

2014 Market Review

&

Investment Update



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SOUTHWESTERN
ILLINOIS

Leadership Council Southwestern Illinois

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Officers 2015

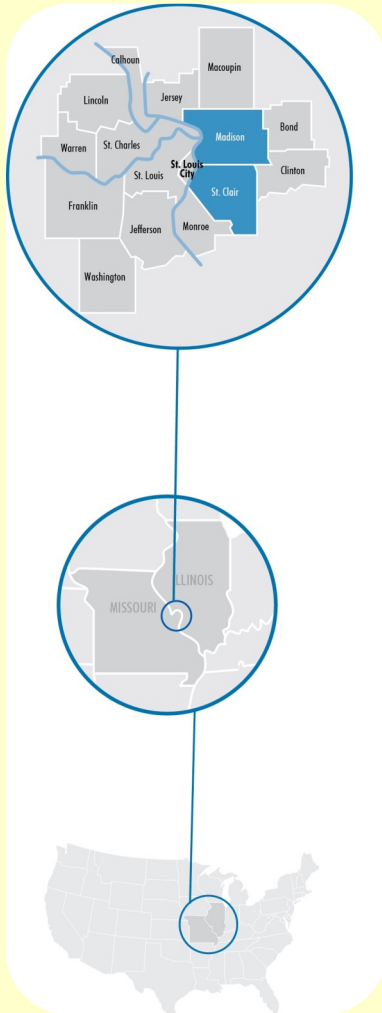
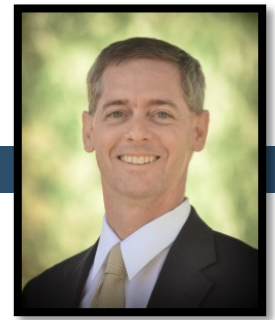
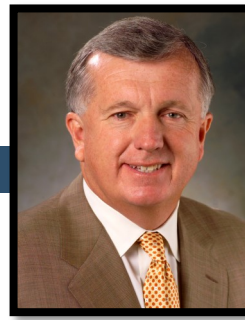
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Leadership Council Southwestern Illinois

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 2014 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,

We are pleased to invite you to explore the 2014 edition of the Leadership Council's *Market Review and Investment Update*. While the publication has evolved over the years, the one constant is that each year, it presents a comprehensive overview of the investment activity in Madison and St. Clair counties. A quick review of this year's report indicates that Southwestern Illinois remains a development hotspot.

A few projects highlighted in this year's report top \$100 million, but they are projects with significance that goes far beyond their price tags. Among them are the new Stan Musial Veteran's Memorial Bridge, which opened in February 2014, and the upcoming completion of the restoration of the Metro East Levees, both of which will pave the way for tremendous future investment in our region.

Multiple investments in additional infrastructure improvements and logistics and distribution centers in both counties underscore our region's position as a multimodal hub poised for growth. You can learn more, starting on page 12, about concentrated efforts underway to capitalize on the opportunities identified in this vibrant sector of our economy.

Investments also continue in our manufacturing sector. That is another area of focus for the Leadership Council, which is working through its *Manufacturing Steering Committee* to implement a public relations campaign aimed at promoting the high-paying job opportunities that can be found in both manufacturing and the trades in Southwestern Illinois. (See page 11 for more details.)

The continuing importance of the investments at and around Scott Air Force Base is also spotlighted, along with the significant investments in our healthcare sector. Continuing investments in education facilities, office buildings, senior housing developments, the hospitality sector and many other areas are also captured and underscore the diversity of our economy.

We thank you for your interest in the information shared in the pages that follow and for your continued support of the Leadership Council's efforts to unite our region for growth.

Sincerely,

Mike Riley
President, 2015

Dennis Wilmsmeyer
Chairman, 2015



Our Mission

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

A large concrete pipe section is being lowered into a deep trench by a crane. Two workers in safety gear are guiding the pipe. The pipe is labeled "Levee Relief Well Collector—Metro East Levees".

Additional progress also was made during 2014 in the effort to deliver higher-speed rail between St. Louis and Chicago. Work along the corridor included siding reconstructions, grade crossing improvements, fencing installation, utilities and signal improvements, as well as bridge construction/modifications. In the coming year, the Illinois Department of Transportation (IDOT) will continue to work to have infrastructure improvements in place to support speeds of up to 110 mph, which ultimately will reduce travel times to approximately four and a half hours. Ground is set to be broken this fall on work related to the development of Alton's multi-modal transit center, which will serve as one of the stations on the high-speed line. Being developed at the former Robert P. Wadlow Golf Course on Homer Adams Parkway, the \$24 million project is scheduled for completion by the end of 2016. Work is also reported to be getting underway on a new station in Dwight, Ill., a small town outside of Chicago. Additional towns confirmed as locations for new stations to be built along the way include Pontiac,

CLICK HERE FOR MORE INFORMATION ON STATION IMPROVEMENTS

Maplewood to Joliet to Springfield route via I-170
251 miles

St. Louis

Alton
New Station Planned

Carlinville
New Station Planned

Springfield
New Station Planned

Lincoln
Station Modification Planned

Bloomington-Normal
Existing station, potential platform platform

Pontiac
New Station Planned

Dwight
New Station Planned

Joliet

Summit

Chicago

Higher speed service begins 150 yards on Joliet Ave. 10/14

ILLINOIS HIGH-SPEED RAIL
LEAD THE WAY TO THE FUTURE

Work also continued on various additional infrastructure projects, ranging from road and bridge improvements to the multi-year investment being made by Ameren Illinois to improve the efficiency and reliability of the natural gas and electric energy delivery system throughout its territory, which includes Southwestern Illinois.

Project	Community	\$Mil
Continued Expansion of US Highway 67	Jersey County	134.0
Metro East Levee System	Madison, St. Clair & Monroe County	110.0
High-Speed Rail Construction (Excluding Alton Multi-Modal Project)	Madison County	72.0
Ameren-Energy Updates	Southwestern Illinois	36.5
IL Route 3 and IL 203 Connector Project	Madison, St Clair & East St. Louis	33.7
Tamarack Substation - Ameren	O'Fallon/Shiloh	6.0
IL Route 159-Road Improvements	St. Clair/Madison County	4.4
IDOT- 5yr. Hwy. Improvements	Southwestern Illinois	2.2

A Message from . . .

Our Madison County Board Chairman Alan Dunstan



Dear Leadership Council Supporter:

What an exciting year 2014 proved to be for Madison County as we continued to see significant investments in a variety of industry sectors. Our unmatched location as a logistics hub attracted the largest speculative industrial building the Metro East has ever seen. The building is now complete and occupied, and a second speculative building representing another \$30 million investment is now under development, also at the thriving Gateway Commerce. A third, planned for Lakeview Commerce Center, was announced as this publication was being finalized, further evidence of the advantages we offer for those in the logistics and distribution sector.

With work on the entire Metro East Levee system nearing completion and continuing progress being made on the new South Harbor at America's Central Port, the potential for continuing investment in the American Bottom and throughout Madison County is tremendous!

As you'll see in the charts that follow, investments also are being made in our educational institutions, the manufacturing sector, housing, healthcare and hospitality, giving us much to be optimistic about as we look to the future.

Alan Dunstan
Madison County Board Chairman

2014 Southwestern Illinois Projects—Madison County

Madison County Highlights

A variety of projects across different sectors continued to make progress in Madison County during 2014. Among those making news was the new \$104 million Chain of Rocks Bridge, which opened last year, and the New South Harbor Project, which continues to take shape at America's Central Port and is scheduled for completion in October of 2015. That entire project represents a \$50 million investment at the Port.



Other projects of note that were completed during the year include the \$30 million, 10,900 square-foot Amy's Crossing Independent Living Facility in Alton; the \$16 million Chuck Fruit Aquatic Center in Edwardsville (which features the only Olympic-size swimming pool in the Metro East and one of two in the entire St. Louis region); and the \$7 million Enclave West Student Housing facility at Southern Illinois University Edwardsville. There was also an abundance of expansions and renovations of existing projects that wrapped up, including the \$6.5 million Granite City School renovation and the \$5.6 million Lewis and Clark Community College expansion and renovation project.

