

2008-2009
MARKET REVIEW
&
INVESTMENT
UPDATE



LEADERSHIP
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Building Relationships. Shaping the Future.

Message from the President & Chairman

Dear Friends:



Welcome to the latest edition of the Leadership Council's *Market Review & Investment Update*.

As we look back over this reporting period, clearly it was a time of unprecedented challenges for the economies of our region and nation. When combined with the uncertainty created by FEMA and issues related to our Metro East levees, it's no surprise that there has been a pull back in new investment activity in our region. What is surprising, however, is the significant level of investment in projects announced in prior years that are still underway.

This report has total investments in Madison and St. Clair counties topping out at almost \$7.9 billion. While this total is down from the record high of \$9.4 billion in the prior year, our region has continued to reap the benefits of a loaded capital investment pipeline. Individual investments at ConocoPhillips Wood River Refinery, Scott Air Force Base, U.S. Steel's Granite City Works, Abengoa Bioenergy's facility at Tri-City Regional Port and scores of other projects across Southwestern Illinois have permeated the local economy, keeping construction workers in our area busy while supporting small businesses and local communities. In addition, there is more than one billion dollars worth of transportation projects announced or are underway. Projects like the new Mississippi River Bridge and completion of Interstate 255 are helping to put the Metro East on a solid footing for when the national economy begins to turn around.

While another billion dollars of projects have recently been announced and have yet to break ground, our challenge going forward will be to replenish our capital investment pipeline if we are to sustain the high level of economic activity we've seen in recent years. The state's new capital bill will help to fuel the public infrastructure sector of our economy, but we must find new and creative ways to attract additional private investment. The Southwestern Illinois Vision 2020 initiative is helping to determine key cluster areas that provide opportunities for future growth. Among the most promising due to existing infrastructure and/or significant capital investments are logistics and transportation, manufacturing and energy production.

This report and the Vision 2020 initiative give us confidence that individuals and organizations representing business, industry, government, education and labor will continue to effectively work together to address the current challenges and move our region forward.

Sincerely,

Handwritten signature of Mark Tade in black ink.

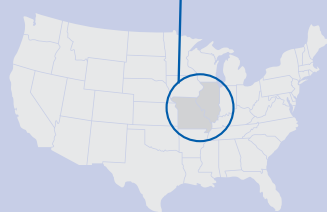
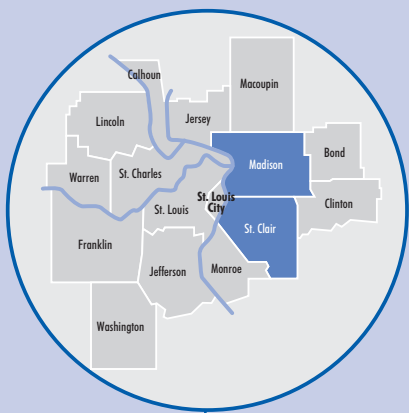
Mark Tade
President, 2010

Handwritten signature of Vaughn Vandegrift in black ink.

Vaughn Vandegrift
Chairman, 2010

Note: The time period covered in this edition reflects a one-time adjustment to cover a 15-month period of activity (10/1/08 thru 12/31/09) versus a 12-month period. This was necessary to enable us to complete our transition to an annual publication schedule in which we will report on investment activity by calendar year and have access to more current data for some of the information we include.

This edition of the Market Review and Investment Update is funded in part by the PNC Foundation.



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.

2008 - 2009 HIGHLIGHTS

Commercial Total: \$1.059 billion

- 3rd year topping **one billion dollars** in investments
- **\$840 million** under construction
- **85** total projects
- 12 projects over **\$10 million**

Industrial Total: \$5.004 billion

- Almost **\$4 billion** under construction
- Over **half a billion dollars** in alternative energy projects
- The **\$3.6 billion** ConocoPhillips project remains the region's single largest

Office Total: \$173.4 million

- **\$34 million** in new office product delivered
- **\$132 million** in projects yet to break ground

Institutional Total: \$243.5 million

- Almost **\$200 million** in healthcare and senior housing projects
- **\$130.8 million** under construction

Educational Total: \$482 million

- **10 percent** increase over last year
- **\$92.3 million** being invested in Belleville
- 14 projects over **\$10 million**
- 20 separate projects in Edwardsville, including the largest – SIUE's **\$79 million** Science Building

Public Total: \$899.6 million

- **38.7 percent** increase since 07-08 edition
- Over **half a billion dollars** in projects completed or under construction
- **109 projects**, the most of any sectors tracked
- **\$343 million** yet to break ground

GRAND TOTAL: \$7.86 BILLION

*Total Announced: \$1.364 billion • Total Under Construction: \$5.482 billion • Total Completed: \$1.016 billion
Reflects Project Status Between 10/08 - 12/09*

Top ten completed projects, projects under construction and announced projects

Reflects project status between 10/08 and 12/09

Completed Projects			Projects Under Construction			Announced Projects		
Project	Community	\$Mil.	Project	Community	\$Mil.	Project	Community	\$Mil.
SunCoke Energy Plant	Granite City	290.0	WRB Refining, LLC Wood River Refinery Coke Oven	Roxana	3,600.0	New Mississippi River Bridge	Madison & St. Clair Cos.	670.0
U.S. Steel Cogeneration Facility	Granite City	280.0	Discovery Business Park	Dupo	450.0	Hydroelectric Power Plant	Alton	425.0
O'Fallon Township High School			Abengoa Bioenergy	Madison	244.0	I-270 over Chain of Rocks Bridge replacement/rehab	Madison County	100.0
9th Grade Attendance Ctr	O'Fallon	30.6	BP Remediation of Amoco Facility	Wood River	100.0	SIUE Science Building	Edwardsville	79.0
Amelia V. Carriel Junior High School	O'Fallon	26.0	U.S. TRANSCOM, SDDC, Joint Intelligence Ops Ctr.	SAFB	93.6	IL 3 Relocation (2.9 mi. roadway construction, etc.) (Part A)	Madison & St. Clair Cos.	75.0
Westway III Expansion	Edwardsville	22.0	Belleville Crossing Shopping Center	Belleville	90.0	Port of East St. Louis	East St. Louis	60.0
Caseyville Township Wastewater Treatment Plant Add'n	Caseyville	22.0	Green Mount Crossing	Shiloh	90.0	Regency Park Corporate Campus North	O'Fallon	55.2
Shiloh Hall (120-person dorm)	SAFB	18.0	Phase I Combined Sewer Overflow Treatment System	Belleville	85.0	American Red Cross	Edwardsville	50.0
Meachum Crossing	Venice	15.6	Edwardsville Crossing	Edwardsville	58.0	IL 3 Relocation (2.9 mi. roadway construction, etc.) (Part B)	Madison & St. Clair Cos.	48.0
MetroLink Turnabout	Fairview Heights	13.0	Alton Memorial Hospital-Duncan Wing	Alton	45.0	Mascoutah High School	Mascoutah	47.0
Comprehensive Behavioral Health Ctr of St. Clair County	East St. Louis	13.0						

Readers' Note: The information on the following pages is the best available and was compiled from a variety of private and public sources. For the purposes of this report, references to Southwestern Illinois include numbers for just Madison and St. Clair counties. This document includes only reported projects of \$0.5 million or more in Madison and St. Clair counties. Public sector transportation projects are not included in the overall investment totals.

*Project status – announced, under construction or completed – is as of the end of the 4th quarter of 2009. Because some projects can take several years from announcement through completion, some projects in this current edition may have appeared in prior editions. Projects that have moved on through the development pipeline have been re-classified and updated. Any repeat projects that were announced in last year's edition but haven't yet broken ground are designated with an asterisk.

The Southwestern Illinois Development Foundation and the Leadership Council Southwestern Illinois assume no responsibility for any inaccuracies or omissions.

Cover Photo Credit: Cover Photo of the Salute to Steel Sculpture is courtesy of the It Starts Here Committee of the Chamber of Commerce of Southwestern Madison County.

INDUSTRIAL INVESTMENTS

GRAND TOTAL \$5.004 Billion

Industrial investments continued to be a key driver of the economy in Southwestern Illinois during 2009 with just over \$5 billion in projects in various stages of development. The \$3.6 billion project underway at ConocoPhillips Wood River refinery remains the largest project in the industrial sector, but a variety of other energy-related projects also are contributing to a growing awareness of Southwestern Illinois as an energy production hub.

Among those are the \$244 million investment by Abengoa Bioenergy in its new plant at Tri-City Regional Port, and BP's \$100 million remediation of its Amoco facility in Wood River, both of which were under construction during 2009. The completion of the SunCoke Energy Plant and U.S. Steel's Cogeneration facility in Granite City last year, coupled with plans announced for a \$425 million hydroelectric power plant in Alton, are further evidence that this emerging cluster will be a growth area for our region in the coming years.

While total investments in the industrial sector are down 22.6 percent since our 2007-2008 report, it's important to note that the drop is largely due to the deletion of one previously announced project. Martin Aviation Group's \$1.4 billion Mega Airpark project, which was included in the list of projects announced in our last two editions, was not included in this year's edition due to a lack of new information about the status of the project.

▼ Work is well underway on the \$3.6 billion project at ConocoPhillips Wood River Refinery.

