

2013 Market Review

&

Investment Update



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SOUTHWESTERN
ILLINOIS

Leadership Council Southwestern Illinois

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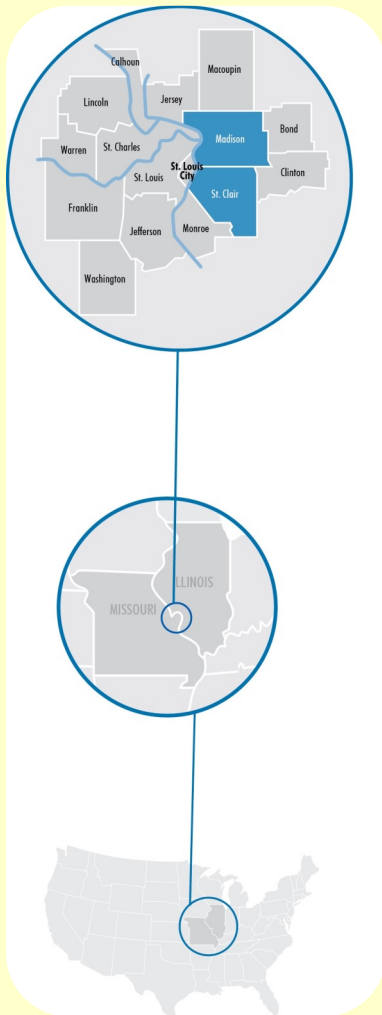
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Leadership Council Southwestern Illinois

Building Relationships. Shaping the Future.

Message from the President and Chairman



Just a river's width from St. Louis' Gateway Arch in the heart of the Midwest, the Southwestern Illinois portion of the St. Louis metropolitan area has experienced unprecedented economic growth over the past few years and continues to be a hot spot for public and private investments.

Readers' Note: The projects listed are just a sampling of the investments that have occurred in Southwestern Illinois during 2013 and are in no way intended to be considered a complete list. The information that follows is the best available and was compiled from a variety of public and private sources. The Leadership Council and Southwestern Illinois Development Foundation assume no responsibility for any inaccuracies or omissions.

Dear Friends:

What a difference a few years can make! With the conclusion of several mega projects that had helped to fuel our economy during the height of the recession, many apprehensively wondered what our development and investment pipeline would look like in 2013. The good news is there was still significant investment occurring across the region, and we spotlight several projects in both counties in this annual edition of the *Market Review and Investment Update*. Even better news, however, is that many of the projects underway were the types of foundational projects that have the potential to attract additional investments in the years to come.

The Leadership Council began the year with a sharpened focus on the role our organization could play in providing the leadership required to guide the economic growth strategy of the Southwestern Illinois region. It was clear to us that the future economic health of our region would depend upon our ability to stimulate future growth in Southwestern Illinois, so we were excited to see that there were already great things happening upon which we would be able to build.

At the heart of our strategy was a new Southwestern Illinois Economic Growth Action Plan, for which the Leadership Council has taken the role of catalyst and coordinator, convening a group of economic development leaders in the two-county region to work collaboratively on implementation of the plan. Recognizing that Southwestern Illinois is a major part of the greater St. Louis region, the strategy was intended to also enable Southwestern Illinois to work closely and in concert with economic growth plans that regional organizations, such as the St. Louis Regional Chamber, are developing and implementing.

Drawing on the findings of our Vision 2020 strategic planning work, our Southwestern Illinois Economic Development Leadership Team identified three key priorities to focus on as we worked to unite our region for growth during 2013 and 2014: Retention and Expansion of Industry; Transportation/Manufacturing; and Entrepreneurship and Innovation. In this edition of the Market Review, we take a look at some of the exciting things happening in each of these areas that have us feeling very optimistic about the future.

Yes, the landscape is different than it was a few years ago, but the seeds for future growth have been planted, and we remain confident that they will bear fruit for our region in the years to come. Thank you for your commitment to Southwestern Illinois!

Sincerely,

Dennis Wilmsmeyer
President, 2014

Dr. Ronda Sauget
Chairman, 2014



Our Mission

To unite business, industry, government, education and labor for economic growth in Southwestern Illinois.

A Message from ...

Our County Board Chairmen



**Madison County
Board Chairman**
Alan Dunstan

It is my distinct pleasure to present the Leadership Council Southwestern Illinois' Market Review and Update, the annual publication which provides a comprehensive overview of the economic development investment taking place in our area and, importantly, the positive story of our region.

As a result of careful planning and the effective promotion of the positive business climate, in 2013 Madison County continued its successful emergence from the recession which gripped the county -- and our country -- for so long. We continue to see significant investments in a variety of industry sectors, but are particularly excited about the many projects solidifying Madison County's position as one of the country's premier logistical hubs offering outstanding multimodal capabilities.

The continuing investment at Gateway Commerce Center by Proctor & Gamble, World Wide Technologies and others accents the cooperation and support that exists in Madison County between elected officials, community leaders and the construction industry that, when combined with an exceptional infrastructure system and our county's central location, contribute to a progressive business environment.

One project of significant importance to all of Southwestern Illinois is the renovation of the levees that protect our homes and businesses from the Mississippi River. This project is currently underway and is scheduled for completion in 2015. The levee renovation project, the continued expansion and enhancement of America's Central Port, and the many improvements to our highway and bridge system have enabled Madison County to create a successful business environment that leads to increased income for our area and, importantly, jobs for our residents.

I am confident that after reviewing the Market Review and Update, each of you will share my optimistic outlook for Madison County and all of Southwestern Illinois!

Sincerely,

A handwritten signature in blue ink that reads "Alan J Dunstan".

**Alan Dunstan
Madison County Board Chairman**



**St. Clair County
Board Chairman**
Mark Kern

Reflecting on 2013, multiple projects will have a huge impact on our region's focused efforts to attract additional investment in the logistics and distribution arena. Anchored by the new Stan Musial Veterans Memorial Bridge, significant public and private investment is being made which will enhance our bi-state connectivity and expand our capabilities to efficiently move goods with connections to the new Illinois Route 3. We are also opening up hundreds of virtually unoccupied acres with Mississippi River access for new commercial development.

The continuing investments at Scott Air Force Base also are encouraging, particularly during a time when the Department of Defense continues to look for places to cut spending. We are seeking out missions that could move to Scott, while also focusing on retaining existing operations. We are accomplishing this by working closely with the Leadership Council.

This annual review by the Leadership Council spotlights not only the new investments at and around the Base, but also many other projects and investments in the industrial, healthcare, education, commercial, office, institutional and public sectors throughout St. Clair County. We are especially proud of the many infrastructure projects that are progressing in the City of East St. Louis.

As you'll see in the following pages, there's a lot to be excited about, and we appreciate the Council's efforts to capture and share this information.

Sincerely,

A handwritten signature in black ink that reads "Mark Kern".

**Mark Kern
St. Clair County Board Chairman**

2013 Overall Southwestern Illinois

Project Spotlights

One of the most significant projects making news during 2013 was the Metro East Levee project, which actually involves multiple projects along the entire levee system protecting the American Bottom in Madison, St. Clair and Monroe counties. Much was accomplished behind the scenes last year as designs were completed and approvals secured from the U.S. Army Corps of Engineers for a series of projects aimed at improving the levee system to the 100-year standard so it continues to safeguard the homes and businesses of the 156,000 residents and 55,000 workers that lie behind it. It's now estimated the levee improvements can be completed for \$110 million, less than originally expected, and all remains on schedule for completion of the improvements and reaccreditation by the Federal Emergency Management Agency (FEMA) sometime in 2015.

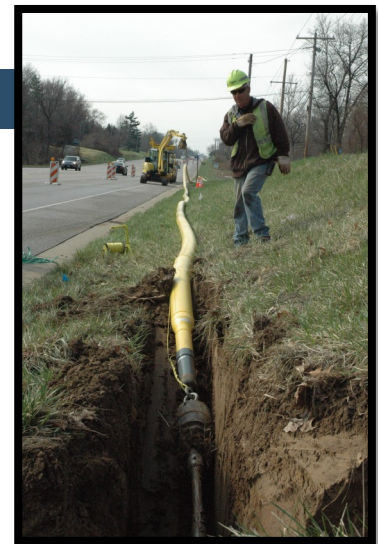
Work is also well underway on Ameren Illinois' \$42 million upgrade of the electrical distribution system in Southwestern Illinois, part of a \$643 million modernization of the entire system operating in central and southern Illinois. In 2013, Ameren Illinois also secured state legislative approval of its plan to accelerate a natural gas infrastructure upgrade program with an additional \$330 million investment over 10 years, a portion of which will be invested in Madison, St. Clair, Clinton, Jersey and Monroe counties.