Several projects that were announced in 2013 or in prior years remained under construction in 2014. The largest investments included the \$40 million expansion at the Kraft Food Group Manufacturing Facility in Granite City, which expects to add 30 new jobs when the upgrades are completed; the ongoing \$22.3 million overhaul of SIUE's Science Building; \$20 million expansion at Gateway Commerce Center, where a new speculative building was being developed that is now being leased, and the \$15 million East Alton Emerald Ridge Housing Development, which boasts 46 new single-family homes and has since been completed. (See page 16 for details on healthcare investments.)

2014 Southwestern Illinois Projects—Madison County

Madison County Projects Completed during 2014

Project	Community	\$Mil
IDOT Bridge over the Chain of Rocks Canal/New Bridge	Madison County	104.0
Amy's Crossing Independent Living Facility/New Building	Alton	30.0
Anderson Hospital/Remodel	Maryville	26.7
IDOT I-255 North of Horseshoe Lake Rd. to I-270 Resurfacing/Bridge Repair	Madison County	17.4
Edwardsville Aquatic Center/New Building	Edwardsville	16.0
Enclave West Student Housing at SIUE/New Building	Edwardsville	7.0
Friar Tuck Store/New Building	Edwardsville	6.7
Granite City School/Renovation	Granite City	6.5
Granite City Six Mile Library/Renovation	Granite City	6.0
Interstate 70 Road Improvements	Madison County	6.0
Jack Schmitt Chevy Automotive Dealership/New Building	Wood River	5.8
Lewis and Clark Community College/Renovation and Expansion	Godfrey	5.6
May Apartments/Remodel	Edwardsville	5.6
Parkside Market/New Building	Granite City	5.3
SIUE-Roads Projects and Parking Lot Resurfacing/Improvements	Edwardsville	4.8
Ronald Foster Bike Trail/Upgrades	Glen Carbon	4.2
Sam's Club/New Building	Glen Carbon	4.1
SIUE -The Edge/ Student Housing	Edwardsville	4.1
IDOT IL 40 West of IL 159 to West of Park Ave. in Hamel/Road Resurfacing	Madison County	2.6
St. Joseph's Hospital Medical Office/New Building	Highland	2.0
The Defense Area Neighborhood/Re-Development	East Alton	2.0
Trailblazer Commons/Apartments & Condominium Building/New Building	Godfrey	2.0
IDOT IL 3 Jersey Co. Line to Pierce Lane in Godfrey/Road Resurfacing	Madison County	2.0
IDOT IL 11 at Chain of Rocks Road/Intersection Reconstruction	Madison County	1.6
Walmart/Expansion	Glen Carbon	1.5
IDOT US 40:I-55/70 to Highland/Lake Road & IL 160/Road Patching	Madison County	1.5
West Star Aviation/Expansion	East Alton	1.4

NOTE: PROJECTS ARE JUST A SAMPLING AND NOT INTENDED TO BE VIEWED AS A COMPLETE LISTING.



South Harbor Project



New Projects in the Pipeline

The area continues to attract logistics-related investments, underscoring that freight movement will be a growth area for Madison County. Yet another spec building is being developed at Gateway Commerce Center – a \$30 million facility that will be the first warehouse facility in the industrial park to be located east of Interstate 255. And plans were just announced in late July for a separate spec building to be developed at Lakeview Commerce Center. Other recently announced projects indicate that the hospitality sector will continue to see additional investments, with four new hotels planned for Edwardsville, Pontoon Beach, Troy and Alton.

Madison County Projects Under Construction During 2014

Project	Community	\$Mil
New South Harbor Project-America's Central Port	Madison	50.0
Kraft Food Group Manufacturing Facility/Expansion	Granite City	40.0
IDOT Resurfacing/Bridge Repair, 2.5 mi. East of I-55/270 to 0.1 mi. West of Prairie Road	Madison County	29.9
SIUE Science Building/Renovation	Edwardsville	22.3
Saint Anthony's Health Center (Technology & Campus)/Renovation	Alton	20.0
Speculative Facility at Gateway Commerce Center/Expansion	Edwardsville	20.0
Emerald Ridge/Housing Development	East Alton	15.0
SIUE Engineering Building/Expansion	Edwardsville	14.2
Illinois American Water Company 2.5 Million Gallon Water Clear Well/Infrastructure Improvement	Granite City	12.0
Collinsville Street Projects/Updates	Collinsville	8.3
Cedarhurst Memory Care/New Building	Edwardsville	8.0
Fairfield Inn & Suites by Marriott Hotel/New Building	Pontoon Beach	7.5
SIUE Electrical System Upgrade (Phase 1)/Renovation	Edwardsville	6.0
Hotshots Restaurant/New Building	Edwardsville	5.0
Granite City Green Community/Phase 2	Granite City	4.0
North Elementary School/Renovation	Alton	2.8
Triad School District/Renovation	Troy	2.8
IDOT New Bridge Deck Under IL 4/New Bridge Deck	Madison County	2.4
IDOT IL 159 (North of IL 140) to IL 143/Road Resurfacing	Madison County	2.1
Alton Memorial Hospital Women's Health and Childbirth Center/Expansion	Alton	2.0
San Gabriel Memory Care/New Building	Highland	2.0
SIUE Information Tech. Systems Computer Room/Renovation	Edwardsville	1.6
IDOT I-255 NB Ramp Collinsville/Bi-Directional Left Turn Lane	Madison County	1.5
IDOT Bridge Replacement IL 143 Over Sugar Creek West of Pierron	Madison County	1.2

NOTE: PROJECTS ARE JUST A SAMPLING AND NOT INTENDED TO BE VIEWED AS A COMPLETE LISTING.

2014 Southwestern Illinois Projects—Madison County

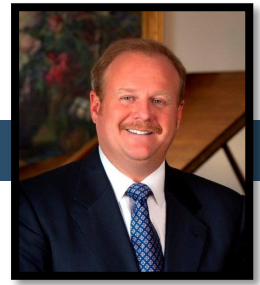
Madison County Projects Announced during 2014/2015

Project	Community	\$Mil
Gateway Commerce East Distribution Center/Speculative Building/New Building	Edwardsville	30.0
Father McGivney High School/New Building	Glen Carbon	30.0
Multi-Modal Transportation Development Project (Terminal, Parking etc.)/New Complex	Alton	24.0
Edwardsville Fire Station Near SIUE/New Building	Edwardsville	16.0
Water Treatment Plant/New Building	Collinsville	15.6
Spray & Play Park, Ice Rink, Sports Park/New Complex	Edwardsville	12.0
IDOT Bridge Replacement IL 157 over St. Clair Ave./Bridge Replacement	Madison County	9.3
Holiday Inn/New Building	Edwardsville	8.0
Holiday Inn/New Building	Troy	8.0
Wood River Police Station/New Building	Wood River	7.8
Hampton Inn/New Building	Alton	6.0
Planet Fitness/New Building	Edwardsville	7.5
IDOT Resurfacing IL 157- IL 140 in Hamel to North of IL 143/157 East Jct. in Edwardsville/Resurfacing	Madison County	4.8
Fairfield Inn and Suites/New Building	Pontoon Beach	4.5
Stillwater Senior Living Community/New Building	Edwardsville	4.3
IDOT Bridge Replacement IL 4 over Silver Creek North of US 40/Bridge Replacement	Madison County	3.5
Altitude Trampoline Park/New Complex	Glen Carbon	3.3
Maryville Christian High School/New Building	Maryville	3.0
Gateway Packaging/Remodel	Granite City	3.0
Lewis and Clark Community College/Manny Jackson Center for the Humanities/New Building and Renovation	Edwardsville	3.0
DaVita/Relocation	Alton	2.8
St. Anthony's Physicians Group/Renovation	Alton	2.7
Dollar Tree/New Building	Collinsville	2.2
San Gabriel Memory Care/New Building	Highland	2.0
IDOT Resurfacing I-270 Mississippi River to 1.5 miles East & IL 3 to St Thomas Road/Resurfacing	Madison County	1.9
IDOT Resurfacing IL 143/159 from College St. to E. Schwartz St. & IL 157 from IL 143 to W. Schwartz St. & North of IL 143/157 Jct./Resurfacing	Madison County	1.9
Ross Dress for Less/New Building	Glen Carbon	1.5
IDOT Microsurfacing IL 3 South of IL 143 in Wood River to North of Poag Road/Microsurfacing	Madison County	1.0

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A Message from . . .

Our St. Clair County Board Chairman Mark Kern



Dear Leadership Council Supporter:

Last year was a milestone year for St. Clair County with the opening of the much-anticipated Stan Musial Veterans Memorial Bridge, which added capacity across the Mississippi River and set the stage for additional future development.

