

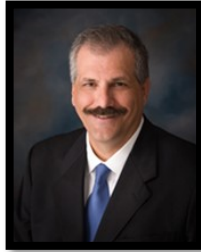
2016 Market Review & Investment Update



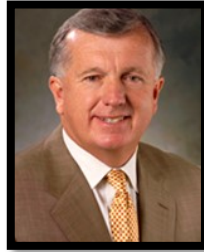
"Uniting the Region for Growth"

Leadership Council Southwestern Illinois

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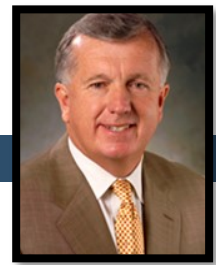
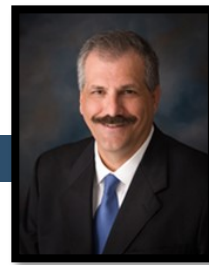
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Amanda Hornacek, MBA, Coordinator
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Dear Friends:

This edition of the Leadership Council's Market Review will provide an overview of the critical business investments and projects that continue to grow and strengthen the economy of Southwestern Illinois. As the years go by, our goal has remained the same in "Uniting the Region for Growth" and also to highlight special contributions the business community has made in generating a positive impact on the region. Southwestern Illinois is the second largest population center in the State of Illinois and is a great place to live, work and raise a family. Madison and St. Clair counties account for approximately 77% of the region's population. Therefore both counties have a tremendous impact on the development of the entire region. As you read on in this report it is clear the future looks very bright for Southwestern Illinois as our region continues to create new opportunities for all businesses and residents living in our communities.

There are several projects highlighted in this year's report that will play a pivotal role in shaping the region's economy for many years to come. Among the essential projects under construction in 2015-2016 was the New Madison South Harbor Project and the continued restoration of the American Bottoms levee system. Both projects are poised to attract new business and jobs to the region, lead to increased production, create cost effective transportation capabilities, and demonstrate why businesses should view Southwestern Illinois a prime economic development location.

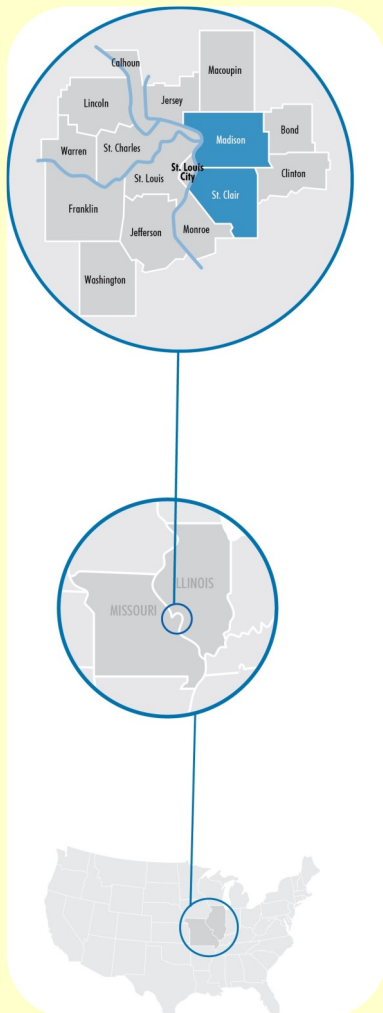
The Leadership Council is deeply committed to long-term workforce development in creating a talent pipeline of world class skilled, work ready and productive employees. To enable this process, the Leadership Council continues to take a leading role in coordination with strategic partners in building awareness of career options in Technical Science, Technology, Engineering, and Math (STEM) related fields through its Manufacture/Craft your Future Campaign (listed on page 12) and also seen in other investments in education facilities, such as new infrastructure and improvements. Southwestern Illinois will continue to invest in youth and entrepreneurial businesses serving as the regions next group of leaders and workforce.

Investments involving Scott Air Force Base along with notable investments regarding our healthcare sector remain a priority in Southwestern Illinois. Continued investments in office buildings, senior housing developments and the hospitality sector are on the rise. In this edition of the Market Review, we take a look at some of the exciting investments that have happened in each of these areas making us feel optimistic about the future.

We thank you for your interest in learning more about Southwestern Illinois shared in this publication, and for your continued support of the Leadership Council's efforts to unite our region for growth.

Sincerely,

Mark Turner and Mike Riley



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 2015/2016 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.

A Message from . . .

Our Board Chairman Mark Kern and Kurt Prenzler



Dear Leadership Council Supporter:

Both Madison and St. Clair Counties saw exciting business investments in 2015-2016 with significant economic growth and workforce development activities in a variety of business clusters. We see continued business investments and job growth with our region. For Example, being the new site location for two new Amazon distribution facilities, adding more than 1,000 new jobs and new multi-modal capabilities on the Mississippi River with Bunge/SCF Grain and Louis Dreyfus business expansion, also adding new jobs.

Our unmatched location in the center of the country with connectivity to all multi-modal modes of transportation (river, road, rail, air, and pipeline) and available, affordable shovel ready development sites makes Southwestern Illinois a very attractive place for development. This combined with the \$110 million in American Bottom Levee restoration and utility infrastructure enhancements uniquely positions Southwestern Illinois as a top development site in comparison to other river locations needing levee infrastructure updates. More than 50 percent of the U.S. buying power can be reached within a single day's drive from Southwestern Illinois. Our Midwest location has a combined direct and indirect impact of more than 215,000 jobs and revenue of \$19 billion making our location a robust economic hub for business activities. To continue to maintain and attract business investments and job creation is.

Economic power zones with robust activities, strong job creation and deep expansion opportunities include: advanced/light manufacturing; energy/green energy; chemical industry/medical processing; agriculture/food processing; warehouse/distribution/supply chain, multi-modal transportation and cyber security/GIS/defense contractor/STEM. Due to these immense business clusters, our region has collaboratively developed the "Manufacture/Craft Your Future" campaign reaching out to thousands of students, teachers, guidance counselors, school administrators, and parents in both Madison and St. Clair Counties to build awareness of careers in STEM and technical fields.

By creating a highly trained and skilled workforce in combination with the before mentioned core competencies makes Southwestern Illinois the right location for business growth and attraction. We look forward to welcoming more companies to our region. Southwestern Illinois is Open for Business!

Our region is strongly committed to maintaining and growing Scott Air Force Base (AFB). Scott AFB serves a critical mission role in our nation's national security from right here in Southwestern Illinois. The base has experienced 40 percent growth in the past decade with a new mission joining to its Cyber Command functions.

In 2016, both the 835th Cyberspace Operations Squadron and the 837th Cyberspace Squadron were launched at Scott AFB that led to the hiring of about 200 active duty troops, 59 civilian staff, and 20 contract support personnel. The Air Force created a \$16 million budget to upgrade and expand Scott's existing facilities to be able to make room for the new cybersecurity units. Cyber security attacks are becoming a top priority for the Air Force in particular, and Scott AFB has the personnel and facilities to help prevent further cyber-attacks.

After a decade of planning and three years of construction, the ribbon has been cut to open the Defense Information System Agency (DISA) located at Scott AFB. The federal, state, and local government's collaboration was instrumental in developing this \$100 million investment that's created jobs and is now home to the largest cyber operations center in the U.S. The facility also provides centralized housing for DISA's 950-plus military, civilian, and contractor workforce. Not only are these new locally filled jobs being created at Scott Air Force highly beneficial for the local economy, it allows Southwestern Illinois the opportunity to join the prevention effort against cyber-attacks on our country.

Without a doubt, the future economic and workforce opportunities are robust and growing for our regional area. We look forward to the years to come building on the success of our past efforts!

Sincerely,

Chairman Mark Kern and Kurt Prenzler

Reaccreditation to 100th Level of Flood Protection

As the restoration of the levees that protect more than 156,000 people, 4,000 businesses, and over 56,000 jobs from Alton, IL to south of Columbia, IL located in Madison, Monroe, and St. Clair counties continues; businesses and homeowners can feel confident our region will be protected against flooding now and long into the future. The \$110M invested to restore the levee system is being hailed as one of the largest and most successful projects in Southwestern Illinois and in our nation. In 2016, this project received regional recognition from East-West Gateway Council of Governments for innovation and design excellence award.