Efforts to deliver higher speed rail between St. Louis and Chicago and reduce travel time between the two to four-and-a-half hours continued to advance. Governor Quinn recently announced \$102 million from the *Illinois Jobs Now!* Capital Program to enhance key sections of the route between St. Louis and Chicago. While IDOT is still studying the feasibility of an additional station between Alton and St. Louis, St. Clair County recently pledged \$500,000 toward the construction of an East St. Louis stop. Meanwhile, the Alton Regional Multi-Modal Transportation Center is moving closer to reality. The city of Alton received a 2011 TIGER grant of \$13.8 million toward construction of the high-speed passenger rail station and bus transfer hub, and the Madison County Transit Board has committed to providing half of the remaining matching local funds required.

The Metro East's world class system of bike trails also continues to evolve, with the state announcing in April 2013 plans to invest more than \$4.7 million in bike and pedestrian trails in the metro-east.



Recent state funding will enhance connections to existing bikeways



Ameren workers in the field



Metro East Levees Work

Sampling of Regional Projects Announced during 2013

Project	Community	\$Mil
High-Speed Rail Construction	Various in Illinois	1.45 Bil
Ameren Illinois Natural Gas Infrastructure Upgrades	Southern Illinois Service Area	330.0
Metro East Levees	Various	110.0
Continued Expansion of US Route 67	Jerseyville Area	47.1
Ameren IL Electrical Distribution System Upgrades	Southwestern Illinois	42.0
Poplar Street Bridge and Martin Luther King Connector Bridge Updates	Madison & St. Clair Counties	25.0
Road Projects in Madison & St. Clair Counties	Madison & St. Clair Counties	5.0
Metro East Bike and Pedestrian Trails	Metro East	4.7

2013 Southwestern Illinois Projects

Madison County Highlights

Construction cranes and other heavy equipment continued to dot the landscape across Madison County during 2013 as a variety of projects in different sectors took shape.

Among those making news was the new \$63 million hospital completed for St. Joseph's in Highland, the largest single project underway, while Southern Illinois University Edwardsville had several different projects completed, under construction or announced, with a total estimated cost of \$114 million. Among those was the much-anticipated new \$52 million Science Building.

Other projects of note that were completed during the year include the \$20 million, 482,000-square-foot Westway One expansion at Gateway Commerce Center (where the Metro East region's largest speculative building ever is now also taking shape); McKinley Health Center in Granite City, a 31,800-square-foot facility operated by Southern Illinois Healthcare Foundation that is expected to serve 4,500 new patients, and the \$4.4 million East Alton Dialysis Center, a 10,244-square-foot facility with 19 treatment stations.

Projects remaining under construction throughout the year included Illinois American Water's \$12 million Clear Well project in Granite City, which aims at saving the utility both energy and money; and the new South Harbor at America's Central Port.

The commercial and hospitality sectors also were active with a new \$7.5 million Fairfield Inn and Suites by Marriott Hotel being built in Pontoon Beach; a new \$6.7 million, 136,000-square-foot Sam's Club that has since opened in Glen Carbon, generating an estimated 175 new jobs, as well as a \$5.6 million expansion of Walmart that was expected to create an additional 80 jobs in that same community. The new \$6.5 million Jack Schmitt Chevy Dealership in Wood River also was taking shape.

Other exciting projects announced back in 2013 that have since moved forward include the \$40 million expansion by Kraft Foods in Granite City, and the \$5.8 million expansion of West Star Aviation at St. Louis Regional Airport in East Alton.



Enclave West Student Housing at SIUE

Madison County Projects Completed during 2013

Project	Community	\$Mil
St. Joseph's Hospital	Highland	63.0
New SIUE Science Building	Edwardsville	52.0
Westway I Expansion at Gateway Commerce Center	Edwardsville	20.0
SIUE Art & Design Building renovation and addition	Edwardsville	15.3
SIUE Dental Simulation Laboratory	Alton	9.5
McKinley Health Center	Granite City	8.8
Cedarhurst of Edwardsville Memory -Care Facility	Edwardsville	8.0
East Alton Dialysis Center	Alton	4.4
1410 Discovery Parkway, subsidiary of American Water Co. (expansion)	Alton	2.0



Westway 1 Expansion at Gateway Commerce Center

New Projects in the Pipeline

East Alton will be getting a new affordable housing community as the \$15 million Emerald Ridge Housing Development is completed. In Granite City, Phase 2 of the Granite City Green community, a \$4 million sustainable housing development is getting underway. Other investments are planned at both Alton Memorial Hospital and St. Anthony's Health Center, while the education sector will continue to see additional investment, with SIUE planning a series of additional improvements, the new aquatic center planned for Edwardsville High School and renovations coming to both Civic Memorial High School in Bethalto and North Elementary in Alton.

Madison County Projects Under Construction during 2013

Project	Community	\$Mil
Saint Anthony's Health Center 5-year renovation project	Alton	40.0
Enclave West Student Housing at SIUE	Edwardsville	26.7
SIUE Engineering Building Expansion	Edwardsville	14.2
Illinois American Water Co. 2.5 Million Gallon Water Clear Well	Granite City	12.0
Phase 1 of New South Harbor Project	Granite City	11.0
Collinsville Street Projects	Collinsville	8.3
Fairfield Inn and Suites by Marriott Hotel	Pontoon Beach	7.5
New Sam's Club	Glen Carbon	6.7
New Jack Schmitt Chevy Dealership	Wood River	6.5
Expanded Walmart	Glen Carbon	5.6
Lewis & Clark Community College Renovation and Expansion	Godfrey	5.6
Wood River Police Station Expansion	Wood River	4.5
Upgrades to Glen Carbon Heritage Bike Trail	Glen Carbon	3.0
Amy's Crossing Independent Living Facility	Alton	2.0
St. Joseph's Hospital Medical Office Building	Highland	2.0

Madison County Projects Announced during 2013

Project	Community	\$Mil
Kraft Foods Group Manufacturing Facility	Granite City	40.0
SIUE Science Building Renovations	Edwardsville	23.0
Spec Facility at Gateway Commerce Center	Edwardsville	20.0
West Star Aviation Expansion	East Alton	5.8
Civic Memorial High School Updates	Bethalto	4.6
Granite City Library Renovation	Granite City	4.1
Edwardsville Aquatic Center	Edwardsville	5.3
North Elementary School Renovations	Alton	2.8

Madison County Projects Announced during 2014

Project	Community	\$Mil
Saint Anthony's Health Center (technology and campus)	Alton	20.0
Emerald Ridge Housing Development	East Alton	15.0
Water Treatment Plant Upgrades	Roxana	7.9
SIUE Union Station Renovation	Edwardsville	5.6
SIUE Improvements	Edwardsville	5.6
Granite City Green (Phase 2)	Granite City	4.0
Alton Memorial Hospital Expansion of Women's Health and Childbirth Center	Alton	2.0
SIUE Renovations to Info Tech Services	Edwardsville	1.6

2013 Southwestern Illinois Projects

St. Clair County Highlights

A quick look at the sampling of projects under construction or completed in St. Clair County during 2013 reinforces that investments were flowing into various sectors across the county last year. While the new bridge over the Mississippi was the largest project, it wasn't the only project making news. Work began on Memorial Hospital's new facility in Shiloh; Ameren Illinois pumped an estimated \$42 million into Metro East upgrades, including a new \$6 million, 11-acre worker training facility in Belleville; and Belleville's Waste Water Treatment Plant was modernized to the tune of \$41.5 million.

Things were active in the education arena as Mascoutah got a new \$25 million, 68,000-square-foot elementary school; East St. Louis Senior High School received a \$27.4 million overhaul; Southwestern Illinois College completed its new \$19 million Liberal Arts Complex - a 78,901-square-foot facility on the Belleville Campus; and Lindenwood University-Belleville continued to invest in its facilities, completing a \$4 million women's dormitory in late 2013 and announcing plans for an additional \$4 million new men's dorm to get underway in 2014.

