

The logo features the text "St!Louis" in a black serif font. The exclamation point is red and positioned between the "t" and "L". The "i" in "Louis" has a red dot above it.

St!Louis

Perfectly Centered. Remarkably Connected.



Perfectly Centered. Remarkably Connected.

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This Executive Summary will provide you with a summary of key facts and figures about Greater St. Louis. If you are interested in learning more, visit our Web site at www.gotostlouis.org or contact us directly at 314-231-5555.

Greater St. Louis perfectly balances convenience and affordability with the advantages of a broadly talented work force, exceptional educational and cultural institutions, and superb recreational opportunities. This blend, along with our central location and extraordinary transportation assets, makes the region an ideal home for progressive companies competing in — and connected to — a global economy.

GREATER ST. LOUIS SNAPSHOT

Favorable Business Climate

We have a pro-growth and innovative culture, with nationally recognized incubators for advanced technology, abundant financing, favorable legislative environments, and a competitive structure of incentives and taxes to assist companies from startup through every succeeding phase of development.

Highly and Broadly Skilled Work Force

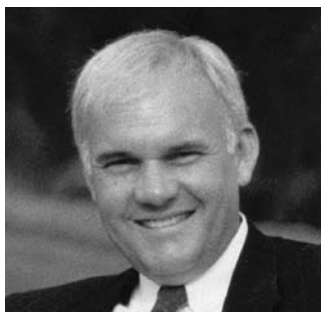
The work force here is productive and well-educated, reflecting the impact of the area's outstanding colleges, universities, and other educational institutions as well as experience with an extraordinarily diverse and sophisticated local economy.

Strategic Location

Our central location — we're near the geographic and population centers of the nation — offers fast, convenient connections to a vast portion of the country through all modes of transportation, as well as the economic diversity of a presence in two states.

Remarkable Quality of Life

This is a place where people can *live* where they *work*. New residents are consistently impressed by the region's distinctive character — the way in which it combines the business, cultural, and recreational assets of a major metropolis with surprising affordability, convenience, access, and sense of community.



“My father founded Enterprise Rent-A-Car here 50 years ago with seven cars and a leap of faith. St. Louis gave us a chance, and Enterprise flourished, becoming the largest rental car company in North America. The area is rich in world-class educational institutions that provide a well-educated work force. And people here work hard and look out for each other — good attributes for any corporate culture.”

Andy Taylor, Chairman and CEO, Enterprise Rent-A-Car, St. Louis County

Recent Locations and Expansions

Of the many businesses that have located or expanded here in the last few years, it is clear that St. Louis is attracting smart companies in our key growth industries: plant and medical sciences, advanced manufacturing, information technology, transportation and distribution, and financial services.

Centocor Biologics, Inc. A member of the Johnson & Johnson family of companies, it is investing significantly in its bio-pharma complex in St. Louis County.

CitiMortgage. One of the nation’s largest lending and servicing operations, it recently moved into a new 515,000-square-foot headquarters building in St. Charles County, Mo.

Express Scripts, Inc. This Fortune 500 pharmacy benefits management company, founded in St. Louis in 1992, plans to build a new \$50 million, 320,000-square-foot headquarters in a new business park at the University of Missouri–St. Louis.

Harman/Becker Automotive Systems. The company is building a \$26 million facility in Washington, Mo., to manufacture a new radio and navigation system for DaimlerChrysler’s production facilities in Fenton, Mo.

The Hershey Company. The food company completed a new 1.1 million-square-foot distribution center at the Gateway Commerce Center in Madison County, Ill.

KV Pharmaceutical Co. A leader in developing proprietary products using advanced drug delivery technologies, KV is investing \$135 million to expand three of its facilities in St. Louis County.

Reuters America. The global information company has established one of its four worldwide software development centers in St. Louis. The others are in Paris, London, and Bangkok.

The Solae Co. An alliance between DuPont and Bunge Ltd., Solae, which brings soy foods to the marketplace, selected the City of St. Louis for its corporate headquarters.

Major Corporations

Greater St. Louis is the headquarters for 19 Fortune 1000 companies, eight of which are in the Fortune 500. St. Louis also is home to many of the nation’s largest privately held companies, from Enterprise Rent-A-Car and Edward Jones to UniGroup, the parent company of Mayflower Transit and United Van Lines.