PROJECTS ANNOUNCED

Project	Community	\$Mil.
Hydroelectric Power Plant*	Alton	425.0
Commercial Storage Building	Granite City	0.7
Prairie Farms Expansion	Granite City	11.3
TOTAL		437.0

Source: Southwestern Illinois Development Foundation

UNDER CONSTRUCTION

Project	Community	\$Mil.
Rand Diversified	Edwardsville	1.5
Deli Star - Phase 4	Fayetteville	0.8
Abengoa Bioenergy	Madison	244.0
WRB Refining, LLC Wood River Refinery Coke Oven	Roxana	3600.0
Pump Station for Crude Oil Pipeline	Uninc. Mad. Co.	2.4
BP Remediation of Amoco Facility	Wood River	100.0
TOTAL		3948.7

Source: Southwestern Illinois Development Foundation

COMPLETED PROJECTS

Project	Community	\$Mil.
Praxair Upgrade & Renovation	Cahokia	6.0
Gateway Commerce Center III	Edwardsville	0.6
Proctor & Gamble	Edwardsville	5.5
Westway III Expansion	Edwardsville	22.0
Deli Star - Phases 1 & 2	Fayetteville	1.2
Arnette Pattern Company	Granite City	2.1
Prairie Farms - 09	Granite City	1.0
SunCoke Energy Plant	Granite City	290.0
U.S. Steel Cogeneration Facility	Granite City	280.0
AirGas	Madison	3.5
Arizon Air Dome Manufacturing Facility	Madison	5.0
Feed Products	Madison	1.0
TOTAL		617.9

Source: Southwestern Illinois Development Foundation

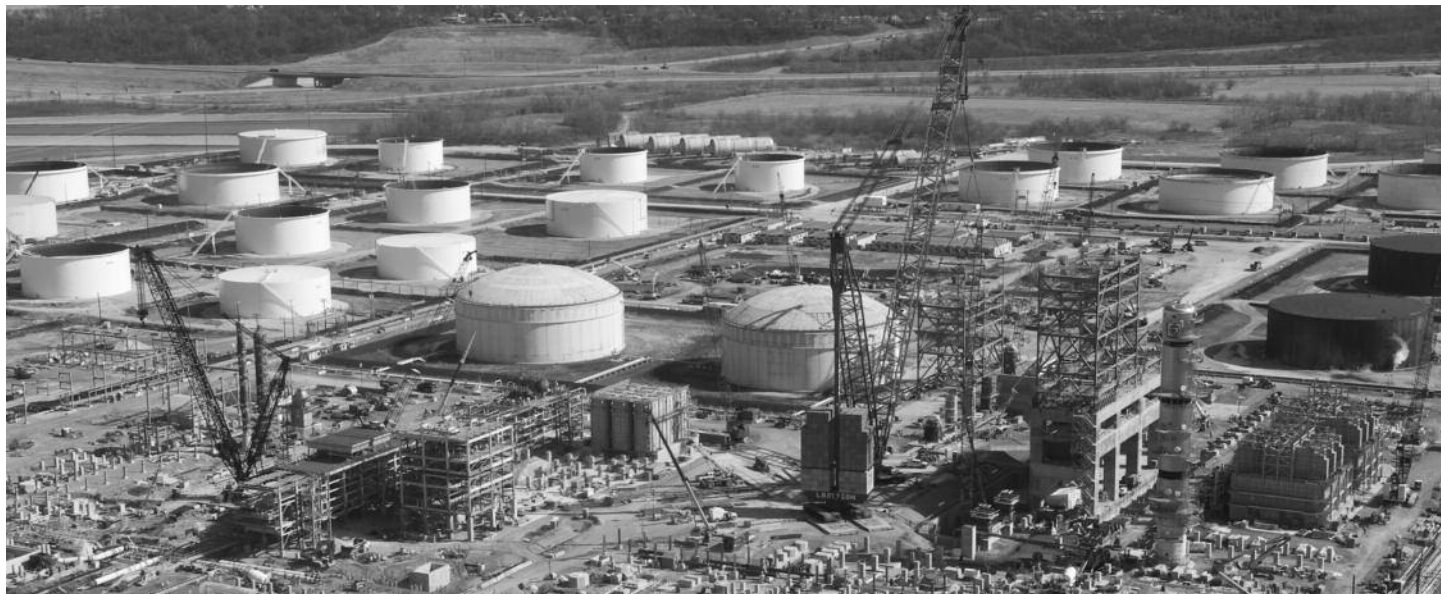


Photo courtesy of ConocoPhillips

COMMERCIAL INVESTMENTS

GRAND TOTAL: \$1.059 Billion

Despite the slowing economy, investments in the commercial sector remained surprisingly strong through 2009, topping the billion dollar mark for the third consecutive year.

While the \$1.059 billion total represented a drop of 19.3 percent since our 2007-2008 report, a total of 85 commercial projects were still in various stages of development, almost the same number in our last report. And, of those, a dozen were projects estimated at \$10 million or more. Collinsville once again had the largest number of projects with 14, while Edwardsville followed close behind with 13.

The value of projects under construction remained relatively steady and accounted for almost \$850 million of the 2009 total, but the pipeline for new projects has fallen from \$274.6 million to \$125.5 million. Until the economy begins to rebound, it's likely that the slowdown in this sector will continue.

Not unexpectedly given the recent economic climate, retail sales also have dropped over the past couple of years, falling from almost \$6.5 billion in 2007 to just under \$6.0 billion in 2009.

PROJECTS ANNOUNCED

Project	Community	\$Mil.
Alton Square Renovations Ph. II	Alton	2.0
Champion Hotels Renovation (Old Days Inn)	Alton	11.0
Imperial Manufacturing Group	Alton	2.0
Bar Louie*	Belleville	0.7
Eckert's, Inc. Expansion	Belleville	5.5
Lelly Retail Center*	Belleville	1.2
Shoppes at Beltline	Collinsville	1.0
Commercial Strip Building	Collinsville	1.0
Westview Condominiums (Interstate 55-70)	Collinsville	7.8
Riverside Quick Shop*	East St. Louis	2.6
Schulte Supply	Edwardsville	3.0
Wildey Theatre Restoration	Edwardsville	2.8
Walmart Supercenter (Godfrey Rd & Airport Rd)	Godfrey	8.0
Burger King	Granite City	1.0
Gateway Village Shopping Center	Granite City	30.0
Premiere Cinema 3-Screen Theater	Granite City	4.0
Quadrant Properties Development*	Granite City	3.1
Super Walmart Expansion	Granite City	8.0
Drost Park	Maryville	0.7
300 E Hwy 50 Retail Center*	O'Fallon	1.0
282 Wingate Commercial Building*	Shiloh	1.2
Mitre Corporation Campus	Shiloh	5.0
White Castle	Shiloh	0.8
Convenience Store (building demo construction)	Venice	2.6
Wood River Landing	Wood River	19.5
TOTAL		125.5

2009 Top Retail Sales Communities in Madison and St. Clair Counties:

	\$Mil.
Fairview Heights	\$764,228,740
Belleville	\$650,870,180
O'Fallon	\$541,055,500
Alton	\$494,394,400
Edwardsville	\$431,862,120
Collinsville	\$399,075,120
Granite City	\$281,610,320
Wood River	\$248,750,960
Glen Carbon	\$194,003,360
Highland	\$190,511,640
Shiloh	\$149,556,920
Cahokia	\$140,254,860
Godfrey	\$135,174,720
St. Clair Unincorp	\$130,330,660
Swansea	\$111,899,500
Bethalto	\$101,911,700
*Madison County Totals	3,004,517,280
*St. Clair County Totals	2,938,655,160
TOTALS	5,943,172,440

* Totals included sales for all communities, not just the top-selling communities.
Source: Illinois Department of Revenue