Other projects of note include the \$37.8 million Illinois State Police Metro East Forensic Science Lab recently completed in Belleville, the \$18.8 million Milam Renewable Gas Facility being built in Fairmont City, Terra Source Global's new \$5.1 million, two-story office building in Belleville to accommodate their anticipated employment growth, and the 100,000-square-foot, \$22 million mixed-use Jazz at Walter Circle Senior Housing complex.

After a couple of quiet years, there was an uptick in activity in the commercial sector with the opening of the new \$23 million, 162,000-square-foot Menard's Hardware Store in O'Fallon and plans announced for the Fairview Heights City Center, a \$32 million, 180,000-square-foot redevelopment across from St. Clair Square. Gateway Motorsports Park also is getting a \$20 Million makeover.



Gateway Motorsports Park



**Southwestern Illinois College's
New Liberal Arts Complex**



**New Women's Dorms at
Lindenwood University**

St. Clair County Projects Completed during 2013

Project	Community	\$Mil
New Elementary School in Mascoutah School District 19	Mascoutah	25.0
Gateway Motorsports Park Improvements	Madison	20.0
Southwestern Illinois College Liberal Arts Complex	Belleville	19.1
Ameren Illinois Training Center	Belleville	6.0
New Women's Dorms at Lindenwood University	Belleville	4.0
Terra Source Global Office Building	Belleville	5.1
St. Clare Catholic School Addition	O'Fallon	4.9
North Bay Warehouse Expansion	Mascoutah	3.5
Central Park Center	O'Fallon	1.3
Regions Bank	East St. Louis	1.0

New Projects in the Pipeline

Recently announced projects making headlines in 2014 indicate continued investment in the education sector, as well as plans for a \$65 million, 20-megawatt Solar Panel Farm in East St. Louis. The 400-acre site is currently being cleared at an estimated cost of \$19 million. Phase 1 of the I-64/Reider Road project by Scott Air Force also is moving forward, representing a \$38 million investment and paving the way for additional investment around MidAmerica Airport.

St. Clair County Projects Under Construction during 2013

Project	Community	\$Mil
Stan Musial Veterans Memorial Bridge	St. Clair	670.0
Memorial Hospital Satellite Campus: Memorial Hospital-East	Shiloh	124.0
Belleville's Wastewater Treatment Modernization Project	Belleville	41.5
Illinois State Police Metro East Forensic Science Lab	Belleville	37.8
New Menards Store	O'Fallon	23.0
East St. Louis Senior High School Overhaul	St. Louis	27.4
FedEx Distribution Center	Sauget	23.5
Jazz at Walter Circle Senior Housing	East St. Louis	22.0
Milam Renewable Gas Facility	Fairmont City	18.8
SAFB 18th Air Force and Mobility Command Headquarters Renovations	Scott Air Force Base	16.0
Cottages at Cathedral Square Senior Living Complex	Belleville	5.0
Colonnade Senior Living and Memory Care Center	O'Fallon	8.1
Touchette Regional Hospital Reconstruction and Expansion	Centreville	2.8

St. Clair County Projects Announced during 2013

Project	Community	\$Mil
St. Elizabeth's Hospital Expansion	O'Fallon	300.0
Defense Headquarters Building at Scott Air Force Base	Scott Air Force Base	65.0
Rieder Road and I-64 Project (Phase 1)	By Scott Air Force Base	38.0
Fairview Heights City Center	Fairview Heights	32.0
Wingate Elementary School	Belleville	27.0
Widening of North Green Mount Road	O'Fallon	10.4
New Grade School in Lebanon Community School District 9	Lebanon	7.5
Improvements to Frank Scott Parkway East	St. Clair County	5.5
Repair and Improvements to the Belleville campus of Southwestern Illinois College	Belleville	1.2
McKendree University Infrastructure Improvements	Lebanon	1.2
Metroeast Endoscopic Surgery Center	Fairview Heights	1.1

St. Clair County Projects Announced during 2014

Project	Community	\$Mil
Solar Panel Farm	East St. Louis	65.0
SAFB Infrastructure Investment	Scott Air Force Base	16.0
Illinois American Water Corporate Office	Belleville	1.4
TGI Fridays Redevelopment	Fairview Heights	3.0
Lindenwood University-Bellville Men's Residence Hall	Belleville	4.0

Business Retention & Expansion Remains Top Priority

Top 50 Manufacturers By Number of Employees in Madison and St. Clair County

Rank	Company Name	Employees	County
1	UNITED STATES STEEL CORPORATION	2,300	Madison
2	AMSTED RAIL COMPANY, INC.	1,100	Madison
3	GLOBAL BRASS AND COPPER, INC.	1,100	Madison
4	PHILLIPS 66	835	Madison
5	JET AVIATION	810	St. Clair
6	COOPER B-LINE, INC.	600	Madison
7	SOLUTIA INC.	560	St. Clair
8	BEELMAN SLAG SALES	500	Madison
9	WORLD WIDE TECHNOLOGY	500	Madison
10	BASLER ELECTRIC	415	Madison
11	METRO EAST INDUSTRIES	400	St. Clair
12	ROCKWOOD PIGMENTS NA, INC.	365	St. Clair
13	HUBBELL WIEGMANN, INC.	350	St. Clair
14	BELLEVILLE BOOT COMPANY	350	St. Clair
15	HIGHLAND SUPPLY CORPORATION	325	Madison
16	KRAFT FOODS GROUP, INC.	324	Madison
17	BIG RIVER ZINC CORPORATION	315	St. Clair
18	WEST STAR AVIATION	300	Madison
19	AFTON CHEMICAL CORPORATION	292	St. Clair
20	ALTON STEEL, INC.	259	Madison
21	GATEWAY PACKAGING COMPANY, LLC	250	Madison
22	NATIONAL MAINTENANCE & REPAIR, INC.	250	Madison
23	CERRO FLOW PRODUCTS, LLC	200	St. Clair
24	EMPIRE COMFORT SYSTEMS, INC.	200	St. Clair
25	HOLTEN MEAT, INC.	200	St. Clair
26	SIEMENS MANUFACTURING CO. INC.	198	St. Clair
27	THE ROHO GROUP	165	St. Clair
28	NEFF MOTIVATION, INC.	163	Madison
29	GOLDEN STATE FOODS CORP.	160	St. Clair
30	MENASHA PACKAGING COMPANY, LLC	151	Madison
31	OLIN CORPORATION	150	Madison
32	ECKERT ORCHARDS, INC.	150	St. Clair
33	VIDEOJET TECHNOLOGIES, INC.	150	St. Clair
34	SHELL OIL COMPANY	140	Madison
35	INTERNATIONAL PAPER COMPANY	130	St. Clair
36	ROCKTENN CP, LLC	125	Madison
37	ARDENT MILLS, LLC	105	Madison
38	HEIDTMAN STEEL PRODUCTS, INC.	100	Madison
39	PEERLESS-PREMIER APPLIANCE CO.	100	St. Clair
40	WALTERS METAL FABRICATION, INC.	100	Madison
41	CROP PRODUCTION SERVICES, INC.	98	Madison
42	ALCO INDUSTRIES, INC.	96	Madison
43	DUCOA CO./TROUW NUTRITION	94	Madison
44	MAGNESIUM ELEKTRON NORTH AMERICA, INC.	82	Madison
45	RED-E-MIX, LLC	82	Madison
46	GUNDLACH EQUIPMENT CORPORATION	80	St. Clair
47	MILLER MANUFACTURING COMPANY, INC.	80	St. Clair
48	STELLAR MANUFACTURING CO.	80	St. Clair
49	GEMINI INDUSTRIES, INC.	75	Madison
50	PET O'FALLON, LLC	72	St. Clair

A key component of the Southwestern Illinois economic growth action plan is business retention and expansion, and much of the efforts in this area are focused on our industrial sector and Scott Air Force Base.

Many Southwestern Illinois chambers of commerce and economic development organizations work on retention efforts, to ensure company's needs are addressed.

