



2010
MARKET REVIEW
&
INVESTMENT
UPDATE



LEADERSHIP COUNCIL SOUTHWESTERN ILLINOIS

Building Relationships. Shaping the Future.

Message from the President & Chairman



Dear Friends:

Welcome to the 2010 edition of the Leadership Council's Market Review & Investment Update.

Given the recent sluggishness of the overall economy, you may be surprised to see in the following pages that significant levels of capital investment continued to flow through Madison and St. Clair counties this past year. In fact, projects in various stages of planning and construction added up to \$6.56 billion, while public sector transportation projects accounted for another \$1.4 billion in Southwestern Illinois.

The strength of these numbers is a clear signal of the resiliency of the Metro East region. The health of our capital investment pipeline during this past year reflects the commitment of key stakeholders in various sectors of our economy who continue to invest in our communities. Those investments are being made by big industry and small businesses, and by educational institutions and healthcare facilities. They are coming from our public sector partners who are continuing to expand our vital infrastructure, improve our region's flood protection systems, and enhance our region's largest employer, Scott Air Force Base.

The Leadership Council is pleased to shine a spotlight on all of this economic activity that provides work for our skilled labor force, supports our region's families, strengthens our communities and helps fuel our economy. We also acknowledge that the investments we're highlighting are occurring here in Southwestern Illinois because of the hard work from our elected officials, public institutions and those that have been willing to invest on our economic foundation for many years. The same commitment and collaboration that helped to build that foundation will be vital for our region's continued growth and development as we implement our Southwestern Illinois Vision 2020 initiative and pursue opportunities to replenish our capital investment pipeline in the coming years.

We look forward to working with our members and regional partners in business, industry, government, education and labor as, together, we rise to the challenge.

Sincerely,



Gerry Schuetzenhofer
President, 2011



Mark Tade
Chairman, 2011



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.

2010 HIGHLIGHTS

Public Total: \$767.3 million

- More than **70 separate projects**, the most of all the sectors
- Over **\$600 million** in projects completed or under construction

Industrial Total: \$4.4 billion

- Almost **\$4 billion** under construction
- The **\$3.6 billion** ConocoPhillips project remains the region's largest
- 7.6 percent increase in announced projects, with almost **half a billion dollars** in work yet to move forward

Office Total: \$155.2 million

- **17.6 percent increase** in projects under construction
- 7 percent increase in announced projects, which total almost **\$142 million** in future construction activity

Institutional Total: \$216 million

- Over **\$100 million** under construction
- **\$117 million** being invested in healthcare facilities
- **\$78 million** in senior housing projects

Educational Total: \$493 million

- Up **2.3 percent** over the prior year, education is the only sector showing an overall increase in total investments
- Top five projects represent almost half of the total being invested and range from **\$29 million** in East St. Louis school construction to the **\$79 million** Science Building at SIUE
- Edwardsville is the most active community with **21 projects**

Commercial Total: \$494.7 million

- 55 total projects representing almost **half a billion dollars** in investments
- 9 projects over **\$10 million** taking shape across the region
- Almost **\$300 million** under construction during 2010

GRAND TOTAL: \$6.56 BILLION

Total Announced: \$956.3 million • Total Under Construction: \$4.69 billion • Total Completed: \$919.4 million

Top ten completed projects, projects under construction and announced projects

Completed Projects			Projects Under Construction			Announced Projects		
Project	Community	\$Mil.	Project	Community	\$Mil.	Project	Community	\$Mil.
Abengoa Bioenergy	Madison	244.0	WRB Refining LLC Wood River Refinery Coke Oven	Roxana	3,600.0	Hydroelectric Power Plant	Alton	425.0
U.S. TRANSCOM, SDDC, Joint Intelligence Ops Center	Scott AFB	130.0	Belleville Crossing Shopping Center	Belleville	90.0	Regency Park Corporate Campus North - Office Park with Lake	O'Fallon	55.2
Green Mount Crossing	Shiloh	90.0	Phase I Combined Sewer Overflow Treatment System	Belleville	85.0	American Red Cross Headquarters	Edwardsville	50.0
Alton Memorial Hospital - Duncan Wing	Alton	45.0	SIUE Science Building	Edwardsville/SIUE	79.0	Illinois State Police Crime Lab	Belleville	39.5
Belleville East High School Renovations	Belleville	37.0	Edwardsville Crossing	Edwardsville/Glen Carbon	58.0	Port of East. St. Louis Redevelopment Project	E. St. Louis	35.0
375th Medical Group Facilities Upgrade	Scott AFB	35.8	Chain of Rocks Canal Mitigation Measures	Madison County	56.3	Gateway Village Shopping Center	Granite City	30.0
Wastewater Treatment Facility Expansion	Swansea	21.0	Mascoutah High School	Mascoutah	55.0	Family Sportsplex Aquatic Center	O'Fallon	20.0
Army Reserve Center at River's Edge	Granite City	17.0	Belle Valley District 119 Middle/Elementary School	Belleville	39.5	Delmar Gardens Skilled Nursing Center	O'Fallon	20.0
SIUE Student Success Center	Edwardsville	16.6	Granite Park Center anchored by Lowe's	Granite City	35.0	Wood River Landing	Wood River	19.5
National Great Rivers Research and Education Center - Phase II	Alton	16.3	East. St. Louis School Construction	E. St. Louis	29.0	Housing Projects in Madison and Venice	Madison Co.	16.6

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 2010. 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.

INDUSTRIAL INVESTMENTS

GRAND TOTAL \$4.4 Billion

Investments in the industrial sector continue to far outpace other sectors in Southwestern Illinois, largely the result of recent, ongoing and planned investments in energy production facilities. Chief among these is the \$3.6 billion ConocoPhillips expansion at its Wood River refinery, which remains the largest construction project in the Metro East and is expected to be completed before the end of 2011.

Other notable energy-related investments include the \$244 million ethanol plant completed by Abengoa Bioenergy at Tri-City Regional Port District in early 2010 and the planned \$425 million hydroelectric plant to be built in Alton. While smaller in terms of dollars, planned projects such as the Port of East St. Louis and the 2010 announcement of Boeing's new manufacturing facility at MidAmerica St. Louis Airport also are worthy of mention due to their potential to attract a significant number of new jobs and investment in our region.

In all, almost \$4 billion in industrial projects were underway during 2010, helping our construction industry to weather the economic downturn. And, while total investment in this sector was down approximately 11 percent in 2010 compared to 2009, the value of announced projects actually increased by 7.6 percent, representing one of only two sectors showing growth among projects yet to break ground.