In 2007, Federal Emergency Management Agency's (FEMA) announced its intention to de-accredit the 68.5 miles' levee system in place to protect the St. Louis Metro East Region. Leaders of Madison, Monroe, and St. Clair counties quickly responded by working with the Illinois legislature to create the Southwestern Illinois Flood Protection District (FDP). Our County Chairman (Madison, Monroe, and St. Clair County) along with support from our state delegation were key players in deciding to locally fund the project. Without the leaders of our region uniting for the greater good of its people, the American Bottoms in Madison, Monroe, and St. Clair counties would be placed in a Special Flood Hazard Area with devastating economic consequences to our region.

The Leadership Council simultaneously created the St. Louis Metro East Levee Issues Alliance (LIA), in support of the FDP. The LIA is a growing coalition of business and civic organizations, community leaders, and concerned citizens supporting the timely completion of the improvements needed to restore our levee system to prevent devastating economic outcomes. It's truly admirable that the Flood Prevention District Council and Levee Issues Alliance Committee are working towards finishing the \$110M project to restore the levee system in 2017. If left up to the federal government, our levee system would have taken decades to be completely restored. In 2007 the U.S. Corps of Engineers estimated that the earliest completion of the project would have been 2044.

The Flood Prevention District Council (FPD) and Levee Issues Alliance Committee (LIA) has saved the St. Louis Metro East region a great deal of time and money, while putting the safety of the community as their top priority. Not only did this levee project save our community \$50M annually from increased flood insurance premiums, but allowed businesses to prosper, and employed local workers during the levees restoration. Our region owes its gratitude to local contractors and workforce for the timely completion of our levee system, which is nearly thirty years ahead of the U.S. Corps of Engineers original estimate of 2044. The FDP has been working

methodically to have the Metro East Levees improved to the latest federal standards and expect FEMA accreditation to the 100-year level of flood protection in 2017. The removal of inaccurate flood maps will aid in economic development in the future.

The successful completion of the levee system signifies the efforts of our region's hardworking local governments, workers, and citizens. Our counties are the only region in the nation to proactively address this challenge with this type of vision and leadership as a public private partnership. Our local governments could have easily passed this restoration project to the national government, but instead took it upon themselves to locally raise money, hire contractors, and set an ambitious timeline for the project's completion. The FPD and LIA demonstrated the type of leadership and composure needed to execute such a significant project quickly and rationally, while having the best interest of its people at heart.

The restoration project has improved the stability, reliability, and performance of the 68.5 miles of the levee system. Companies in the region such as Amazon, Phillips 66, and FedEx can be ensured they will be protected due to the added safety of our restored levee system. Incoming businesses can look at the locally funded and constructed levee restoration as a perfect example as why they should move their business to Southwestern Illinois. Thanks to this project, the St. Louis Metro East region will continue its economic growth and development.

The restoration has been an overwhelming regional success in ensuring the safety of our communities while continuing the economic growth within our region. The American Bottoms Levee Project can serve as a model of how successful region projects can be completed in a cost effective and timely manner when everyone is working together for a common goal. The collaboration between everyone who worked to make this project successful has been incredible. This effort in ensuring the safety and economic development of the St. Louis Metro East region is honorable and serves as a inspirational model for other regional projects. WELL DONE!

Sampling of Regional Projects Underway

| Project | Community | \$Mil |
|--------------------------------------|------------------|-------|
| Mississippi River Levee Improvements | St. Clair County | 110 |
| Industrial Park Facility | Madison County | 60.0 |
| Metro East Levee - Eight Year Plan | Madison County | 72.0 |
| Metro Bike Link Trail- Bike Trail | St. Clair County | 1.3 |

2015/2016 Southwestern Illinois Projects

A variety of projects have been completed in Southwestern Illinois in 2015/2016, paving the way for economic expansion in the region for many years to come. The completed \$23.5 million FedEx Distribution Center located in Sauget, Illinois, is capable of processing 10,000 packages an hour. Not only is the completion of this project creating 175 new full and part-time positions, but will serve as a model of why businesses should expand into Southwestern Illinois.

Other stand out projects completed in 2015/2016 include the completion of the \$8 million Roxana Water Treatment Plant project. The City of O'Fallon was proud to welcome the newly completed \$5.8 million Fire House & Parks Maintenance Facility. Alton Memorial Hospital completed its \$2 million expansion of its Women's Health & Childbirth Center, providing an essential service to the families of Southwestern Illinois. The \$4.5 million completion of the Mannie Jackson Center for the Humanities in Edwardsville has the future potential to impact real social change in the community. These completed projects improve the lives of our residents and ensure Southwestern Illinois is a healthy and safe place to live.

2015/2016 was also an important year for the completion of education projects. Three new schools opened in 2015-2016, including the completed \$30 million Father McGivney Catholic High School, \$17.5 million Wingate Elementary School, and \$4.1 million Maryville Christian School. Southwestern Illinois College also expanded their campus by adding the newly completed \$19.1 million Liberal Arts Building. Leaders of the community know how important the youth community is to the future of Southwestern Illinois, therefore it is critical to provide them with every opportunity to learn in state-of-the-art, high tech facilities and work in the region.

Projects Completed during 2015/2016

| Project | Community | \$Mil |
|--|------------------|-------|
| Memorial Hospital East | St. Clair | 130.0 |
| Father McGivney Catholic High School | Madison County | 30.0 |
| FedEx Distribution Center | St. Clair County | 23.5 |
| Historic Building P-4 SAFB | St. Clair County | 21.6 |
| SWIC- Liberal Arts Building | St. Clair County | 19.1 |
| Wingate Elementary School | St. Clair County | 17.5 |
| Emerald Ridge-Housing | Madison County | 15.7 |
| New Canteen 138/34 Bulk Substation | Madison County | 11.4 |
| May Apartments | Madison County | 8.1 |
| Roxana Water Treatment Plant | Madison County | 8.0 |
| Cottages at Cathedral Square | St. Clair County | 6.0 |
| O'Fallon Fire House & Parks Maintenance Facility | St. Clair County | 5.8 |
| Mannie Jackson Center for the Humanities | Madison County | 4.5 |
| Dierbergs -Market | Madison County | 4.5 |
| Roxana Street Dept. Headquarters | Madison County | 4.5 |
| Maryville Christian School | Madison | 4.1 |
| High Voltage Distribution Line System Improvements | St. Clair County | 3.7 |
| Fresh Thyme Farmer's Market | St. Clair County | 3.4 |
| High-Service Pump Station- Edwardsville | Madison County | 2.3 |
| Cedarhurst of Shiloh | St. Clair County | 2.0 |
| Alton Memorial Expansion of Women's Health & Childbirth Center | Madison County | 2.0 |
| Rebuild High Voltage Distribution Lines | Madison County | 1.6 |
| Roxana Village Street Department Headquarters | Madison County | 1.5 |
| IDOT- Paris Ave. in Cahokia to I-255 in Alorton | St. Clair County | 1.4 |
| Dollar Tree | Madison County | 1.2 |
| Chelar Tool & Die | St. Clair County | 1.1 |