Another important infrastructure project is the new Rieder Road/I-64 Interchange, scheduled for completion in 2016, which will immediately create a couple thousand acres of aviation- and defense-related commercial opportunities adjacent to Scott AFB and MidAmerica Airport. It also enhances our competitive position as we pursue the new headquarters for the National Geospatial-Intelligence Agency, and the 3,000 jobs it represents.

While we await a decision on that project, several others are coming on line at the nearby airbase, strengthening Scott's presence in our region. The continued growth in defense and logistics is encouraging, as is the level of healthcare investment, with highlights including Memorial Hospital East under construction in Shiloh and plans for the new St. Elizabeth's Hospital in O'Fallon. Also noteworthy is the planned \$66 million development near the Shrine of our Lady of the Snows. The significant activity in so many sectors is clear indication that St. Clair County is well-positioned for the future.

Sincerely,

A handwritten signature in dark ink, appearing to read 'Mark Kern'. The signature is fluid and cursive.

Mark Kern
St. Clair County Board Chairman

2014 Southwestern Illinois Projects—St. Clair County

St. Clair County Highlights

With the completion of the \$670 million Stan Musial Veterans Memorial Bridge in early 2014, investments in projects in St. Clair County that were completed or underway last year surpassed the billion dollar mark. Some of the significant projects completed in 2014 include the \$41.5 million Belleville Waste Water Treatment Modernization project, the \$37.8 million Illinois State Police Metro East Forensic Science Lab, the \$32 million Fairview City Center project and a new \$23.5 million FedEx Ground Distribution Center in Sauget.

St. Clair County also saw work progress on many education projects in 2014. Those that were completed include the \$27.4 million overhaul at East St. Louis Senior High School; the \$27 million construction of Wingate Elementary School in Belleville; and two renovation and expansion projects at Lindenwood, totaling \$33 million; while construction also continued on the new \$8.1 million grade school in Lebanon Community School District 9, which was completed in April.

Other projects of note that continued or broke ground in 2014 include two separate IDOT projects totaling \$43.6 million to enhance the Martin Luther King Bridge; the \$38 million Rieder Road/I-64 project by Scott Air Force Base, and three projects at the base itself. These include the new

\$65 million Defense Information Systems Agency Headquarters Building, the \$16 million Air Mobility Command Headquarters and the \$16 million Cyber Security Squadron renovation. (See page 16 for healthcare-related investments.)



Stan Musial Veterans Memorial Bridge

(Photo courtesy of MoDOT)

2014 Southwestern Illinois Projects—St. Clair County

St. Clair County Projects Completed during 2014

Project	Community	\$Mil
Stan Musial Veterans Memorial Bridge/New Bridge	St. Clair	670.0
Belleville's Waste Water Treatment Modernization Project	Belleville	41.5
Illinois State Police Metro East Forensic Science Lab/New Building	Belleville	37.8
Fairview City Center/New Building	Fairview Heights	32.0
St. Paul Senior Community/New Building	Belleville	29.0
East St. Louis Senior High School Overhaul	East St. Louis	27.4
Wingate Elementary School/New Building	Belleville	27.0
Lindenwood University-Belleville Women's Resident Hall/Renovation and Expansion of the Former High School	Belleville	25.0
FedEx Ground Distribution Center/New Building	Sauget	23.5
Milam Renewable Gas Facility/New Building	Fairmont City	19.0
IDOT Resurfacing East of 1-255 to East of IL 159/Road Resurfacing	St. Clair	9.8
Colonnade Senior Living and Memory Care Center/Expansion	O'Fallon	8.1
Lindenwood University -Dining Hall/Renovation	Belleville	8.0
TerraSorce Global Office Building/New Building	Belleville	5.1
IL Route 158/Centerville Avenue/Reconstruction	Belleville	5.0
Engine House 2 Fairview/Caseyville Township Fire Protection District/ New Building	Fairview Heights	3.2
TGI Friday's/New Building	Fairview Heights	3.0
Touchette Regional Hospital Emergency Room/Reconstruction and Renovation	Centreville	2.8
Tamar II Office Building-Medical Clinic/New Building	Shiloh	2.0
City of Shiloh Sanitary Sewer Project	Shiloh	1.7
IDOT Resurfacing Old IL 13 to IL 4/Road Resurfacing	St. Clair	1.6
Illinois American Water Corporate Office/New Building	Belleville	1.4
Metroeast Endoscopic Surgery Center/New Building	Fairview Heights	1.1
Replacement Services LLC/Refurbished and Renovation	Belleville	1.0

NOTE: PROJECTS ARE JUST A SAMPLING AND NOT INTENDED TO BE VIEWED AS A COMPLETE LISTING.

Illinois State Police Metro East Forensic Science Lab



East St. Louis Senior High School Overhaul



East St. Louis High School photo credited to Aaron Gipperich Photography

New Projects in the Pipeline

A new \$65 million solar panel farm, which is planned for a 400-acre site in East St. Louis, is one of the significant St. Clair County projects announced in 2014. Another exciting development that's brewing is the proposed \$66 million mixed-use project near the Shrine, which will incorporate a hotel, brew pub, restaurants and conference center. Visionary Wealth Advisors is the latest company to invest in new office space in the County, with a \$16.1 million building in the works in O'Fallon, and multiple additional projects have already been announced in 2015, an indication of continuing investment across various sectors of our economy in the years to come.

St. Clair County Projects Under Construction During 2014

Project	Community	\$Mil
Memorial Hospital Satellite Campus: Memorial Hospital East/New Building	Shiloh	124.0
Defense Information Systems Agency Headquarters Building at Scott Air Force Base/New Building	Scott Air Force Base	65.0
IDOT New I-64 Interchange at Rieder Road/New Bridge & Ramps	St. Clair County	36.5
IDOT New Bridge Martin Luther King/New Construction	St. Clair County	27.7
IDOT Deep Well & Pump Station on Missouri Avenue/Improvements	St. Clair County	16.7
SAFB 18th Air Force and Mobility Command Headquarters	Scott Air Force Base	16
SAFB Cyber Security Squadron/Renovation	Scott Air Force Base	16
IDOT Bridge Rehabilitation MLK Bridge/Bridge Rehabilitation	St. Clair County	15.9
IDOT 18th Street to East of IL.111/Resurfacing Bridge Repair	St. Clair County	15.3
Widening of North Green Mount Road	O'Fallon	10.4
Bank of Belleville/New Building	Belleville	10.1
Grade School in Lebanon Community, School District 9/New Building	Lebanon	8.1
The Cottages at Cathedral Square Senior Living Complex/New Building	Belleville	6.0
Improvements to Frank Scott Parkway East	St. Clair County	5.5
IDOT Resurfacing IL 159 North Fountains Parkway to Salem Pl., & Market Pl. North of Rosewood Village Dr. in Swansea	St. Clair County	4.3
Enjoy Church/New Building	O'Fallon	4.0
IDOT Bridge Repair at Church Rd. and ICG RR. SW of IL.15/Bridge Repairs	St. Clair County	2.8

NOTE: PROJECTS ARE JUST A SAMPLING AND NOT INTENDED TO BE VIEWED AS A COMPLETE LISTING.



2014 Southwestern Illinois Projects—St. Clair County

St. Clair County Projects Announced during 2014/2015

Project	Community	\$Mil
St. Elizabeth Hospital/Expansion	O'Fallon	300.0
Hotel, Brew Pub, Restaurants, Conference Center at the Shrine Development/New Development	Belleville	66.0
Solar Panel Farm/New Development	East St. Louis	65.0
LD Commodities River Elevators LLC/Renovation	Cahokia	50.0
IDOT-Poplar Street Bridge I-55/64 widening and repair/Road Repair	St. Clair	25.1
Casper Stolle Quarry/Expansion	Dupo	23.0
The McKendree Metro Recreation Plex-Ice rinks, aquatic centers and fitness center/New Development	O'Fallon	20.0
Visionary Wealth Advisors/New Office Building	O'Fallon	16.1
Global Sports International Convention Center-Soccer Complex and Hotel/New Development	Belleville	13.0
Touchette Regional Hospital-Behavioral Health Center/Expansion	Centerville	10.0
Belleville Police Station/Renovation and Expansion	Belleville	9.0
IDOT- I-64 West of I-57 to West of Green Mount Road/Road Resurfacing	St. Clair	7.5
Vanguard Truck Center/Construction and Renovation	Cahokia	3.9
IDOT IL 156 to IL 13/Road Resurfacing	St. Clair	1.8
Fairview Heights Business and Industrial Park/Warehousing New Development	Fairview Heights	1.2
Circle K Gas Station/New Building	Shiloh	1.1
O'Fallon Public Library/Remodel	O'Fallon	1.0

NOTE: PROJECTS ARE JUST A SAMPLING AND NOT INTENDED TO BE VIEWED AS A COMPLETE LISTING.