PROJECTS ANNOUNCED		
Project	Community	\$Mil.
Hydroelectric Power Plant	Alton	425.0
Port of East St. Louis project - redevelop old industrial site and build in River's Edge Redevelopment Zone	E. St. Louis	35.0
Boeing Co. / MidAmerica St. Louis Airport	Mascoutah	10.0
TOTAL		470.0
Source: Southwestern Illinois Development Foundation		

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Prairie Farms Expansion	Granite City	11.3
WRB Refining LLC Wood River Refinery Coke Oven	Roxana	3,600.0
BP Remediation of Amoco Facility	Wood River	100.0
TOTAL		3,711.3
Source: Southwestern Illinois Development Foundation		

COMPLETED PROJECTS		
Project	Community	\$Mil.
Commercial storage building	Granite City	0.7
U.S. Steel Desulphurization Facility	Granite City	10.0
Abengoa Bioenergy	Madison	244.0
TOTAL		258.3
Source: Southwestern Illinois Development Foundation		



▲ In August 2010, Boeing announced its plans to lease the existing warehouse space at MidAmerica St. Louis Airport and invest \$10 million converting it to a manufacturing facility. Left to right: seated - St. Clair County Board Chairman Mark Kern and Boeing Defense, Space & Security (BDS) President and CEO Dennis Muilenburg sign a ceremonial copy of the lease as U.S. Rep. John Shimkus (R-III.), Illinois Gov. Pat Quinn, U.S. Rep. Jerry Costello (D-III.), and U.S. Sen. Dick Durbin (D-III.) look on.



▲ The \$244 million Abengoa ethanol facility in Madison officially began operations in early 2010.

PUBLIC INVESTMENTS

GRAND TOTAL: \$767.3 Million

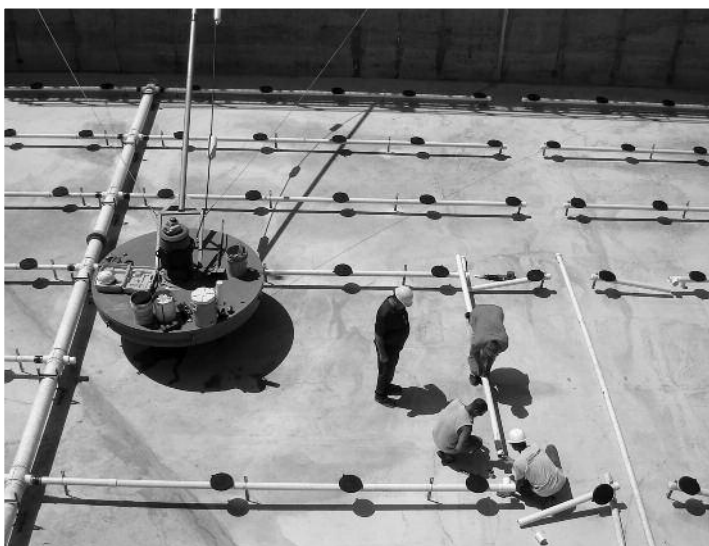
In all, there were 76 publicly funded, non-transportation projects identified in 2010, representing total investments in excess of three-quarters of a billion dollars.

The number of projects surpasses that of any other sector, and the fact that more than \$600 million of those projects were under construction or completed last year illustrates that state and federal stimulus dollars helped to fuel our economy in recent months.

With more than a dozen projects totaling almost \$220 million, Scott Air Force Base also remained a hub of construction activity in the past year as it continues to be a major economic driver in the St. Louis metropolitan area. It also was home to the largest public investment on this year's list, the new \$130 million Joint Intelligence Operations Center, which was completed in 2010.

PROJECTS ANNOUNCED		
Project	Community	\$Mil.
Belleville Metro East Forensic Lab*	Belleville	2.5
Bike Trail (North End Park to Mem. Hosp. MetroLink Station)*	Belleville	7.0
St. Clair County Jail Addition*	Belleville	11.0
Streetscape (North Illinois St.)*	Belleville	3.0
Streetscape (West Main Gateway)*	Belleville	2.0
IL State Police crime lab*	Belleville	39.5
St. Louis Downtown Airport Primary Runway Widening & Rehab*	Cahokia/Sauget	7.0
City Park	Edwardsville	0.7
Water Tower at Pierce and Winter lanes (by Jersey County Rural Water's pump station)	Godfrey	0.8
Old YMCA Renovation	Granite City	5.0
Housing Projects in Madison and Venice	Madison Co.	16.6
MCT -Troy, IL Park-Ride Lot*	Madison Co.	1.0
Radio System Upgrade (police, fire, emergency, etc.)	Madison Co.	4.0
Madison Co Transit-MEPRD Troy-O'Fallon Trail	Madison Co./St. Clair Co.	6.0
Pleasant Ridge Park	Maryville	0.4
Fiber Optic System Expansion*	Mascoutah	0.7
Family Sportsplex Ph. 4 (Aquatic Ctr.)*	O'Fallon	20.0
Public Library	O'Fallon	11.0
Shiloh Valley Recreation & Conservation Area	Shiloh	0.8
Madison Avenue Sewer Separation	Wood River	8.0
TOTAL		147.0

Source: Southwestern Illinois Development Foundation



▲ Work underway on Swansea's Waste Water Treatment Plant during 2010



▶ The pavilion at the new Family Sportsplex in O'Fallon



▲ The new Joint Intelligence Operations Center at Scott AFB

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Melvin Price Locks & Dam 26	Alton	0.5
Phase I Combined Sewer Overflow Treatment System	Belleville	85.0
Sanitary Sewer Projects Eagle Park Acres/Belleville	Belleville	1.7
St. Louis Downtown Airport Fire & Rescue Station	Cahokia/Sauget	4.6
Madison County Community Development Building & expansion of MCT's Nickel Plate bike trail along Troy Road	E. Alton	0.8
Chain of Rocks Locks 27 Gate Repairs	Edwardsville	4.0
Locks #27 Miter Gates Installation, etc.	Granite City	27.0
North Levee Berms near Chain of Rocks Canal	Granite City	27.7
21st Homes	Granite City	2.4
Fiber-Optic Network	Granite City	5.0
Chain of Rocks Canal Mitigation Measures	Highland	15.7
Wood River Levee Phases I and 2	Madison Co.	56.3
Wood River Levee Relief Wells	Madison Co.	15.3
Metro East Sanitary District Levees design/engineering	Madison Co.	2.4
Lakeview Acres Road Improvements	Madison Co./St. Clair Co.	3.0
Water System Improvements	Maryville	3.5
Family Sportsplex Ph. 3 (ball fields, 2 soccer fields, parking, playground, bathroom pavilion, maintenance pavilion & trails)	Mascoutah	0.7
Parkway Lakeside Apartments	O'Fallon	15.0
Levee District Seepage Remediation	O'Fallon	29.0
New Wastwater Treatment Plant	Prairie Du Pont	0.5
Aeromedical Evacuation Squadron Center	Roxana	6.5
Heritage Airport	Scott AFB	7.4
Roof repairs, office renovations & replacement of air handling unit	Scott AFB	1.5
Wood River Levee District Relief Wells Construction	Scott AFB	1.3
	Wood River	2.6
TOTAL		319.3
Source: Southwestern Illinois Development Foundation		