NOTE: PROJECTS ARE JUST A SAMPLING AND NOT INTENDED TO BE VIEWED



Projects Under Construction During 2015/2016

| Project | Community | \$Mil |
|---|-----------|-------|
| HSHS St. Elizabeth's Hospital | St. Clair | 140 |
| Reserves of Timber Ridge - Residential Housing (Phase I) | St. Clair | 55 |
| New Madison South Harbor Project- America's Central Port | Madison | 50.0 |
| SAFB Visitors Quarters Hotel - Scott AFB | St. Clair | 44 |
| Alton Regional Multimodal Transportation Center | Madison | 25.0 |
| McKendree Metro Rec. Plex - Office and Rec. Center | St. Clair | 20 |
| Belleville Police Department | St. Clair | 18.5 |
| Visionary Wealth Advisors | Madison | 16.1 |
| SIUE/City of Edwardsville Fire Station | Madison | 16.0 |
| New Modern Logistics | Madison | 16.0 |
| Louis Dreyfus Commodities | St. Clair | 13.6 |
| Park Street Plaza- Downtown Edwardsville | Madison | 13.0 |
| Il. America East St. Louis Water Treatment Plan | Madison | 12.0 |
| Touchette Regional Hospital Behavioral Health Center | St. Clair | 10 |
| Park Street Plaza- Office Building | Madison | 9.6 |
| IDOT- Replace Bridge 157 over IL. 161 | St. Clair | 9.3 |
| Holiday Inn Express | Madison | 9.0 |
| America's Central Port Advanced Chemical Processing Facility | Madison | 8.0 |
| Visionary Wealth Advisors | St. Clair | 7.8 |
| Wood River Police Station | Madison | 7.8 |
| Planet Fitness- Edwardsville | Madison | 7.5 |
| Hampton Inn & Suites | Madison | 6.3 |
| Lewis & Clark CC Alton Scott Bibb Center | Madison | 5.6 |
| IDOT- Fountains Prkwy. To Salem Pl. & Market Pl. to N. Rosewood Village | St. Clair | 4.3 |
| Semispec Industrial Building- Eastport Project | Madison | 4.3 |
| Nickel Plate Trail | Madison | 4.2 |
| Vanguard Truck Center | St. Clair | 4 |
| The Landings At Belle Meadows | Madison | 4.0 |
| Christ United Methodist Church | St. Clair | 3.5 |
| Amazon Corp. | Madison | 3.5 |
| Altitude Trampoline Park- Glen Carbon | Madison | 3.2 |
| Roxana CUSD I | Madison | 2.6 |
| First to the Finish | Madison | 2.5 |
| SIUE- Fitness Center | Madison | 2.5 |
| Southern Il. Healthcare Foundation Mother & Child Center | St. Clair | 2.4 |

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

Madison and St. Clair Counties have seen new investments of nearly \$600 million on projects under construction in 2015/2016. We greatly appreciate and value these business investments that continue to drive robust economic activities within Southwestern Illinois.

HSHS St. Elizabeth's Hospital is building a \$140M new hospital and Memorial Hospital East at \$130M both will continue to impact both the health of the community and economy. Two police stations were under construction in 2015/2016: including the \$18.5M Belleville Police Department and the \$7.8M Wood River Police Department. These community safety projects will enhance community protection for the people of Southwestern Illinois.

The \$50M New Madison South Harbor and the \$25M Alton Regional Multimodal Transportation Center projects provides local business growth and led to new job creation. Also, the addition of Amazon, a \$3.5M project added over 1,000 new jobs and added to the region's growing business community. Southwestern Illinois is becoming one of the top regions for transportation and supply chain distribution of goods nationwide.



Projects Under Construction During 2015/2016

| Project | Community | \$Mil |
|---|-----------|-------|
| Crystal Dodge Jeep Ram Dealership | Madison | 2.3 |
| DaVita Healthcare Partners | Madison | 2.1 |
| Sports Complex Splash Park (Leon Corlew Park) | Madison | 2.0 |
| American Water Main Replacement Projects | Madison | 1.9 |
| Hawthorne Hills Sub Division | Madison | 1.7 |
| Medical Marijuana Dispensary | Madison | 1.6 |
| St. Louis Regional Airport | Madison | 1.6 |
| Ameren- Replacing 135 New Poles & Fiberglass Utility Poles & Power Line | Madison | 1.5 |
| Circle K Store | Madison | 1.5 |
| America's Central Port Bulk Storage | Madison | 1.5 |
| Mascoutah Hardware | St. Clair | 1.4 |
| Medical Marijuana Dispensary | Madison | 1.4 |
| MetroBikeLink Trail- Bike Trail | St. Clair | 1.3 |
| Tri-Ford Highland | Madison | 1.3 |
| Highland Family Dentistry | Madison | 1.2 |
| Gateway Commerce Center | Madison | 1.1 |
| Cloverdale New Homes- Edwardsville | Madison | 1.1 |
| Tri-Ford Dealership | Madison | 1.1 |
| SACHS Electric | St. Clair | 1.0 |

Why Southwestern Illinois?

The newly announced projects in the pipeline continues to verify that the Southwestern Illinois region is growing and a great place to do business. If you look geographically, Southwestern Illinois is situated in the midsection of America and serves as the central corridor for vigorous economic activities both now and into the future. This is why our region has been a trading post for hundreds of years. Multi-Modal transportation modes can easily connect our region with 50% of the U. S. buying power in one short day's travel. This combined with all major modes of transportation (river, road, rail, air, and pipeline) converging in our region, thus enables a premium supply chain distribution location for domestic and international markets.

Projects Announced during 2015/2016

| Project | Community | \$Mil |
|---|-----------|-------|
| National Shrine-Hotel + Hofbrauhaus Beer Hall, Soccer Complex & Convention Center | St. Clair | 100.0 |
| 5-Year Lebanon Highway Improvement Program | St. Clair | 65-34 |
| Parkway West Estates- six office buildings + 70 homes | St. Clair | 50.0 |
| New Madison South Harbor Project- America's Central Port | Madison | 50.0 |
| Gateway Commerce Center- 2 buildings | Madison | 49.0 |
| McKendree University | St. Clair | 40.0 |
| Edwardsville New Business District | Madison | 34.0 |
| Nursing Home & Assisted Living Housing- three phases | Madison | 25 |
| Memorial- BJC New Complex adjacent to Memorial East | St. Clair | 22 |
| Public Safety Building- City of Edwardsville | Madison | 15.0 |
| Fire & Police Dept. Headquarters—Public Safety Building | Madison | 12.0 |
| Senior Apartments near Metrolink | St. Clair | 10.5 |
| Prairie Farms Dairy Headquarters | Madison | 9.0 |
| IDOT- Bridge Replacement over St. Clair Ave. | St. Clair | 9.3 |
| Front Street- East St. Louis | St. Clair | 8.1 |
| Lewis & Clark Godfrey Campus Weber Workforce Center | Madison | 5.1 |
| East St. Louis Port | St. Clair | 5.0 |
| Anderson Hospital - Patient Rooms | Madison | 4.5 |
| St. Louis Bread Company | St. Clair | 4.5 |
| Madison County Historical Museum | Madison | 4.1 |
| SIUE - Engineering Building | Madison | 4.0 |
| Roxana School District- Junior High | Madison | 4.0 |
| Lewis & Clark Godfrey Campus Montessori School | Madison | 3.7 |
| SIUE - Electrical Upgrades | Madison | 3.5 |
| Academy Sports | St. Clair | 3.3 |
| Lewis & Clark CC Workforce Building | Madison | 3.2 |

Projects Announced during 2015/2016

| Project | Community | \$Mil |
|---|-----------|-------|
| Multi-Modal Park & Ride Facility | Madison | 2.8 |
| SS Peter & Paul Church | Madison | 2.7 |
| America's Central Port New Rail Loops | Madison | 2.5 |
| America's Central Port Rail Extension & Rehab | Madison | 2.5 |
| Dollar Tree | Madison | 2.2 |
| Village of Bethalto, Central St. Improvements (3rd Phase) | Madison | 2.1 |
| Mississippi River- Melvin Price Lock & Dam | Madison | 2.0 |
| Plummer Family Park Sports Complex | Madison | 2.0 |
| IDOT- IL. 143/159 from College St. E. Schwartz St. & IL.157 | Madison | 1.9 |
| IDOT- #20 Crossing Safety Upgrades | Madison | 1.9 |
| Jimmy John's | Madison | 1.6 |
| Ameren Illinois | Madison | 1.5 |
| Dollar Tree | Madison | 1.2 |
| Dollar General | St. Clair | 1.2 |
| Collinsville Health Center | Madison | 1.2 |
| College Avenue/ City of Alton | Madison | 1.1 |
| Wood River Resurfacing Project | Madison | 1.0 |
| CVS Pharmacy | Madison | 1.0 |
| Winning Streak Sports Apparel | St. Clair | 1.0 |

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



National Shrine-Hotel + Hofbrauhaus Beer Hall, Soccer Complex & Convention Center

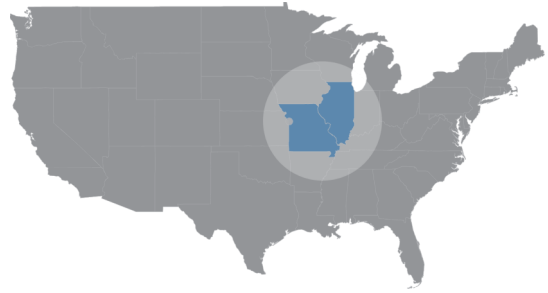
Southwestern Illinois America's Center for Transportation.