Business Retention & Expansion Remains Top Priority

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

Company Name	Employees	County
UNITED STATES STEEL CORPORATION	2,234	Madison
GLOBAL BRASS AND COPPER, INC.	1,118	Madison
PHILLIPS 66	860	Madison
JET AVIATION	810	St. Clair
ROCKWOOD PIGMENTS NA, INC.	680	St. Clair
AMSTED RAIL COMPANY, INC.	637	Madison
BELLEVILLE SHOE COMPANY	600	St. Clair
COOPER B-LINE, INC.	600	Madison
SOLUTIA INC.	560	St. Clair
BEELMAN SLAG SALES	500	Madison
WORLD WIDE TECHNOLOGY	500	Madison
CERRO FLOW PRODUCTS, LLC	410	St. Clair
STELLAR MANUFACTURING COMPANY	380	St. Clair
KRAFT FOODS GROUP, INC.	350	Madison
BASLER ELECTRIC	340	Madison
WEST STAR AVIATION	330	Madison
HUBBELL WIEGMANN, INC.	325	St. Clair
COPE PLASTICS INC.	315	Madison
HIGHLAND SUPPLY CORPORATION	300	Madison
METRO EAST INDUSTRIES	300	St. Clair
ALTON STEEL, INC.	250	Madison
BIG RIVER ZINC CORPORATION	250	St. Clair
EMPIRE COMFORT SYSTEMS, INC.	250	St. Clair
AFTON CHEMICAL CORPORATION	242	St. Clair
NATIONAL MAINTENANCE & REPAIR, INC.	200	Madison
ECKERT ORCHARDS, INC.	170	St. Clair
PEERLESS-PREMIER APPLIANCE CO.	165	St. Clair
THE ROHO GROUP	163	St. Clair
SIEMENS MANUFACTURING CO. INC.	160	St. Clair
GATEWAY PACKAGING COMPANY, LLC	150	Madison
GOLDEN STATE FOODS CORP.	150	St. Clair
NEFF MOTIVATION, INC.	150	Madison
OLIN CORPORATION	140	Madison
VIDEOJET TECHNOLOGIES, INC.	140	St. Clair
MENASHA PACKAGING COMPANY, LLC	130	Madison
SHELL OIL COMPANY	125	Madison
ARDENT MILLS, LLC	100	Madison
INTERNATIONAL PAPER COMPANY	100	St. Clair
MILLER MANUFACTURING COMPANY, INC.	100	St. Clair
ROCK-TENN CP, LLC	100	Madison
HEIDTMAN STEEL PRODUCTS, INC.	98	Madison
WALTERS METAL FABRICATION, INC.	96	Madison
ALCO INDUSTRIES, INC.	94	Madison
CROP PRODUCTION SERVICES, INC.	94	Madison
TROUW NUTRITION	90	Madison
HOLTEN MEAT, INC.	82	St. Clair
GUNDLACH EQUIPMENT CORPORATION	80	St. Clair
MAGNESIUM ELEKTRON NORTH AMERICA, INC.	80	Madison
RED-E-MIX, LLC	80	Madison
PET O'FALLON, LLC	72	St. Clair

Source: "Hoover's" Dun & Bradstreet, www.hoovers.com Secondary Source: St. Louis Business Journal Top 150 Employer List, 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.

Opportunities in Manufacturing and the Trades

The manufacturing sector has long been a mainstay of the Southwestern Illinois economy and remains so with an estimated 16,000 individuals employed by the top 50 companies operating in that sector and many more employed at a number of smaller companies in the region.



As a further sign of its continuing viability, information gathered by the Leadership Council's Manufacturing Steering Committee (MSC) during 2014 reveals that, in the next five years, 1,500 high-paying jobs will be opening up in the manufacturing sector in Madison and St. Clair counties. An additional 1,200 high-paying jobs in the various trades that support manufacturing and other aspects of our regional economy will also be opening up over the next several years.

While many of these positions are coming open due to retirements versus growth, they still represent tremendous opportunity for stable employment in our region. To spread the word, members of the MSC, which include regional leaders in manufacturing, regional Workforce Investment Boards, the construction trades, education and the public sector, have been laying the groundwork over the past several months for a comprehensive communications campaign. Participation by several educators who have volunteered their time to this initiative is helping to ensure the messaging and plans for delivery will be

These manufacturing jobs are high-paying jobs, with average earnings in Madison and St. Clair counties topping \$80K, well above the national average. Careers in the trades also come with a high wage, averaging almost \$33 per hour, plus benefits of \$22 for a total of \$55.

“Manufacture Your Future” Campaign Getting Underway

To raise awareness among guidance counselors, educators, students and parents about the job openings on the horizon, the new **“Manufacture Your Future”** campaign is launching in September 2015 to highlight the opportunities available and position manufacturing as *“A career that pays in Southwestern Illinois.”* It aims to change the perception that manufacturing is dirty work with mediocre pay and job insecurity and reposition it as the high-tech, high-paying field that it is today. A parallel initiative highlighting opportunities in the trades will also be rolled out under the **“Craft Your Future”** banner.

The goal is to educate the various target audiences about how careers in manufacturing and the trades are family supporting positions that facilitate an enviable lifestyle, as well as outline the skills and education needed to embark on a rewarding career in these vital sectors of our economy. The marketing brochure and website identify the local companies with current job openings to help reinforce that the jobs being referenced are real.

In addition to promoting the message via billboards and through the media, school newsletters and facilities tours, a speakers’ bureau is being established to reach out directly to the target audiences and arm them with the information they need to map out a path that will lead to employment opportunities in manufacturing and the trades.

Who is Hiring?

Some of the best recognized companies in the country are based right here in Southwestern Illinois. Jobs can be found at a variety of local organizations, including Phillips 66, Dynegy, U.S. Steel, SunCoke Energy and Olin Corporation; along with growing local businesses such as The ROHO Group, Progressive Recovery Inc., Metro East Industries and others.



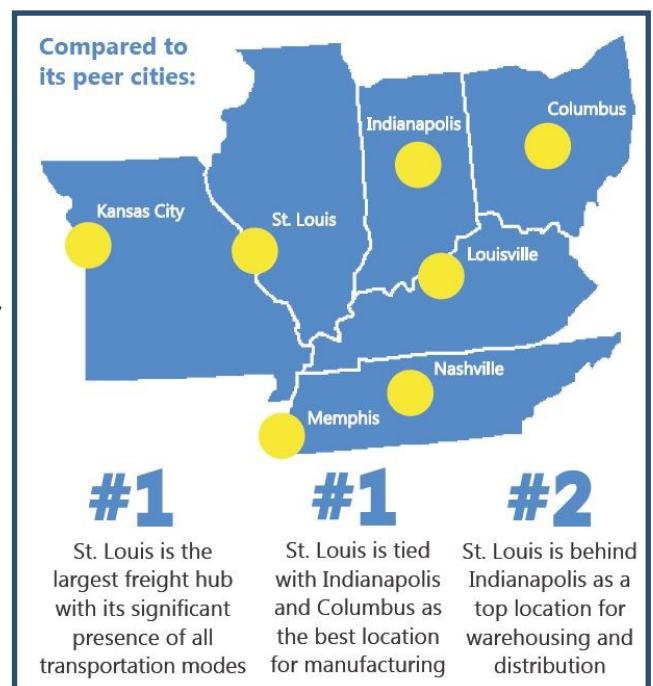
Focus on Freight

One look at the individual projects captured in charts on the pages for Madison and St. Clair counties reveals that many recent and continuing investments will further enhance the region’s capabilities to foster growth in our freight-based industries.

Aside from the 2014 completion of the new Mississippi River crossing and the progress on the new South Harbor at America’s Central Port, a range of other infrastructure improvements are in various stages of planning and development to help ensure the efficient movement of goods through our region. The recent completion of the new FedEx facility in Sauget, and the additional spec buildings underway at both Gateway Commerce Center and Lakeview Commerce Center, are further signs the region is readying for additional growth.