COMPLETED PROJECTS		
Project	Community	\$Mil.
Alton Landmarks Crossing (pedestrian bridge)	Alton	2.5
Belle Valley Industrial Park office-warehouse	Belleville	2.3
Illinois American Water Company Projects	Belleville	2.5
Public Square Improvements	Belleville	2.0
Sanitation Dept./Storage Bldg.	Belleville	2.8
St. Louis Downtown Airport Runway Extension & Service Road	Cahokia	2.7
Gateway Community Hospital demolition	E. St. Louis	0.7
Malcolm W. Martin Memorial Park	E. St. Louis	1.1
Southwestern Illinois Correctional Facility (expansion)	E. St. Louis	0.8
Army Reserve Center at River's Edge	Granite City	17.0
Water Tower, Water System Improvements	Hamel	1.3
Confluence Tower (Phase 3)	Hartford	3.6
Tri-Township Water District Improvements	Highland	1.5
Housing Project in Venice	Madison Co.	15.5
Drost Park Improvements	Maryville	0.7
Ground Water Storage Tank, booster pump station and install 2 water softeners	Maryville	2.5
Vetta Sports	O'Fallon	2.0
375th AW and 126th ANG Security Forces Complex	Scott AFB	12.1
375th Medical Group Facilities Upgrade	Scott AFB	35.8
5yr Repair Bottom of 6' Culvert, Pryor Dr.	Scott AFB	0.5
Airlift Squadron Ops/Parts Storage - 932nd Operations Group Bldg.	Scott AFB	10.2
Child Development Center	Scott AFB	7.2
Culvert repair on Pryor Drive	Scott AFB	0.5
Installation of flightline cable barrier system	Scott AFB	0.7
Re-Configure/Mold Remediation of O'Fallon Hall	Scott AFB	3.2
Regrade South Drainage Ditches	Scott AFB	0.8
U.S.TRANSCOM, SDDC, Joint Intelligence Ops Ctr.	Scott AFB	130.0
IL National Guard Readiness Center	Scott AFB / Shiloh	8.5
Illinois National Guard Readiness Center	Shiloh	8.5
Wastewater Treatment Facility Expansion	Swansea	21.0
Worden City Park	Worden	0.5
TOTAL		301.0
Source: Southwestern Illinois Development Foundation		

EDUCATIONAL INVESTMENTS

GRAND TOTAL: \$493 Million

The educational sector continues to be very active with close to half a billion dollars in projects in varying stages of construction, and it is the only sector showing an increase in total investments, which are up 2.3 percent.

Edwardsville tops the list as the most active community with 21 projects representing almost \$173 million. Belleville also is seeing significant activity with 10 separate projects, over \$100 million of which were under construction or completed during 2010. The top five projects represent investments in educational facilities serving all ages across the region, including the \$79 million Science Building at SIUE, the \$55 million Mascoutah High School, the \$39.5 million Belle Valley District 119 Middle/Elementary School, \$37 million in renovations at Belleville East High School and \$29 million in East St. Louis construction.

In all, investments were pretty even split between K-12 and higher education projects, with \$232 million in K-12 and \$261 million in higher education.



▲ McKendree University broke ground for its new residence halls during 2010.



▲ Work underway on the new Mascoutah High School.

PROJECTS ANNOUNCED

Project	Community	\$Mil.
SIUE Dental School multidisciplinary lab*	Alton	4.5
E. St. Louis Community College Center Capital Improvements	E. St. Louis	2.1
Edwardsville School District 7 National Corn to Ethanol Research Center Fractionation Project	Edwardsville	0.9
Dental MDL Clinic	Edwardsville / SIUE	4.7
Greek Village - housing renovation	Edwardsville / SIUE	4.5
Planning for SIUE Athletic office building*	Edwardsville / SIUE	6.9
SIUE Art and Design Building*	Edwardsville / SIUE	4.0
SIUE High Tech Simulation Lab for Advance Practice Nursing Students	Edwardsville / SIUE	14.3
SIUE Peck Hall - Office/Classroom Renovation (windows)	Edwardsville / SIUE	0.5
SIUE Vadalabene Center - expansion	Edwardsville / SIUE	2.8
Freeburg High School addition and new athletic fields	Edwardsville / SIUE	4.5
Father McGivney Catholic High School at Bouse Rd & Old Troy Rd*	Freeburg	4.9
Lewis & Clark Community College Daycare*	Glen Carbon	10.0
Lewis & Clark Community College Engineering Complex*	Godfrey / LCCC	1.7
Elementary School building	Godfrey / LCCC	1.5
O'Fallon School District #90 Renovations*	Lebanon	7.5
	O'Fallon	15.0

TOTAL 90.3

Source: Southwestern Illinois Development Foundation

UNDER CONSTRUCTION

Project	Community	\$Mil.
Hayner Public Library - Youth Library building renovation	Alton	0.8
Althoff Catholic High School Renovations	Belleville	2.6
Belle Valley District 119 Middle/Elementary School (Green Mount Rd. & Amann Drive)	Belleville	39.5
Ellis Elementary School	Belleville	2.5
Lindenwood University Cafeteria Renovation	Belleville	1.0
East St. Louis School Construction	E. St. Louis	29.0
East St. Louis' Career & Technical Education Academy	E. St. Louis	8.7
Metro-East Lutheran High School	Edwardsville	2.2
SIUE School of Engineering Expansion	Edwardsville / SIUE	11.4
SIUE Science Building	Edwardsville / SIUE	79.0
Lewis & Clark Hatheway Hall	Godfrey / LCCC	12.0
McKendree University Residence Hall	Lebanon	14.0
Mascoutah High School	Mascoutah	55.0
Central Elementary School	O'Fallon	3.0
Jr. High/High School Cafeteria/Commons	Roxana	4.0

TOTAL 264.7

Source: Southwestern Illinois Development Foundation

COMPLETED PROJECTS

Project	Community	\$Mil.
National Great Rivers Research and Education Center (Phase 1)	Alton	6.7
National Great Rivers Research and Education Center - Phase II new Confluence Field Station	Alton	16.3
Phase 4 - Lovejoy Elementary School Renovations	Alton	9.2
SIUE School of Dental Educational Testing Facility	Alton	1.1
Belleville East High School Cafeteria & Media Center	Belleville	7.5
Belleville East High School Renovations	Belleville	37.0
Emge Junior High School	Belleville	1.5
Lindenwood University Main Gym Renovation and campus fitness center	Belleville	1.0
Lindenwood University upgrades and additions	Belleville	10.0
Lindenwood University Welcome Center	Belleville	1.2
Multiple Roof Replacements	Edwardsville / SIUE	4.3
SIUE Biology Labs and GIS Suite at Bio-Tech Lab Incubator (included Dept of Geography GIS Renovation)	Edwardsville / SIUE	1.5
SIUE Cougar Village Apartment	Edwardsville / SIUE	1.0
SIUE School of Pharmacy Student & Office Space	Edwardsville / SIUE	0.8
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 - 2nd floor lockers	Edwardsville / SIUE	0.8
SIUE Vadalabene Center Gym Renovations	Edwardsville / SIUE	6.0
SWIC Sam Wolf Granite City Campus Roof/Air Handlers Phase I	Granite City	3.4
TOTAL		138.1

Source: Southwestern Illinois Development Foundation



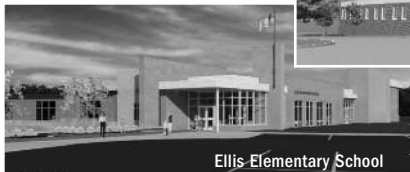
East St. Louis Career & Technical Center



Hathaway Hall



SIUE's Science Building



Ellis Elementary School

▲ A preview of just some of new educational facilities that are taking shape across our region and helping to keep area laborers at work.