Fortune 1000 Companies Based in St. Louis

Emerson (134)
Express Scripts, Inc. (137)
Anheuser-Busch Companies, Inc. (139)
Monsanto Company (357)
Ameren Corporation (380)
Charter Communications (390)
Graybar Electric (462)
Peabody Energy (497)
Energizer Holdings, Inc. (593)
Solutia, Inc. (613)
Kellwood Company (634)
A.G. Edwards (644)
Furniture Brands International, Inc. (653)
Olin Corporation (756)
Brown Shoe Company, Inc. (774)
Arch Coal, Inc. (784)
Ralcorp Holdings, Inc. (901)
Maverick Tube Corporation (934)
Sigma-Aldrich (956)

Top Privately Held Companies Based in St. Louis*

Apex Oil Co.
CCA Global Partners, Inc.
Center Oil Company
Edward Jones
Enterprise Rent-A-Car
Graybar Electric
Harbour Group
Maritz Inc.
McCarthy Building Companies, Inc.
Prairie Farms, Inc.
Schnuck Markets, Inc.
UniGroup, Inc.
World Wide Technology

*Includes companies with 2003 revenues exceeding \$1 billion
(St. Louis Business Journal Book of Lists 2005)

Greater St. Louis is the 18th-largest metropolitan statistical area (MSA) in the United States.

2.7 million

PEOPLE IN EAST-CENTRAL
MISSOURI AND
SOUTHWESTERN ILLINOIS

Ratings and Rankings

In recent years, Greater St. Louis has earned national recognition in many areas. Some specifics:

Favorable Business Climate

Expansion Management magazine this year called St. Louis a **"5-Star Business Opportunity Metro"** and listed the area among the top 50 metropolitan areas in the country for business expansions and relocations.

Inc. magazine in 2005 rated St. Louis as the 44th **best place in the country to do business** (out of 274). It cited "a growing array of technology and business firms," resulting partly from the area's "lower costs."

Forbes ranked St. Louis 56th for **cost of doing business** in its "150 Best Metropolitan Areas" report, ahead of such cities as Cincinnati, Milwaukee, and Denver.

Strategic Location

St. Louis is near the **geographic and population centers** of the United States. It's at the confluence of three major rivers and is served by four interstate highways.

Expansion Management and *Logistics Today* ranked the St. Louis region No. 6 among **"America's Most Logistics-Friendly Cities,"** based on 10 criteria, including transportation and distribution industry climate, highway infrastructure, and fuel taxes and fees.

St. Louis is the nation's **second-largest inland port and third-leading rail hub.**

Lambert-St. Louis International Airport offers **390 daily flights** to 87 destinations. Most major markets are within **1 to 3 1/2 hours.**

St. Louis is within **500 miles of one-third of the U.S. population** and within 1,500 miles of 90 percent of the people in North America.

Highly and Broadly Skilled Work Force

A 2005 Council on Competitiveness regional survey found that the **availability of workers with the skills that businesses require** was considered a strong regional asset.

The percentage of St. Louisans with **bachelor's, graduate, or professional degrees** exceeds the national average, according to the American Community Survey 2004.

The St. Louis **bioscience work force is one of the country's largest**, with more than 80,000 employed, according to the Battelle Memorial Institute.

The St. Louis work force has a **concentration of scientists and engineers** – 4.4 percent – more than twice the national average, according to the U.S. Bureau of Labor Statistics.

A study by the Census of Manufactures showed that the **productivity** level of St. Louis-area manufacturing workers is 18.7 percent higher than the U.S. average.

In 2005, three of the four **St. Louis area automobile assembly plants** ranked as the **most productive** or among the most productive in their vehicle categories, according to the authoritative Harbour Report.

Expansion Management and *Logistics Today* ranked the St. Louis region **No. 1** for transportation and warehousing work force in 2005.

Great Quality of Life

Forbes named Greater St. Louis one of the **"Best Metropolitan Areas"** in America in 2005 for such reasons as its business environment, cost of living, healthcare services, and quality of transportation.

St. Louis was named the **second-most affordable** large metropolitan area in the country by the National Association of Home Builders in 2005.

St. Louis is home to more than **100 parks** and some **200 miles of trails** for cycling, running, and walking.

