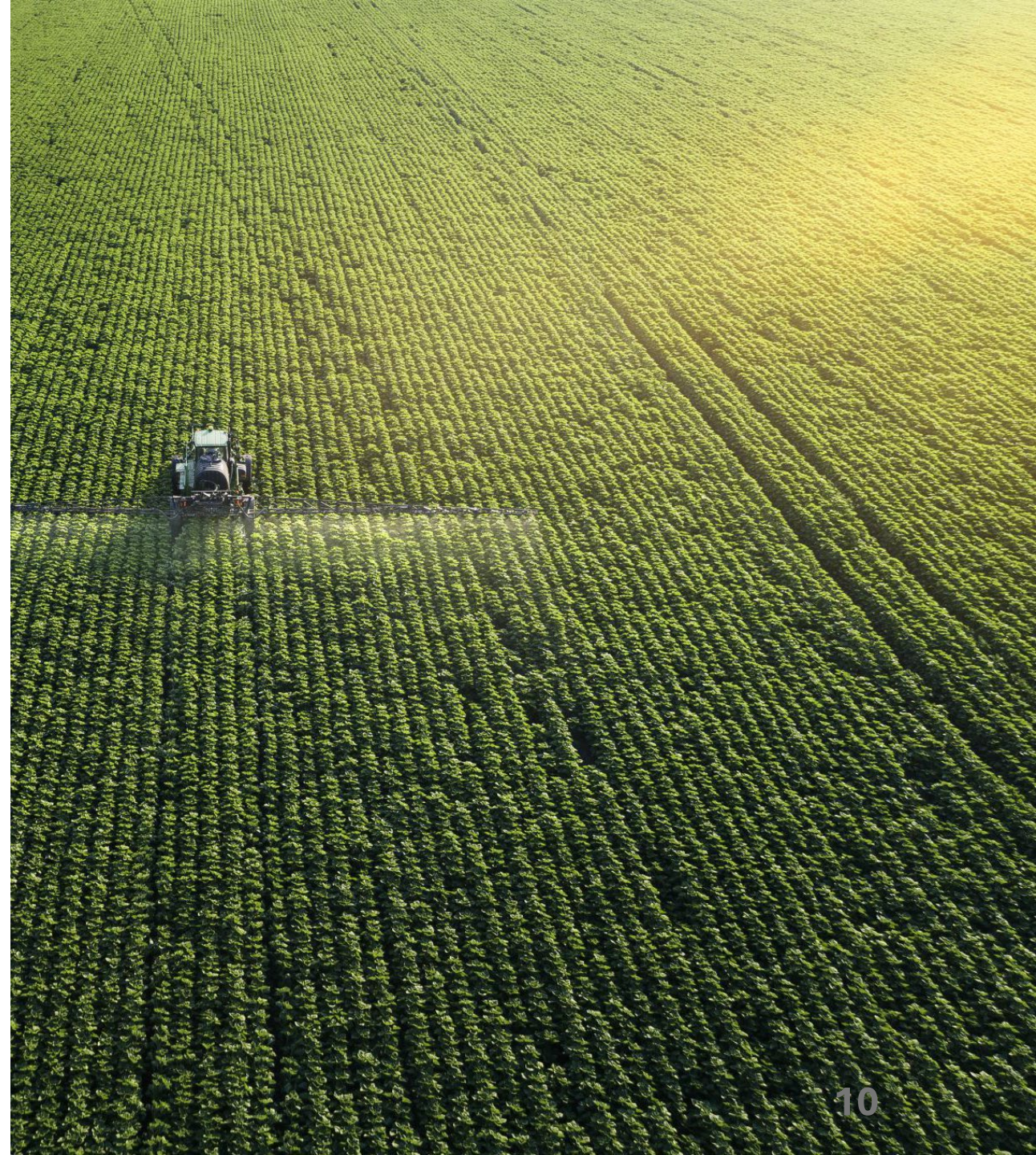
PEW RESEARCH CENTER

Population Growth By Region, 2024-2100



Illinois Soybean Aligned Work to Meet Challenges Ahead

1. Ensuring our Transportation system is reliable, resilient and protects our competitive advantage. (Transportation 2050)
2. Growing Soy utilization in emerging markets.
3. Expanding utilization of Soy in “New Uses”





Illinois' Freight Transport System:

Reliable, resilient, & supports competitive advantage.