**LEWIS & CLARK
COMMUNITY COLLEGE**

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



**MCKENDREE
UNIVERSITY**

Type: 4-year
 Budget (\$ millions): 32
 # Full-Time Faculty: 98
 # Part-Time Faculty: 227
 Enrollment: 2,312
 Enrollment FTE: 1,893
 Main Campus: Lebanon, IL



**SOUTHERN ILLINOIS UNIVERSITY
EDWARDSVILLE**

Type: 4-year
 Budget (\$ millions): 251
 # Full-Time Faculty: 627
 # Part-Time Faculty: 251
 Enrollment: 14,133
 Enrollment FTE: 12,003
 Main Campus: Edwardsville, IL



**SOUTHWESTERN
ILLINOIS COLLEGE**

Type: 2-year
 Budget (\$ millions): 62
 # Full-Time Faculty: 160
 # Part-Time Faculty: 641
 Enrollment: 13,926
 Enrollment FTE: 8,196
 Main Campus: Belleville, IL



LINDENWOOD
LINDENWOOD UNIVERSITY ST. CHARLES, MISSOURI

Type: 4-year
 Budget (\$ millions): NA
 # Full-Time Faculty: 14
 # Part-Time Faculty: 179
 Enrollment: 2,300
 Enrollment FTE: 790
 Main Campus: St. Charles, MO
 Illinois Campus: Belleville, IL
(Numbers are for Illinois location only)

COMMERCIAL INVESTMENTS

GRAND TOTAL: \$494.7 Million

Despite the sluggish economy and a corresponding drop in commercial development, commercial investments in Southwestern Illinois still represented close to half a billion dollars in 2010 with 56 confirmed projects in varying stages of development.

Twenty-four of those projects were under construction last year, representing \$283 million in investments, almost 60 percent of the total. Approximately \$71 million of the total investments are in projects that have yet to break ground in both Madison and St. Clair counties. Nine of the projects tracked in 2010 represent investments of \$10 million or more that are being made in communities spanning from Belleville to Wood River. The largest project is in Belleville, where the \$90 million Belleville Crossing Shopping Center remained under construction during 2010.

While the continuing activity is welcome, it reflects a drop of over 50 percent compared to 2009 and is the third consecutive year that investments in this sector have declined. Our region's reduced commercial construction has coincided with a slide in retail sales during 2010, falling to \$5.4 billion from \$5.9 billion in 2009.

2010 Top Retail Sales Communities in Madison and St. Clair Counties:

Fairview Heights	\$649,701,564.68
Belleville	\$598,098,204.80
O'Fallon	\$469,245,732.64
Alton	\$431,802,418.12
Edwardsville	\$402,788,987.44
Collinsville	\$360,072,651.40
Granite City	\$260,820,093.80
Wood River	\$230,485,003.96
Highland	\$162,528,460.92
Glen Carbon	\$159,351,343.52
Shiloh	\$136,317,202.64
Unincorporated	\$135,894,074.84
Godfrey	\$130,200,274.08
Cahokia	\$115,563,442.48
Swansea	\$111,028,243.24
*Madison County Totals	\$2,706,184,739
*St. Clair County Totals	\$2,710,424,838
TOTALS	\$5,416,609,577

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

PROJECTS ANNOUNCED

Project	Community	\$Mil.
Building Renovation for Offices at 29 N. 64th Street	Belleville	0.9
Commercial strip building*	Collinsville	1.0
Schulte Supply*	Edwardsville	3.0
Gateway Village Shopping Center*	Granite City	30.0
Syngenta Seeds*	Highland	0.7
H-Trading Cargo Warehouse at MidAmerica Airport	Mascoutah	6.0
300 E Hwy 50 development retail center*	O'Fallon	1.0
Pet Dairy*	O'Fallon	4.0
Mitre Corporation Campus	Shiloh	5.0
Wood River Landing*	Wood River	19.5
TOTAL		71.1

Source: Southwestern Illinois Development Foundation



▲ The newly expanded Eckert's in Belleville, where additional investment is being made by IDOT in a new entrance.



◀ The Wildey Theatre in Edwardsville, which recently underwent an extensive \$2.1 million restoration.

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Alton Square Renovations Ph. II	Alton	2.0
Champion Hotel Renovation	Alton	11.0
Hampton Inn	Alton	8.5
Belleville Crossing Shopping Center	Belleville	90.0
Eckert's, Inc. Expansion	Belleville	5.5
CVS Pharmacy (Pine Lake Road & Vandalia St)	Collinsville	3.9
Frost Electric	Collinsville	6.0
Miner's Theater - renovation	Collinsville	7.0
Westview Condominiums	Collinsville	7.8
Edwardsville Crossing	Edw / Glen Carbon	58.0
Office in 400 block of St. Louis Street	Edwardsville	2.2
Modern Wholesale	Edwardsville	1.2
Park Plaza	Edwardsville	13.4
Willey Theatre restoration	Edwardsville	2.1
Wal-Mart Supercenter (Godfrey Rd & Airport Rd)	Godfrey	8.0
Granite Park Center anchored by Lowe's	Granite City	35.0
Super Wal-Mart expansion	Granite City	8.0
A Auto Repair Shop Reconstruction	Highland	0.8
Thiems Construction Company	Roxana	2.0
Old Castle Landscape	Sauget	2.0
White Castle	Shiloh	0.8
Building demo, construction of convenience store	Venice	2.6
Zeiser Automotive Group / KIA dealership	Wood River	2.5
1st Mid-American Credit Union	Wood River	3.1
TOTAL		283.3
Source: Southwestern Illinois Development Foundation		

COMPLETED PROJECTS		
Project	Community	\$Mil.
Alton Center Business Park	Alton	5.0
Wendy's Restaurant	Alton	0.8
Lee's Chicken Restaurant	Belleville	0.8
Eastport Plaza Executive Center	Collinsville	4.0
Jack Schmitt Renovation	Collinsville	1.5
Kohl's (601 Belt Line Rd)	Collinsville	1.4
Retail Outlot 5 Collinsville Crossing	Collinsville	1.0
Rural King	Collinsville	0.5
The Orchards at Collinsville	Collinsville	12.0
North Main Street Plaza (HeplerBroom Law Office)	Edwardsville	5.0
World Wide Technology	Edwardsville	1.2
Provision Living at Godfrey	Godfrey	8.0
Burger King	Granite City	1.0
Premiere Cinema 3-screen theater	Granite City	4.0
CARD equipment storage shed and Pleasant Ridge Park	Maryville	0.9
Executive Plaza - retail center	Maryville	1.0
Regency Center II Retail Center	O'Fallon	1.0
282 Wingate Commercial Building	Shiloh	1.2
Green Mount Crossing	Shiloh	90.0
TOTAL		140.2
Source: Southwestern Illinois Development Foundation		



▲ Westview condos and wine bar in Collinsville.