The Sporting News in 2005 named St. Louis as America's **"Best Baseball Town."**

St. Louis is home to **world-renowned** arts and cultural institutions such as the **St. Louis Zoo**, ranked No. 1 by Zagat; the **Missouri Botanical Garden**, one of the most significant gardens in the world; and, the **Municipal Opera**, the nation's oldest and largest outdoor theatre.



MEAGAN SINN, PROJECT ACCOUNTANT, HOK, ST. LOUIS



BOEING F-15 EAGLES



KEITH NELSON, ASSISTANT OPERATIONS MANAGER, GENCO



AMELIA A.J. BOND
SENIOR VICE PRESIDENT
DIRECTOR OF PUBLIC FINANCE
A.G. EDWARDS

Greater St. Louis has a pro-growth business culture that fosters innovation, as evidenced by the large number of start-ups and Fortune 1000 companies here. Missouri and Illinois provide aggressive economic incentives to companies creating jobs with health benefits and good wages. Both Missouri and Illinois enacted comprehensive reforms of their workers' compensation systems in 2005, reducing costs for business. Missouri also enacted one of the most sweeping tort reform laws in the country, while Illinois recently passed medical malpractice tort reforms.

FAVORABLE BUSINESS CLIMATE

Top Regional Employers

More than 10,000 Employees

- BJC HealthCare*
- Boeing Integrated Defense Systems*
- Schnuck Markets, Inc.*
- Scott Air Force Base
- SSM Health Care*
- United States Postal Service
- Washington University in St. Louis
- Wal-Mart

5,000 – 10,000 Employees

- A.G. Edwards*
- Anheuser-Busch Companies, Inc.*
- DaimlerChrysler Assembly Plants
- Dierbergs Markets*
- Federated Department Stores, Inc.
- McDonald's
- Saint Louis University
- SBC Communications
- St. John's Mercy Health Care*
- Tenet St. Louis

(Source: St. Louis Business Journal Book of Lists 2005)
*Corporate headquarters in St. Louis

2,500 – 5,000 Employees

- Ameren Corporation*
- CitiMortgage
- Edward Jones*
- Enterprise Rent-A-Car*
- MasterCard
- Monsanto Company*
- Tyco Healthcare/Mallinckrodt*
- U.S. Bancorp
- U.S. Steel

1,000 – 2,500 Employees

- Casino Queen Hotel and Casino
- Charter Communications*
- Commerce Bancshares, Inc.
- Delmar Gardens Enterprises*
- Emerson*
- Express Scripts, Inc.*
- First Banks, Inc.
- HBE Corporation*
- Knights Direct
- The Laclede Group, Inc.*
- Lee Enterprises
- Lou Fusz Automotive Network, Inc.*
- Maritz Inc.*
- MEMC Electronic Materials, Inc.*
- Sabreliner
- Sigma-Aldrich*

High-Growth Industries and Opportunities

The Battelle Memorial Institute has identified five business clusters — established and emerging — as offering the best opportunities for growth in the region:

Business Cluster	Major Players	Employment in Cluster
Advanced Manufacturing	Boeing, DaimlerChrysler, Emerson, Ford, General Motors, GKN Aerospace	45,610
Financial Services	A.G. Edwards, CitiMortgage, Edward Jones, Scottrade, Stifel Nicolaus	63,460
Information Technology	MasterCard Global Technology & Operations Center, Quilogy, Reuters, SAVVIS, World Wide Technology	33,840
Plant and Medical Sciences	Centocor Biologics, Donald Danforth Plant Science Center, Forest Pharmaceuticals, KV Pharmaceuticals, Missouri Botanical Garden, Monsanto, Pfizer, Sigma-Aldrich, Tyco Healthcare/Mallinckrodt	15,220
Transportation and Distribution	Dial, Graybar, The Hershey Company, Lanter Distribution, Procter & Gamble, UniGroup, Unilever	79,700

Source: US Bureau of Labor Statistics, 2004



“My business has grown from one to 120 employees since it began here in 1996. The region has provided a strong, well-educated work force, and the Midwestern work ethic is very real. We have nationally prominent educational institutions, and the central location affords low telecom and travel costs, which are important for startup companies.”