1. Public investments in infrastructure mirror and propel private Illinois crop marketing

China's share of U.S. soy exports declined from 57% in '15, 62% in '16 to 34% in 2026[‡]

USDA Foreign Agricultural Trade of the U.S.
2015, 2016 Calendar Year, [‡]October 2025-June 2026 Marketing Year, 8-6-26

Thoughtful analysis



**TRANSPORTATION NETWORK
EVALUATION OF SOYBEAN AND SOY
PRODUCT MOVEMENTS STUDY**

Prepared by:
Civil Design, Inc.
5220 Oakland Ave.
St. Louis, MO 63110
08/30/2023



**SOYBEAN TRANSPORTATION TO
GLOBAL MARKETS**

Prepared by:
Civil Design, Inc.
5220 Oakland Ave.
St. Louis, MO 63110
08/29/2025



**Transportation Requirements to Move Future
Soybean, Corn, and Wheat Products to Market**

Prepared by:
Civil Design, Inc.
5220 Oakland Ave.
St. Louis, MO 63110
03/13/2026





What we have learned:

The transportation system needs to accommodate yield growth and deliver soy to new markets.

By 2050 using historical Illinois yield growth projections:

Crop Production	Percent Increase	Bushels	Truckloads
Soybean	~64%	1,396,182,455	1,469,665
Corn	~52%	2,760,868,400	2,906,177
Wheat	~43%	199,920,716	210,443

Illinois' Soy Utilization:

Shifting markets prompt the need for agility

2. Corn, Soybeans and Wheat are primary row crops in Illinois

Corn and Soybeans have increased from 60% cropped acreage in 1950 to 90% today.



Illinois Primary Cropland – Corn & Soybeans

In some proportional rotation from year to year

- **Total Illinois land area: 33,999,360 acres (USGS)**
- **Total farmland in Illinois: ~26.3 million acres* = ~77% of Total**
- **Planted Acreage: 21,500,000 ~63% of the state's land area**
- **Soy & Corn Processing: 7 & 10**
- **Grain Terminals: 746**
- **Rail Terminals: 186**
- **River Terminals: 59**

Illinois' New Uses:

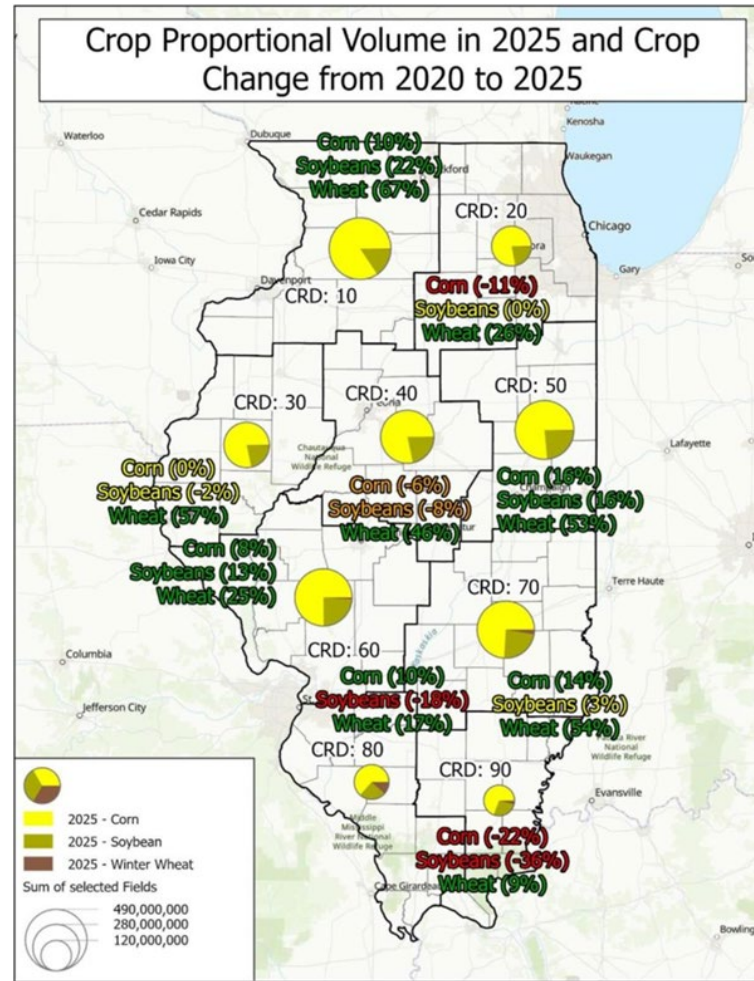
Increasing processing with applied innovations