Nurturing our Industrial Roots

Southwestern Illinois has a strong industrial base with a host of manufacturing companies calling this area home. While many of these have been operating in Madison and St. Clair counties for decades, in recent years, many have undergone or announced significant expansions. Additional new light manufacturing operations have also started up, illustrating the continuing importance of this sector of our economy.

The Illinois Manufacturing Excellence Center notes that a total of 425 manufacturing firms of all sizes currently operate in Southwestern Illinois, employing approximately 20,000. A snapshot of the top 50 companies, ranked by number of employees, reveals that they account for almost 16,000 of these workers.

With so many jobs at stake, it's vital that effective retention programs are in place to understand the issues these businesses face and support their expansion opportunities. Efforts to retain our current base of heavy manufacturing are being spearheaded by the Workforce Investment Boards and the counties they serve. Resources are also being directed at growing the light manufacturing sector that supports industries in the region and increasing exports of products produced here.

Source: "Hoover's" Dun & Bradstreet, www.hoovers.com Secondary Source: St. Louis Business Journal Largest Southwestern Employers Ranked by Number of Southwestern Employees, aggregated from Hoovers, and the companies themselves. * Please note this list is based on preliminary research using the above sources and has not been verified for accuracy.

Championing Scott Air Force Base

Efforts to retain and grow Scott Air Force Base ramped back up during 2013 with the formation of the Scott Air Force Base and Southwestern Illinois Defense Assets Retention and Expansion Task Force. As the Department of Defense continues to look for ways to cut costs, and the potential of another possible round of Base Realignment and Closure looms on the horizon, the taskforce is working to determine what can and should be done to continue to help protect and grow the base – a \$3 billion economic engine for the region and the largest employer in Southwestern Illinois with 13,000 employees. The taskforce is co-chaired by the Leadership Council, St. Clair County and Madison County. The importance of the work underway is highlighted by the fact that former U.S. Congressman Jerry Costello and retired USAF General Duncan McNabb are among a team of consultants retained to support the regional task force's efforts. Smith Dawson & Andrews, a Washington, D.C.-based government relations firm, rounds out the team.

Highlights from Scott Air Force Base during 2013 included the completion of the \$16 million renovation project for the 18th Air Force and Mobility Command Headquarters and the announcement that Scott would



Defense Information's Systems Agency Rendering

be home to a new \$65 million headquarters facility for the Defense Information Systems Agency (DISA). Currently under construction, the state-of-the-art facility is scheduled to be completed in 2015. The good news for Scott Air Force Base continued into 2014 with the announcement that it would be the site of two new cyber protection squadrons, which will require a \$16 million infrastructure investment and bring 320 new jobs to the base. Scott Air Force Base also was recently ranked by *Air Force Times* as the #1 air base to be stationed in the nation!

A Thriving Healthcare Sector

When it comes to identifying growing sectors of the Metro East Economy, healthcare clearly emerged over the past couple of years as a thriving industry. In 2013, Highland welcomed the opening of the new \$63 million St. Joseph's Hospital, which encompasses more than 125,000 square feet on a single level, attached to an adjacent three-story medical office building representing an additional \$2 million investment. St. Elizabeth's Hospital Belleville also announced its plans for a new \$300 million hospital to be built in O'Fallon. Work also got underway on Memorial

Hospital East, a \$124 million, five-story, 94-bed facility expected to open in early 2015. More than \$62 million in improvements are also underway or planned at St. Anthony's Health Center and Alton Memorial Hospital.

The existing hospitals alone employ approximately 9,000 individuals, a number that is likely to continue to grow as the new facilities come on line, and dozens of smaller healthcare facilities account for hundreds of additional jobs.



St. Joseph's Hospital, Highland, IL

Solidifying Our Region as a Multimodal Hub

A Compelling Story to Tell

Part of the exciting story to be told centers on the exciting developments already underway or planned to leverage the tremendous infrastructure capabilities in the region. Among those is the largest speculative industrial building the Metro East area has ever seen, a \$40 million, 1.2 million-square-foot facility being developed by out-of-town investors. That project is slated for Gateway Commerce Park at I-255 and I-270, which has seen \$400 million in investment in the last 15 years, creating 4,600 jobs. Other noteworthy projects in this sector include the new \$23.5 million, 181,000 square-foot distribution center for FedEx in Sauget Industrial Park opened in Fall of 2014, creating 25 full-time and 150 part-time jobs' and the \$3.5 million 19,000 square-foot expansion of North Bay Produce's facilities at MidAmerica St. Louis Airport, which was completed in 2013.

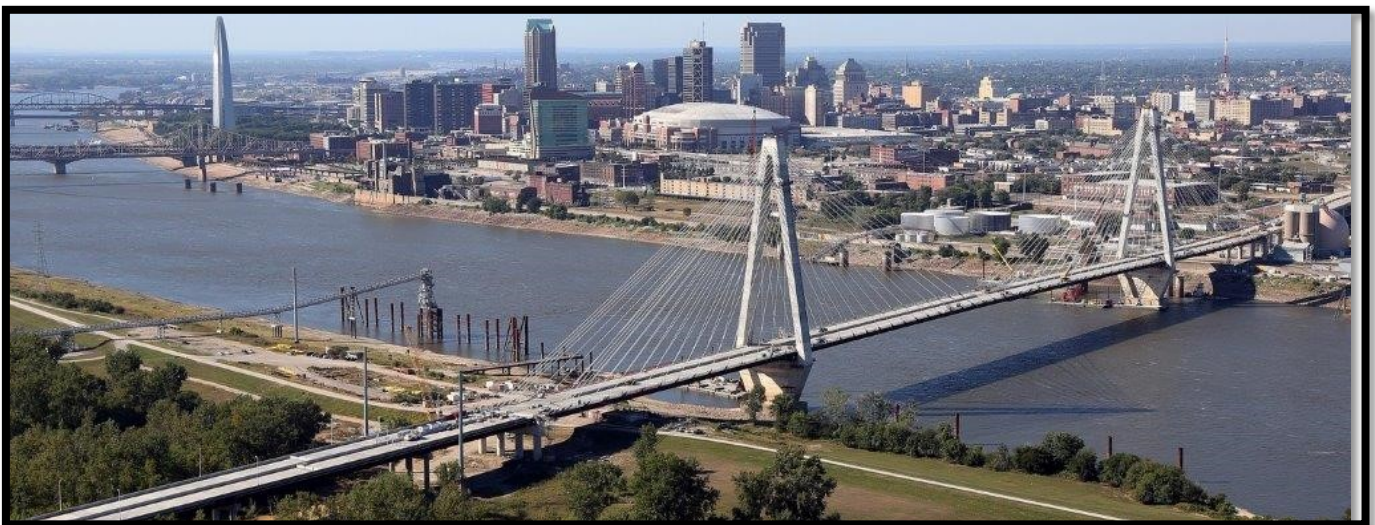


Gateway Commerce Park at I-255 and I-270

Location and Infrastructure—A Powerful Combination

Southwestern Illinois' location at the center of the U.S. is the envy of many metropolitan areas. With our multimodal transportation infrastructure featuring: six Class I rail lines, four major interstates, three airports, several pipelines, and of course, the most northern ice-free, lock-free river and port capability, the region is truly blessed.

This infrastructure, coupled with available, affordable property, has attracted over 14 million square feet of distribution/logistics space for companies such as Walgreens, Hershey's, Dial, World Wide Technologies and FedEx, to name just a few.