Photo courtesy of Doubletree Hotel Collinsville/St. Louis

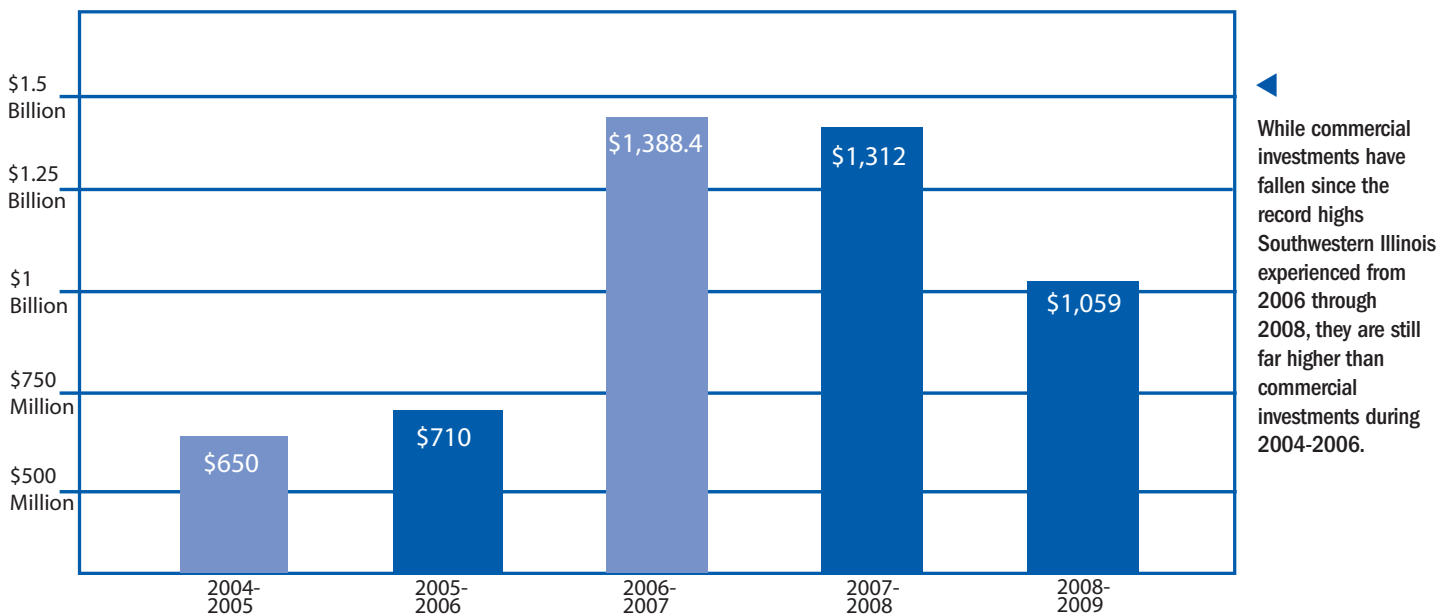
▲ The new lobby at the Doubletree Hotel in Collinsville following a \$9 million renovation at the property.

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Riverbend Billiards & Grill, Inc.	Alton	5.0
Belleville Crossing Shopping Center	Belleville	90.0
Lee's Chicken Restaurant	Belleville	0.8
Forest Lakes Retail Development	Caseyville	23.0
CVS Pharmacy	Collinsville	3.9
Frost Electric	Collinsville	6.0
Jack Schmitt Renovation	Collinsville	1.5
Kohl's (601 Belt Line Rd)	Collinsville	1.4
Miner's Theatre Renovation	Collinsville	10.0
Retail Outlot 5 Collinsville Crossing	Collinsville	1.0
Rural King	Collinsville	0.5
The Orchards at Collinsville	Collinsville	12.0
Discovery Business Park	Dupo	450.0
HeplerBroom Law Office	Edwardsville	5.5
Park Plaza South - Phase II	Edwardsville	3.4
Edwardsville Crossing	Edwardsville / Glen Carbon	58.0
Provision Living at Godfrey	Godfrey	8.0
Granite Park Center (anchored by Lowe's)	Granite City	35.0
Executive Plaza (retail center)	Maryville	1.0
Villa Marie Winery	Maryville	3.0
Walgreens	Maryville	1.0
Regency Center II Retail Center	O'Fallon	1.0
161 Wingate Commercial Building	Shiloh	1.2
Bank of Springfield	Shiloh	0.8
Green Mount Crossing	Shiloh	90.0
Demo and construction of 15,000 sq. ft. office building	Venice	2.1
YTB (Your Travel Business)	Wood River	25.0
TOTAL		840.1

Source: Southwestern Illinois Development Foundation

COMPLETED PROJECTS		
Project	Community	\$Mil.
Alton Square Renovations Ph. I	Alton	2.0
Green Mount Station Shopping Center	Belleville	4.0
Crown Food Mart	Centreville	3.8
Doubletree Hotel Renovation	Collinsville	9.0
Eastport Plaza Executive Center	Collinsville	4.0
Starbucks	Collinsville	1.2
Julia's Banquet Center	East Alton	0.8
Casino Queen's Sevens	East St. Louis	2.2
Park Plaza	Edwardsville	8.5
12-Unit Apt. Building	Edwardsville	0.8
Commercial Shell	Edwardsville	0.6
Hospice Residence Center	Edwardsville	4.9
La Casa Mexicana	Edwardsville	0.5
Park Plaza Phase I	Edwardsville	4.0
U.S. Bank	Edwardsville	0.7
Fountains Court Service Center	Fairview Heights	2.1
Fountains Plaza	Fairview Heights	1.2
Holiday Inn	Fairview Heights	6.0
Tom's Auto	Granite City	0.5
Marathon Oil Company	Hartford	3.5
Wal-Mart	Highland	0.9
Retail Center	Maryville	0.8
La Quinta Inn & Suites	Mascoutah	6.0
Hilton Garden Inn	O'Fallon	8.9
McDonald's Restaurant	O'Fallon	0.8
Newbold Toyota Carwash & Addition	O'Fallon	1.7
Outlaw Blues	O'Fallon	1.3
Regency Conference Center	O'Fallon	4.3
Sam's Club Expansion	O'Fallon	3.0
Walker Storage Buildings (2)	O'Fallon	1.2
Wal-Mart Remodeling	O'Fallon	1.7
McMoto	Shiloh	1.8
Wendy's Restaurant	Wood River	0.9
TOTAL		93.6

Source: Southwestern Illinois Development Foundation



INSTITUTIONAL INVESTMENTS

GRAND TOTAL \$243.5 Million

Although the institutional sector experienced the sharpest decline in investments since our last report (26.5 percent), almost a quarter of a billion dollars still found its way into projects that were announced, under construction or completed during 2009.

Expansion projects at area hospitals and investments in new medical facilities totaled more than \$130 million, while investments in senior housing projects accounted for another \$59 million. The value of projects under construction remained fairly consistent with the prior year, dropping less than 5 percent, but newly announced projects accounted for just \$54.8 million, down almost 50 percent from the prior year.

UNDER CONSTRUCTION

Project	Community	\$Mil.
Alton Memorial Hospital-Duncan Wing	Alton	45.0
St. Elizabeth's Expansion	Belleville	25.0
Methodist Church (on Prairie)	Bethalto	1.6
The Villas at Richland Estates	Bethalto	22.5
Knollwood Retirement Village	Caseyville	14.0
Braner Building	Collinsville	1.6
Horseshoe Lake Animal Hospital	Collinsville	1.0
Christ United Methodist Church (Phase 1)	Fairview Heights	1.2
Anderson Hospital Urgent Care Center	Highland	2.0
Legacy Place Assisted Living Facility	Highland	6.5
Liberty Village Retirement Community	Maryville	3.5
Anderson Hospital Intensive Care Unit Expansion	Maryville	4.1
New Life in Christ Church Expansion	O'Fallon	2.8
TOTAL		130.8

Source: Southwestern Illinois Development Foundation

PROJECTS ANNOUNCED

Project	Community	\$Mil.
Memorial Hospital Expansion	Belleville	24.0
First Baptist Church in Maryville	Maryville	3.3
Delmar Gardens Skilled Nursing Center*	O'Fallon	20.0
Cedarhurst of Shiloh Assisted-Living Center	Shiloh	7.5
TOTAL		54.8

Source: Southwestern Illinois Development Foundation

COMPLETED PROJECTS

Project	Community	\$Mil.
Faith Fellowship	Alton	3.0
Elks Club Lodge	Belleville	1.0
Poor Clare Monastery	Belleville	0.9
First Baptist Church of Bethalto	Bethalto	3.5
Anderson Hospital Urgent Care	Collinsville	1.6
Cedarhurst Assisted-Living Center	Collinsville	9.0
Veteran's Homeless Shelter / Eagle's Nest (aka Joseph Center)	East St. Louis	1.5
Comprehensive Behavioral Health Center of St. Clair County	East St. Louis	13.0
First Assembly of God Church	Edwardsville	2.2
Relais Bonne Eau Hospice Center	Edwardsville	4.9
St. Joseph Catholic Church Parish Center	Freeburg	2.5
First United Methodist Church	Godfrey	3.0
Arch Medical Helicopter	Granite City	0.5
Gateway Regional Medical Center Endoscopy Lab	Granite City	2.0
Gateway Regional Medical Center Exterior Renovation	Granite City	1.0
New Life Christian Fellowship Church	Hamel	0.1
St. Joseph's Hospital Remodeling	Highland	1.1
Anderson Hospital ICU	Maryville	4.1
First Baptist Church of O'Fallon	O'Fallon	1.0
Memorial & St. Elizabeth's Cancer Treatment Center	Swansea	2.0
TOTAL		57.9

Source: Southwestern Illinois Development Foundation

►
Relais Bonne Eau
Hospice Home
in Edwardsville



Photo courtesy of Impact Strategies

GRAND TOTAL \$173.4 Million

After reporting a record jump in the 2007-2008 edition of *Market Review*, investments in the office sector fell back 20 percent to \$173.4 million, just below the prior years' level. The sharpest declines were among projects completed and under construction. Projects announced actually posted an increase of 22.7 percent as new office developments joined the planned American Red Cross facility at SIUE and the \$55.5 million proposed Regency Park Corporate Campus in O'Fallon.

\$34 million in new office buildings and financial institutions were completed during late 2008 or in 2009, while projects under construction totaled just \$6.8 million. Financial institutions accounted for six of the projects on this year's list, down from 12 during the last reporting period.

As the economy continues to rebound and work moves forward on those announced projects that have yet to break ground, an estimated \$132.6 million in new office product will be added to St. Louis' Metro East market.