Brenda Newberry, Founder and CEO, The Newberry Group, St. Charles

Entrepreneurship

The St. Louis area is fertile ground for innovation and entrepreneurs — and is becoming more so all the time. The area has become a national leader in the number and quality of its advanced technology incubators. More than \$1 billion in venture capital has been invested in technology firms here since 2000. These and other developments are establishing St. Louis as the center of innovation in the Midwest.

Technology Incubators and Tenants

The area is home to two of the nation’s top 10 technology incubators, as ranked by the National Business Incubation Association:

The Center for Emerging Technologies, a 100,000-square-foot center, which fosters advanced technology and other knowledge-based industries. Tenants have included Stereotaxis, now a publicly held company (STXS, NASDAQ), which provides computer-assisted magnetic navigation for medical devices, and Orion Genomics, which develops products for early cancer diagnosis.

Nidus Center for Scientific Enterprise, a 40,000-square-foot center serving clients who are refining and preparing new plant and life sciences technologies for market. Tenants have included Apath LLC, Chlorogen, Inc., and Quick Study Radiology.

Real Estate

The area’s 16 counties, which span the Missouri-Illinois border, offer a dynamic real estate market with no less than seven distinct submarkets. Greater St. Louis maintains more than 47 million square feet of office space, nearly 65 percent of which is Class A. At the end of 2004, vacancy rates for Class A and B space were 15.1 percent and 17.6 percent, respectively.*

Real Estate *continued*

The regional industrial real estate market is also extremely strong, representing nearly 220 million square feet under roof. Approximately 6.5 million square feet of industrial space was absorbed in 2004, and 27 buildings totaling more than 3 million square feet were added. More than 1.2 million square feet will come online in 2005 through the addition of 13 more buildings.*

One of the hottest markets in recent years has been downtown St. Louis, where more than \$3 billion has been invested since 1999 in a variety of projects, from loft condominiums and apartments to new and rehabbed office buildings and hotels to a federal courthouse. In addition, the new Busch Stadium, home of the St. Louis Cardinals, will be completed downtown in 2006.

Ongoing land developments in both the Missouri and Illinois portions of the region are making significant commercial and industrial sites available as never before across the metropolitan area.

*Source: Colliers Turley Martin Tucker, “2005 St. Louis Market Report”

Construction Cost Index

Metro Area	Factory	Warehouse	Office
Charlotte	\$48.80	\$42.00	\$76.00
Chicago	\$56.43	\$48.56	\$87.88
Baltimore	\$57.58	\$49.56	\$89.68
St. Louis	\$58.38	\$50.24	\$90.92
Atlanta	\$59.17	\$50.93	\$92.15
Indianapolis	\$59.17	\$50.93	\$92.15
Kansas City	\$59.17	\$50.93	\$92.15
Dallas	\$59.29	\$51.03	\$92.34
Cincinnati	\$60.94	\$52.45	\$94.91
Minneapolis	\$62.22	\$53.55	\$96.90
Denver	\$62.83	\$54.08	\$97.85
Pittsburgh	\$64.84	\$55.81	\$100.99
U.S. Average	\$61.00	\$52.50	\$95.00

Source: 2005 RSMears Building Construction Cost Data Book

Situated at the confluence of the Mississippi, Missouri, and Illinois rivers, the Port of St. Louis is the nation's second-largest inland port.



Cost Advantages, Taxes, and Incentives

In addition to affordable homes and cost of living, Greater St. Louis offers competitive tax rates and a myriad of programs to help companies in the region save money and increase their competitiveness.

Taxes

Businesses in the St. Louis area enjoy favorable tax climates in both Missouri and Illinois. Corporate, sales, and property taxes are all among the lowest in the country in Missouri. The nonpartisan Tax Foundation ranks Missouri's business tax climate No. 11 among the 50 states; it ranks Illinois No. 23. All in all, Greater St. Louis stands as one of the most tax-friendly regions in the United States for doing business — even before additional incentives are taken into account.

Incentives

Missouri and Illinois offer a variety of tax incentive programs to help lower operating costs for startups and expanding businesses. They include: enterprise zones, work force training programs, and competitive tax credit programs as well as property tax abatements and work force training grants. Utility providers in both states may also offer significant rate discounts for large projects.

Both states enacted comprehensive reforms of their workers' compensation systems in 2005, reducing costs for businesses. Missouri also enacted one of the most sweeping tort reform laws in the country. In addition, the Missouri Quality Jobs Act of 2005 provides incentives for businesses to create and attract family-supporting jobs, complementing the highly successful Illinois EDGE (Economic Development for a Growing Economy) program.