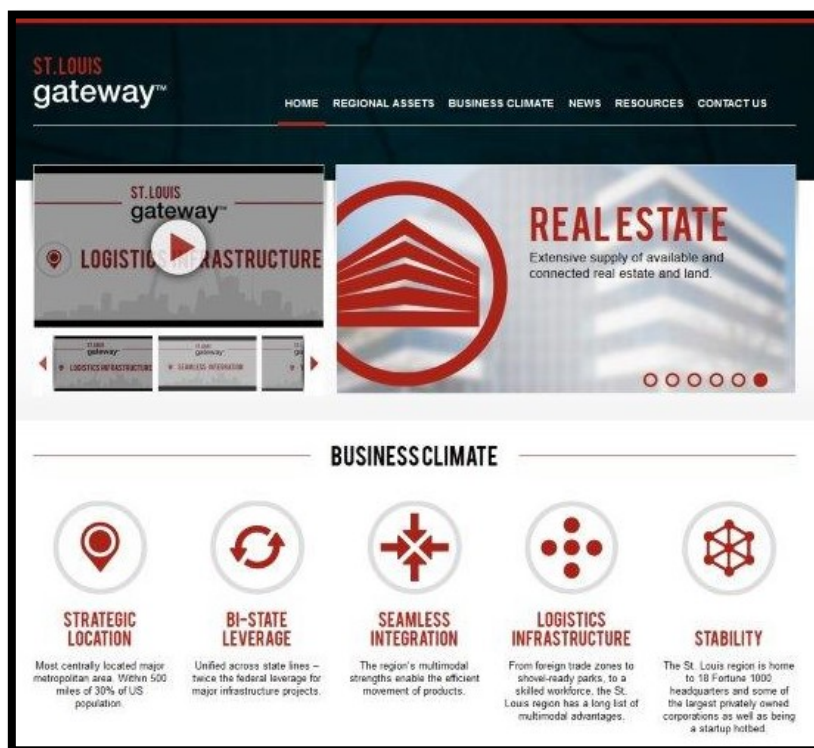


Stan Musial Veterans Memorial Bridge

Building our Brand

In 2013, the Leadership Council's Southwestern Illinois Transportation Enhancement Initiative (SITE) began working with the St. Louis Regional Chamber, laying the groundwork for development of a new brand identity for the St. Louis region - and for Southwestern Illinois within that region - as a multimodal hub poised for growth. A variety of investments are expected to fuel that growth, including America's Central Port's new \$51 million South Harbor, for which the \$24 million Phase 1 is currently under construction. Other developments of note include the recent opening of the new \$670 million Stan Musial Veteran's Memorial Bridge providing an additional connection between Missouri and Illinois, and continuing improvements to the Metro East's highway and interstate system.

As the branding initiative is being finalized, the Council is preparing to launch a new website, www.stlgateway.com and kick off a focused marketing campaign to get the word out about St. Louis Gateway™. The website highlights the bi-state St. Louis region's strategic location, seamlessly integrated transportation infrastructure and business climate, underscoring how it is well suited for multimodal logistics and supply chain solutions. Key advantages noted include our multiple Foreign Trade Zones, shovel-ready sites available throughout the region, and an educated workforce that has been centered on transportation and supply chain solutions for decades. Even our bi-state composition signals strength, providing twice the leverage on major infrastructure projects, evidenced by the brand new I-70 bridge spanning the Mississippi River.



www.stlgateway.com

South Harbor Excavation



Growing our Entrepreneurial Base

Entrepreneurship and innovation represent another area of opportunity for Southwestern Illinois. Recognizing that there are an assortment of programs throughout the Metro East, but not a focused system of readily available support for entrepreneurs, the Leadership Council recently launched a subgroup of the Economic Development leadership team to delve further into what we can be doing to advance this sector of our economy. In the meantime, following is an overview of some of the resources already available.

The SIUE Small Business Development Center

The SIUE Small Business Development Center (SIUE SBDC) is a service to the community supported by the U.S. Small Business Administration (SBA), Illinois Department of Commerce and Economic Opportunity, and Southern Illinois University Edwardsville (SIUE) School of Business. SIUE operates two Small Business Development Centers, one on the Edwardsville Campus and another in East St. Louis, as well as the International Trade Center at SIUE. All Centers provide resources and information to Southwestern Illinois entrepreneurs, business owners, small business service providers, and the university community in a 9-county Metro East region, which includes Calhoun, Jersey, Madison, Bond, Clinton, St. Clair, Washington, Monroe and Randolph counties.

The SBDC enhances Southwestern Illinois's economic interests, providing one-stop assistance to individuals by means of training, research and advocacy for new ventures and existing small businesses. The Center conducts more than 30 seminars and workshops annually on topics important to successful businesses. For clients that require specialized services, the SBDC provides referrals to a variety of business professionals and consultants, along with confidential, no-cost counseling services to entrepreneurs and existing business owners. The Center also offers a business resource library, containing computer programs, video tapes and reference material on a variety of business-related topics to its clients for no cost.

<http://www.siu.edu/business/sbdc/>

Metro East Start Up Challenge

Launched in 2014, the SIUE Metro East Start-Up Challenge is a business plan competition to recognize and reward excellence in entrepreneurship by offering a \$15,000 cash prize for entrepreneurs and new business startups in the Illinois portion of the St. Louis metropolitan area. The purpose of the challenge is to increase the region's interest in and excitement for business startups through a competitive process, while identifying "high impact" startups for possible location in SIUE University Park's new Business Enterprise Center. It also aims to generate a greater awareness of SBDC services/resources for entrepreneurs and small business owners in the Metro East region and to advance the academic mission of the University by strengthening relationships with private enterprise and expanding learning opportunities for both students and faculty.

The first place winner receives a \$10,000 cash prize accompanied by in-kind professional services. Low-cost office accommodations in University Park may be available to the winner depending upon suitability and the availability of space. The second place plan receives a \$5,000 cash prize along

with in-kind professional services. More than 30 innovative entrepreneurs competed in the inaugural challenge.

The 2014 recipients were, first place winner, Todd "Dutch" Eschman, founder of Old Dutch Classic Bats in Swansea, Ill., and second place winner, Adam Stumpf, president and CEO of Stumpy's Spirits Co. of Columbia, Ill. Eschman plans to use the funds to manufacture custom baseball bats

for vintage baseball players, while Stumpf plans to start a distillery that will produce spirits using grain produced on the family farm.

University Park at Southern Illinois University Edwardsville sponsored the challenge, with PNC Bank and the St. Louis Regional Chamber serving as award sponsors.

<http://www.siu.edu/business/sbdc/news.shtml>



River's Edge Enterprise Center

America's Central Port operates what was the first small business incubator in Southwestern Illinois. The River's Edge Enterprise Center serves small companies and business startups by providing a host of amenities to tenants that help keep overhead costs to a minimum. With office spaces starting at 150 sq. ft., and attractive office suites available for lease for as little as \$5 per day, the Center also offers reduced rates for copying and faxing, notary service available upon request and free use of conference rooms, along with the opportunity to network with other business startups. The small business incubator also provides business counseling services to all tenants through its partnership with the Southern Illinois University Edwardsville School of Business. For more information, visit: <http://www.americascentralport.com/small-business-incubator/>



Turner Hall, Belleville

The Historic Turner Hall Building in Downtown Belleville

Some \$1 million in work is going into the historic Turner Hall building in downtown Belleville, which is being transformed into the new location of Replacement Services LLC, but also will include offices for a business incubator program. The building owner hopes to help launch on the second floor. Most of the cost is being covered by a loan through TheBANK of Edwardsville. The building encompasses 46,000 square feet in total. 13,000 square feet will be devoted to the company call center, with an additional 4,700 square feet of retail space on the first floor. 5,000 square feet on the second floor is being renovated to establish co-working space and a location for business incubation. With co-working space, companies, primarily professional services, can lease a desk or cubicle on a month-to-month basis. Owner Kurt Artinger plans to have roundtable discussions about how to proceed, but the concept calls for the incubator to provide desks, Internet access, conference rooms, fax, copiers, phones and a mailing address. Anyone seeking information can reach Artinger through his company, (888) 205-2522.

Great Rivers Market Fresh Network, Alton

The Great Rivers Market Fresh Network, a nonprofit project of the still-new Alton Area Business Development Association, was officially launched in May 2014, and has been supported by thousands of dollars in community contributions and widespread support to link local food growers, buyers and entrepreneurs. The Network is designed to incubate new and accelerate existing businesses with three interconnected business development components, each sustaining the other; the incubator, commercial kitchen rental and a local food hub.

The core is a business incubator, which will support start-ups and existing companies with a network of business tools, back office support, space for lease, and/or expert advisors, and business plans to meet performance milestones. The commercial kitchen rental business, will generate revenues to run the incubator and serve as a complementary source of income for the kitchen owners, all of which are non-profit community service or charitable organizations. The third element is a food hub that connects producers of fresh, locally grown food products to local wholesale buyers, such as restaurants, education and community service institutions, and grocers.