The original St. Louis Regional Freight Study commissioned in 2012 by East-West Gateway Council of Governments began the process of clarifying the status of freight movement through the region, as well as the future ability of local freight infrastructure to sustain growth in jobs and economic opportunity. An outcome of the study was a recommendation to create a freight district capable of coordinating with the public and private sector, managing transportation and infrastructure programming, financing and marketing for the region.

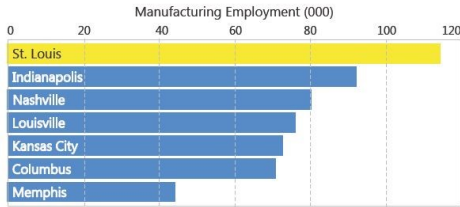
To advance marketing the region, The Leadership Council teamed with the St. Louis Regional Chamber to launch www.stlgateway.com as a collaborative initiative to begin to create a new identity for the St. Louis region, and for Southwestern Illinois, as a multimodal hub poised for growth.



Study Reveals Region is a Multimodal Hub Poised for Growth

Employment Base

The St. Louis region has the largest number of workers employed in manufacturing of its peer cities.



As the STL Gateway website was being developed, the Southwestern Illinois Freight Transportation Study got underway to delve further into the competitiveness of the region's freight industry.

The study aimed to identify quantitative means for the region to understand its position in the marketplace and to evaluate key performance indicators to prioritize areas of investment. By analyzing freight flow outlook and freight infrastructure inventory, conducting a market survey of industry representatives and a comparative cities review, the study concluded that the region is a multimodal hub positioned for growth.



The distribution service area is within a 400 mile radius of St. Louis. However, shipments can reach anywhere in the U.S. within a three-day truck drive. The existence of UPS and FedEx hubs make St. Louis an ideal location for eCommerce.

Peer cities for the study included Indianapolis, Nashville, Louisville, Kansas City, Columbus and Memphis. The study, which utilized data for the St. Louis Metropolitan Statistical Area so the findings would be applicable to the region as a whole, clearly supports that the St. Louis region is well positioned against these peer cities.

Among the key findings, the study revealed that the St. Louis region is the largest freight hub with significant presence of all modes of transportation. It is tied with Indianapolis and Columbus as the best location for manufacturing, and it is a top location for regional warehousing and distribution, capturing the #2 spot just behind Indianapolis. Of its peer cities, the St. Louis region has the largest number of workers employed in manufacturing. And, compared to its peer cities, total truck cost from the St. Louis region produced the lowest cost option for shippers.

Lowest Shipping Cost

Compared to its peer cities, total truck cost from the St. Louis region produced the lowest cost option for shippers. Successful distribution models are demonstrated by the existing presence of national logistics leaders including: Dial, Genco, Hershey's, Holland, Kraft, Menasha, OHL, Owens & Minor, Procter & Gamble, QPSI, Save-A-Lot, Schneider National, Spectrum Brands, Target, Unilever, USF Logistics, Walgreens, and World Wide Technologies.

A variety of factors contribute to these top rankings for the St. Louis region, including the presence of six Class 1 Railroads; major multi-directional interstates allowing freight to travel radially from the St. Louis region and reach any U.S. destination in just three days; being home to the most northerly, ice-free, full-service port on the Mississippi River; having five airports with cargo service capacity available, including MidAmerica St. Louis Airport with its cold storage capabilities for perishable goods; and the region's proven role as a logistics leader with available real estate, with over 15 million square feet of freight-based modern warehouse space developed in the last two decades.

Projected Growth

St. Louis has a long-held, dominant position on bulk commodity shipments. While bulk commodity shipments are still expected to grow, higher value/warehouseable/manufacturing goods are expected to grow at a faster rate.

Lower value/bulk commodities

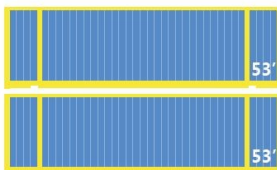
Higher value/warehouseable/manufacturing

Among the opportunities identified to continue growth in this sector is the need to ramp up promotion of the region as a key distribution hub in the epicenter of the Midwest Markets; continue and increase investment in the transportation network; build on the success in bulk and break-bulk transload services; target growth in regional distribution and manufacturing; promote the region's benefits for eCommerce, and capture growth from emerging trends, such as focusing on the Port of Houston and emerging Latin American trade.

Shipping Trends

The state of freight transportation has been in flux for the past two decades. Potential cargo diversions from the West Coast to the Port of Houston have big implications for the region.

St. Louis has faster intermodal rail service to and from the Port of Houston than regional rivals.



While the Leadership Council will continue to collaborate with key partners who will champion the efforts going forward, much of the heavy lifting in pursuing these will be taken up by the newly formed Regional Freight District, the newest enterprise of Bi-State Development, which was created as a public-private partnership to optimize the region's freight transportation network.

Keeping the Momentum Going at Scott Air Force Base

Scott Country had much to be excited about in 2014 and early 2015 as a series of firsts that were each *individually* noteworthy combined to make a compelling case for Scott Air Force Base to be awarded the coveted Abilene Trophy for the second time in just three years. Among the firsts that propelled the base into the winner's circle were:

- The *Air Force Times* ranking of Scott AFB as the #1 air base in the nation for airmen, and the many reasons contributing to that honor;
- The role of regional leaders in securing passage of House Bill 3939, which assured for the first time ever that prior schooling counts for the children of military families transitioning to Scott AFB;
- The first ever "Salute to Scott Air Force Base" as the Leadership Council dedicated its entire annual awards dinner to Scott AFB, highlighting the base and the individual missions housed there;
- The launch of the first-of-its kind networking event for veterans to help facilitate employment in Southwestern Illinois for as many separating military as possible; and
- Celebration of the 1st Anniversary of the Scott Patriot Program, which had grown to include an impressive 650 Patriots demonstrating their "military friendly" commitment through discounts or other support.



Potential Site of the new NGA

While the repeat Abilene victory was cause for celebration, the region also celebrated the news that land in St. Clair County, adjacent to Scott Air Force Base and MidAmerica Airport, is among just four sites that are in the running to become home to the new National Geospatial Intelligence Agency and the 3,000 jobs it represents. With its 178 acres that can expand to more than 200, a new highway interchange under construction to serve the site, and its proximity to Scott Air Force Base, the St. Clair County location is a clear front runner. A decision on the project is due in early 2016.

In the meantime, work continues on various other projects at Scott Air Force Base, where almost \$100 million is being invested in the new \$65 million Defense Information Systems Agency Headquarters Building, the \$16 million 18th Air Force and Air Mobility Command Headquarters and the \$16 million Cyber Security Squadron renovation. Cyber Security is anticipated to be a growing industry with potential to grow right here in Southwestern Illinois, and efforts to nurture that growth will be spearheaded in the coming months by the Cyber Security initiative that the Air Force Community Partnership Program is advancing.

The Air Force Community Partnership Program

Base and community leaders also signed a Memorandum of Understanding on June 8, 2015, formalizing an agreement to explore and pursue potential partnership opportunities under The Air Force Community Partnership Program. Through this framework, an Air Force installation and public/private sector community leaders can develop creative ways to leverage their capabilities and resources by finding shared value and benefit. Scott Air Force Base is one among 40 Air Force installations participating in the program, which aims to enhance mission viability and improve Airmen resiliency while implementing collaborative projects that reduce operations and services costs or reduce risks and provide mutual value to the Air Force or Department of Defense and local communities.

Six categories of partnership opportunity have emerged as a result of early brainstorming: community employment, storm water management, shared fitness instructors and programs, growing a cyber community, building a joint-use multi-functional firing range, and shared first responder and tactical training. As projects develop, the military and civilian lead for each partnership category notify leadership of execution requirements and budget needs. If they encounter roadblocks along the way, the Air Force Community Partnership program managers provide direct access to Air Force-level experts to identify solutions.

The community employment category already is one with proven results being generated through a collaborative



event between the Airmen and Family Readiness Center, St. Clair and Madison counties, the Leadership Council Southwestern Illinois, the Belle Scott Committee and other regional partners to help connect separating or retiring service members with potential employers. Held once last fall and again this spring, the event, known as Scott Air Force Base Networking Night, is a fast-paced event where service members work their way around the room to talk one-on-one with employers eager to hire them. A new resource for employers to market their employment opportunities to the Scott AFB community also has recently been launched on LinkedIn, where recruiters can post jobs on the Scott AFB Community Job Board and job seekers can share skill sets on the Scott AFB Candidate Connection.