Southwestern Illinois is home to six class I railroads, three airports, the northern-most lock-free, ice free, port on the Mississippi River, great interstate highway access, intercontinental energy pipelines, and public transit systems. While our region is already capable of transporting goods to anywhere in the U.S., the New Madison South Harbor project and the Alton Regional Multimodal Transportation Center were completed in 2015, which will continue economic growth in Southwestern Illinois. Our multi-modal strengths, central location, workforce, and manufacturing sector create opportunities for current and incoming businesses to succeed in Southwestern Illinois long into the future.

Southwestern Illinois has access to six class I railroads, which make the region the third largest rail hub by volume in the country. These railroad systems have access to every corner of the U.S. markets without interchange and also have connectivity to International markets, which increases the cost efficiency and effectiveness of transporting goods by rail. The rail systems proximity within Southwestern Illinois directly enhances the growth of distribution centers and the manufacturing sector in the region.

The three airports located in Southwestern Illinois provide the region with effective means of transportation through air. The central location is a four-hour flight or less to nearly every location in the continental U.S. Our region's airports are a cost effective, time efficient, and can import and export goods internationally. The airports benefit the region's freight movement by having large runways perfect for shipping cargo, 24/7 operations, no noise limitations, accessible on runway storage facilities, and nearby developable land.

Southwestern Illinois has a competitive advantage with the northern-most-lock-free, ice free, port on the Mississippi River which enhances cost effectiveness and production port operations. For example, America's Central Port harbor services include: a dry bulk terminal, fleeting, general cargo dock, liquid bulk, and roll-n-roll-off dock. This port contributes to shipping 80M tons of product each year. America's Central Port also has direct access to major interstates highways, six class I railroads, warehousing and developmental sights, making Southwestern Illinois one of the leaders in multi-modal transportation and prime site location. The \$50M New Madison South Harbor expansion project will increase the handling and shipping capabilities of America's Central Port, accommodating the needs of the regions manufacturers, growers, and shippers.



16M sq. ft. in industrial grade bulk warehouses since 1998 at Gateway and Lakeview Commerce Center, less than 1% vacancy

Four major interstates give Southwestern Illinois access to every part of the country. Trucks are able to easily navigate through the region with little congestion and efficient highway connectivity. In 2012, the St. Louis region had the lowest travel time index among the 25 largest metro areas. Our region's freight distribution benefited from the completed \$670M Stan Musial Veteran Memorial Bridge, which connects St. Louis to Southwestern Illinois. Southwestern Illinois can easily connect to domestic and international markets through its world class multi-modal transportation modes making this location a Gateway to the World!

Home to large domestic and international manufacturing, agriculture, and logistics companies:

| | |
|------------------------|-----------------------|
| Amazon | SEACOR Holdings |
| P&G | Schneider National |
| Jet (General Dynamics) | Bunge NA |
| Dial | SuperValu |
| Solvay Fluorides | Cassens Transport |
| Veolia | World Wide Technology |
| Unilever | Boeing |
| Hershey | ADM |
| North Bay Produce | Fed Ex |
| Walgreens | Phillips 66 |
| Kinder Morgan | Prairie State Energy |
| USF Holland | West Star Aviation |
| Cargill | Kraft |
| SCF Marine | Louis Dreyfus |

and many more!

Gateway to the World!

Infrastructure Enhancements Making Southwestern Illinois Ripe for Development!

Utilities play a vital role in the economic development of Southwestern Illinois serving our businesses and homeowners. Utility companies not only employ a large number of workers in Southwestern Illinois, but also make an economic impact for the region by providing reliable, low cost energy to our communities.

Businesses could not operate without reliable utilities providing electricity, natural gas, trash, water, and sewage services. Utility companies are constantly interacting with businesses in the region to make sure their utility needs are being met. All businesses use energy differently, therefore utilities do their best to serve the needs of individual firms. Utility companies can positively impact local economy by offering reliable energy and other services that are cost effective for businesses. Utility companies work diligently to inform our region's businesses on how they can maximize their utility efficiency to help lead to a more sustainable future in Southwestern Illinois.



Ameren Illinois enhanced natural gas service by upgrading a high-pressure distribution gas pipe that runs adjacent to Gateway Motorsports Park. The new 12-inch coated steel pipe will fully protect the pipeline from corrosion while allowing for increased system capacity, safety, and reliability to the residential, commercial, and industrial customers served in Madison, East St. Louis and surrounding areas.



In order to meet the energy needs of the new Memorial Hospital in Shiloh, Ameren Illinois built a new, \$8 million substation. Ameren Illinois also added new power lines from its substation on Porter Road in O'Fallon to the Cross substation to strengthen the electric delivery service for O'Fallon and Shiloh residents. The new lines will create alternate pathways with other distribution substations to re-route and deliver power in the event of an outage.



A 100-ton transformer slowly moves along Illinois Route 111 to its new home inside the Collinsville substation near Interstates 55-70. Ameren Illinois invested more than \$10 million in the substation that will provide reliable electric service to more than 10,000 customers in Collinsville, Maryville and Troy.



J.F. Electric crew members working on the new Ameren Illinois substation in Collinsville safely pulled power lines across all lanes of Interstates 55-70 to be hooked up to the substation. The substation added capacity to meet increasing customer load growth in the three communities while reinforcing the existing electric system in Madison County and enhance service reliability.

Illinois American Water Company continues yearly to make an economic impact with over 30 million dollars in in work in Southwestern Illinois. Projects include a completed water treatment plant, main replacements, improvements, plan elevated tanks and plant rapid mix, and miscellaneous other water projects.

Manufacture/Craft Your Future Campaign

The manufacturing and craft business clusters continue to be key economic drivers for the current and future success of Southwestern Illinois. With significant workforce shortages in each of these technical fields, we developed the "Manufacture/Craft Your Future Campaign in coordination with many other strategic partners— Madison Employment and Training/ Workforce Investment Board, MidAmerica Work Investment Board, Southern Illinois Builders Association (SIBA), and others. This campaign began in 2015/2016 with the goal of raising awareness of job openings and career options in manufacture/craft industries. To date, the campaign has reached thousands of guidance counselors, educators, students, parents, and community residents to create awareness of the benefits and options in STEM and technical careers. The campaign aims to change the perception that manufacturing/crafts are low paying dirty jobs with few opportunities for growth and to reposition options as high-tech, high-paying field with many job openings now and in the future.

A four-year university is not always the right path for everyone. Therefore, the campaign introduces a career path to success directly out of high school.



Col. Adams, St. Clair County Chairman Kern and Sherri Parker with Phillips 66 read to children.

The campaign outlines the skills and education required to embark on a career in these vital sectors of our economy. It also highlights each fields benefits of job security, advancement opportunities, sustainable income/benefits, which leads to the enviable lifestyle most students dream of after graduation. Due to the high demand in the marketplace, Scott AFB Cyber Security experts joined the campaign to raise awareness of this important career option in our region. Marketing brochures continue to be distributed to various target audiences informing them of the local companies hiring and types of positions available in Southwestern Illinois. Pennants have been distributed to local high schools and middle schools for their counselors to hang to help spread awareness.

In 2015/2016 a speaker's bureau was implemented, establishing presentations at local schools, rotaries,

churches, and community events throughout Southwestern Illinois. The campaign continues to be well received, and in 2016 the goal was to further reach a larger audience speaking to over 5,000 thousand people giving them sustainable career options.