Recent news reports indicate progress in setting up a food storage and distribution facility in the old Central Electric headquarters building at 415 Ridge Street, with plans to get area farmers' products into the hands of local buyers, including restaurants and individual consumers. The Grass Roots Grocery, a separate entity, will serve as a grocery in a neighborhood where there has been none for many years. The grocery will be run as a cooperative and will serve as the retail component. The building will also become a base for food handling and certification classes. For more information, visit: <http://www.marketfreshnetwork.org/>



Great Rivers Market Fresh Network, Alton

Educating the Future Work Force: Driving the Economy Today

We usually provide a summary of the key numbers associated with each of our institutions of higher learning in each issue of the *Market Review*, but we haven't always looked at their combined impact, until now. All five institutions collectively employ an estimated 5,400 individuals, have more than 39,350 students enrolled, and a combined total annual budget of almost \$500 million. When we also consider the additional ways that our K-12 education system contributes to the economy of Southwestern Illinois, it's clear that education is a key economic driver in the Metro East. For this year's *Market Review*, we asked our universities and colleges to share an example of how their institution is supporting entrepreneurship, preparing the workforce of the future or creating jobs today. Here's a summary of what they shared:

SOUTHERN ILLINOIS UNIVERSITY EDWARDSVILLE

Type:	4-year
Budget (\$ Mil)	272
# Full-Time Faculty	626
# Part-Time Faculty	294
Enrollment	14,055
Enrollment FTE:	11,943
Main Campus:	Edwardsville, IL

*Includes Alton and East St. Louis Locations

MCKENDREE UNIVERSITY

Type:	4-year
Budget (\$ Mil)	56.5
# Full-Time Faculty	103
# Part-Time Faculty	167
Enrollment	3,145
Enrollment FTE:	2,345
Main Campus:	Lebanon, IL

LINDENWOOD LINDENWOOD UNIVERSITY BELLEVILLE, ILLINOIS

Type:	4-year
Budget (\$ Mil)	28
# Full-Time Faculty	40
# Part-Time Faculty	185
Enrollment	2,300
Enrollment Day FTE:	1,450
Main Campus:	St. Charles, MO
Illinois Campus	Belleville, IL

*Numbers are for Belleville, IL campus only.

Southern Illinois University Edwardsville

The SIUE School of Business is among an elite 10 percent of business schools worldwide that have earned the prestigious seal of approval from the Association to Advance Collegiate Schools of Business International (AACSB International). This accreditation represents the highest standard of achievement for business schools worldwide. Less than 30 percent of AACSB accredited schools also hold the accounting accreditation. The School of Business has been accredited by AACSB since 1975, and the accountancy program achieved separate accreditation in 1987.

For the eighth consecutive year, the SIUE School of Business is named an outstanding business school by The Princeton Review. "The Best 295 Business Schools: 2014 Edition" by The Princeton Review recommends the School as one of the best institutions in the U.S. from which students can earn an MBA.

In addition to learning from innovative curricula and quality faculty, School of Business students are encouraged to get involved outside the classroom to enrich both their academic and personal lives and prepare for careers in business leadership. Students can choose from 15 student organizations, including three national honor societies.

McKendree University Promotes the Entrepreneurial Spirit

McKendree University has produced hundreds of business leaders who have built global companies, owned chain franchises, run small businesses, started consulting companies and opened health-related establishments. From courses on free market and capitalism, to guest lectures by successful business leaders, McKendree brings entrepreneurial themes into the classroom and beyond.

The university's Wayne E. Lanter Memorial Lecture Series brings influential business people and entrepreneurs to campus to share their insights and strategies for success. The series was established in 2009 by the family, friends and associates of the late Mr. Lanter, who grew a one-man trucking operation into a national logistics provider. Lectures are free and open to the public. Speakers have included CEOs Joseph Tantillo of Express Design Group, Jim Allsup of Allsup, Inc. and Don Welge of Gilster-Mary Lee Corporation; Saint Louis Brewery owner Thomas Schlafly; attorney Joseph E. Cordell; and attorney and international business advisor Dennis Unkovic. Since 2010, over 225 students, faculty and staff members have met business leaders and entrepreneurs at informal lunches hosted by the university and funded by a Lanter Foundation grant.

Lindenwood University-Belleville

Since 2009, Lindenwood University-Belleville has dramatically changed Belleville's West End, bringing more than 100 jobs to campus, investing \$28 million in campus restoration projects, and increasing surrounding home and property values. Lindenwood boasts a wide variety of full-time and part-time faculty and staff positions from entry level to executive with



Type:	2-year
Budget (\$ Mil)	108
# Full-Time Faculty	160
# Part-Time Faculty	753
Enrollment	11,332
Enrollment FTE:	7,261
Main Campus:	Belleville, IL



Type:	2-year
Budget (\$ Mil)	33.6
# Full-Time Faculty	104
# Part-Time Faculty	263
Enrollment	8,520*
Enrollment FTE:	4,384
Main Campus:	Godfrey, IL

*Source: Illinois Community College Board –Fall 2013 Opening Enrollment Survey Results.

Lindenwood University-Belleville (Continued)

an additional 16 full-time jobs added over the summer.

Approximately 60 percent of the campus' 2,300 students come from the surrounding communities in Southwestern Illinois. Lindenwood estimates that the economic impact of its students spending in the community within the last three years totals around \$220 million.

Beginning in fall 2014, Lindenwood Belleville will open its first extension center in Collinsville, Illinois. To offer additional evening classes in graduate and undergraduate degree programs at another convenient location in the Metro East. The campus also prides itself on its frequent use of local vendors and businesses for various on-site projects and events.

Southwestern Illinois College

Thanks in large part to two rounds of Trade Adjustment Assistance Community College and Career Training grant funding, totaling more than \$2 million, and considerable college investment, Southwestern Illinois College has been able to develop an advanced manufacturing training facility at its Industrial Technology Center. In the last five years, SWIC has added two new degrees and six new certificates related to manufacturing. Cutting-edge technology includes multi-axis computer numeric control and robotic welding equipment. Also, the electronics lab now has an operational bottling line to provide real-world programming and maintenance experience to students. SWIC students annually earn medals at the national Skills USA competition. Employers know that SWIC graduates are well trained and ready to enter the workforce. Last year, the Manufacturing Day celebration drew more than 600 visitors to the ITC and the college repeated that success with Manufacturing Day 2014.

Lewis & Clark Community College

Lewis & Clark led a nine-member community college consortium to attain a \$23.8 million grant from the Department of Labor aimed at advancing

economic development in the Mississippi River region from the headwaters to the Gulf. The Mississippi River Transportation, Distribution and Logistics (MRTDLSM) consortium is dedicated to the placement of dislocated and other workers in high-wage, high-skill occupations in the vital transportation, distribution and logistics and related industry sectors. MRTDLSM members are working with industries in their communities along the river to recalibrate programs to align with employer needs, build stacked credentials and integrate evidence-based strategies to serve veterans and displaced workers.

As the lead, L&C utilized \$4.9 million to expand workforce training programs including Welding, Auto Tech (Hybrid-Electric and Conventional), Process Operations Technology, Logistics and Truck Driver Training. Additionally, L&C received a private donation totaling nearly \$2.5 million to be used toward the construction of an advanced workforce training center on its Godfrey Campus.

With more than 40 career programs that prepare students for high-skill and high-wage occupations throughout the region, L&C annually contributes 4.6 percent of the Gross Regional Product - a \$338.5 million annual impact.

Workforce Investment Boards Also Play a Key Role

We are also fortunate enough to have two workforce boards in Southwestern Illinois that are focused on our region's growth and success.

Madison-Bond Workforce Investment Board

The Madison-Bond Workforce Investment Board works to satisfy the labor demand needs of the residents and business community of Madison Bond counties and enhance the economic well-being of the community. The Board takes a leadership role in advocating, planning, evaluating, and developing local workforce resources in order to enable individuals and businesses to reach their full potential in a changing global marketplace.

Mid-America Workforce Investment Board

Serving St. Clair County, as well as the Illinois counties of Clinton, Monroe, Randolph and Washington, The Mid-America Workforce Investment Board (MAWIB) is working to improve Southwestern Illinois. Through a collaboration of leaders in the business, economic development, education, human resources, community and labor sectors, MAWIB connects businesses and job seekers to meet both of their needs and help those who want to further their careers.