Other projects making progress include the sharing of fitness instructors and programs, as the base collaborated with the local YMCA to find new ways to enhance base fitness programs; and efforts to create a collective military and community initiatives to advance issues related to the emerging field of cyber studies and cyber warfare.

Base and community leaders will continue meeting and discussing these partnership opportunities, and will remain open to incorporating others as new ideas or needs arise.

Growth Continues in Our Healthcare Sector

Investment in the region's healthcare sector reached new heights in 2014 and early 2015 in the Metro East Economy with several new construction projects and renovations in various stages of development underway across Madison and St. Clair counties.

With the growth in the healthcare sector, there is an expected positive ripple effect of growth that Southwestern Illinois may see in the residential and commercial real estate market. Along with real estate investment dollars, the areas around the hospitals will likely attract a host of other service businesses to support the expanded workforce.

The largest project under construction was the \$124 million, 207,000-square-foot Memorial Hospital East taking shape in Shiloh, which is scheduled for completion in 2016. Also noteworthy for the size of the investment is the planned \$300 million new St. Elizabeth's Hospital to be built in O'Fallon.

These mega projects join the \$63 million St. Joseph's Hospital, which opened in Highland in 2013, and continued to be a magnet for additional investment with the opening of a \$2 million medical building adjacent to the hospital in 2014.

Significant renovations underway during 2014 included the \$26.7 million remodel of Anderson Hospital in Maryville, a \$20 million renovation at Saint Anthony's Health Center in Alton and the \$10 million expansion of Touchette Regional Hospital's Behavioral Health Center in Centerville. An additional \$2.8 million is being invested in the reconstruction and renovation of Touchette Regional Hospital's Emergency Room, while \$2 million is being invested in the expansion of Alton Memorial Hospital's Women's Health and Childbirth Center in Alton.



Who will gain from these hospital moves?

Wayne Barber, Principal, Barber Murphy Group

O'Fallon and Shiloh will gain, but it's not who wins and loses, because all can win. Belleville has wanted to do something about its downtown area, and this presents an opportunity to do that.

There's a new bank building being built near St. Elizabeth's Hospital – Bank of Belleville on South Illinois Street – there's senior housing being built by the Belleville Catholic diocese, and there's a new public police station planned. As the hospital site becomes vacant or partly vacant and available for redevelopment, this can be a positive rather than a negative.



Will the moves spark more development? How?

David Wittenauer, Vice President, NAI DESCO

Absolutely! The placement of the hospitals solidifies O'Fallon's status as a regional hub of commerce. We should see medical professionals relocating or opening new practices in this area, along with new office and retail developments, especially at the Green Mount Road interchange. That intersection experienced a wave of development when it was first built, but the recession slowed growth. The hospitals should spur a second wave of restaurants, financial companies, law firms and general office users to further enhance commerce in an area that is already flourishing.

Commenting on the other implications of these investments

Dave Kunkel, President/Managing Broker, Kunkel Commercial Group, Inc.

Regarding any other implications of importance to the real estate market and communities, I see the hospitals as a quality-of-life benefit that will help surrounding communities be able to attract residents. This, in turn, will increase residential, retail and office development opportunities.

Q&A responses are excerpts from a *St. Louis Business Journal* article.

For additional insight on this topic, please view the full article at: <http://www.bizjournals.com/stlouis/print-edition/2015/05/29/on-the-way-barber-development-to-come-with.html>

**Touchette Regional Hospital - Rendering
Behavioral Health Center Expansion**



Educating the Work Force of the Future: Driving the Economy of Today

All five of Southwestern Illinois' institutions of higher learning collectively employ more than 5,400 individuals, including more than 2,800 full or part-time faculty members. They also have a combined student enrollment of more than 42,000, an increase of 7.3 percent from what was reported in 2013, and a combined total annual budget of more than \$500 million.

These institutions, which have received various honors and awards recognizing them among the best in the country in a range of different categories, are continuing to make investments in the Southwestern Illinois community.

SOUTHERN ILLINOIS UNIVERSITY EDWARDSVILLE

Type:	4-year
Budget (\$ Mil)	270
# Full-Time Faculty	623
# Part-Time Faculty	284
Enrollment	13,972
Enrollment FTE:	11,767
Main Campus:	Edwardsville, IL

*Includes Alton and East St. Louis Locations



MCKENDREE UNIVERSITY

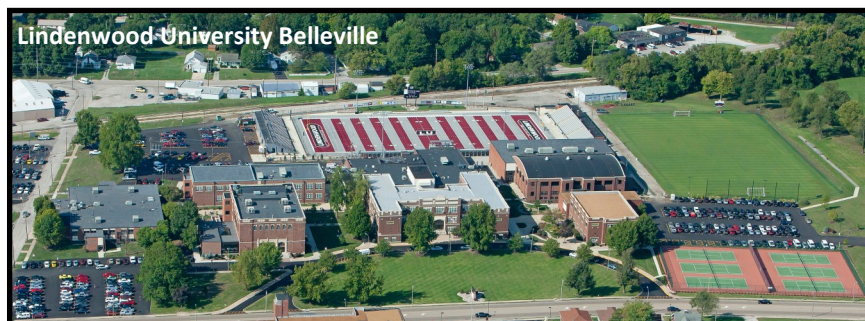
Type:	4-year
Budget (\$ Mil)	56.5
# Full-Time Faculty	103
# Part-Time Faculty	187
Enrollment	3,131
Enrollment FTE:	1,842
Main Campus:	Lebanon, IL



LINDENWOOD LINDENWOOD UNIVERSITY BELLEVILLE, ILLINOIS

Type:	4-year
Budget (\$ Mil)	32
# Full-Time Faculty	50
# Part-Time Faculty	185
Enrollment	2,450
Enrollment FTE:	1,450
Main Campus:	St. Charles, MO
Illinois Campus	Belleville, IL

*Numbers are for Belleville, IL campus only.



Growth Fueled by Educational Excellence

The Leadership Council Southwestern Illinois's 2015 Salute to Southwestern Illinois Awards Dinner made it clear just how strongly regional leaders feel about the importance of a quality education in driving our region's growth. The event paid special tribute to the five higher level educational institutions in Southwestern Illinois for their collective impact on workforce and the economy and their exceptional growth over the past decade. Dr. Ed Hightower, superintendent of Edwardsville School District #7, was also honored for his years of service to the educational community.

As an added highlight, the event also spotlighted Southwestern Illinois primary and secondary level teachers, administrators, support staff and school board members who received recognition awards during 2014. Those recognized were recipients of awards through: Those who Excel, The Peabody Energy Leaders in Education, and The Emerson Excellence in Teaching Awards.



Type:	2-year
Budget (\$ Mil)	108.4
# Full-Time Faculty	156
# Part-Time Faculty	891
Enrollment	10,545
Enrollment FTE:	4,591
Main Campus:	Belleville, IL

SWIC Liberal Arts Complex



Type:	2-year
Budget (\$ Mil)	33.6
# Full-Time Faculty	105
# Part-Time Faculty	250
Enrollment	12,115
Enrollment FTE:	4,189
Main Campus:	Godfrey, IL

Lewis and Clark Community College



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

Madison and St. Clair counties continue to see increases in residential home sales. In 2014, St. Clair County's home sales rose slightly by 1.1 percent from 2013, while Madison County's residential sales increased by 2.6 percent during the same time period. While the increases were modest, when comparing the 2014 data with what was reported in 2012, the increase in residential home sales is much more significant for both St. Clair and Madison counties, at 18.5 percent and 16.1 percent, respectively.

Residential building remains steady in St. Clair County. While there was no change in housing permits compared to what was reported in 2013, there was a shift in how the permits were dispersed among the county. The unincorporated areas of St. Clair County saw the biggest increases in permits, followed by a slight increase in Fairview Heights. O'Fallon once again demanded the most housing permits. Maryville saw the biggest increase in permits, while other communities demanding the most permits included Edwardsville, Glen Carbon and Troy.