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Belle Valley Industrial Park Office-Warehouse	Belleville	2.3
UMB Bank	Collinsville	2.0
Regions Bank (2nd location)	Glen Carbon	2.5
TOTAL		6.8
Source: Southwestern Illinois Development Foundation		

▼ The \$4.7 million Maryville Professional Building was one of several office projects completed in 2009.

PROJECTS ANNOUNCED		
Project	Community	\$Mil.
Simmons Browder Gianaris Angelides and Barnerd LLC	Alton	0.3
American Red Cross*	Edwardsville	50.0
Farm Credit Services	Highland	2.5
I-64 Office Park (Rasp Farm Office Park)	O'Fallon	24.6
Regency Park Corporate Campus North*	O'Fallon	55.2
TOTAL		132.6
Source: Southwestern Illinois Development Foundation		

COMPLETED PROJECTS		
Project	Community	\$Mil.
Plumbers and Pipefitters Union Hall	Belleville	2.9
Power Maintenance & Constructors	Belleville	2.3
TheBANK of Edwardsville	Belleville	2.0
Laclede Community Credit Union	Bethalto	1.5
Eastport Plaza Executive Center - Phase II	Collinsville	3.2
Eastport Tech Center	Collinsville	4.0
Reliance Bank Building	Edwardsville	1.7
Impact Strategies "Green" Home Office	Fairview Heights	2.1
Syngenta Seeds	Highland	0.7
B-Line Office Addition	Highland	2.6
Maryville Professional Building	Maryville	4.7
Green Mount Corporate Center I	O'Fallon	6.3
TOTAL		34.0
Source: Southwestern Illinois Development Foundation		



Photo courtesy of Impact Strategies

EDUCATIONAL INVESTMENTS

GRAND TOTAL \$482.1 Million

Investments in the educational sector rose almost 10 percent during 2009 compared to the prior year. After holding steady at just under \$440 million for two consecutive years, total investments climbed to more than \$480 million, with over half of that in newly announced projects that will continue to provide construction jobs in the coming years as they break ground.

Consistent with findings in the 2007-2008 *Market Review*, almost 60 percent of the 2009 investments (\$270.7 million) are in K-12 projects throughout Madison and St. Clair counties. Higher education investments totaled just over \$211 million, with projects at Southern Illinois University Edwardsville (SIUE) accounting for \$164.2 million. During 2009, we also saw the start of construction on Phase I of the long anticipated National Great Rivers Research and Education Center in Alton, while Phase II was announced as a \$16.3 million project.

The new Science Building at SIUE, which secured funding during 2009, is the largest project on this list. The planned new high school in Mascoutah was the second largest at \$47 million, followed by the \$39.5 million Belle Valley District 119 Middle/Elementary School coming to Belleville.



Photo by Bill Brinson

▲ SIUE celebrates the official groundbreaking for its new Science Building. (From left to right) Ill. Reps. Thomas Holbrook, Dan Beiser (in background), and Dan Rietz; SIUE President Glenn Poshard; Ill. Gov. Pat Quinn; SIUE Chancellor Vaughn Vandegrift; Ill. Sen. Deanna Demuzio; Ill. Reps. JAY Hoffman and Ron Stephens; and College of Arts and Sciences Dean Aldemaro Romero.

PROJECTS ANNOUNCED		
Project	Community	\$Mil.
National Great Rivers Research and Education Center - Phase II (Confluence Field Station)	Alton	16.3
SIUE Dental School Multidisciplinary Lab	Alton / SIUE	4.5
Belle Valley District 119 Middle/Elementary School*	Belleville	39.5
East St. Louis School Construction	East St. Louis	29.0
Planning for SIUE Athletic Office Building	Edwardsville / SIUE	4.5
SIUE Art and Design Building (planning stage)	Edwardsville / SIUE	14.3
SIUE Cougar Village Apartments	Edwardsville / SIUE	1.0
SIUE Science Building*	Edwardsville / SIUE	79.0
SIUE Vadalabene Center (2nd floor lockers)	Edwardsville / SIUE	0.8
Father McGivney Catholic High School at Bouse Rd. & Old Troy Rd.	Glen Carbon	7.0
Lewis & Clark Community College Daycare	Godfrey / LCCC	1.7
Lewis & Clark Community College Engineering Complex	Godfrey / LCCC	1.5
Elementary School Building	Lebanon	7.5
Mascoutah High School	Mascoutah	47.0
O'Fallon School District #90 Renovations	O'Fallon	15.0
O'Fallon Township High School Stadium	O'Fallon	2.0
TOTAL		270.6

Source: Southwestern Illinois Development Foundation

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Alton School District - Phase 4 - Lovejoy Elementary School Renovations	Alton	9.2
National Great Rivers Research and Education Center - Phase 1	Alton	7.5
SIUE School of Dental Education Testing Facility	Alton / SIUE	1.1
Althoff Catholic High School Renovations	Belleville	2.6
Belleville East High School Renovations	Belleville	37.0
Lindenwood University - Cafeteria Renovation	Belleville	1.0
Lindenwood University - Main Gym Renovation	Belleville	1.0
Lindenwood University (upgrades and additions)	Belleville	10.0
Lindenwood University Welcome Center	Belleville	1.2
SIUE Biology Labs and GIS Suite at Bio-Tech Lab Incubator	Edwardsville / SIUE	1.8
SIUE Dept. of Geography GIS Renovation	Edwardsville / SIUE	1.6
SIUE Environmental Resource Training Center Renovation	Edwardsville / SIUE	0.5
SIUE Roof Replacement	Edwardsville / SIUE	4.1
SIUE School of Engineering Expansion	Edwardsville / SIUE	11.4
SIUE School of Pharmacy Student & Office Space Expansion	Edwardsville / SIUE	0.5
SIUE Student Fitness Center Expansion	Edwardsville / SIUE	10.6
SIUE Student Success Center	Edwardsville / SIUE	16.6
SIUE University Center Bookstore	Edwardsville / SIUE	1.6
SIUE Vadalabene Center Gym Renovations	Edwardsville / SIUE	6.0
Lewis & Clark Community College Hathaway Hall Parking Lot Rebuilding/Expansion	Godfrey / LCCC	2.9
SWIC Sam Wolf Granite City Campus Addition	Granite City	3.4
TOTAL		131.6

Photo courtesy of Goddard School



▲ Kids enjoy their day at the Goddard School for Early Childhood Development.

COMPLETED PROJECTS		
Project	Community	\$Mil.
Alton Elementary Schools Upgrades	Alton	9.2
Eastwood Elementary School Gym	East Alton	1.2
Edwardsville District Wrestling/Multi-Purpose Facility	Edwardsville	3.5
Goddard School for Early Childhood Development	Edwardsville	1.3
Early Childhood Center Expansion	Edwardsville / SIUE	2.4
SIUE Guelker Field Turf Installation	Edwardsville / SIUE	1.1
SIUE Secondary Computing Center	Edwardsville / SIUE	0.8
Pontiac Jr. High School Addition	Fairview Heights	1.9
Vatterott College	Fairview Heights	1.9
Amelia V. Carriel Junior High School	O'Fallon	26.0
O'Fallon Township High School 9th Grade Attendance Center	O'Fallon	30.6
TOTAL		79.9

Source: Southwestern Illinois Development Foundation

Photo courtesy of O'Fallon Township High School



▲ The recently completed \$30 million O'Fallon Township High School 9th Grade Attendance Center.



Type: 2-year
 Budget (\$ millions): 30.1
 # Full-Time Faculty: 102
 # Part-Time Faculty: 265
 Enrollment: 8,179
 Enrollment FTE: 4,391
 Main Campus: Godfrey, IL



Type: 4-year
 Budget (\$ millions): 32
 # Full-Time Faculty: 146
 # Part-Time Faculty: 234
 Enrollment: 3,403
 Enrollment FTE: 2,407
 Main Campus: Lebanon, IL



Type: 4-year
 Budget (\$ millions): 245
 # Full-Time Faculty: 622
 # Part-Time Faculty: 248
 Enrollment: 13,940
 Enrollment FTE: 11,806
 Main Campus: Edwardsville, IL



Type: 2-year
 Budget (\$ millions): 62
 # Full-Time Faculty: 165
 # Part-Time Faculty: 614
 Enrollment: 14,774
 Enrollment FTE: 8,375
 Main Campus: Belleville, IL



LINDENWOOD UNIVERSITY ST. CHARLES, MISSOURI
 Type: 4-year
 Budget (\$ millions): NA
 # Full-Time Faculty: 13
 # Part-Time Faculty: 120
 Enrollment: 2,348
 Enrollment FTE: 800
 Main Campus: St. Charles County, MO
 Illinois Campus: Belleville, IL
 (Numbers are for Illinois location only)

PUBLIC INVESTMENTS

GRAND TOTAL: \$899.6 Million

Public sector investments continue to play a key role in keeping the construction trades at work in Southwestern Illinois. Over half a billion dollars in projects were under construction or completed in 2009, and additional announced projects double the total being invested in this area to almost one billion dollars. That represents an increase of almost 39 percent since the 2007-2008 *Market Review*, following two consecutive years with growth in excess of 40 percent, and those numbers don't include additional road and bridge investment dollars reported in our public transportation section.