Top 50 Manufacturer Supply Chain By Number of Employees in Madison and St. Clair County

| Company Name | Employees | County |
|---|-----------|-----------|
| Amazon | 1000 | Madison |
| Cooper B-Line, Inc. | 600 | Madison |
| Solutia Inc. | 560 | St. Clair |
| Cablofil, Inc. | 500 | St. Clair |
| Beelman Slag Sales | 500 | Madison |
| Amsted Rail Company, Inc. | 450 | Madison |
| Belleville Boot Company | 350 | St. Clair |
| Hubbell Wiegmann Inc. | 350 | St. Clair |
| Highland Supply Corporation | 325 | Madison |
| Kraft Heinz Foods Company | 324 | Madison |
| Afton Chemical Corporation | 292 | St. Clair |
| Alton Steel, Inc. | 259 | Madison |
| Gateway Packaging Company, LLC | 250 | Madison |
| National Maintenance & Repair, Inc. | 250 | Madison |
| Cerro Flow Products, LLC | 200 | St. Clair |
| Empire Comfort Systems, Inc. | 200 | St. Clair |
| Siemens Manufacturing Co. Inc. | 198 | St. Clair |
| The Roho Group Inc | 165 | St. Clair |
| Bad Girlz Enterprises, Inc. | 162 | St. Clair |
| Golden State Foods Corp. | 160 | St. Clair |
| Eckert Orchards Inc | 150 | St. Clair |
| Huntsman Pigments Americas, LLC | 150 | St. Clair |
| Olin Corporation | 150 | Madison |
| Videojet Technologies, Inc. | 150 | St. Clair |
| Menasha Packaging Company, LLC | 140 | Madison |
| Shell Oil Company | 140 | Madison |
| Gateway Industrial Power, Inc. | 131 | Madison |
| Westrock CP, LLC | 120 | Madison |
| Ardent Mills LLC | 105 | Madison |
| Walters Metal Fabrication, Inc. | 100 | Madison |
| Peerless-Premier Appliance Co. | 100 | St. Clair |
| Heidtman Steel Products, Inc. | 100 | Madison |
| United States Steel Corp | 100 | Madison |
| Crop Production Services, Inc. | 98 | Madison |
| ALCO Industires, Inc. | 96 | Madison |
| SIUE Foundation | 93 | Madison |
| Holten Meat, Inc. | 90 | St. Clair |
| Highland Machine & Screw Products Company | 90 | Madison |
| Magnesium Elektron North America, Inc. | 82 | Madison |
| Red-E-Mix, LLC | 82 | Madison |
| Phillips 66 | 82 | Madison |
| Stellar Manufacturing Company | 80 | St. Clair |
| Gundlach Equipment Corporation | 80 | St. Clair |
| Miller Manufacturing Company, Inc. | 80 | St. Clair |
| Terrasource Global Corporation | 80 | St. Clair |
| Baily International, Inc. | 79 | St. Clair |
| Gemini Industries, Inc | 75 | Madison |
| CSI Cutting Specialist, Inc | 75 | Madison |

Source: "Hoover's" Dun & Bradstreet, www.hoovers.com * Please note this list is based on preliminary research using the above sources and has not been verified for accuracy.

Keeping the Momentum Going at Scott Air Force Base

Scott Air Force Base had much to be excited about in 2015/2016 as our region gears up with many new programs and activities in preparation for the 100th Centennial Celebration in 2017 by building on past success. Many noteworthy previous accomplishments combined with scheduled upcoming events makes a compelling case for Scott Air Force Base to be awarded the coveted Abilene Trophy for the third time as we prepare for this award submission at the end of 2017.

Among many past accomplishments include the following:

- 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 Scott Patriot Program, which had grown to include an impressive 650 Patriots demonstrating their “military friendly” commitment through discounts or other support.

New Missions and Military Investments

As mentioned in our Chairman’s Letter:

- The Air Force has made several impactful contributions to turn Scott Air Force Base into a major cyber-security hub. In 2016, both the 835th Cyber Operations Squadron and the 837th Cyberspace Squadron were launched at Scott Air Force Base that led to the hiring of about 200 active duty troops, 59 civilian staff, and 20 contract support personnel. The Air Force has created a budget of \$16 million to upgrade and expand Scott’s existing facilities to be able to make room for the new cybersecurity units. Cyber Security attacks are becoming a top priority for the Air Force in particular, and Scott Air Force Base has the personnel and facilities to help prevent further cyber-attacks.
- After a decade of planning and three years of construction, the ribbon has been cut to open the Defense Information System Agency (DISA) located at Scott Air Force Base. The federal, state, and local government’s collaboration was instrumental in developing this \$100 million investment that’s created jobs and is now home to the largest cyber operations center in the U.S. The facility also provides centralized housing for DISA’s 950-plus military, civilian, and contractor workforce. Not only are these new locally filled jobs being created at Scott Air Force highly beneficial for the local economy, but allows Southwestern Illinois the opportunity to join the prevention effort against cyber-attacks on our country.



The Scott Air Force Base 100th Centennial Celebration Planning and P4 Public Private Partnership Committees are engaged in the following activities:

January 2017 Centennial Kickoff Celebration with Illinois Gov Bruce Rauner signing a state proclamation making 2017 the year of Scott Air Force Base throughout the State of Illinois and a **Kickoff Reception will be held to announce all of the upcoming events and activities.**

- February 2017 Race Through Scott’s Past featuring a marathon running through the history of Scott AFB.
- May 2017 St. Clair County 3rd Annual Military Ball with over 400 people in attendance to build awareness of Scott AFB Military Mission in securing U.S. values and freedoms our citizens and military.
- June 10-11, 2017 Air Power of the Midwest Air Show returns with a bluster of prominent air acts and community engagement activities with over 300,000 people attending.
- October 2017 Scott Fall Festival with exciting activities for military families and children.
- 2017 Fall Scott AFB Artwork commissioning contest with local educational institutions provides the opportunities to capture the history of Scott AFB in everlasting art work.

Additional Scott Air Force Base Activities

- University of Illinois coordinated and planned Defense Information Asset and Supply Chain Mapping process in Southwestern Illinois kickoff meeting and further business interviews are underway with an expected report expected in Q1-2 2017. This information will provide Southwestern Illinois a deeper understanding of the defense industry firms and supply chain activities.
- Dr. Ronda Sauget inducted as 2017 Honorary Base Commander for the 375th Air Mobility Wing along with 35 other community leaders being inducted for mission support groups.
- Working closely with the Cyber Security Communications Group, the Leadership Council supported the National Cyber Security Awareness Month by presenting to thousands of high school students about career options in Cyber Security, STEM, and GIS. The Leadership Council also supported the 1st Cyber Security Banquet with over 350 attending.
- The Military Affairs Committee helped to coordinate community engagement of many different community groups including Belle Scott Committee, Scott Air Park, and 100th Centennial Fundraising Committee.
- The Leadership Council led an effort with other key community groups and St. Clair and Madison County Workforce Investment Boards to work with the Scott Airmen and Family Readiness Center and present job opportunities in Transition Assistance Programs (TAP) classes for existing airman who may want to remain in the region. This effort creates significant opportunities for airman, their families and regional employers to connect in building the workforce of tomorrow.



Scott AFB P4 Partnership and Workforce Development

Base and community leaders 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 notifies 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 with significant Workforce Development activities occurring with the Scott Airmen and Family Readiness Center. Ongoing Activities include:

- ◆ Mini Industry Specific Job Fairs – Healthcare, IT/CyberSecurity, Manufacturing/Transportation/Supply Chain Management, etc. Includes on-site interviews with 40+ people attending each fair.
- ◆ Hiring Our Hero's National Campaign - Networking Event with business professionals in coordination with First Lady Michelle Obama and Second Lady Dr. Jill Biden through national and regional chamber events was a great success and received significant attention with many military members making good connections with local companies.
- ◆ Virtual Ongoing Job Fairs using the Scott Patriot 2.0 Web site listing industry specific military friendly hiring companies, so the virtual job fair will be easy access and ongoing from anywhere.
- ◆ Building an Access Database to track military members and their job preferences, so we can link them more easily with employers and follow-up to ensure no one is lost.
- ◆ Further expansion of this group is underway with the edition of several other command functions and also the participation education, career tech, and building trades groups.