INSTITUTIONAL INVESTMENTS

GRAND TOTAL \$216 Million

After reporting a drop of more than 25 percent in our last Market Review, total investments in the institutional sector declined a further 11.3 percent during 2010, but this may in part be due to the fact some projects in the early planning stages were not included on the list as the estimated investment amounts were unavailable. One such example is the new 75,000-square-foot facility to be built in Highland by St. Joseph's Hospital.

In the meantime, continuing confirmed investments in both healthcare and senior housing facilities contributed significantly to a total of \$216 million in projects. During 2010, \$117 million in projects to enhance existing or create new healthcare facilities were announced, under construction or completed, while an additional \$78 million in senior housing projects were in varying stages of development.

\$76 million in projects were delivered during 2010, up 32 percent from 2009, while projects totaling more than \$100 million were under construction.

PROJECTS ANNOUNCED		
Project	Community	\$Mil.
Glenhaven of Belleville (Frank Scott Parkway by Memorial Hospital)	Belleville	9.2
Life Point Ministries	Edwardsville	1.2
Eden United Church of Christ	Edwardsville	5.6
Delmar Gardens Skilled Nursing Center*	O'Fallon	20.0
TOTAL		36.0
Source: Southwestern Illinois Development Foundation		

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Alton Memorial Hospital-Medical Office Building #2	Alton	6.0
Southwest Illinois Health Ventures, Inc - Orthopedic and Neurosciences Center	Belleville	24.0
St. Elizabeth's Expansion	Belleville	25.0
Methodist Church (on Prairie)	Bethalto	1.6
The Villas at Richland Estates	Bethalto	22.5
Knollwood Retirement Center Caseyville	Caseyville	14.0
New Life in Christ Church	O'Fallon	4.5
Cedarhurst of Shiloh (assisted living center)	Shiloh	12.0
TOTAL		103.6
Source: Southwestern Illinois Development Foundation		

COMPLETED PROJECTS		
Project	Community	\$Mil.
Community Counseling Center (Main & Edwards)	Alton	7.5
Alton Memorial Hospital-Duncan Wing	Alton	45.0
Braner Building	Collinsville	1.6
Horseshoe Lake Animal Hospital	Collinsville	1.0
Christ United Methodist Church (Phase 1)	Fairview Heights	1.2
Meridian Village Care Center (27 Auerbach Place)	Glen Carbon	6.0
Anderson Hosp. 3rd Express Care	Highland	2.0
St. Joseph's Hospital Remodeling	Highland	1.3
Liberty Village Retirement Community	Maryville	3.5
First Baptist Church in Maryville Addition	Maryville	3.3
Anderson Hospital Intensive Care Unit Expansion	Maryville	4.1
TOTAL		76.5
Source: Southwestern Illinois Development Foundation		



▲ Southwest Illinois Health Ventures, Inc. Orthopedic and Neurosciences Center coming to the Memorial Hospital complex in Belleville.

GRAND TOTAL \$155.2 Million

The office sector remains the weakest for investment with only one \$8 million project under construction during 2010 and just \$4.5 million in projects completed.

On a more positive note, 2010 saw a 7 percent increase in the total dollars for announced projects as plans for new corporate headquarters for Scott Credit Union and an Alton-based law firm joined projects such as the \$50 million American Red Cross facility that is still pending funding.

In all, there are almost \$130 million in announced projects that have yet to break ground and are expected to do so in the coming years as the economy continues to rebound.

UNDER CONSTRUCTION		
Project	Community	\$Mil.
Simmons Browder Gianaris Angelides and Barnerd LLC	Alton	8.0
TOTAL		8.0
Source: Southwestern Illinois Development Foundation		

PROJECTS ANNOUNCED		
Project	Community	\$Mil.
American Red Cross*	Edwardsville / SIUE	50.0
Scott Credit Union Corporate Headquarters, Edwardsville Corporate Center	Edwardsville	12.0
I-64 Office Park (Rasp Farm Office Park)*	O'Fallon	24.7
Regency Park Corporate Campus North - office park with lake*	O'Fallon	55.2
TOTAL		141.9
Source: Southwestern Illinois Development Foundation		

COMPLETED PROJECTS		
Project	Community	\$Mil.
UMB Bank	Collinsville	2.0
Farm Credit Services	Highland	2.5
Bank of Springfield	Shiloh	0.8
TOTAL		5.3
Source: Southwestern Illinois Development Foundation		

▼ The new corporate headquarters for Scott Credit Union, being built in Edwardsville.



PUBLIC SECTOR TRANSPORTATION

2010 was a good year for public sector transportation investments in Southwestern Illinois, with almost \$1.5 billion in projects under construction, completed or in the planning stages. With a total price tag of \$670 million, the New Mississippi River Bridge remains the largest project in this sector and the largest infrastructure project in the region. Following the ground breaking in early 2010, work shifted into high gear on this project, which continues to take shape on the banks of the Mississippi just north of downtown St. Louis.

Another significant investment on the list includes the \$100 million Chain of Rocks Canal bridge project, which calls for the replacement or rehabilitation of various sections of the bridge. The IL-3 interchange project rounds out the top three in terms of dollars, with a \$60 million price tag. In all, a dozen projects across Madison and St. Clair counties represent investments of \$20 million or more.

More than \$88 million in projects wrapped up during 2010, with the largest of these being the Pontoon Road Overpass over Route 203. Projects under construction accounted for \$861.5 million in investments, while an additional \$453 million in projects have yet to break ground. With work on many of the projects under construction during 2010 expected to continue for some time, this sector will continue to positively impact our economy in the coming years.

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 are good news for our region as they help to pave the way for additional development in the Metro East.