Tax	Missouri	Illinois
Corporate Income Tax	6.25% of Missouri taxable income with adjustments including deductibility of 50% of federal income tax.	7.3% which includes 4.8% state income tax and 2.5% personal property replacement tax.
Taxable Income	Three-factor or sales only, whichever results in lower taxes.	In-state sales only.
Franchise Tax	\$0.33 per \$1,000 of par value of outstanding shares and surplus or total assets. Corporations with less than \$1,000,000 outstanding shares and surplus are not taxed.	Initial franchise tax of 0.15% of paid-in capital, thereafter annual franchise tax of 0.1% of paid-in capital, maximum of \$2 million.
Property Tax	Residential property is assessed at 19% of value; commercial and industrial property at 32%; most personal property at 33 1/3%. Selected metro area real property tax rates range from 5.6% – 7.3% of assessed value. Business inventories are not taxed.	Real property is assessed at 33 1/3% of value. Selected metro area real property tax rates range from 6.4% – 8.6% of assessed value. Personal property and business inventories are not taxed.
Sales and Use Tax	4.225% of purchase price of tangible personal property and enumerated services. Local sales taxes also apply and vary by jurisdiction.	6.25% of purchase price of tangible personal property. Local sales taxes also apply and vary by jurisdiction.
Personal Income Tax	\$315 plus 6% of modified federal adjusted gross income over \$9,000. Taxable income is modified adusted gross income with generous federal and state deductions.	3% of modified federal adjusted gross income less an exemption allowance equal to exemptions claimed on a federal return.
Local Income Tax	St. Louis city residents and workers pay a 1% earnings tax. St. Louis city employers pay a payroll tax of 0.5%.	No local earnings taxes.



RUKO SENSENY, HEALTHCARE MARKETING PROFESSIONAL



ANDREW MOLCHANY, PROJECT ARCHITECT, HOK



MARIE PETRACEK, RESEARCHER, MONSANTO



WASHINGTON UNIVERSITY
IN ST. LOUIS

Companies in Greater St. Louis have access to a rich pool of talented employees. A Council on Competitiveness Regional Survey in 2005 found that the availability of workers with the skills that businesses require is one of the region's strengths. Each year, the area's colleges and universities produce more than 23,000 new graduates with bachelor's, master's, doctorate, or professional degrees.

WORK FORCE AND EDUCATION

Work Force Population

There are 1.4 million people in the St. Louis area work force — 1.1 million in the Missouri portion of the region and .3 million in the Illinois portion. More than 20 colleges and universities, which enroll about 155,000 students, help keep the work force's skills and knowledge base up to date.

County	Labor Force	Unemployment Rate (percentage)
Illinois		
Bond	8,391	6.7
Calhoun	2,498	7.2
Clinton	18,408	5.5
Jersey	11,226	5.9
Macoupin	24,203	6.5
Madison	132,745	6.3
Monroe	16,337	4.6
St. Clair	119,753	7.1
Illinois Statewide	6,395,785	6.2
Missouri		
Franklin	53,104	5.7
Jefferson	116,164	5.5
Lincoln	23,530	5.5
St. Charles	182,040	4.3
St. Louis City	159,026	9.1
St. Louis County	560,629	5.4
Warren	14,817	5.3
Washington	10,262	8.4
Missouri Statewide	3,031,105	5.7
St. Louis MSA	1,453,133	6.0
United States		5.5

Source: Bureau of Labor Statistics, 2004 annualized data, not seasonally adjusted

Colleges and Universities

College	Enrollment
Blackburn College	594
Fontbonne University	2,827
Greenville College	1,137
Harris-Stowe State University	1,605
Lindenwood University	8,615
Maryville University	3,140
McKendree College	2,258
Missouri Baptist University	4,058
Principia College	542
Saint Louis University	14,549
Southern Illinois University-Edwardsville	13,493
University of Missouri-St. Louis	15,498
Washington University in St. Louis	13,380
Webster University	7,250
Totals	88,946

Two-Year and Community Colleges

College	Enrollment
East Central College	3,337
Jefferson College	4,136
Kaskaskia College	4,601
Lewis and Clark Community College	7,446
Southwestern Illinois College	13,624
St. Charles Community College	6,772
St. Louis Community College (3 Campuses)	26,138
Totals	66,054



“I came to Washington University from Harvard Medical School in 1997 because of its reputation as one of the world’s top biomedical research institutions. Since then, I’ve recruited nearly 150 world-class clinical faculty and cancer researchers. Like me, they were drawn to the remarkable depth in life sciences research and health care here.”