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 are on the rise. Madison County's median home prices increased from \$113,950 to \$116,000 last year. St. Clair County saw its median home price increase significantly from \$110,000 to \$119,000,

Residential Building Housing Starts

	2012	2013	2014
Madison County	300	381	257
Alton	35	2	1
East Alton	NA	47	0
Edwardsville	37	45	37
Glen Carbon	40	42	38
Maryville	9	31	36
Troy	54	38	23
Other Communities	44	48	49
Unincorporated	81	128	73
St. Clair County	414	387	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 2014 represents approximately:

- \$184 million in local income,
- \$23.18 million in local taxes, and
- 2,537 local jobs



Single Family Home Sales

	2012	2013	2014
Madison County	2,660	3,008	3,087
St. Clair County	2,194	2,571	2,599

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		
Under 18 years		
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+)		
Percent High School Graduate or Higher		
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 261,846 individuals in 2014, an increase from 255,601 individuals in 2013, and the unemployment rate fell significantly. In 2014, the unemployment rate was 7.2 percent, compared with 8.95 percent in 2013. The Southwestern Illinois labor force accounts for approximately 18 percent of the St. Louis SMSA total.

Southwestern Illinois Labor Force	
2014	
Madison County	133,695
St. Clair County	128,151
Combined	261,846
Total Employed 2014	
Madison County	117,641
St. Clair County	105,048
Combined	222,689
Unemployment Rate 2014	
Madison County	6.8
St. Clair County	7.6
Combined	7.2

Private Sector Employment—2014 Snapshot

At the end of 4th Quarter 2014, there were 11,539 private employers in Southwestern Illinois, an increase of 138 from 2013. After experiencing a decrease several years in a row, private sector employment is on the rebound, with a net gain of 4,097 jobs. Sectors seeing the biggest gains were the professional and business services industry, with an increase of 1,478 jobs; the construction industry, with an increase of 1,420 jobs, and the leisure and hospitality industry, with an increase of 1,335 jobs. While changes were small, the biggest decreases were seen in the trade, transportation and utilities industry. Service-providing jobs account for approximately 83 percent of the total number of private sector jobs in Southwestern Illinois.

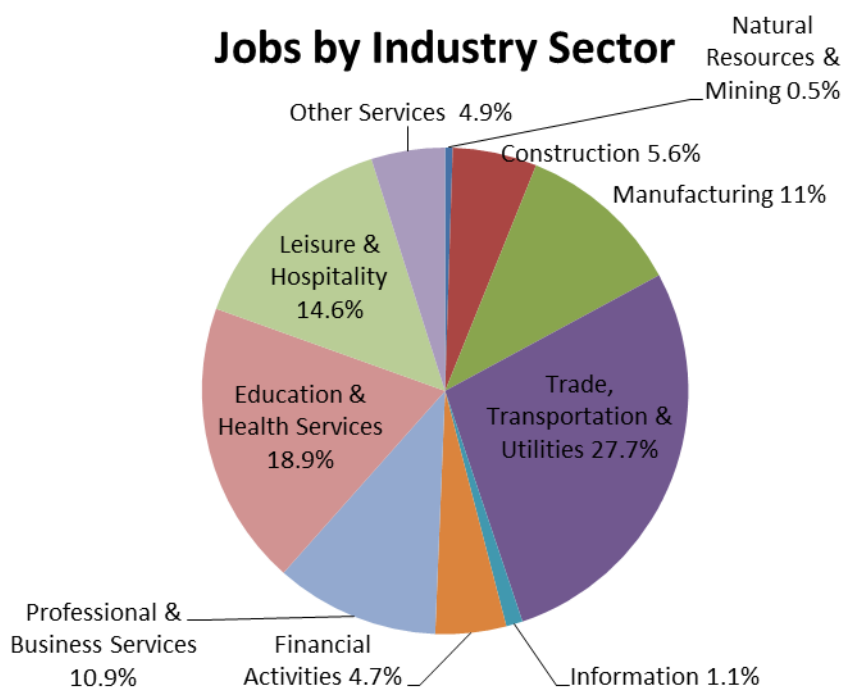
Southwestern Illinois Workforce

Workforce is defined as those who work in the area represented but may live elsewhere. A total of 222,689 are employed in Madison and St. Clair counties with 158,310 of these in the private sector. The Trade/Transportation/Utilities sector continues to account for more than a quarter of the total number of jobs in Southwestern Illinois, while Education and Health Services was the next largest sector with 18.9 percent of the jobs. After experiencing declines in 2013, Manufacturing and Construction both grew this year to 11 percent and 5.6 percent, respectively.

No. of Firms - 2014	Madison	St. Clair	Total
GOODS-PRODUCING	1,025	819	1,844
Natural Resources and Mining	48	37	85
Agriculture, Forestry, Fishing & Hunting	37	25	62
Mining, Quarrying, & Oil and Gas Extraction	11	12	23
Construction	739	599	1,338
Manufacturing	238	183	421
SERVICE-PROVIDING	5,010	4,685	9,695
Trade, Transportation, and Utilities	1,356	1,284	2,640
Wholesale Trade	294	215	509
Retail Trade	795	842	1637
Transportation & Warehousing	250	214	464
Utilities	17	13	30
Information	66	69	135
Financial Activities	605	526	1131
Finance & Insurance	382	318	700
Real Estate & Rental & Leasing	223	208	431
Professional and Business Services	958	940	1898
Professional, Scientific & Technical Services	603	590	1193
Management of Companies & Enterprises	19	14	33
Administrative & Support & Waste Mgmt.	336	336	692
Educational and Health Services	659	601	1260
Educational Services	68	70	138
Health Care & Social Assistance	591	531	1122
Leisure and Hospitality	716	661	1377
Arts, Entertainment & Recreation	104	79	183
Accommodation & Food Services	612	582	1194
Other Services	628	572	1,200
Unclassified	22	32	54
Total	6,035	5,504	11,539

Source: Illinois Department of Employment Security (4th Quarter 2014) Source: Illinois Department of Employment Security (4th Quarter 2014)

Jobs by Industry Sector



No. of Employees - 2014	Madison	St. Clair	Total
GOODS-PRODUCING	17,690	9,418	27,108
Natural Resources and Mining	364	514	878
Agriculture, Forestry, Fishing & Hunting	209	434	643
Mining, Quarrying, & Oil and Gas Extraction	155	80	235
Construction	4,952	3,853	8,805
Manufacturing	12,374	5,051	17,425
SERVICE-PROVIDING	66,458	64,744	131,202
Trade, Transportation, and Utilities	22,473	21,438	43,911
Wholesale Trade	3,189	2,580	5,769
Retail Trade	12,356	12,737	25,093
Transportation & Warehousing	6,552	5,623	12,175
Utilities	471	498	969
Information	683	983	1,666
Financial Activities	3,997	3,417	7,414
Finance & Insurance	3,137	2,491	5,628
Real Estate & Rental & Leasing	860	926	1,786
Professional and Business Services	9,174	8,125	17,299
Professional, Scientific & Technical Services	3,674	5,012	8,686
Management of Companies & Enterprises	620	469	1,089
Administrative & Support & Waste Mngmt.	4,880	2,644	7,524
Educational and Health Services	13,893	16,088	29,981
Educational Services	936	1,617	2,553
Health Care & Social Assistance	12,957	14,471	27,104
Leisure and Hospitality	12,430	10,660	23,090
Arts, Entertainment & Recreation	1,781	1,567	3,348
Accommodation & Food Services	10,649	9,093	19,742
Other Services	3,796	3,972	7,768
Unclassified	12	61	73
Total	84,148	74,162	158,310

Source: Illinois Department of Employment Security (4th Quarter 2014) Source: Illinois Department of Employment Security (4th Quarter 2014)

Major Employers

Madison and St. Clair Counties Top Employers	2014 Employees	Community
Scott Air Force Base	13,000	Scott Air Force Base
Southern Illinois University Edwardsville (SIUE)	2,480	Edwardsville
U. S. Steel, Granite City Works/United States Steel Corp	2,234	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
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)	1,118	East Alton
East St. Louis Community School District 189	950	East St. Louis
Gateway Regional Medical Center	935	Granite City
Walgreens	932	Southwestern Illinois
Edwardsville School District	922	Edwardsville
Alton Memorial Hospital	903	Alton
R.P. Lumber	890	Edwardsville
St. Anthony's Health Center	880	Alton
Phillips 66	860	Roxana
Madison County	854	Madison County
Moto Inc.	850	Belleville
St. Clair County	850	St. Clair
Alton Community Unit School District #11	842	Alton / Godfrey
Jet Aviation (formerly Midcoast Aviation Inc.)	810	Cahokia
Belleville Public Elementary School District #118	700	Belleville
Rockwood Pigments	680	St. Clair
Casino Queen Hotel & Casino	667	East St. Louis
O'Fallon Community Consolidated School District #90	664	O'Fallon
Lewis and Clark Community College	663	Godfrey
Granite City School District #9	650	Granite City
Amsted Rail Company, Inc.	637	Granite City
Cahokia School District #187	607	Cahokia
Belleville Shoe Company	600	St. Clair
Cooper B-Line, Inc.	600	Highland and Troy
Illinois-American Water Company (including Alton Call Center)	575	Belleville
Solutia Inc.	560	Sauget
J.F. Electric Inc.	552	Edwardsville
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
Allsup, Inc.	502	Belleville
Beelman Slag Sales	500	Madison
Mascoutah #19	500	Mascoutah
World Wide Technologies	500	Edwardsville
YMCA of Southwestern Illinois	500	Southwestern Illinois

Sources include St. Louis Business Journal Book Lists for 2014, Hoovers Dun & Broadsheet list of manufacturers generated June 2014, and the companies themselves. Those same sources were also used to create the Leadership Council's manufacturers list referenced.