Scott Air Force Base Financial Impact

| | |
|--------------|-----------------|
| Expenditures | \$662,436,322 |
| Payroll | \$2,394,451,257 |
| Total | \$3,056,887,579 |

Scott Air Force Base Individuals Impacted

| | |
|------------|---------|
| Personnel | 56,865 |
| Dependents | 79,534 |
| Total | 136,399 |

Midwest Cyber Security Center

The Leadership Council, a founding member, in coordination with several other regional partners collaborated to create this unique workforce focused effort. The new mission is to provide cyber security capabilities and a cyber security workforce to meet the growing needs for this critical talent pipeline. The Midwest Cyber Security Center supports youth education, regional information sharing, workforce development, public awareness, research & development, and collaboration.

The overall vision of the center is to be a premier Cyber Center leveraging the St Louis region's innovation and entrepreneurial energy to foster economic development. The center worked with Southwestern Illinois College and other regional partners to develop a Cyber Patriot program for regional schools and a hosted the 2016 Spring 1st Hack-a-thon.



Cyber Expertise in support of:



Federal Delegation and State Legislators Outreach

Monthly conference calls conducted with our regional federal delegation and Governor Rauner's Washington DC office to ensure we have the best flow of military information between Southwestern Illinois and our federal legislators about any activities at Scott AFB and/or military opportunities coming down the pipeline.

The Leadership Council is deeply committed to maintaining and building the military assets at Scott AFB now and into the future. Federal Delegation calls and legislative outreach provide ongoing interaction and communications on importation regional issues, such as Scott AFB, American Bottoms Levee Restoration, business concerns and incentives, transportation infrastructures, and other high priority challenges impacting the region. We greatly appreciate and value the support of our federal, state, and local elected officials and state agency representatives.



Businesses over a century old serve as the backbone of Southwestern Illinois. Businesses with this type of longevity continue to play an important role in the local economy and strive to make a lasting economic impact on the communities it serves. Businesses that reach the 100-year-old milestone serve as models for aspiring businesses to emulate. These inspirational businesses strengthen the industries of healthcare, education, agricultural, manufacturing, government, banking and labor sectors. Southwestern Illinois wouldn't be where it is today without the timeless innovation, leadership, and dedication required for sustainable economic growth.

100-year-old foundational businesses have created countless jobs for the past, present, and future generations of workers in Southwestern Illinois. The region continues to see economic growth because it's home to sustainable businesses that provide secure positions and fair wages to its employees. Workers and families will then take their job security and steady incomes to purchase a house, raise children, and reinvest back into Southwestern Illinois. The century old businesses of Southwestern Illinois provide highly sought after job opportunities that will continue to directly benefit our region's economy.

Sustainability is the goal of any business that calls Southwestern Illinois home. Our region prides itself on having a balance of family owned, non-profits, and profitable businesses that have contributed to the overall economic success of Southwestern Illinois for over a century. Scott Air Force Base will celebrate its 100-year anniversary in 2017 and remains the region's largest employer. McKendree University and Lewis and Clark Community College have been educating the youth members of the region for over 100 years, making it the oldest universities in Illinois.

Southwestern Illinois is also home to several family owned farms that have been passed down from generation to generation providing food for the families of our region for over 100 years. By 2017, our newly renovated levees will be given the 100-year level of certification, giving current and incoming businesses the protection they need to prosper in Southwestern Illinois for the next century.

The Leadership Council would like to honor businesses whom hold the status of 100-years-old at the Annual Awards Dinner in April 2017.

Leadership Council Current Members of Businesses Over 100 Years

Alton & Southern

Ameren

Boeing Company

Cassens Corporation

Eckert's Inc.

Egyptian Business Furniture

Glik Stores

Illinois American Water Co.

Massman Construction Co.

McCarthy Building Companies

Olin Corporation

Phillips 66

Solvay Fluorides

Terminal Railroad Association

Union Pacific Railroad

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

Education is one of the five essential pillars of the Leadership Council and one of the initial foundation committees of the organization in 1983. Founding members of the Leadership Council recognized this field as a key component of development in Southwestern Illinois. The Education Committee has established several key initiatives to create a strong voice for educational institutions and business connected efforts:

- Serves as an education advocate for regional issues and school construction funding
- Identifies new opportunities between business and education to meet job skills shortages
- Develops a regional communications network between education and business to address specific job needs and career tech programs
- Develops education directory on Leadership Council Web Site for industry specific resources and training

Southern Illinois University Edwardsville registered an all-time record high enrollment of 14,265 students in Fall 2015. The university has a large economic impact on the region with nearly 3,500 employees, making SIUE the 2nd largest employer in Southwestern Illinois. SIUE's economic impact only continues to grow, reaching \$514M in FY14. The universities growth is due to its excellent facilities including a regional STEM center, an outreach center in East St. Louis, a nursing complex in Springfield, a School of Dental Medicine in Alton, and a research and technology park. Strategic investments and growing enrollment and staff have SIUE ranked inside the top 15 Midwest regional universities and was also included in the 2015 list of "up and coming" Midwest regional universities. With a budget of \$270M a year, SIUE will continue its growth and impact on the economy of Southwestern Illinois.

SOUTHERN ILLINOIS UNIVERSITY
EDWARDSVILLE



McKendree University is the oldest higher learning institution in the state of Illinois, therefore it has been positively impacting the region's economy for the last 187 years. The university has used its \$56.5M yearly budget to improve its facilities and education programs for the benefit of its student population of over 3,100 students. McKendree now offers 48 undergraduate and graduate programs, and has renovated its academic, fine arts, athletic, and dining buildings. McKendree University also has been honored as one of the country's "Great Colleges to Work For" by the Chronicle of Higher Education for five straight years, employing nearly 300 part-time and full-time workers. McKendree University continues its longtime tradition of delivering a quality undergraduate education for the benefit of Southwestern Illinois and its future workforce.


MCKENDREE
UNIVERSITY



Lindenwood University has seen tremendous growth over the years leading to a greater economic impact in Southwestern Illinois. The student body has increased from a total of 900 students in 2009, to more than 2,300 in 2015. To keep up with demand, Lindenwood has constructed two new dormitory buildings for its growing student population.

LINDENWOOD
LINDENWOOD UNIVERSITY BELLEVILLE, ILLINOIS



The university is proud to be a yellow ribbon school and was named a Top School in Military Advanced Education's 2015 Guide to Colleges and Universities. What used to be an extension center offering only a handful of evening classes, Lindenwood University now offers 35 degree programs and has launched the school's intercollegiate athletic program. Lindenwood University is providing an economic boost for the city of Belleville, and will continue to grow for the betterment of Southwestern Illinois and its students.

Southwestern Illinois College (SWIC) is one of the finest community colleges in the state of Illinois. It has the highest student enrollment and is dedicated to investing in the future of its student population of over 10,500. In 2015, SWIC completed the construction of its \$19.1M new Liberal Arts Complex and is set to break ground on a \$6.1M Early Childhood Development Center project. The college also obtained \$8.3 million in grants for a project to improve vehicle, bike, and pedestrian traffic, further enhancing accessibility for its Belleville Campus. As a founding member of the Illinois Green Economy Network, SWIC has received grants that have led to establishing a top class manufacturing facility at its Granite City Campus. SWIC's dedication to its veteran programs, new facilities, large student body, and strategic investments have led it to become one of the best education values in Southwestern Illinois.

Lewis and Clark Community College (Lewis and Clark) is one of the fastest growing community colleges in the nation with a rise in student population from 3,000 to more than 14,000 over the last 18 years. Lewis and Clark graduates are staying in Southwestern Illinois after graduation, creating an economic impact of \$338M in the region. The community college has invested more than \$180M on projects such as the N.O. Nelson campus in Edwardsville and the construction of the Templin Nursing building, which has tripled the size of the College's nursing program. In 2015, Lewis and Clark invested an additional \$20M to improve its humanities, advanced technology, workforce training, sustainability, early childhood

education and adult education programs. Lewis and Clark has made substantial improvements to its campus and education programs that will have a direct impact on the economy of Southwestern Illinois.