Dr. Tim Eberlein, chair, Department of Surgery, Washington University in St. Louis School of Medicine; director, Alvin J. Siteman Cancer Center, City of St. Louis

Elementary and Secondary Education

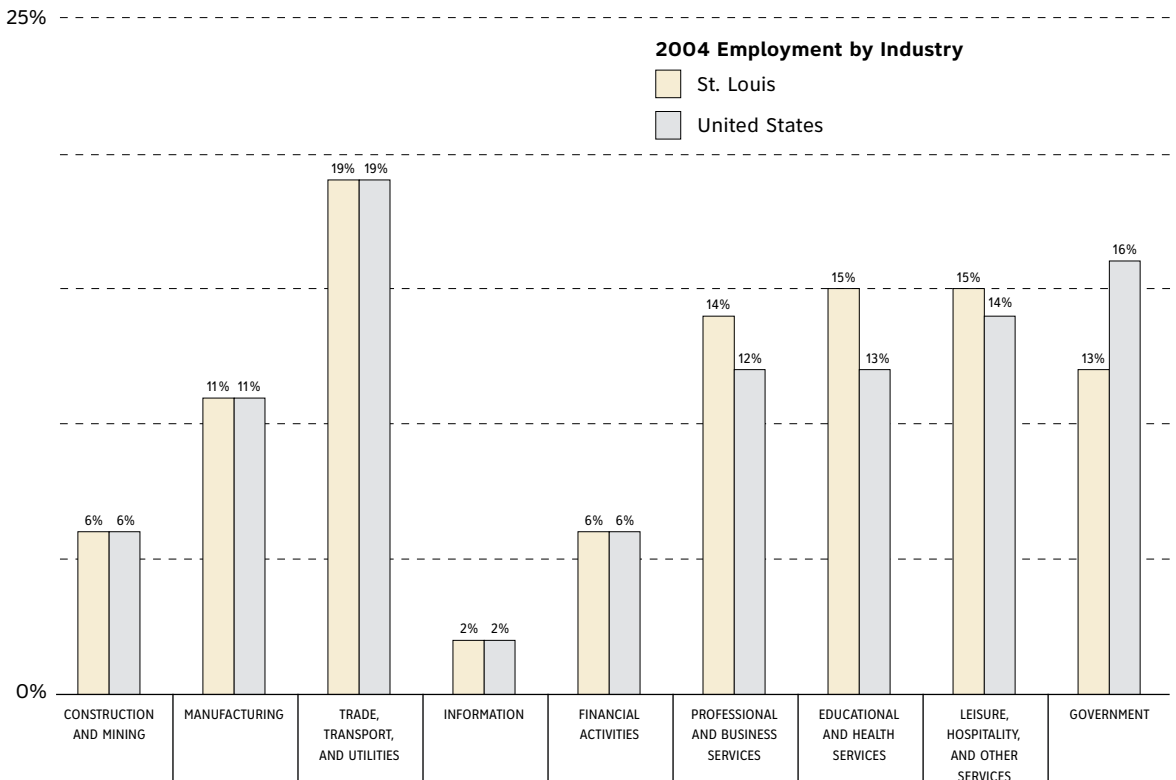
St. Louis prides itself on its award-winning school systems, which have produced countless successful graduates who have gone on to achieve fulfilling careers, thanks to the strong academic foundation they built growing up here.

The St. Louis area features several public school districts and numerous private elementary and secondary schools — including 45 Lutheran schools and more than 90 Catholic schools — ensuring that no matter where you live in the area, there are multiple options for quality education.

In addition, the St. Louis Special School District (SSD) is one of the nation’s leading providers of special education services, educating more than 30,000 students. The SSD provides services to students in 265 public schools in 23 St. Louis districts, which allows 97 percent of the students it serves to attend a school in their local district.