PROJECTS ANNOUNCED		
Project	Community	\$Mil.
Bike Trail*	Belleville	0.6
Bike Trail (North End Park to Memorial Hospital MetroLink Station)	Belleville	7.0
IL State Police Forensic Lab*	Belleville	39.5
Public Square Improvements	Belleville	2.0
Sanitary Sewer Projects Eagle Park Acres	Belleville	4.6
St. Clair County Jail Addition	Belleville	11.0
Streetscape (North Illinois St.)	Belleville	3.0
Streetscape (West Main Gateway)	Belleville	2.0
St. Louis Downtown Airport Primary Runway Widening & Rehab	Cahokia/Sauget	7.0
Dinosaur Museum*	Collinsville	25.0
East St. Louis Flood Control	East St. Louis	1.8
Gateway Community Hospital Demolition	East St. Louis	0.7
Port of East St. Louis*	East St. Louis	60.0
Southwestern Illinois Correctional Facility	East St. Louis	0.8
Underseepage Engineering Investigations	East St. Louis	3.0
I-64 Interchange Beautification Project*	Fairview Heights	1.0
Locks #27 Miter Gates Installation, etc.	Granite City	27.7
Work on North & South Levee Berms near Chain of Rocks Canal	Granite City	11.4
Old YMCA Renovation*	Granite City	5.0
Eagle Park Acres Sanitary Sewer System, Ph. 1 & 2	Madison/St. Clair Cos.	4.6
Metro East Sanitary District Levees (design/engineering)	Madison/St. Clair Cos.	3.0
Chain of Rocks Canal Mitigation Measures	Madison Co.	11.4
MCT Troy Park-Ride Lot	Madison Co.	1.5
Wood River Levee Phases 1 and 2	Madison Co.	15.3
Lakeview Acres Road Improvements	Maryville	3.5
Ground Water Storage Tank, Booster Pump Station, 2 Water Softeners	Maryville	2.5
Fiber Optic System Expansion	Mascoutah	0.7
Water System Improvements	Mascoutah	0.7
Family Sportsplex Ph. 3*	O'Fallon	15.0
Family Sportsplex Ph. 4 (Aquatic Ctr.)*	O'Fallon	20.0
Public Library Expansion	O'Fallon	1.6
Archview Visitors Center*	Sauget	2.6
375th Explosive Ordinance Disposal Facility*	Scott AFB	1.5
Aeromedical Evacuation Squadron Center	Scott AFB	7.4
Airlift Squadron Ops/Parts Storage*	Scott AFB	10.2
Distinguished Visitors Quarters Upgrade*	Scott AFB	0.6
Shiloh Valley Recreation & Conservation Area*	Shiloh	0.8
Kaskaskia River Navigation System	St. Clair Co.	11.9
Wood River Levee District Relief Wells Construction	Wood River	15.3
TOTAL		343.2
Source: Southwestern Illinois Development Foundation		

UNDER CONSTRUCTION

Project	Community	\$Mil.
Alton Landmarks Crossing	Alton	2.5
Community Counseling Center (Main & Edwards)	Alton	7.5
Melvin Price Locks & Dam 26 - Replacement of 4 Bulkheads	Alton	3.0
Illinois American Water Company	Belleville	2.5
IL State Police Forensic Lab Design (design only)	Belleville	1.7
Phase I Combined Sewer Overflow Treatment System	Belleville	85.0
Sanitation Dept./Storage Building	Belleville	2.8
Travel Lodge Renovation	Belleville	1.4
Wastewater Treatment Facility	Belleville	2.8
St. Louis Regional Airport Runway Modification	Bethalto	1.0
St. Louis Downtown Airport Runway Extension & Service Road	Cahokia	2.7
St. Louis Downtown Airport Fire & Rescue Station	Cahokia/Sauget	4.6
Collins House	Collinsville	2.0
Collinsville City Hall	Collinsville	2.0
Warren Billhartz Animal Shelter	Collinsville	0.7
Malcolm W. Martin Memorial Park	East St. Louis	8.0
Trail and Transit Facility	Edwardsville	4.0
Glen Carbon Park-Ride Lot and Pedestrian Facilities	Glen Carbon	2.5
Glen Carbon Sewer Upgrade	Glen Carbon	15.8
2008 TIF Project	Granite City	9.7
21st Homes	Granite City	5.0
Army Reserve Center at River's Edge	Granite City	17.0
Granite City Passenger Terminal	Granite City	1.8
Water Tower, Water System Improvements	Hamel	1.3
Lewis & Clark Confluence Tower Phase 3	Hartford	3.6
Fiber-Optic Network / Multi-Phase	Highland	15.7
Madison County Transit-MEPRD Troy-O'Fallon Trail	Madison/St. Clair Cos.	6.0
CARD Equipment Storage Shed and Pleasant Ridge Park	Maryville	3.8
New Wastewater Treatment Plant	Roxana	6.5
375th AW and 126th ANG Security Forces Complex	Scott AFB	122.1
375th Medical Group Facilities Upgrade	Scott AFB	35.8
5-yr Repair Bottom of 6' Culvert, Pryor Dr.	Scott AFB	0.5
932nd Operations Group Bldg.	Scott AFB	10.2
Child Development Center	Scott AFB	7.2
Heritage Airpark	Scott AFB	1.5
IL National Guard Readiness Center	Scott AFB	8.5
Re-Configure/Mold Remediation of O'Fallon Hall (dormitory)	Scott AFB	3.2
Regrade South Drainage Ditches	Scott AFB	0.8
Roof Repairs, Office Renovations & Replacement of Air Handling Unit	Scott AFB	1.3
RPR HVAC Bldg. 1521	Scott AFB	4.6
U.S.TRANSCOM, SDDC, Joint Intelligence Ops Ctr.	Scott AFB	93.6
Wastewater Treatment Facility Expansion	Swansea	21.0
Worden City Park	Worden	0.5
TOTAL		423.7
Source: Southwestern Illinois Development Foundation		

COMPLETED PROJECTS

Project	Community	\$Mil.
Amphitheater	Alton	4.4
Hayner Public Library Alton Square Facility	Alton	2.0
MCT Bus Transfer Station	Alton	5.9
Waste Water Treatment Plant Expansion	Alton (West)	3.6
Belleville Fire House #4/Admin. Bldg.	Belleville	3.3
Belleville Maintenance, Parks & Human Services Bldg.	Belleville	1.7
Stookey Township Park	Belleville	5.0
Streetscape (Main Street)	Belleville	7.0
Caseyville Township Wastewater Treatment Plant Additions	Caseyville	22.0
Collinsville Regional State Office Bldg.	Collinsville	2.0
Historic Preservations to Cahokia Mounds	Collinsville	1.7
E. Alton Wastewater Treatment Plant Add'n	East Alton	3.5
Mississippi River Overlook	East St. Louis	5.7
Edwardsville Water Tower	Edwardsville	1.9
Granite City Fire & Police Department	Granite City	3.1
Granite City Youth Center	Granite City	0.6
River's Edge Industrial Park Improvement	Granite City	0.8
Hamel/Worden Bike Trail	Hamel/Worden	1.0
MidAmerica St. Louis Airport Runway Repairs	Mascoutah	0.5
Community Unit School District Improvements	O'Fallon	0.5
Elevated Water Storage Tanks (2)	O'Fallon	5.0
Family Sportsplex Ph. 2	O'Fallon	8.0
Water Booster Pump Station	O'Fallon	1.0
Air Force Global Logistics Support Center	Scott AFB	8.0
Shiloh Hall (120-person dorm)	Scott AFB	18.0
Meachum Crossing	Venice	15.6
Worden/Staunton Bike Trail	Worden	0.9
TOTAL		132.7
Source: Southwestern Illinois Development Foundation		

POTLIGHT ON SCOTT AIR FORCE BASE

Projects at Scott AFB Total \$400 Million over Five Years

In the five years since our region celebrated the news that Scott Air Force Base had survived the last round of Base Realignment and Closure (BRAC), the Base has continued to be a huge driver of the Southwestern Illinois economy.

The cloud of uncertainty about Scott's future during the BRAC process, which had caused investment at the Base to grind to a halt by end of 2004, quickly evaporated when the BRAC recommendations were announced. That was when our region got the news that Scott AFB would not only remain intact but also was slated to receive new missions as part of the military's consolidation. The level of investment activity began to pick up during late 2005 and early 2006, and continued to accelerate during the next several years.

The Leadership Council's 2006-2007 *Market Review and Investment Update* included \$36.7 million in non-housing related projects that were under construction or had recently been completed at the base. By the 2007-2008 edition of the *Market Review* that number had soared to more than \$160 million, and an additional \$20.4 million in newly announced projects had yet to break ground. This current edition reports that as of the end of 2009, almost \$180 million in non-housing related projects were still under construction, and another \$20 million were in the planning stages. In all, almost a quarter of a billion dollars in projects had been completed, remained under construction or been announced over the five year period, and another \$160 million was being invested in housing at the base.

Officials with Scott AFB put their total investments over the past five years at approximately \$400 million. That's an impressive number that supports countless construction and secondary jobs in our region during these challenging economic times.

Of course, those hard investment dollars are just one of the many ways that Scott AFB positively impacts our economy. The base's total economic impact on our region is estimated at \$2.2 billion annually, and the citizens and military personnel that the base employs, and their families, also make their own significant contributions to our region. These men and women are active in our schools and churches, volunteer organizations and local politics, and we salute them for their willingness to serve not only our country, but also our communities and region.