Residential Development

Housing Market Update

The local housing market continues to rebound. After sluggish sales in prior years, homes sales in both counties once again climbed in 2013. St. Clair County's home sales rose by 17.2 percent from 2012 to 2013, while Madison County saw an increase of 13.1 percent during the same period.

Residential building is also rebounding in Madison County. In 2013, the county saw a 27 percent increase in housing permits from 2012 and a 40 percent increase from 2011, with East Alton, Edwardsville, Glen Carbon, Troy and Maryville demanding the most permits. St. Clair County experienced a slight decrease in residential building permits in 2013, down 6.5 percent from the year prior, but the decrease is much smaller than what was experienced in 2011 and 2012.

Data from the Southwestern Illinois Regional Multiple Listing Service, as provided by the REALTOR Association of Southwestern Illinois, indicates that median home prices in both counties dropped slightly in 2013. After seeing an increase in 2012, Madison County's median home prices decreased from \$115,000 to \$113,950 last year, although the amount is still higher than what was reported in 2011. St. Clair County's median home price dropped from \$112,000 to \$110,000, but the decrease is smaller than what was seen from 2011 to 2012.

Single Family Home Sales			
	2011	2012	2013
Madison County	2,354	2,660	3,008
St. Clair County	1,977	2,194	2,571
Source: Southwestern Illinois Regional Multiple Listing Service, Inc.			

Residential Building Housing Starts

	2011	2012	2013
Madison County	272	300	381
Alton	NA	35	2
East Alton	NA	NA	47
Edwardsville	31	37	45
Glen Carbon	17	40	42
Maryville	49	9	31
Troy	50	54	38
Other Communities	34	44	48
Unincorporated	63	81	128
St. Clair County	474	414	387
Belleville	44	36	34
Fairview Heights	40	33	36
Mascoutah	39	44	33
O'Fallon	96	107	84
Shiloh	68	76	55
Swansea	84	49	30
Other Communities	45	31	44
Unincorporated	58	38	71
Source: MarketGraphics			

Economic Impact

The level of private housing construction remains a key contributor to the economy of Southwestern Illinois. According to a formula developed by the National Association of Home Builder's Development of Housing Economics, new home construction within Madison and St. Clair counties in 2013 represents approximately: \$162 million in local income, \$16.9 million in local taxes, and 2,488 local jobs.

Demographics

Madison and St. Clair Counties by the Numbers

Population	2000	2010
Total Population		
Madison County	258,941	269,282
St. Clair County	256,082	270,056
Combined Total	515,023	539,338
Population by Age		
<i>Under 18 years</i>		
Madison County	64,437	61,127
St. Clair County	70,925	68,594
Combined Total	135,362	129,721
65 Years and Over		
Madison County	36,923	38,507
St. Clair County	33,709	33,757
Combined Total	70,632	72,264
Income Per Capita Income (dollars)		
Madison County	\$20,509	\$26,127
St. Clair County	\$18,932	\$24,770
Combined Average	\$19,721	\$25,449
Median Household Income (dollars)		
Madison County	\$41,541	\$51,941
St. Clair County	\$39,148	\$48,562
Combined Average	\$40,345	\$50,252
Educational Attainment (Age 25+)		
<i>Percent High School Graduate or Higher</i>		
Madison County	84.3	89.4
St. Clair County	80.9	87.4
Combined Average	82.6	88.4
Percent Bachelor's Degree or Higher		
Madison County	19.2	23
St. Clair County	19.3	23.9
Combined Average	19.3	23.5
Source: U.S. Census Bureau		

Madison and St. Clair counties remain the second most populous region in the State of Illinois with a combined population of 539,338 in 2010, the most recent year for which confirmed demographic numbers were available at the time of publication. The two counties represent approximately 19 percent of the population of the total St. Louis Standard Metropolitan Statistical Area (SMSA). Median household income continues to rise, jumping 24.6 percent in the last decade. Per capita income is also on the rise, up 29 percent since 2000. Southwestern Illinois also continues to make gains in educational attainment. The percentage of individuals earning a high school diploma or higher had increased from 82.6 percent in 2000 to 88.4 percent in 2010, and the percentage earning a bachelor's degree or higher was 23.5 percent for 2010.

Labor Force

Labor Force & Unemployment

The labor force is defined as those individuals, employed or looking for work, who live in the area represented. The labor force in Southwestern Illinois represented 255,601 individuals in 2013, a decrease from 260,476 individuals in 2012, and the unemployment rate continues to fall. In 2013, the unemployment rate was 8.95 percent compared with 9.3 percent in 2012. The Southwestern Illinois labor force accounts for approximately 18 percent of the St. Louis SMSA total.

Southwestern Illinois Labor Force	
2013	
Madison County	133,166
St. Clair County	122,435
Combined	255,601
Total Employed 2013	
Madison County	122,036
St. Clair County	110,845
Combined	232,881
Unemployment Rate 2013	
Madison County	8.4
St. Clair County	9.5
Combined	8.95

Private Sector Employment

Southwestern Illinois Workforce

Workforce is defined as those who work in the area represented but may live elsewhere. A total of 232,881 are employed in Madison and St. Clair counties with 154,213 of these in the private sector. The Trade/Transportation/Utilities sector showed a slight increase in 2013 and continues to account for more than a quarter of the total number of jobs in Southwestern Illinois, while Education and Health Services were the next largest sector with 19.6 percent of the jobs. Manufacturing and Construction fell slightly to 10.7 percent and 4.8 percent, respectively.

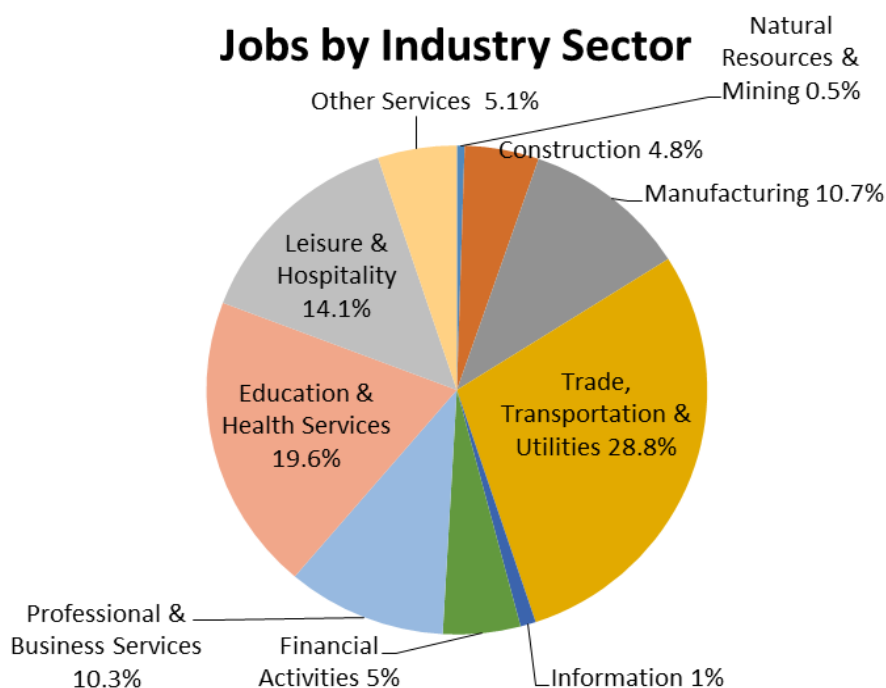
Private Sector Employment—2013 Snapshot

At the end of 4th Quarter 2013, there were 11,401 private employers in Madison County, an increase of nearly 200 from 2012. After years of steady growth, Southwestern Illinois once again saw a slight decrease in private sector employment, with a net loss of 1,299 jobs. The decrease was smaller than the year prior. While changes were small, the biggest decreases were seen in the construction industry, with a net loss of 1,173 jobs. Sectors seeing gains were in the trade, transportation and utilities, with an increase of 1,881 jobs, and education and health services, with an increase of 438 jobs. Service-providing jobs account for 84 percent of the total number of private sector jobs in Southwestern Illinois.