3. Efficiency improvements are anticipated all across the state

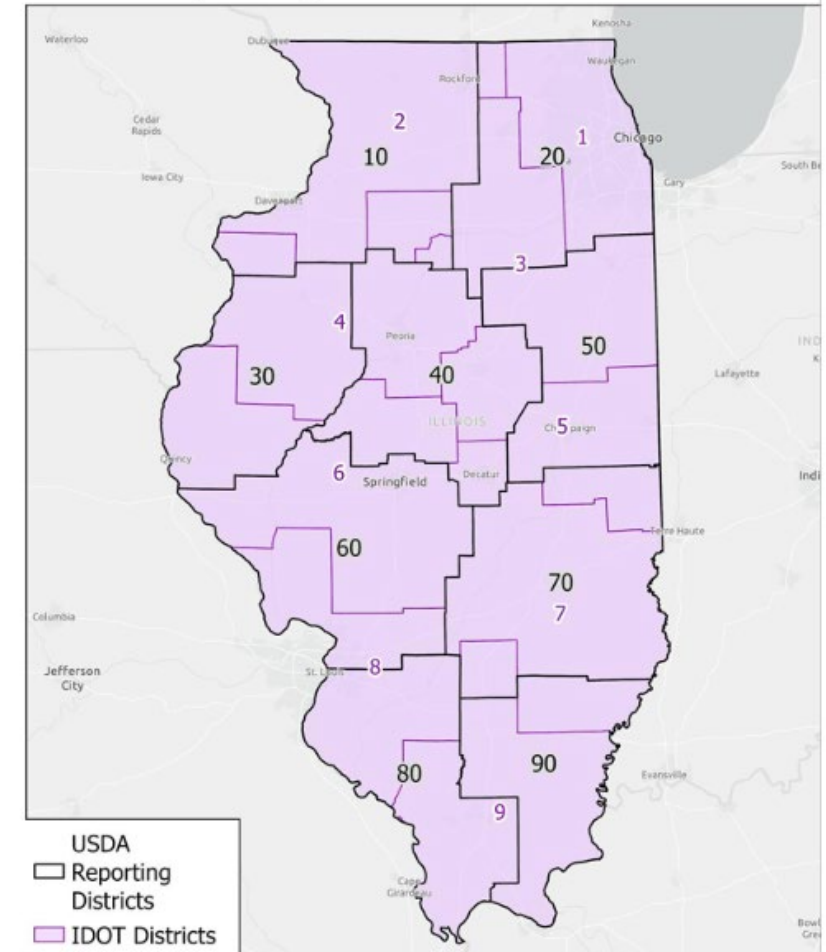
32% of grain elevators do not have shuttle train service which can reduce shipping costs by 8 cents a bushel

Nine (9) Illinois USDA Crop Reporting Districts (CRD)

Nine (9) Illinois IDOT Districts



USDA Reporting Districts and IDOT Districts



Drilling Down in the Data: CRD 60 (West-SW)