RECENTLY COMPLETED MAJOR TRANSPORTATION PROJECTS:

Project	Community	\$Mil.
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
Royal Heights Rd. Overlay, IL 161 to North Belt West Church Road	Belleville	0.5
I-55/70 Pavement Patching	Centreville	1.0
IL 159 - Resurfacing	Collinsville	1.2
Resurfacing New Poag Rd to St. Louis Street	Collinsville	0.9
University Park Drive Improvements	Edwardsville	1.8
Pleasant Ridge Road	Edwardsville / SIUE	0.8
Pleasant Ridge Road Bridge	Fairview Heights	2.2
Glen Crossing Road	Fairview Heights	0.7
IL 100 resurfacing from State St. to Lockhaven Road	Glen Carbon	5.8
Piasa Creek Bridge Replacement	Godfrey	4.8
Stamper & Pierce Lane Project - Phase 3	Godfrey	1.4
Stamper Lane - Phase 2	Godfrey	2.2
Robbins Road Improvement	Godfrey	1.0
Iberg Road Reconstruction	Hartford	3.4
St. Louis Street Improvements - Phase 2	Highland	1.6
I-270 from Mississippi River to IL 157 (resurfacing)	Lebanon	0.9
IL 159 - north of IL 140	Madison Co.	7.8
I-255 bridge at Wenzel Road	Madison Co.	0.8
Pontoon Rd. Overpass over IL 203 & RR Tracks	Madison Co.	2.7
Possum Hill Bridge (CH-14)	Madison Co.	26.0
St. Rose Road re-surfacing	Madison Co.	1.5
US 50 - asphalt overlay	Madison Co.	0.6
Sauget Business Boulevard	O'Fallon	2.5
Lebanon Avenue	Sauget	5.0
Seibert Road Improvements	Shiloh	1.3
Huntwood Road (3 lane upgrade & sidewalks)	Shiloh	1.0
IL 159 Pedestrian Way Improvements	Swansea	2.0
Bridge in rural Worden	Swansea	0.6
Watershed Trail extension	Worden	1.4
Red Dock improvement	Madison Co.	0.5
	Tri-City Regional Port District	0.5
TOTAL		88.8

Projects listed were completed during 2010 and represent just a sampling of the various projects completed during that timeframe.



Photo courtesy of Keeley & Sons

▲ Work underway on the Illinois approach to the New Mississippi River Bridge.

SAMPLING OF MAJOR PROJECTS PLANNED OR UNDER CONSTRUCTION:

Project	Community	\$Mil.
Bridge West Beautification Plan - Design phase as of 12/8/10 Construction to begin mid 2011	Alton	1.5
Piasa Street - redevelopment	Alton	0.8
17th Street Extension	Belleville	1.1
17th Street Widening, West Main to Bunsen	Belleville	3.2
Frank Scott Parkway West Upgrade, B'ville West High & Concordia Rd.	Belleville	0.6
West Washington Street / Centerville Avenue Resurfacing	Belleville	0.9
West Corbin Phase II	Bethalto	4.2
IL 159 - Phase 2 (middle section)	Collinsville	3.9
IL 159 - Phase 3 (Northern section-Beltline Rd to Johnson St.)	Collinsville	16.0
IL 159 - Phase 1 (Southern section) to begin Aug 2010	Collinsville	14.3
17th Street	E. St. Louis	0.6
Main Street (E. Alton)	East Alton	1.1
I-64 Interchange Beautification Project	Fairview Heights	1.0
Old Collinsville Road	Fairview Heights	1.2
I-255 bridge 2 (Humbert Road)	Godfrey	5.0
I-255 bridge 3 (Route 111/267)	Godfrey	5.0
I-255 bridge over Union Pacific & Kansas City Southern railroad tracks	Godfrey	6.5
Alton Bypass (IL 255 extending to US 67)	Godfrey	22.2
Crosstown Road - Phase 1	Godfrey	6.0
Ramp connecting IL 67 & I-255	Godfrey	3.8
US 67 bridge over & onto I-255	Godfrey	4.0
Niedringhaus Streetscape - Phase 2	Granite City	1.3
Maryville Road	Granite City	0.6
Project to improve safety and relieve train-related traffic delays on Pontoon Road	Granite City	30.7
Rand Avenue (reconstruction from Delmar to IL 111)	Hartford	0.6
Old St. Louis Road Repairs	Hartford	0.4
New Mississippi River Bridge	IL / E. St. Louis and MO	670.0
Chain of Rocks Canal Bridge - replacement	Madison Co.	100.0
I-55 from .2 mi N. of IL 140 to .5 mi. N of IL 4 (rubblization/overlay)	Madison Co.	15.0
I-255 from Collinsville Rd. to I-270 (resurfacing, bridge & ramp repair)	Madison Co.	33.0
Nickel Plate Trail Extension	Madison Co.	1.0
I-55 from .3 mi n. of I-55/70/270 to .5 mi. n. of IL 4 (Part A)	Madison Co.	30.0
I-255 bridge at IL 111	Madison Co.	5.5
Ridgeview Road Reconstruction	Madison Co.	2.9
Confluence Bikeway Extension	Madison Co.	0.7
I-255 Bridge repair, bridge deck overlay, patching ramp repair, shoulder repair & resurfacing I-255	Madison Co./St. Clair Co.	21.0
Scott - Troy Trail, Phase II	Madison Co./St. Clair Co.	2.0
Milburn School Road - HS campus Improvements	O'Fallon	2.5
Porter & Simmons Roads Roundabout	O'Fallon	0.4
State Street-North Seven Hills Road roundabout	O'Fallon	0.5
Venita Drive Project	O'Fallon	6.0
Milburn School Road - Phase 4	O'Fallon	1.2
Old Collinsville Road Improvements	O'Fallon	2.9
Rail Track to Serve new Mississippi River Harbor	River's Edge	5.5
Station Road Improvements	Shiloh	4.2
I-255 Interchange near Davis St. & Ferry Rd.	St. Clair Co.	19.5
I-64 @ IL 159 Interchange Enhancements	St. Clair Co.	1.1
I-64 @ Rieder Road AJR	St. Clair Co.	15.0
I-64 from 15th St. to .3 mi. west of IL 157 (resurfacing, bridge repair, underdrains, engineering)	St. Clair Co.	23.1
I-64 New Bridge (Collinsville Ave. to First St. for eastbound traffic)	St. Clair Co.	44.0
IL 3 over Union Pacific Railroad (Bridge Rehab)	St. Clair Co.	20.0
IL 15 over IL 13 to 1.4 miles east of IL 159 at U.P. RR	St. Clair Co.	19.0
IL 3 Interchange	St. Clair Co.	60.0
Poplar Street Bridge - decking overlay	St. Clair Co.	12.5
Ramps to South Belt West intersection	St. Clair Co.	3.5
Clinton County IL 127 Bridge replacement	St. Clair Co.	13.5
Bridge replacement on I-64	St. Clair Co.	10.5
Fullerton Road Bi-Directional Turn Lane	Swansea	0.8
South Harbor Project & connecting railroads	Tri-City Regional Port District	6.0
I-55/70 and IL 162 bridge replacement and frontage road replacement	Troy	23.5
Edwardsville Road	Wood River	2.2
TOTAL		1,314.8

R RESIDENTIAL DEVELOPMENT

Housing Market Update

While the effects of the recession could still be seen in the level of home sales in the Metro East in 2010, there are signs that the housing industry could slowly be turning around.

Total home sales fell again in both counties over the past year. Madison County saw a drop of 12.8 percent from 2009 to 2010, while St. Clair County home sales declined by 6.6 percent.

More positive news could be found on the construction side of the industry. After experiencing a significant drop in housing permits over the past couple of years, both counties saw increases from 2009 to 2010. Madison County experienced a slight increase in residential building permits of 3.3 percent. St. Clair County's residential building permits have increased dramatically over the past year by 23.8 percent, with the biggest increases seen in the communities of Swansea, O'Fallon, Shiloh and Fairview Heights. The rise in new home construction in Madison and St. Clair counties represents a bright spot in the broader bi-state region, which, as a whole, has seen the number of residential building permits drop.