▲ The \$15 million, 28,000-square-foot administrative facility for U.S. TRANSCOM's Headquarters and Air Mobility Command.



▲ The \$18.4 million Shiloh Dorm at Scott AFB, which was finished in February 2009.



▶ The \$8 million 635th Supply Chain Management Group facility, which falls under Global Logistics Support Center. Completed in late 2008, the GLSC was a part of the 2005 round of BRAC to reorganize the Air Force supply chain management process.

PUBLIC SECTOR TRANSPORTATION

Communities throughout Madison and St. Clair counties continued to see significant activity in the area of public sector transportation investments, in part as stimulus dollars flowed into the area to fund shovel-ready projects. With the Illinois Department of Transportation allocating additional dollars for projects here in the Metro East as part of its FY 2011-2016 Multi-Year Plan, many of the recently announced projects are expected to move forward in the coming year.

Recently completed projects include road and bridge improvements, enhancements to the MetroLink system, new rail improvements at Tri-City Regional Port District's River's Edge business park and extensions to Madison County Transit's bikeway system.

Much of the site preparation work was completed for the New Mississippi River Bridge in 2009 so that the official ground breaking could take place in early 2010. With a total estimated cost of \$670 million, the new bridge remains the largest infrastructure project in the region. An additional \$123 million will be invested in the related relocation of IL Route 3.



▲ Both Missouri and Illinois were well represented at the official groundbreaking for the New Mississippi River Bridge. Left to right: MoDOT's Pete Rahn, St. Louis Mayor Francis Slay, Missouri Reps. Russ Carnahan and William "Lacy" Clay, U.S. Secretary of Transportation Ray LaHood, Congressman Jerry Costello, Illinois Governor Pat Quinn, Illinois Secretary of Transportation Gary Hannig, St. Clair County Board Chairman Mark Kern and Congressman John Shimkus.

While investments in public sector transportation projects are not counted toward the annual investment totals reported in each edition of the *Market Review & Investment Update*, continuing infrastructure investments is good news for our region as it helps to pave the way for additional development in the Metro East.

RECENTLY COMPLETED MAJOR TRANSPORTATION PROJECTS:

Project	Community	\$Mil.
Pedestrian Bridge for City of Alton	Alton	2.5
Resurfacing State Street to Lockhaven Road	Alton	2.1
Frank Scott Parkway West Widening	Belleville	3.6
Installation of Traffic Signals at Sandwedge Dr. & IL 159	Belleville	0.6
IL Route 111/140	Bethalto	0.5
I-255 Patching and Striping	Collinsville	1.4
I-255/IL 255 Guardrail Repair	Collinsville	1.6
Intersection of Horseshoe Lake Road & Eastport Plaza Drive	Collinsville	1.2
MetroLink Paint Facility	East St. Louis	4.0
MLK Bridge Repair	East St. Louis	1.4
East Lake Drive Rebuilding	Edwardsville	0.7
Goshen Road Improvements - Phase 3	Edwardsville	0.5
Schwarz Street Reconstruction	Edwardsville	0.5
Resurfacing of S. University Dr. from Stadium Dr. to Parking Lot #1	Edwardsville / SIUE	2.0
Lexington Road	Fairview Heights	0.5
MetroLink Turnaround	Fairview Heights	13.0
Bender Road Reconstruction	Fort Russel Township	0.6
Welcome Center, Restrooms & Park Lot	Hartford	1.9
Frank Watson Parkway	Highland	2.0
IL 160 from Lemon Street to West Deal Street	Highland	0.9
Intersection Roundabout	Highland	1.9
IL 203 Pavement Removal and Replacement	Madison	1.1
I-270 from Mississippi River to IL 157 (Part A)	Madison Co.	8.4
Kuba Bridge (TR 67) Libbra Road	Madison Co.	0.8
Nature Trail Extension to Granite City	Madison Co.	1.5
Troy-O'Fallon Road	Madison Co.	1.4
Whitey Hamilton Bridge (Wolf Road/Foster Tnshp.)	Madison Co.	0.8
IL 4 Resurfacing	Marine	1.1
Obernuefemann Road Improvements	O'Fallon	1.1
Route 270 and Route 111 Interchange	Pontoon Beach	
North Loop Track (River's Edge)	Rivers Edge	2.5
IL 3 Venice Subway	Venice	0.6
TOTAL		62.7

Projects listed were completed between October 2008 and December 2009 and represent just a sampling of the various projects completed during that timeframe.

SAMPLING OF MAJOR PROJECTS PLANNED OR UNDER CONSTRUCTION:

Project	Community	\$Mil.
17th Street Extension	Belleville	1.1
17th Street Widening, West Main to Bunsen	Belleville	3.2
Bridge Replacement/Resurfacing Cleveland Ave., State St. to IL 159	Belleville	2.0
Frank Scott Parkway West	Belleville	1.9
Frank Scott Parkway West Center Turn Lane	Belleville	0.6
Frank Scott Parkway West Upgrade, Belleville West High & Concordia Rd.	Belleville	0.6
Royal Heights Rd. Overlay, IL 161 to North Belt West	Belleville	0.5
West Washington Street / Centerville Avenue Resurfacing	Belleville	0.9
Bridge over I-255 Extending W. Corbin St.	Bethalto	4.2
West Corbin Phase II (Bethalto)	Bethalto	3.1
Church Road	Centerville	1.0
IL 159 - Phase 1 (Southern section)	Collinsville	14.3
I-55/70 Pavement Patching	Collinsville	1.2
IL 159 - Resurfacing	Collinsville	0.9
Main Street	East Alton	1.1
17th Street	East St. Louis	0.6
New Poag Rd. to St. Louis Street (resurfacing)	Edwardsville	1.8
University Park Drive Improvements	Edwardsville / SIUE	0.8
Old Collinsville Road	Fairview Heights	1.2
Pleasant Ridge Road	Fairview Heights	2.2
Pleasant Ridge Road Bridge	Fairview Heights	0.7
Glen Crossing Road (Glen Carbon)	Glen Carbon	5.8
Alton Bypass (extending to U.S. 67)	Godfrey	22.2
Ramp connecting IL 67 & IL 255	Godfrey	3.8
I-255 bridge 2 (Humbert Road)	Godfrey	5.0
I-255 bridge 3 (Route 111)	Godfrey	5.0
I-255 bridge over Union Pacific & Kansas City Southern Railroad Tracks	Godfrey	6.5
Crosstown Road - Phase 1	Godfrey	6.0
IL Route 100 Resurfacing from State St. to Lockhaven Road	Godfrey	3.5
Piasa Creek Bridge Replacement	Godfrey	1.8
Stamper & Pierce Lane Project - Phase 3	Godfrey	2.2
Stamper & Pierce Lane Project - Phase 4	Godfrey	1.0
Robbins Road Improvement	Hartford	3.4
Koefly Lane	Highland	2.6
Iberg Road Reconstruction	Highland	1.6
New Mississippi River Bridge	IL / MO	670.0
Poplar Street Bridge	IL / MO	12.0
St. Louis Street Improvements - Phase 2	Lebanon	0.9
IL 3 Relocation (2.9 mi. roadway constr., etc.) (Part A)	Madison/St. Clair Cos.	75.0
IL 3 Relocation (2.9 mile roadway construction, etc.) (Part B)	Madison/St. Clair Cos.	48.0
Confluence Bikeway Extension to McKinley Bridge	Madison Co.	0.7
I-255 from Collinsville Rd. to I-270 (resurfacing, bridge & ramp repair)	Madison Co.	33.0
I-270 from Mississippi River to IL 157 (Part B)	Madison Co.	7.8
I-270 over Chain of Rocks Canal (bridge replacement/rehabilitation)	Madison Co.	100.0
I-55 from .3 miles north of I-55/70/270 to .5 miles north of IL 4 (Part A)	Madison Co.	30.0
I-55 from .3 miles north of I-55/70/270 to .5 miles north of IL 4 (Part B)	Madison Co.	15.0
Nickel Plate Trail Extension to Alhambra	Madison Co.	1.0
Park-Ride Lot at River's Edge	Madison Co.	1.7
Watershed Trail Extension	Madison Co.	0.5
Milburn School Road - Phase 4	O'Fallon	1.2
Old Collinsville Road Improvements	O'Fallon	2.9
Porter & Simmons Roads Roundabout	O'Fallon	0.4
Venita Drive/Hwy. 50 Intersection Reconstruction	O'Fallon	7.3
Pontoon Bridge Road / Nameoki Road (IL 203) overpass	Pontoon Beach	28.6
Rail Track to Serve new Mississippi River Harbor	Rivers Edge	6.0
Bissell Street Construction (River's Edge)	Rivers Edge	1.6
Sauget Business Boulevard	Sauget	5.0
Lebanon Avenue	Shiloh	1.3
Station Road Improvements	Shiloh	4.2
Seibert Road Improvements	Shiloh	1.0
Concordia Church Road	St. Clair Co.	2.0
I-64 from 15th to .3 miles west of IL 157 (resurfacing, bridge repair, underdrains, engineering)	St. Clair Co.	32.9
IL 15 from IL 13 to 1.4 miles east of IL 159 at U.P. RR	St. Clair Co.	15.0
Fullerton Road Bi-Directional Turn Lane	Swansea	0.8
Huntwood Road (3 lane upgrade & sidewalks)	Swansea	3.2
IL Rte. 159 Pedestrian Way Improvements	Swansea	0.6
I-55/70 and IL Rte. 162 (bridge replacement and frontage road replacement)	Troy	23.5
Broadway Avenue	Venice	0.6
Edwardsville Road	Wood River	3.0
N. Old St. Louis Road - Phase 2	Wood River	1.2
Bridge in Rural Worden	Worden	1.4
TOTAL		1253.4

RESIDENTIAL DEVELOPMENT

Housing Market Update

The Metro East housing industry continues to be hit by the lingering recession, but it wasn't all bad news over the past couple of years. While total home sales fell again in both counties, Madison County saw a drop of 12.8 percent from 2007 to 2008, but only a 2.3 percent drop from 2008 to 2009. St. Clair County's numbers were off by marginal amounts, declining by just 2.3 percent from 2007 to 2008 and less than one percent from 2008 to 2009.