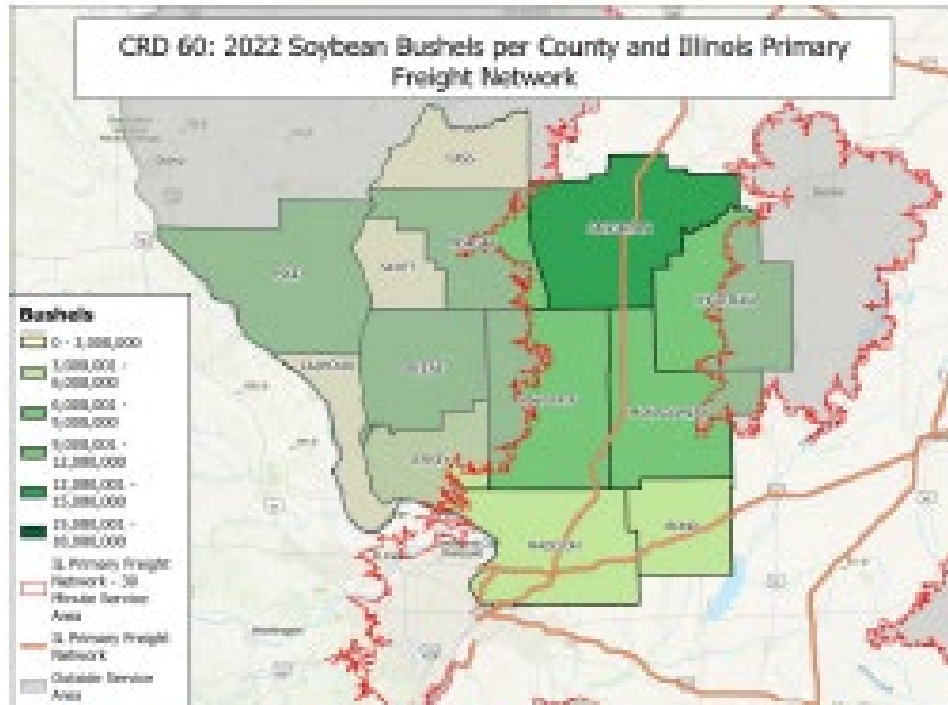


Figure 1.2 – CRD 60 Bushels per County & IPFN

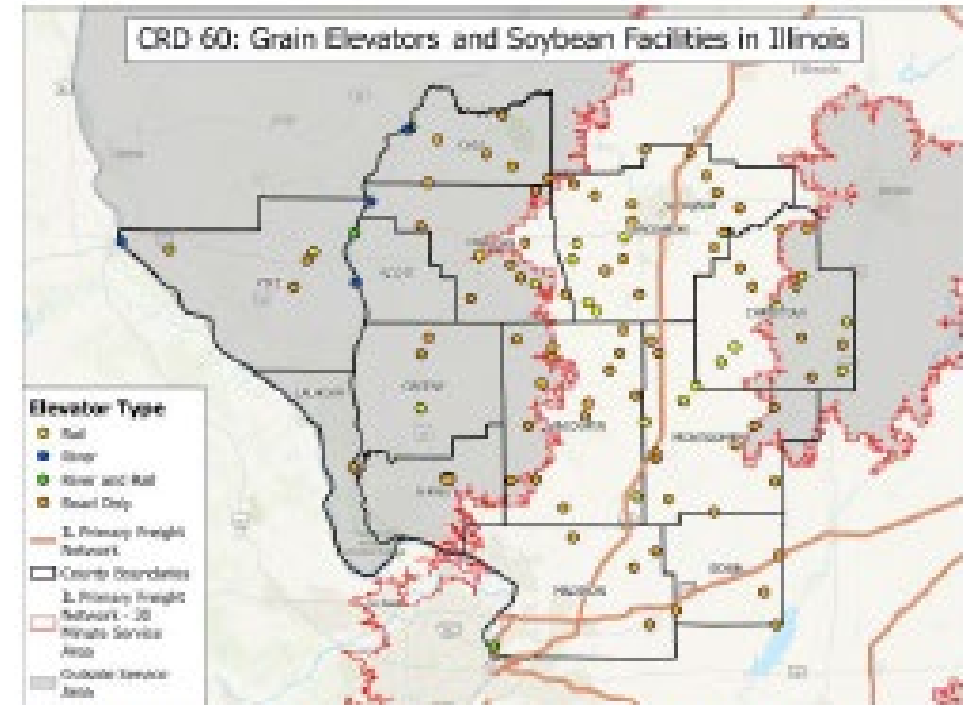


Figure 1.3 - CRD 60 SB Facilities & IPFN

49% of CRD 60 within 30 minutes of ILPFN

13% increase in Soybean prod., 8% increase in Corn prod., 17% increase in Wheat prod.