Data provided by the Illinois Association of Realtors indicates that median home prices are also on the rise after seeing significant losses over the previous few years. From 2009 to 2010, Madison County's median home price rose slightly from \$112,000 to \$113,500. St. Clair County saw a 5.9 percent jump from 2009 to 2010, with the median home price increasing from \$118,000 to \$125,000.

Economic Impact

The level of private housing construction remains a key contributor to the economy of Southwestern Illinois. According to a formula developed by the National Association of Home Builder's Department of Housing Economics, new home construction within Madison and St. Clair counties represents approximately:

- **\$214 million in local income**
- **\$22.9 million in local taxes, and**
- **3,379 local jobs**

Single Family Home Sales

	2008	2009	2010
Madison County	2,898	2,837	2,474
St. Clair County	2,416	2,394	2,236

Source: Illinois Association of Realtors

Residential Building Housing Starts

	2009	2010
Madison County	359	371
Edwardsville	29	52
Glen Carbon	29	35
Granite City	26	11
Highland	32	12
Maryville	75	70
Troy	36	61
Other Communities	41	24
Unincorporated	91	106

	2009	2010
St. Clair County	543	672
Belleville	64	48
Fairview Heights	64	84
Mascoutah	82	83
O'Fallon	100	135
Shiloh	48	65
Smithton	16	27
Swansea	15	119
Other Communities	68	33
Unincorporated	86	78

Note: Only individual communities with 25 or more permits in one of the last two years are listed.

Source: Market Graphics and the Home Builders Association of Greater Southwest Illinois



DEMOGRAPHICS & LABOR FORCE

Demographics

Madison and St. Clair counties remain the second most populous region in the State of Illinois with a combined population of 539,338. Median household income continues to rise for area residents, growing from \$40,345 in 2000 to \$48,498 in 2010. Per capita income also is on the rise, up from \$19,721 in 2000 to \$25,095 today. Southwestern Illinois has also seen a significant increase in educational attainment in the last 10 years. The percentage of individuals earning a high school diploma or higher has risen to 87.6 percent, and the percentage earning a bachelor's degree or higher is almost 23 percent for 2010.

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 263,559 individuals in 2010, a slight increase from 263,065 individuals in 2009, while the unemployment rate dropped from 10.6 percent the previous year to 10.4 percent in 2010. This labor force accounts for approximately 18 percent of the St. Louis Standard Metropolitan Statistical Area (SMSA) total.

SOUTHWESTERN ILLINOIS LABOR FORCE		2010
Madison County		138,701
St. Clair County		124,858
Combined		263,559
TOTAL EMPLOYED		
Madison County		125,119
St. Clair County		111,192
Combined		236,311
UNEMPLOYMENT RATE		
Madison County		9.8
St. Clair County		10.9
Combined		10.4

Source: Illinois Dept. of Employment Security - Average for all of 2010

MADISON AND ST. CLAIR COUNTIES BY THE NUMBERS

Population	2000	2010
Total Population		
Madison County	258,941	269,282
St. Clair County	256,082	270,056
Combined Total	515,023	539,338
Population by Age		
<i>Under 18 Years</i>		
Madison County	64,437	61,665
St. Clair County	70,925	68,324
Combined Total	135,362	129,989
<i>65 Years and Over</i>		
Madison County	36,923	38,238
St. Clair County	33,709	34,027
Combined Total	70,632	72,265
Persons Per Square Mile		
Madison County	357.2	371.4
St. Clair County	385.8	406.8
Combined Average	371.5	389.1
Income		
<i>Median Household Income (dollars)</i>		
Madison County	41,541	50,628
St. Clair County	39,148	46,368
Combined Average	40,345	48,498
<i>Per Capita Income (dollars)</i>		
Madison County	20,509	25,873
St. Clair County	18,932	24,316
Combined	19,721	25,095
Educational Attainment (Age 25+)		
<i>Percent High School Graduate or Higher</i>		
Madison County	84.3	88.6
St. Clair County	80.9	86.6
Combined Average	82.6	87.6
<i>Percent Bachelor's Degree or Higher</i>		
Madison County	19.2	22.6
St. Clair County	19.3	23.2
Combined Average	19.3	22.9

Source: U.S. Census Bureau

PRIVATE SECTOR EMPLOYMENT

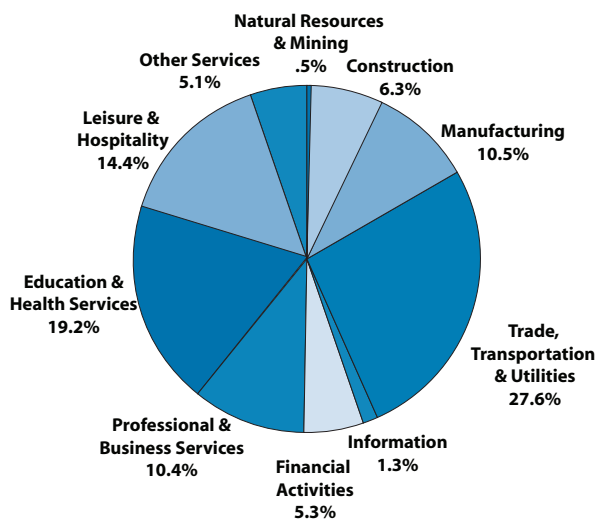
3,430 New Private Sector Jobs

At the end of 3rd Quarter 2010, there were 11,097 private sector employers in Madison and St. Clair counties, which is comparable to what was reported at the end of 2009. Southwestern Illinois saw its private sector employment rates rise slightly from 2009 to 2010 with a net gain of 3,430 jobs. This increase is fairly evenly split between the goods-producing and service-providing industries, with a gain of 1,545 goods-producing jobs and 1,885 service-providing jobs. Service-providing jobs continue to represent nearly 83 percent of the total number of private sector jobs in Southwestern Illinois.

Southwestern Illinois 2010 Workforce

Workforce is defined as those who work in the area represented, but may live elsewhere. A total of 236,311 individuals are employed in Madison and St. Clair counties with 153,841 of these in the private sector. As in recent years, the Trade/Transportation/Utilities sector in 2010 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 19.2 percent of the jobs. Manufacturing remained stable at 10.5 percent, while construction jobs increased slightly to 6.3 percent in 2010 after experiencing a significant drop the prior year. This increase is due, in part, to continuing investments at Scott Air Force Base and ConocoPhillips.