On the construction side of the industry, the overall trend mirrored that of the country, yet interestingly it played out a little differently for Madison and St. Clair counties. Madison County saw a 23 percent drop in housing starts from 2007 to 2008, followed by a more significant drop in 2009, for a total decrease of 55 percent over the two years. In contrast, housing starts in St. Clair County declined 42 percent from 2007 to 2008, then fell only 7.5 percent during 2009, for a total decrease of 47 percent.

Despite the pull back in this sector, 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 Department of Housing Economics, new home construction within Madison and St. Clair counties still represents approximately:

- \$190.3 million in local income,
- \$19.8 million in local taxes, and
- 2,922 local jobs.

Data provided by the Greater Gateway Association of Realtors indicates median home prices in Madison County dropped again since 2007, falling from \$121,250 to \$112,550 at the end of the 4th Quarter of 2009. After posting an increase in 2007, St. Clair County also followed the national downward trend, with the median price falling from \$135,000 to \$115,000. On a more positive note, the *St. Louis Post-Dispatch* recently reported that the median for Madison County homes had leveled off to \$110,500 by June 2010, while median home prices in St. Clair County had climbed back to \$136,000. Industry professionals caution that there can be much fluctuation from quarter to quarter, so these numbers are really meant to provide just a snapshot in time.

Single Family Home Sales

	2007	2008	2009
Madison County	3,325	2,898	2,832
St. Clair County	2,475	2,416	2,393

Source: Southern Illinois Regional Multi-listing service, Realtor Association of Southern Illinois and Greater Gateway Association of Realtors

Residential Building Housing Starts

	2007	2008	2009
Madison County	791	603	359
Bethalto	32	13	0
Collinsville	33	33	11
Edwardsville	58	37	29
Glen Carbon	40	33	29
Godfrey	73	59	8
Granite City	67	54	26
Highland	70	65	32
Maryville	119	75	75
Troy	70	68	36
Other Communities	53	31	22
Unincorporated	176	135	91
St. Clair County	1028	587	543
Belleville	178	80	64
Fairview Heights	106	43	64
Mascoutah	117	56	82
Millstadt	37	18	10
O'Fallon	201	131	100
Shiloh	92	41	48
Smithton	30	16	16
Swansea	94	70	15
Other Communities	42	28	58
Unincorporated	131	104	86

Note: Only communities with 25 or more housing starts in one of the last three years are listed.

Primary Source: Market Graphics



DEMOGRAPHICS & LABOR FORCE

Demographics

Madison and St. Clair counties remain the second most populous region in the State of Illinois with a combined population that was estimated to reach 531,545 in 2009. Median household income continues to rise for area residents, growing from \$40,345 in 2000 to an estimated \$45,593 in 2005 and \$49,376 in 2009. Per capita income also is on the rise, up from \$19,721 in 2000 to \$24,818 today. The percentage of individuals earning a high school diploma or higher is holding steady at just over 83 percent, and the percentage earning a bachelor's degree or higher is estimated to be a little more than 20 percent for 2009.

Labor Force & Unemployment

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 263,065 individuals in 2009, down from 267,653 in 2008, while the unemployment rate rose from 7.4 percent the previous year to 10.6 percent in 2009. This labor force accounts for approximately 18 percent of the St. Louis Standard Metropolitan Statistical Area (SMSA) total.

SOUTHWESTERN ILLINOIS LABOR FORCE		2009
Madison County		139,060
St. Clair County		124,087
Combined		263,147
TOTAL EMPLOYED		
Madison County		124,917
St. Clair County		110,609
Combined		235,526
UNEMPLOYMENT RATE		
Madison County		10.2
St. Clair County		10.9
Combined		10.6

Source: Illinois Dept. of Employment Security

MADISON AND ST. CLAIR COUNTIES BY THE NUMBERS

	2000	Projected 2009
Population		
<i>Total Population</i>		
Madison County	258,941	268,955
St. Clair County	256,082	262,590
Combined	515,023	531,545
<i>Population by Age</i>		
<i>Under 18 Years</i>		
Madison County	64,437	62,499
St. Clair County	70,925	67,496
Combined	135,362	129,995
<i>65 Years and Over</i>		
Madison County	36,923	38,042
St. Clair County	33,709	33,235
Combined	70,632	71,277
<i>Median Age</i>		
Madison County	36.9	37.4
St. Clair County	35.3	35.7
Combined	36.1	36.5
Income		
<i>Median Household Income (dollars)</i>		
Madison County	41,541	51,525
St. Clair County	39,148	47,363
Combined	40,345	49,376
<i>Per Capita Income (dollars)</i>		
Madison County	20,509	25,982
St. Clair County	18,932	23,626
Combined	19,721	24,818
Educational Attainment (Age 25+)		
<i>Percent High School Graduate or Higher</i>		
Madison County	84.3	84.7
St. Clair County	80.9	81.6
Combined	82.6	83.2
<i>Percent Bachelor's Degree or Higher</i>		
Madison County	19.2	20.0
St. Clair County	19.3	20.1
Combined	19.3	20.1

Source: 2009 Claritas, Inc.

PRIVATE SECTOR EMPLOYMENT

By Industrial Classification

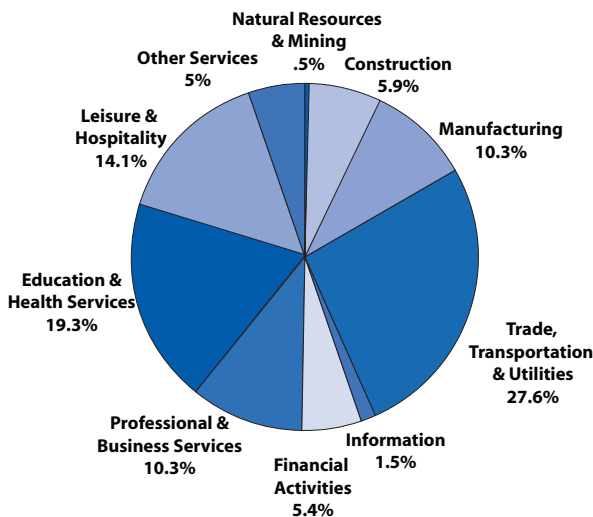
At the end of 2009, there were 11,048 private sector employers in Madison and St. Clair counties, which is comparable to what was reported at the end of 2008. However, Southwestern Illinois saw its private sector employment rates decrease with a loss of 7,887 jobs. While the number of goods-producing jobs in Southwestern Illinois had remained relatively stable in recent years, from 2008 to the end of 2009, the sector experienced a loss of 4,006 jobs. Service-providing jobs also decreased, but continue to represent just over 83 percent of the total number of jobs in Southwestern Illinois.

Southwestern Illinois 2009 Workforce

Work force is defined as those who work in the area represented, but may live elsewhere. A total of 235,526 individuals are employed in Madison and St. Clair counties with 150,411 of these in the private sector. As in recent years, the Trade/Transportation/Utilities sector in 2009 accounted for more than one quarter of the total number of jobs in Southwestern Illinois, while Education and Health Services was the next largest sector with 19.3 percent of the jobs.

Manufacturing is down 2 percent, while construction jobs have dropped by approximately 19 percent since 2008, a drop that would have been larger if not for continuing investments at Scott Air Force Base and huge projects like ConocoPhillips and U.S. Steel, Granite City Works.