11-31% increase in Truck traffic for every ten-year period

Drilling Down in the Data: CRD 10 (Northwest)

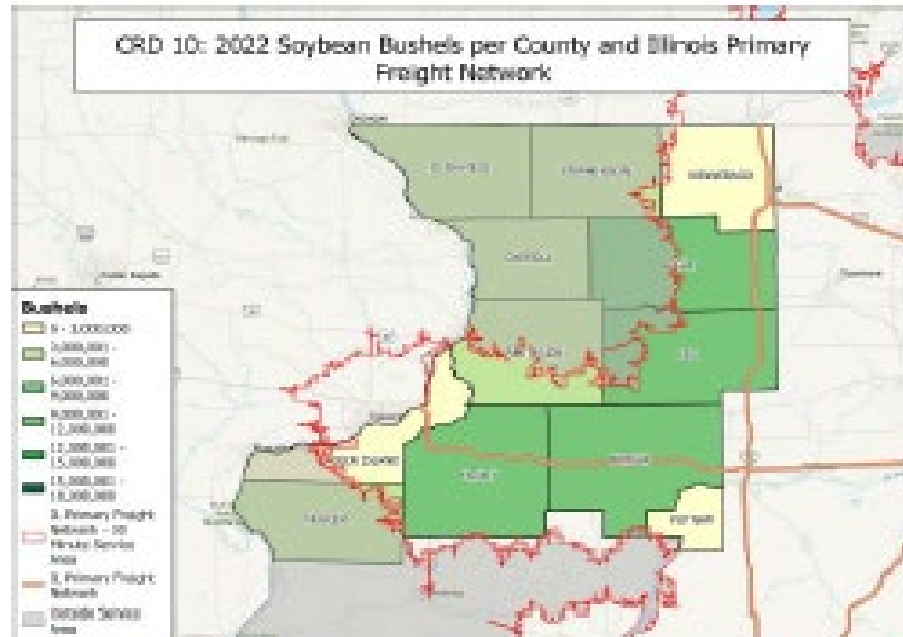


Figure 3.9 – CRD 10 Bushels per County & IPFN

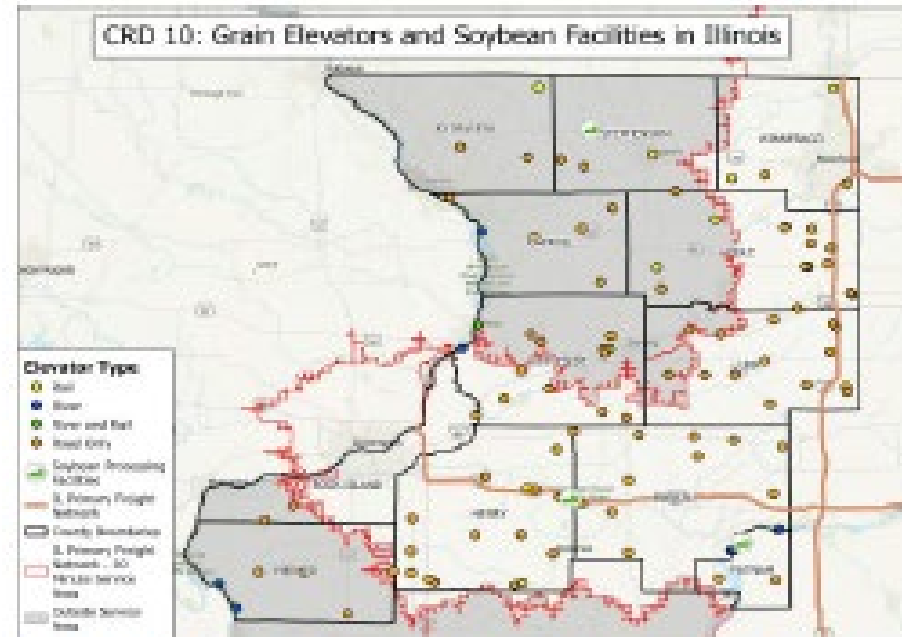


Figure 3.10 – CRD 10 SB Facilities & IPFN

54% of CRD 10 within 30 minutes of ILPFN

22% increase in Soybean prod., 10% increase in Corn prod., 67% increase in Wheat prod.

11-19% increase in truck traffic for every ten-year period

Drilling Down in the Data: CRD 50 (East)