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 and 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 decreases in the average number of days residential home sales are on the market. In 2016, St. Clair County's home sales decreased days on the market from an average of 28 days less than in 2013, while Madison County's residential sales decreased by 44 days during the same time period.

| Housing Days of Market | | |
|------------------------|---------|-----------|
| Days of Market | Madison | St. Clair |
| 2016 | 99 | 101 |
| 2015 | 133 | 131 |
| 2014 | 146 | 137 |
| 2013 | 143 | 128 |

The data from the Southwestern Illinois Regional Multiple Listing Service, as provided by the REALTOR Association of Southwestern Illinois in the charts above and below this text, indicates that median home prices in both Madison County and St. Clair counties are on the rise.

| Single Family Home Sales | | | |
|--------------------------|-------|-------|-------|
| | 2013 | 2014 | 2015 |
| Madison County | 3,008 | 3,087 | 3,260 |
| St. Clair County | 2,571 | 2,599 | 2,815 |



Housing Tax Study

A recent tax study was commissioned by the Illinois REALTORS®, the REALTOR® Association of Southwestern Illinois and Greater Gateway Association of REALTORS® and done by Dr. John Foster at SIU Edwardsville. The study looked at the total tax burden on residents in the St. Louis Metropolitan Area. It was based on a four person family and at different income levels.

The result of the study, as shown in the chart, found the average percentage difference in taxes paid is less than 1%, making the Illinois and Missouri tax burdens essentially the same. If you combine a competitive tax rate with a lower cost of living and increased purchasing power, it makes Illinois the perfect place to buy your home.

See table below for Population-Weighted Average Rates, Assuming 3.75% Illinois Income Tax Rate.

| Homeowners | | | | | |
|--------------|----------|----------|--------------------|--------------------|--------------------------|
| Income Level | Illinois | Missouri | Illinois % of Inc. | Missouri % of Inc. | Difference (IL Minus MO) |
| \$20,000 | \$2,588 | \$2,855 | 12.94% | 14.28% | -1.34% |
| \$50,000 | \$5,494 | \$5,227 | 10.99% | 10.45% | 0.53% |
| \$75,000 | \$7,409 | \$7,364 | 9.88% | 9.82% | 0.06% |
| \$100,000 | \$9,185 | \$9,030 | 9.19% | 9.03% | 0.16% |
| \$200,000 | \$16,651 | \$17,323 | 8.33% | 8.66% | -0.34% |
| Renters | | | | | |
| Income Level | Illinois | Missouri | Illinois % of Inc. | Missouri % of Inc. | Difference (IL Minus MO) |
| \$20,000 | \$2,233 | \$3,027 | 11.16% | 15.13% | -3.97% |
| \$50,000 | \$4,661 | \$5,170 | 9.32% | 10.34% | -1.02% |
| \$75,000 | \$6,178 | \$7,443 | 8.24% | 9.92% | -1.69% |
| \$100,000 | \$7,556 | \$9,121 | 7.56% | 9.12% | -1.57% |
| \$200,000 | \$13,428 | \$17,074 | 6.71% | 8.54% | -1.82% |

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 stayed steady representing 267,353 individuals in November 2016. The unemployment rate fell significantly. In 2015, the unemployment rate was 6.3 percent, compared with 7.2 percent in 2014. Southwestern Illinois has a well-trained and dynamic labor force, positive labor-management relations and excellent quality of life, all with contribute to success in Southwestern Illinois.

| Southwestern Illinois Labor Force | |
|---|---------|
| 2016 (Updated November) | |
| Madison County | 137,167 |
| St. Clair County | 130,186 |
| Combined Average | 267,353 |
| Total Employed 2016 (Updated November) | |
| Madison County | 130,349 |
| St. Clair County | 123,471 |
| Combined Average | 126,910 |
| Unemployment (Average) Rate 2016 | |
| Madison County | 4.4 |
| St. Clair County | 6.0 |
| Combined Average | 5.2 |

Source: Career Trends

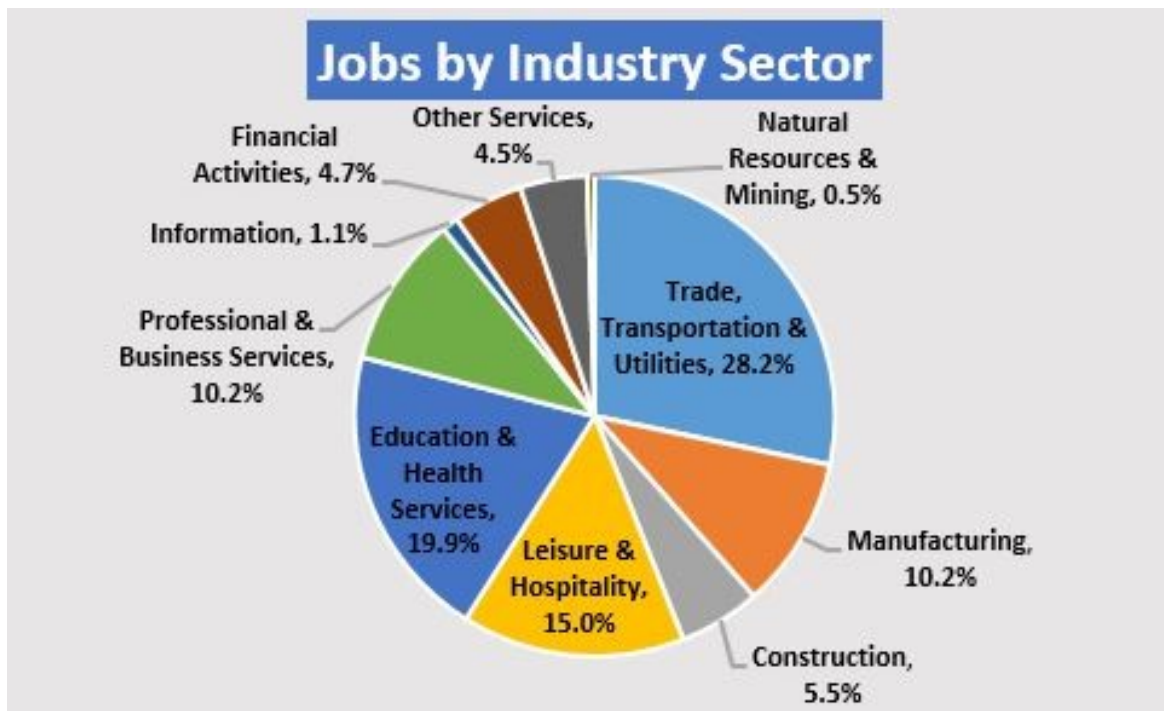
Private Sector Employment—2016 Snapshot

At the end of 4th Quarter 2015, there were 11,077 private employers in Southwestern Illinois. There are many areas in our private sector that continue to stabilize the economy of Southwestern Illinois. Our construction sector continues to be on the rise in 2015/2016, building new infrastructures that will be crucial parts of our economic success in the upcoming years. Also, the regions professional and business services continue to be a focal point in the private sector, accounting for a total of 1,809 firms in this important sector. Educational and health services have continued the momentum it gained in 2014, accounting for 1,218 firms recorded in 2015. The future looks bright for both Madison and St. Clair counties, whose business owners will continue to strive to benefit the economy and people of 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 156,550 employed in the private sector. Trade/Transportation/ Utility sector continues to account for nearly a quarter of the total number of jobs in Southwestern Illinois. The next highest sectors for jobs is both the Education & Health Services and also Leisure and Hospitality industries accounting for a combined 35 percent. Both Madison and St. Clair counties continue to display a strong workforce from many different sectors within the economy of Southwestern Illinois.