No. of Firms - 2013	Madison	St. Clair	Total
GOODS-PRODUCING	1,007	818	1,825
Natural Resources and Mining	49	39	88
Agriculture, Forestry, Fishing & Hunting	37	27	64
Mining, Quarrying, & Oil and Gas Extraction	12	12	24
Construction	722	597	1,319
Manufacturing	236	182	418
SERVICE-PROVIDING	4,899	4,677	9,576
Trade, Transportation, and Utilities	1,328	1,249	2,577
Wholesale Trade	287	213	500
Retail Trade	780	811	1591
Transportation & Warehousing	245	212	457
Utilities	16	13	29
Information	66	74	140
Financial Activities	581	596	1177
Finance & Insurance	368	392	760
Real Estate & Rental & Leasing	213	204	417
Professional and Business Services	935	909	1844
Professional, Scientific & Technical Services	595	581	1176
Management of Companies & Enterprises	17	14	31
Administrative & Support & Waste Mgmt..	323	314	637
Educational and Health Services	649	602	1251
Educational Services	68	68	136
Health Care & Social Assistance	581	534	1115
Leisure and Hospitality	707	653	1360
Arts, Entertainment & Recreation	101	81	182
Accommodation & Food Services	606	572	1,178
Other Services	605	561	1,166
Unclassified	28	33	61
Total	5,906	5,495	11,401

Source: Illinois Department of Employment Security (4th Quarter 2013) Source: Illinois Department of Employment Security (4th Quarter 2013)

Jobs by Industry Sector



No. of Employees - 2013	Madison	St. Clair	Total
GOODS-PRODUCING	16,407	8,311	24,718
Natural Resources and Mining	376	431	807
Agriculture, Forestry, Fishing & Hunting	244	353	597
Mining, Quarrying, & Oil and Gas Extraction	132	78	210
Construction	4,280	3,105	7,385
Manufacturing	11,751	4,775	16,526
SERVICE-PROVIDING	63,701	65,794	129,495
Trade, Transportation, and Utilities	21,831	22,568	44,399
Wholesale Trade	3,015	2,655	5,670
Retail Trade	12,356	13,802	26,158
Transportation & Warehousing	6,013	5,623	11,636
Utilities	447	488	935
Information	566	1,012	1,578
Financial Activities	4,057	3,715	7,772
Finance & Insurance	3,197	2,827	6,024
Real Estate & Rental & Leasing	860	888	1,748
Professional and Business Services	7,963	7,858	15,821
Professional, Scientific & Technical Services	3,666	4,995	8,661
Management of Companies & Enterprises	627	451	1,078
Administrative & Support & Waste Mngmt.	3,670	2,412	6,082
Educational and Health Services	14,226	16,039	30,265
Educational Services	930	1,754	2,684
Health Care & Social Assistance	13,296	14,285	27,581
Leisure and Hospitality	11,468	10,287	21,755
Arts, Entertainment & Recreation	1,542	1,389	2,931
Accommodation & Food Services	9,926	8,898	18,824
Other Services	3,575	4,265	7,840
Unclassified	15	50	65
Total	80,108	74,105	154,213

Source: Illinois Department of Employment Security (4th Quarter 2013) Source: Illinois Department of Employment Security (4th Quarter 2013)

Major Employers

Southwestern Illinois Top Employers	2013 Employees	Community
Scott Air Force Base	13,000	Scott Air Force Base
Southern Illinois University Edwardsville	2,480	Edwardsville
U. S. Steel, Granite City Works/United States Steel Corp	2,300	Granite City
Walmart / Sam's Club	2,189	Southwestern Illinois
Memorial Hospital	2,131	Belleville
Schnuck's Supermarkets	1,734	Southwestern Illinois
Southwestern Illinois College	1,403	Southwestern Illinois
Amsted Rail Company, Inc.	1,345	Granite City
Shop 'N Save	1,313	Southwestern Illinois
St. Elizabeth's Hospital	1,286	Belleville
Southern Illinois Healthcare Foundation (including Touchette Hospital)	1,183	Southwestern Illinois
Southwestern Illinois Health Facilities, Inc. (DBA-Anderson Hospital)	1,124	Maryville
Global Brass and Copper, Inc. (Olin Brass)	1,100	East Alton
Madison County (Illinois)	948	Madison County
Walgreens	932	Southwestern Illinois
Edwardsville School District	922	Edwardsville
Gateway Regional Medical Center	920	Granite City
Alton Memorial Hospital	906	Alton
Ducoa Co./Trow Nutrition	900	Highland
Cerro Flow Products Inc.	900	Sauget
Alton Community Unit School District #11	836	Alton / Godfrey
Phillips 66	835	Roxana
St. Clair County	834	St. Clair
Jet Aviation (formerly Midcoast Aviation Inc.)	810	Cahokia
Collinsville School District	764	Collinsville, Maryville
Challenge Unlimited	725	Southwestern Illinois
East St. Louis Community School District 189	700	East St. Louis
St. Anthony's Health Center	676	Alton
Casino Queen Hotel & Casino	667	East St. Louis
O'Fallon Community Consolidated School District #90	664	O'Fallon
Lewis & Clark Community College	663	Godfrey
Allsup, Inc.	650	Belleville
Granite City School District #9	630	Granite City
Cahokia School District #187	620	Cahokia
Belleville Public Elementary School District #118	615	Belleville
Cooper B-Line, Inc.	600	Highland & Troy
Illinois-American Water Company (including Alton Call Center)	575	Belleville
Solutia Inc.	560	Sauget
Belleville Township High School District #201	543	Belleville
Union Pacific Railroad	537	Southwestern Illinois
Argosy Casino Alton	518	Alton
IL Dept. of Transportation	513	Southwestern Illinois
YMCA of Southwestern Illinois	500	Southwestern Illinois
Mascoutah #19	500	Mascoutah
World Wide Technologies	500	Edwardsville
Beelman Slag Sales	500	Madison

Source: "Hoover's" Dun & Bradstreet, www.hoovers.com Secondary Source: St. Louis Business Journal Largest Southwestern Employers Ranked by Number of Southwestern Employees, aggregated from Hoovers, and the companies themselves. * Please note this list is based on preliminary research using the above sources and has not been verified for accuracy.

About the

Leadership Council Southwestern Illinois

Since 1983, the Leadership Council Southwestern Illinois has been the premier organization fostering economic growth in Madison and St. Clair counties. We developed the first regional economic development agenda, and for over 30 years, our organization has strengthened public/private partnerships throughout Southwestern Illinois to lay the foundation for job growth and retention.

Our Mission:

To unite business, industry, government, education and labor for economic growth in Southwestern Illinois

Our Structure:

The Leadership Council's membership includes approximately 185 top executives and decision makers from the five sectors we unite, providing a level of diversity that makes the organization unique. Cooperation and collaboration among our members and local community-based organizations have in many ways helped reshape Southwestern Illinois - strengthening our infrastructure, protecting and enhancing our major employers, building consensus on key issues, and cultivating a positive labor-management environment. We foster relationships on both sides of the river, recognizing that our efforts have an impact that affects not just Southwestern Illinois, but the entire St. Louis region. The Leadership Council is a 501(c)6 that is guided by a 16-member executive committee dedicated to moving our region forward. The organization's work is supported by three full-time employees - an Executive Director, Coordinator and Office Manager - along with membership volunteers

Core Initiatives:

The Leadership Council is currently working on a number of regional initiatives focused on the following priorities:

- Administration of the St. Louis Metro East Levee Issues Alliance as we work to secure the re-certification of the Metro East Levees so businesses can continue to invest here with confidence for the benefit of the entire region
- Advancement of SITE, our Southwestern Illinois Transportation Enhancement effort focused on retaining and growing the multi-modal infrastructure and job growth that is key to this region's future success
- Retention and strengthening of Scott Air Force Base through the Military Affairs program and Scott Air Force Base Task Force
- Maintaining one of the longest, continuously running labor-management committees in the State of Illinois
- Educating our legislators about, and building support for, issues that are vital to the region's success
- Leading the Southwestern Illinois Economic Development Network, which promotes greater collaboration and communication between the community and economic development professionals across Southwestern Illinois
- Implementing a proactive public relations initiative in order to build a positive image for Southwestern Illinois that enhances our ability to attract and retain family supporting jobs and capital investment

The Leadership Council also works in cooperation with the Southwestern Illinois Development Foundation to conduct studies and create reports that support our efforts to promote public discussion to attract new industry and retain and expand existing industry within the region.

For more information, call 618-692-9745 or email ellenkrohne@siue.edu.



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