Jobs by Industry Sector



(Totals may not equal 100 percent due to rounding)

No. of Firms - 2010	Madison	St. Clair	Total
GOODS-PRODUCING	1,047	805	1,852
Natural Resources and Mining	51	36	87
Agriculture, Forestry, Fishing & Hunting	37	26	63
Mining, Quarrying, & Oil and Gas Extraction	14	10	24
Construction	758	588	1,346
Manufacturing	238	181	419
SERVICE-PROVIDING	4,760	4,485	9,245
Trade, Transportation, and Utilities	1,288	1,239	2,527
Wholesale Trade	275	215	490
Retail Trade	759	797	1,556
Transportation & Warehousing	240	211	451
Utilities	14	16	30
Information	79	79	158
Financial Activities	588	531	1,119
Finance & Insurance	372	326	698
Real Estate & Rental & Leasing	216	205	421
Professional and Business Services	881	870	1,751
Professional, Scientific & Technical Services	553	537	1,090
Management of Companies & Enterprises	20	13	33
Administrative & Support & Waste Mngmt.	308	320	628
Educational and Health Services	642	582	1,224
Educational Services	61	64	125
Health Care & Social Assistance	581	518	1,099
Leisure and Hospitality	662	612	1,274
Arts, Entertainment & Recreation	106	81	187
Accommodation & Food Services	556	531	1,087
Other Services	596	553	1,149
Unclassified	24	19	43
Total	5,807	5,290	11,097
No. of Employees - 2010	Madison	St. Clair	Total
GOODS-PRODUCING	17,732	8,914	26,646
Natural Resources and Mining	410	430	840
Agriculture, Forestry, Fishing & Hunting	267	359	626
Mining, Quarrying, & Oil and Gas Extraction	143	71	214
Construction	5,869	3,860	9,729
Manufacturing	11,453	4,624	16,077
SERVICE-PROVIDING	61,462	65,733	127,195
Trade, Transportation, and Utilities	20,342	21,209	41,551
Wholesale Trade	2,918	2,556	5,474
Retail Trade	11,841	12,464	24,305
Transportation & Warehousing	5,210	5,569	10,779
Utilities	373	620	993
Information	727	1,282	2,009
Financial Activities	4,320	3,790	8,110
Finance & Insurance	3,414	2,932	6,346
Real Estate & Rental & Leasing	906	858	1,764
Professional and Business Services	7,342	8,716	16,058
Professional, Scientific & Technical Services	3,613	5,517	9,130
Management of Companies & Enterprises	698	405	1,103
Administrative & Support & Waste Mngmt.	3,031	2,794	5,825
Educational and Health Services	13,739	15,823	29,562
Educational Services	987	1,494	2,481
Health Care & Social Assistance	12,752	14,329	27,081
Leisure and Hospitality	11,307	10,776	22,083
Arts, Entertainment & Recreation	1,786	1,727	3,513
Accommodation & Food Services	9,521	9,049	18,570
Other Services	3,665	4,126	7,791
Unclassified	20	11	31
Total	79,194	74,647	153,841

Source: Illinois Department of Employment Security (3rd Quarter 2010)

TOURISM IMPACT

With more than \$688 million in expenditures in 2009 (the most recent numbers available), tourism remained a significant economic engine for Madison and St. Clair counties. Those expenditures supported more than 6,700 jobs and an annual payroll in excess of \$174 million. Local sales tax revenues from tourism generated \$5.89 million for Madison County and \$7.4 million for St. Clair County in 2009.

While individual numbers by county for 2010 weren't available at press time, if they mirror the statewide trend, they will show growth across the board. Officials from the Illinois Office of Tourism recently reported that, statewide, revenue from tourism grew to \$29.3 billion last year, an increase of \$2.2 billion over 2009 numbers.



◀ The Confluence Tower in Hartford Illinois opened in spring 2010, and has proven to be a popular destination to take in the panoramic view of the Missouri and Mississippi rivers where their currents converge at a point of historical legend. It was from this location that Captains Meriwether Lewis and William Clark set out on their westward voyage.

MAJOR EMPLOYERS

Madison and St. Clair Counties' Top Employers

Scott Air Force Base	Scott Air Force Base	13,002
Southern Illinois University Edwardsville	Edwardsville	2,416
Memorial Hospital	Belleville	2,316
Walmart / Sam's Club	Madison / St. Clair Counties	2,153
U. S. Steel, Granite City Works	Granite City	2,153
Olin Corporation	East Alton	1,837
Southwestern Illinois College	Madison / St. Clair Counties	1,757
St. Elizabeth's Hospital	Belleville	1,526
Schnuck's Supermarkets	Madison / St. Clair Counties	1,500
Southern Illinois Healthcare Foundation	St. Clair County	1,285
Global Brass and Copper, Inc. (Olin Brass)	East Alton	1,190
Edwardsville School District	Madison County	1,135
East St. Louis Community School District 189	East St. Louis	1,130
Southwestern Illinois Health Facilities, Inc. (DBA-Anderson Hospital)	Maryville	1,121
Challenge Unlimited	Madison / St. Clair Counties	1,025
Midcoast Aviation Inc.	Cahokia	987
Madison County (IL)	Madison County	984
St. Clair County	St. Clair	965
Gateway Regional Medical Center	Granite City	935
Alton Memorial Hospital	Alton	911
Alton Community Unit School District #11	Alton / Godfrey	845
ASF-Keystone	Granite City	830
Cahokia School District #187	Cahokia	819
YMCA of Southwestern Illinois	Madison / St. Clair Counties	800
St. Anthony's Health Center	Alton	798
Conoco Phillips Wood River Refining Co.	Roxana	782
Collinsville School District	Collinsville, Maryville,	770
Allsup, Inc.	Belleville	725
Casino Queen Hotel & Casino	East St. Louis	723
Shop 'N Save	Madison / St. Clair Counties	715
Granite City School District #9	Granite City	700
Belleville Public Elementary School District #118	Belleville	607
Lewis & Clark Community College	Godfrey	577
Belleville Township High School District #201	Belleville	575
Argosy Casino Alton	Alton	570
Triad School District	Troy, Edwardsville, Marine	543
Cooper B-Line, Inc.	Highland & Troy	504
Kraft Foods (Capri-Sun)	Granite City	500

Though not one company, River's 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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Dale Stewart, Secretary/Treasurer

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Dale Stewart, Treasurer

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.

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

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Message From Our County Board Chairmen



*Madison County
Board Chairman
Alan Dunstan*

"For more than two decades, the Market Review and Investment Update has chronicled the increasing level of investment activity in the Metro East, and we appreciate all the time and resources the Leadership Council devotes to this project. With the current edition showing over \$6 billion in projects in varying stages of planning and construction during 2010, it's clear that our region has continued to thrive in recent years, and this report provides a wonderful opportunity to highlight the continuing investments that are fueling our local economy."



*St. Clair County
Board Chairman
Mark Kern*

"We are pleased to see that investment activity remained strong in the Metro East during the past year. Scott Air Force Base was once again a significant contributor to those positive numbers and continues to be a growing economic driver for our region. Southwestern Illinois remains home to an abundance of prime development sites supported by one of the nation's most cost-effective intermodal transportation systems, and those attributes, coupled with our quality workforce, position us well for continued growth as our nation's economy rebounds. We appreciate the Leadership Council spotlighting the many exciting investments underway in our Metro East communities."



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