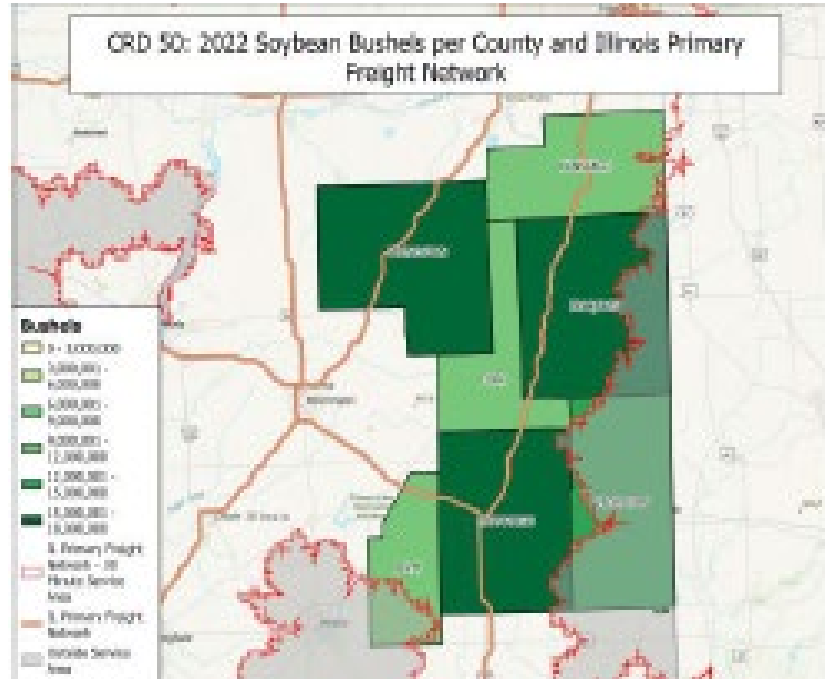


Figure 3.17 – CRD 50 Bushels per County & IPFN

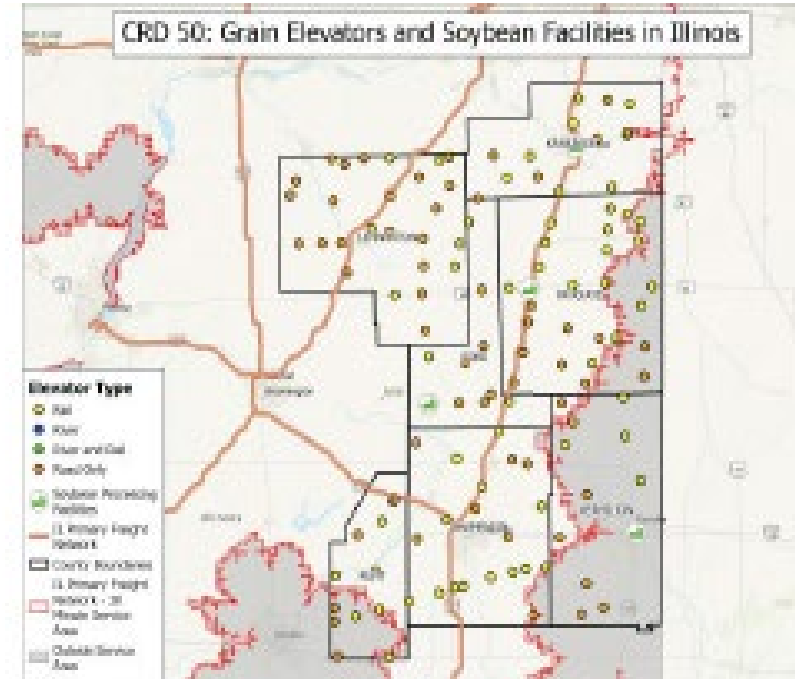


Figure 3.18 – CRD 50 SB Facilities & IPFN

75% of CRD 50 within 30 minutes of ILPFN

16% increase in Soy prod., 16% increase in Corn prod., 53% increase in Wheat prod.

11-31% increase in Truck traffic for every ten-year period



Across Illinois Crop Reporting Districts (CRDs) with the highest yield projections, the default transportation option is to increase truck traffic.

IS that the most cost-efficient solution?

NEXT STEPS



Building progress profiles of each CRD including transportation assets, long range planning, origin and destination overviews, etc.



Engage local and county elected officials, industry stakeholders, and transportation agency staff to develop investment priorities for each CRD.



Engage in decision making process for future public investments in transportation infrastructure to ensure we keep our competitive advantage for agriculture.



Summary

Future Utilization and Efficiency in Logistics

- Current Markets
 - Critical Assets in Transition
 - Drivers of Change
- Transportation, Soy Markets, and New Uses
 - What Could We Do
 - What Should We Do
 - What Can Be Done with Realistic Timetables and Available Resources
- Continue Engagement

Thank you!

- For more information on our research studies