The region is also home to prominent schools for students with visual and hearing disabilities, including the Missouri School for the Blind, the Central Institute for the Deaf, the Moog Center for Deaf Education, and St. Joseph Institute for the Deaf.

Employment by Industry



Source: Bureau of Labor Statistics

The St. Louis region has a concentration of engineers and scientists that is more than twice as high as the national average.



Wage Rates

Cluster	Occupation	St. Louis MSA Median Annual Wage	U.S. Median Annual Wage
Advanced Manufacturing	First-Line Supervisors/Managers of Production and Operating Workers	\$48,950	\$47,760
	Industrial Engineers	\$64,310	\$66,600
	Machinists	\$37,980	\$34,790
	Mechanical Engineers	\$66,420	\$68,460
	Tool and Die Makers	\$46,660	\$44,070
Financial Services	Accountants and Auditors	\$59,390	\$56,880
	Actuaries	\$94,130	\$87,460
	Credit Analysts	\$48,020	\$55,280
	Financial Analysts	\$69,290	\$70,500
	Insurance Underwriters	\$44,520	\$54,240
	Loan Officers	\$59,490	\$58,200
Information Technology	Computer and Information Systems Managers	\$90,680	\$98,260
	Computer Programmers	\$66,800	\$65,910
	Database Administrators	\$62,950	\$63,460
	Network and Computer Systems Administrators	\$58,350	\$61,470
Plant and Life Sciences	Biomedical Engineers	\$76,260	\$70,800
	Food Scientists and Technologists	\$68,740	\$56,110
	Medical and Clinical Laboratory Technicians	\$27,150	\$31,120
	Medical Scientists, Except Epidemiologists	\$66,530	\$68,730
	Microbiologists	\$50,890	\$61,250
	Soil and Plant Scientists	\$32,590	\$55,470
Transportation and Distribution	First-Line Supervisors/Managers of Transportation and Material-Moving Machine and Vehicle Operators	\$41,390	\$48,320
	Laborers and Freight, Stock, and Material Movers, Hand	\$22,920	\$21,910
	Logisticians	\$55,820	\$60,310
	Truck Drivers, Heavy and Tractor-Trailer	\$40,280	\$34,580

Source: Bureau of Labor Statistics data released in 2005 for May 2004 wages

Greater St. Louis is perfectly centered in more ways than one. We're in the Central time zone. We're near the geographic center of the country, and we're the closest major metro area to the nation's population center. We also offer a well-balanced economy and broadly talented work force, reducing our vulnerability to sudden economic shifts. We're remarkably connected, too, with an excellent communications network and transportation assets that make St. Louis a national hub for commerce.

LOCATION AND POPULATION



Population Change
1980 – 2004

1980	2,414,091
1990	2,492,525
1995	2,539,800
2000	2,603,607
2004	2,764,054

Metro Area Counties

Missouri Counties	Population 2004
Franklin	98,234
Jefferson	210,397
Lincoln	45,816
St. Charles	320,734
City of St. Louis	343,279
St. Louis	1,009,235
Warren	27,809
Washington	23,955

Illinois Counties	Population 2004
Bond	17,980
Calhoun	5,190
Clinton	36,065
Jersey	22,320
Macoupin	49,067
Madison	264,350
Monroe	30,491
St. Clair	259,132



Age Distribution

% of Population by Age Group	St. Louis Region	U.S.
17 & Under	26.2	25.6
18-24	8.7	9.6
25-34	13.2	14.1
35-54	30.3	29.7
55 & Up	21.6	21.0



“Greater St. Louis has all the ingredients for distribution: transportation lanes going north, south, east, and west; abundant, affordable land ready for development; and a large work force that’s highly skilled, hard-working, and experienced. It’s perfect for a regional or national distribution facility.”

Ed Ehrenberger, general manager GENCO, logistics coordinator for Hershey and Unilever in Madison County, Ill.

Infrastructure

Situated in the heart of the United States, the St. Louis region enjoys unparalleled access to reliable and cost-effective energy, virtually unlimited water capacity, and exceptional communications resources for companies ranging from leading telecom and information technology businesses to advanced manufacturing and biotech firms.