Jobs by Industry Sector



(Totals may not equal 100 percent due to rounding)

No. of Firms - 2009	Madison	St. Clair	Total
GOODS-PRODUCING	1,059	832	1,891
Natural Resources and Mining	51	39	90
Agriculture, Forestry, Fishing & Hunting	37	28	65
Mining, Quarrying, & Oil and Gas Extraction	14	11	25
Construction	767	600	1,367
Manufacturing	241	193	434
SERVICE-PROVIDING	4,708	4,449	9,157
Trade, Transportation, and Utilities	1,273	1,216	2,489
Wholesale Trade	266	203	469
Retail Trade	753	790	1,543
Transportation & Warehousing	237	208	445
Utilities	17	15	32
Information	82	81	163
Financial Activities	588	524	1,112
Finance & Insurance	368	322	690
Real Estate & Rental & Leasing	220	202	422
Professional and Business Services	861	863	1,724
Professional, Scientific & Technical Services	533	530	1,063
Management of Companies & Enterprises	18	16	34
Administrative & Support & Waste Mngmt.	310	317	627
Educational and Health Services	618	577	1,195
Educational Services	60	66	126
Health Care & Social Assistance	558	511	1,069
Leisure and Hospitality	650	612	1,262
Arts, Entertainment & Recreation	103	79	182
Accommodation & Food Services	547	533	1,080
Other Services	607	549	1,156
Unclassified	29	27	56
Totals	5,767	5,281	11,048
No. of Employees - 2009	Madison	St. Clair	Total
GOODS-PRODUCING	16,540	8,561	25,101
Natural Resources and Mining	424	398	822
Agriculture, Forestry, Fishing & Hunting	278	323	601
Mining, Quarrying, & Oil and Gas Extraction	146	75	221
Construction	5,503	3,331	8,834
Manufacturing	10,613	4,832	15,445
SERVICE-PROVIDING	59,296	66,014	125,310
Trade, Transportation, and Utilities	19,680	21,881	41,561
Wholesale Trade	2,805	2,474	5,279
Retail Trade	12,099	13,213	25,312
Transportation & Warehousing	4,306	5,640	9,946
Utilities	470	554	1,024
Information	831	1,375	2,206
Financial Activities	4,461	3,692	8,153
Finance & Insurance	3,483	2,841	6,324
Real Estate & Rental & Leasing	978	851	1,829
Professional and Business Services	6,603	8,903	15,506
Professional, Scientific & Technical Services	3,340	5,763	9,103
Management of Companies & Enterprises	505	491	996
Administrative & Support & Waste Mngmt.	2,758	2,649	5,407
Educational and Health Services	13,509	15,531	29,040
Educational Services	933	1,594	2,527
Health Care & Social Assistance	12,576	13,937	26,513
Leisure and Hospitality	10,727	10,530	21,257
Arts, Entertainment & Recreation	1,582	1,472	3,054
Accommodation & Food Services	9,145	9,058	18,203
Other Services	3,456	4,070	7,526
Unclassified	29	32	61
Totals	75,836	74,575	150,411

Source: Illinois Department of Employment Security (4th Quarter 2009)

TOURISM IMPACT

Tourism continues to be a significant contributor to the Metro East economy, providing jobs for approximately 6,500 individuals and consistently generating annual expenditures of more than \$700 million for Madison & St. Clair counties alone. The two counties are home to several major attractions that draw visitors from near and far. The popular Cahokia Mounds historic site actually had a 22 percent increase in attendance in 2009 compared to 2008, with visitors coming from all 50 states and 80 foreign countries. See the sidebar for a sampling of some of the other popular attractions and their annual attendance numbers for 2009.

The Metro East is also celebrating the recent completion of two significant new additions to its tourism offerings. The Lewis & Clark Confluence Tower in Hartford, Ill., opened in spring 2010. Here, visitors can climb high above the point of departure for the Lewis & Clark expedition to take in the great panoramic view of the Missouri and Mississippi rivers as they converge at a point of historical legend. The Malcolm W. Martin Memorial Park, featuring the Mississippi River Overlook, opened on the East St. Louis riverfront in June 2009, and has been getting rave reviews for the spectacular views it offers of the downtown St. Louis skyline. It's also home to the Gateway Geyser, one of the world's tallest fountains.

TOURISM IMPACT		
Venue	Location	2009 Attendance
Casino Queen	East St. Louis	2.2 million
National Shrine of Our Lady of the Snows	Belleville	1.1 million+
Argosy Casino	Alton	1.159 million
Pere Marquette State Park	Grafton	912,715
Gateway International Raceway	Madison	400,000 (est.)
Gateway Grizzlies Stadium	Sauget	212,203
Cahokia Mounds	Cahokia	317,004
Lewis & Clark Interpretive Center	Hartford	91,044
National Great Rivers Museum	Alton	89,757

Source: Southwestern Illinois Development Foundation



Photo courtesy of the Metro East Park & Recreation District

▲ The new Mississippi River Overlook on the East St. Louis Riverfront reinforces that the best views of the downtown St. Louis skyline can be had in the Metro East.

MAJOR EMPLOYERS

Madison and St. Clair Counties' Top Employers

Scott Air Force Base	Scott Air Force Base	13,249
Walmart/Sam's Club	Madison/St. Clair counties	2,653
SIU Edwardsville	Edwardsville	2,451
Memorial Hospital	Belleville	2,400
U.S. Steel, Granite City Works	Granite City	2,225
Olin Corp.	East Alton	1,821
Southwestern Illinois College	Madison/St. Clair counties	1,700
Midcoast Aviation	Cahokia	1,600
St. Elizabeth's Hospital	Belleville	1,591
Schnuck's Supermarkets	Madison/St. Clair counties	1,500
Southern Illinois Healthcare Foundation	St. Clair County	1,300
Global Brass and Copper, Inc. (Olin Brass)	East Alton	1,240
Southwestern Illinois Health Facilities, Inc. (DBA - Anderson Hospital)	Maryville	1,130
East St. Louis Community School Dist.	East St. Louis	1,130
Alton Community Unit School Dist.	Alton/Godfrey	1,044
Madison County (IL)	Madison County	1,032
Challenge Unlimited	Madison/St. Clair counties	1,025
Edwardsville School District	Madison County	1,009
St. Clair County	St. Clair County	1,000
Gateway Regional Medical Center	Granite City	950
Collinsville School District	Collinsville, Maryville	877
Alton Memorial Hospital	Alton	866
St. Anthony's Health Center	Alton	821
YMCA of Southwestern Illinois	Madison/St. Clair counties	800
ConocoPhillips	Roxana	771
Shop 'N Save	Madison/St. Clair counties	764
Casino Queen Hotel & Casino	East St. Louis	745
Granite City School District #9	Granite City	684
Allsup, Inc.	Belleville	619
Lewis & Clark Community College	Godfrey	577
Belleville Public Elementary School District #118	Belleville	570
Argosy Casino Alton	Alton	570
Triad School District	Troy, Edwardsville, Marine	553
Cahokia School District #187	Cahokia	551
Cooper B-Line, Inc.	Highland & Troy	520
Kraft Foods (Capri-Sun)	Granite City	520
Regions Bank	Madison/St. Clair counties	500
ASF-Keystone	Granite City	500
McKendree University	Madison	465
Belleville Township High School District #201	Belleville	443
Highland Community Unit School District #5	Highland	433
Beverly Farm Foundation	Godfrey	420
IL Dept. of Transportation	Madison/St. Clair counties	403
Basler Electric	Highland	402
American Water Co. Call Center	Alton	390
TheBANK of Edwardsville	Madison/St. Clair counties	376
City of Belleville	Belleville	350
Alton & Southern Railway	Madison/St. Clair counties	350
Metro East Industries	East St. Louis	330
O'Fallon Community Consolidated School District #90	O'Fallon	278

Though not one company, Rivers Edge (old Mel Price Depot) is currently supporting over 850 jobs.

About the Leadership Council Southwestern Illinois

The Leadership Council Southwestern Illinois has been the premier economic development organization for Madison and St. Clair counties since 1983. Our mission is to attract and retain jobs, stimulate capital investment and promote the economic development of Southwestern Illinois by building effective partnerships with leaders in business, industry, government, education and labor. The Council's membership has grown in recent years to approximately 140 top leaders and CEOs from each of those sectors. The diversity of the organization's membership makes it unique within the metropolitan area and the State of Illinois. Cooperation and collaboration among the Leadership Council's members and local community-based organizations have helped positively reshape Southwestern Illinois.

The Council utilizes standing committees and specially convened task forces on critical initiatives for our region. Standing committees include:

- The **Labor-Management Committee (LMC)**, which strives to promote labor-management cooperation.
- The **Military Affairs Committee**, which works to maintain and enhance Scott Air Force Base, a vital economic asset and the largest employer in our community.
- The **Transportation/Infrastructure Committee**, which works closely with the Illinois Department of Transportation in support of regional transportation issues.

In addition, the Council's Executive Director leads the Southwestern Illinois Economic Development Network, which promotes great collaboration and communication between the community and economic development professionals across Southwestern Illinois.

While the Council may be best recognized as having had a hand in many of the major investments and issues in the bi-county area over the past quarter century, its day-to-day activities focused on strategic marketing and public policy also have a significant impact on the development of our region. These initiatives and many more support the Council's overall objective to attract and retain investments in Madison and St. Clair counties. Looking to the future, those activities will take on renewed importance as the Council moves forward with implementation of the Vision 2020 recommendations and continues to play a key role in shaping the future of the region.

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SOUTHWESTERN ILLINOIS DEVELOPMENT FOUNDATION

The Southwestern Illinois Development Foundation works in cooperation with the Leadership Council to promote public discussion about, and scientific research on, Southwestern Illinois in order to attract new industry, retain existing industry and expand existing industry in the region.

FOUNDATION OFFICERS

Otis Cowan, President
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David Oates, Executive Secretary/Treasurer

For more information about the Leadership Council Southwestern Illinois, call (618) 692-9745 or email pmckeehan@siue.edu.

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