| No. of Firms - 2015/2016 | Madison | St. Clair | Total |
|---|--------------|--------------|---------------|
| GOODS-PRODUCING | 985 | 764 | 1,749 |
| Natural Resources and Mining | 51 | 35 | 86 |
| Agriculture, Forestry, Fishing & Hunting | 37 | 26 | 63 |
| Mining, Quarrying, & Oil and Gas Extraction | 14 | 9 | 23 |
| Construction | 704 | 542 | 1,246 |
| Manufacturing | 230 | 187 | 417 |
| SERVICE-PROVIDING | 4,843 | 4,485 | 9,328 |
| Trade, Transportation, and Utilities | 1,272 | 1,219 | 2,491 |
| Wholesale Trade | 283 | 196 | 479 |
| Retail Trade | 739 | 810 | 1,549 |
| Transportation & Warehousing | 234 | 200 | 434 |
| Utilities | 16 | 13 | 29 |
| Information | 63 | 65 | 128 |
| Financial Activities | 592 | 513 | 1,105 |
| Finance & Insurance | 379 | 313 | 692 |
| Real Estate & Rental & Leasing | 213 | 200 | 413 |
| Professional and Business Services | 930 | 879 | 1,809 |
| Professional, Scientific & Technical Services | 607 | 553 | 1,160 |
| Management of Companies & Enterprises | 21 | 15 | 36 |
| Administrative & Support & Waste Mgmt. | 302 | 311 | 613 |
| Educational and Health Services | 633 | 585 | 1,218 |
| Educational Services | 69 | 64 | 133 |
| Health Care & Social Assistance | 564 | 521 | 1,085 |
| Leisure and Hospitality | 685 | 625 | 1,310 |
| Arts, Entertainment & Recreation | 102 | 72 | 174 |
| Accommodation & Food Services | 583 | 553 | 1,136 |
| Other Services | 600 | 537 | 1,137 |
| Unclassified | 68 | 62 | 130 |
| Total | 5,828 | 5,249 | 11,077 |



| No. of Employees - 2015/2016 | Madison | St. Clair | Total |
|---|---------------|---------------|----------------|
| GOODS-PRODUCING | 16,354 | 8,913 | 26,267 |
| Natural Resources and Mining | 384 | 388 | 772 |
| Agriculture, Forestry, Fishing & Hunting | 230 | 311 | 541 |
| Mining, Quarrying, & Oil and Gas Extraction | 154 | 77 | 231 |
| Construction | 5,249 | 3,302 | 8,551 |
| Manufacturing | 10,724 | 5,223 | 15,947 |
| SERVICE-PROVIDING | 65,484 | 65,799 | 131,283 |
| Trade, Transportation, and Utilities | 23,084 | 21,127 | 44,211 |
| Wholesale Trade | 3,151 | 2,495 | 5,646 |
| Retail Trade | 12,297 | 12,726 | 25,023 |
| Transportation & Warehousing | 7,233 | 5,481 | 12,714 |
| Utilities | 403 | 425 | 828 |
| Information | 744 | 998 | 1,742 |
| Financial Activities | 3,937 | 3,471 | 7,408 |
| Finance & Insurance | 3,106 | 2,480 | 5,586 |
| Real Estate & Rental & Leasing | 831 | 991 | 1,822 |
| Professional and Business Services | 8,089 | 7,873 | 15,962 |
| Professional, Scientific & Technical Services | 3,622 | 5,192 | 8,814 |
| Management of Companies & Enterprises | 680 | 387 | 1,067 |
| Administrative & Support & Waste Mngmt. | 3,787 | 2,294 | 6,081 |
| Educational and Health Services | 13,645 | 17,519 | 31,164 |
| Educational Services | 895 | 2,026 | 2,921 |
| Health Care & Social Assistance | 12,750 | 15,493 | 28,243 |
| Leisure and Hospitality | 12,143 | 11,408 | 23,551 |
| Arts, Entertainment & Recreation | 1,392 | 1,345 | 2,737 |
| Accommodation & Food Services | 10,785 | 10,063 | 20,848 |
| Other Services | 3,733 | 3,255 | 7,028 |
| Unclassified | 109 | 148 | 257 |
| Total | 81,838 | 74,712 | 156,550 |

Source: Illinois Department of Employment Security (1st Quarter 2016)

Major Employers

| Top Employers | 2015 Employees | County |
|--|----------------|-----------------------|
| Scott Air Force Base | 13,000 | St. Clair |
| Southern Illinois University Edwardsville (SIUE) | 3,500 | Madison |
| Walmart / Sam's Club | 2,245 | Southwestern Illinois |
| Memorial Hospital | 2,131 | St. Clair |
| Schnuck's Supermarkets | 1,734 | Southwestern Illinois |
| Lewis and Clark Community College | 1,500 | Southwestern Illinois |
| Southwestern Illinois College | 1,403 | Southwestern Illinois |
| St. Elizabeth's Hospital | 1,350 | St. Clair |
| Shop 'N Save | 1,313 | Southwestern Illinois |
| Southern Illinois Healthcare Foundation (including Touchette Hospital) | 1,300 | Southwestern Illinois |
| Southwestern Illinois Health Facilities, Inc. (DBA-Anderson Hospital) | 1,124 | Madison |
| Olin Brass | 1,118 | Madison |
| R.P. Lumber | 1,055 | Madison |
| Alton Memorial Hospital | 1,017 | Madison |
| St. Anthony's Health Center | 1,000 | Madison |
| Amazon | 1,000 | Madison |
| Gateway Regional Medical Center | 955 | Madison |
| East St. Louis Community School District 189 | 950 | St. Clair |
| Walgreen's | 932 | Southwestern Illinois |
| Edwardsville School District #7 | 922 | Madison |
| Madison County | 854 | Madison |
| Moto Inc. | 850 | St. Clair |
| St. Clair County | 850 | St. Clair |
| Alton Community Unit School District #11 | 842 | Madison |
| Basler Electric | 800 | Madison |
| Phillips 66 | 800 | Madison |
| J.F. Electric Inc. | 784 | Madison |
| Belleville Public Elementary School District #118 | 700 | St. Clair |
| Allsup, Inc. | 700 | St. Clair |
| Rockwood Pigments | 680 | St. Clair |
| O'Fallon Community Consolidated School District #90 | 664 | St. Clair |
| Jet Aviation (formerly Midcoast Aviation Inc.) | 650 | St. Clair |
| Granite City School District #9 | 650 | Madison |
| Eaton Cooper B-Line, Inc. | 650 | Madison |
| Amsted Rail Company, Inc. | 637 | Madison |
| Cahokia School District #187 | 607 | St. Clair |
| Casino Queen Hotel & Casino | 600 | St. Clair |
| YMCA of Southwestern Illinois | 600 | Southwestern Illinois |
| Illinois-American Water Company (including Alton Call Center) | 575 | Southwestern Illinois |
| Eastman (Solutia Inc) | 560 | St. Clair |
| Belleville Township High School District #201 | 543 | St. Clair |
| Union Pacific Railroad | 537 | Southwestern Illinois |
| United Steelworkers | 514 | Madison |
| IL Dept. of Transportation | 513 | Southwestern Illinois |
| Belleville Shoe Company | 500 | St. Clair |
| Beelman Slag Sales | 500 | Madison |
| Regions Bank | 500 | St. Clair |
| Mascoutah School District #19 | 500 | St. Clair |
| World Wide Technologies | 500 | Madison |

Sources include Hoovers Dun & Broadsheet list of manufacturers generated August 2016, 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 (Leadership Council) 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 growth in Southwestern Illinois

Our Structure:

The Leadership Council's membership includes over 225 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. The Leadership Council fosters 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 17-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 engaged in 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 to the 100 year level of reaccreditation by mid 2017 and then on to the 500 year level of Flood Protection, 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 Committee and P4 Partnership in coordination with Madison and St. Clair Counties.
- Focusing on growth in manufacturing, supply chain logistics, warehousing, and business economic power zones in Southwestern Illinois working with educators, the Workforce Investment Boards, labor and manufacturers focused on job creation.
- Maintaining one of the longest, continuously running Labor-Management Committee 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
- Reestablishing the Education Committee to enhance the relationship between K-12, Community Colleges, Higher Education, and Business Leaders.

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



12 Counties SW IL District Council LECET,

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The 2016 Market Review & Investment Update is dedicated in memory of John Herzog, who was a longtime friend of the Leadership Council that helped make this research project happen for many years.



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