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 200 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 Administrative Assistant - 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 our counties work to secure the reaccreditation 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, in partnership with St. Clair and Madison counties.
- 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 Manufacturing Steering Committee focuses on growth in manufacturing in Southwestern Illinois working with educators, the Workforce Investment Boards, labor and manufacturers. Initial initiative is on entry level workforce enhancement.

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, email office@leadershipcouncilswil.com, or visit www.leadershipcouncilswil.com.



12 Counties SW IL District Council LECET,
Glyn Ramage
126th Air Refueling, Illinois ANG,
Col. Peter Nezamis
375th AMW/CC, Col. Laura L. Lenderman
932nd Airlift Wing, Col. Karl Goerke
AAIC Incorporated, Calvin C. Morris
Adam's Auction and Real Estate Services, Inc.,
Adam Jokisch
AECOM, Michael Alesandrini
Aegis Strategies, Jason Carter
Afton Chemical, Carolyn Garrett
Allsup, Inc., Jim Allsup
Ameren Illinois, John Barud
Ameren Illinois, Eric Kozak
Ameren Illinois, Gussie M. Reed
Ameren/St. Louis Regional Chamber, Richard D. Conner
American Red Cross, Cindy Erickson
America's Central Port, Dennis Wilmsmeyer
Anders CPA + Advisors, Derek Barnard
Anderson Hospital, Keith Page
Archford Capital Strategies, James D. Maher
Associated Bank, Phil Hickman
ATT Illinois, James G. Maurer
Bank of America, Marilyn K. Bush
Bank of Belleville, Kevin Pesko
Bank of O'Fallon, James B. Thoman
Bank of Springfield, Patrick L. Mandeville
BarberMurphy Group, Wayne Barber Jr.
Becker, Hoerner, Thompson & Ysursa P.C.
Kevin Hoerner
Bi-State Development Agency / Metro,
John Langa
BKD, LLP, Fred Markwell
Boeing Company, John Frederick
Booz Allen Hamilton, Craig Starnes
BRIC Partnership, LLC, Tom Buchheit
Brown Smith Wallace, LLC, Jeffrey S. Smith
Byron Carlson petri & Kalb, LLC, Christopher W. Byron
C. Green and Associates, Carolyn Green
CARITAS, Gary Huelsman
Carpenters' District Council of Greater St. Louis,
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Carrollton Bank, Dan Jackson
Cassens Corporation, Mark Shashek
Cecil Management Group, Inc., Dorcas E. Cecil
Central Bank of St. Louis, Scott LePere
Centrue Bank, Thomas Davey
Challenge Unlimited, Tony Crawley
The Chamber of Commerce of Southwestern Madison
County, Rosemarie Brown
Clifton Larson Allen, LLP, Bo Butters
Coldwell Banker Brown Realtors,
Gerry Schuetzenhofer
Commerce Bank - Metro Region,
Harlan "Skip" H. Ferry, Jr.
Commerce Bank - St. Louis, Darryl R. Collins
Contegra Construction, Eric Gowin
Cork Tree Creative, Laura Reed
Crawford, Murphy & Tilly, Inc., Dennis Denby
Diel & Forguson, LLC., Ken Diel
DoubleTree Collinsville/St. Louis, Stacy Hinrichs
Dynegy Midwest Region Operations, Dan Thompson
East County Enterprises, Richard A. Sauget
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Eckerts Inc., Chris Eckert
EFK Moen, LLC, Darrell Eilers
Enterprise Holdings, Alonzo Byrd, Jr.
EWR Associates, Inc., Bill Reichert
FCB Banks, Mark Zavaglia
FGM Architects, Tim Kwiatkowski
First Bank, Dave Hopkins
First Clover Leaf Bank, Dennis M. Terry
First Mid-IL Bank and Trust, Christopher W. Kirk
First National Bank, Mary Dix
Gateway Center, Cindy Warke
Gateway Grizzlies Professional Baseball, Steve Gomric
Gateway Motorsports Park, Curtis Francois
Gateway Regional Medical Center, Matt Blevins
GCS Federal Credit Union, Keith Burton
Geotechnology, Lucas Heuerman
Glik Stores, Robert Glik
Goldenberg, Heller, Antognoli & Rowland, P.C.,
John McCracken
Greater Belleville Chamber of Commerce,
John L. Lengerman
Greater Gateway Association of REALTORS,
Rob Wigton
Greater St. Louis Community Foundation, Amelia Bond

Greensfelder, Hemker & Gale, Garry C. Reuterr, Jr.
Hank's Excavating, Henry Rohwedder
Hayden Wrecking, Brian Hayden
Heartlands Conservancy, Dave Eustis
Henricksen, Lisa Vaninger-Gaffney
Hepler Broom, Thomas J. Boster
Heyl, Royster, Voelker, & Allen, Barry Noeltner
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Holland Construction Services, Inc., Mike Marchal
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Hurst Rosche Engineers, James Roth
ICON Mechanical Const. & Eng. LLC, Jeff Smith
IL Dept. of Commerce & Economic Opportunity,
Edie Koch
IL Dept. of Transportation, Jeff Keirn
Illinois American Water Co., Jeffrey Kaiser
Illinois Business Journal, Inc., Alan Orbals
Illinois Federation of Teachers, Marcia Campbell
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Johanna Strong-Wharton
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Keeley & Sons, Inc., Gene Keeley
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Korte & Luitjohan Contractors, Inc., Gregg Korte
Kuhlmann Design Group, Inc., Michael Huber
Kunkel Commercial Group, Dave Kunkel
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Lewis & Clark Community College,
Dale T. Chapman
Lewis & Clark Council Boy Scouts of America,
Alicia Lifrak
Lewis & Clark Marine, Inc., Paul Wellhausen
Lindenwood University, Dr. Brett Barger
Lochmueller Group, Jason Watters
Logistics Management Institute, Russ Dulaney
Louer Facility Planning, Jane Louer

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Dr. Robert Daiber
Madison County Board, Chairman Alan Dunstan
Madison County Community Development,
Frank Miles
Madison County Employment and Training Dept.,
David Stoecklin
Madison County Transit District, Jerry Kane
Massman Construction Co., Mark Schnoebelen
Mathis, Marifian, & Richter, Ltd.,
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McCarthy Builders, Stacy Robben
McKendree University, Dr. James M. Dennis
Memorial Hospital, Mark J. Turner
Merrill Lynch, Woody Gray
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Murphy Co., Rob L. Koester
NAI DESCO, David R. Wittenauer
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Oates Associates, Inc., David M. Oates
O'Fallon/Shiloh Chamber of Commerce,
Debbie Arell-Martinez
Olin Corporation - Winchester Division,
Ted A. Zimmermann
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Phillips 66, Melissa Erker
Phone Masters, Barb Davis
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Regional Freight District, Mary Lamie
RiverBend Growth Association, Monica Bristow

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Southwestern IL Development Authority,
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St. Louis Minority Business Council, Edward Bryant
St. Louis Regional Airport Authority, David Miller
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St. Louis Regional Chamber, Richard D. Conner
Straight Up Solar, Dane Glueck

Stock Transport, Bob D. Stock
Straight Up Solar, Dane Glueck
SunCoke Energy, Don Vichitvongsa
SuprTEK Inc., Ron Howard
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