Power

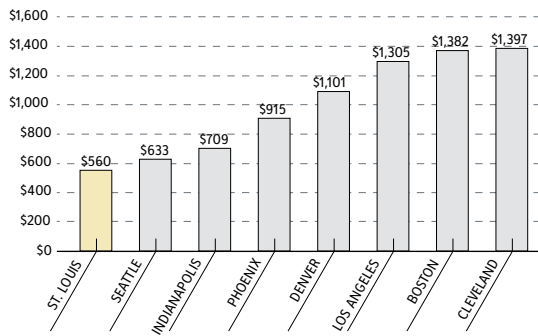
St. Louis-based Ameren Corp. and Laclede Gas are the primary service providers in the area. Electric rates in the region are among the lowest in the nation for commercial and industrial users, while natural-gas costs are very competitive with those in other major metropolitan areas.

Telecommunications

SBC Communications and Charter Communications serve most of the area. Proximity to major fiber backbones and the diversity of carriers result in a broad and deep pool of service providers from which to choose. This infrastructure supports MasterCard’s Global Technology and Operations Center, processing up to 40 million transactions a day. The quality of the region’s telecommunications network also contributed to Reuters’ choice of St. Louis as the site of its North American software development center.

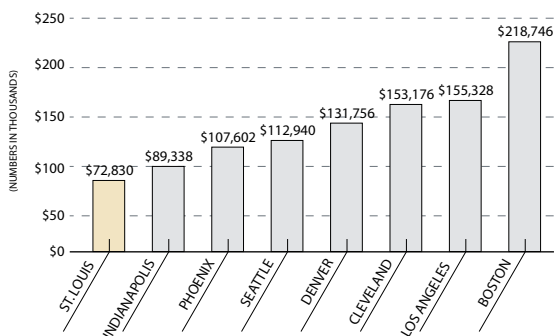
Typical Commercial Electric Bill*

(50kW or 10,000kWh per month)



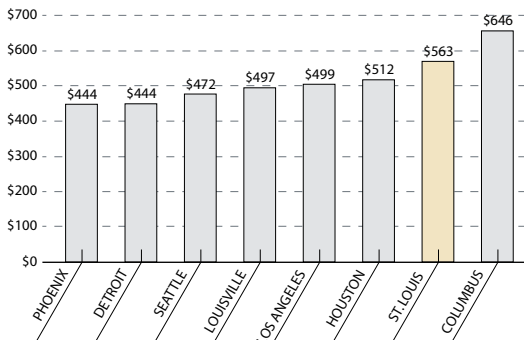
Typical Industrial Electric Bills*

(4,000 kW or 2,000,000 kWh per month)



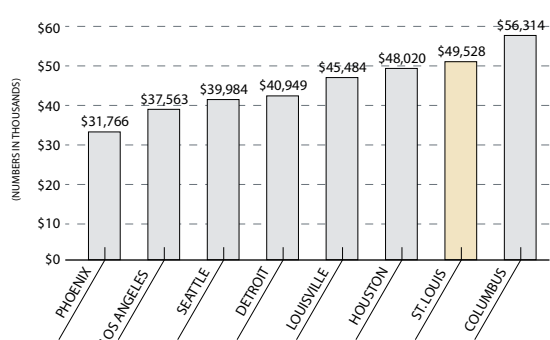
Typical Commercial Gas Bills*

(500 Therms)



Industrial Gas Bill*

(50,000 Therms)



*Source: Memphis Gas, Light, & Water, January 2005

Located near both the geographic and population centers of the country, St. Louis is within 500 miles of one-third of the U.S. population and within 1,500 miles of 90 percent of the North American continental population and gross domestic product.



Transportation

St. Louis is one of the few U.S. regions to enjoy access to four modes of transportation: air, rail, highway, and water. The availability of so many options results in some of the lowest shipping costs — and most convenient business and leisure travel options — in the country.

Air

The St. Louis area’s major airport, Lambert-St. Louis International Airport, has 83 gates and serves 15 airlines. The airport offers nearly 800 daily arrivals and departures and nonstop service to about 90 destinations. Lambert is completing a \$1 billion expansion, which includes installation of a third major runway that will improve capacity, especially in inclement weather. The runway is scheduled for completion by spring 2006.

The region’s second-largest airport, MidAmerica St. Louis Airport, is situated on 5,500 acres next to Scott Air Force Base, 24 miles from downtown St. Louis in Mascoutah, Ill. and has parallel runways of 10,000 and 8,000 feet.

Regional Airports

- Spirit of St. Louis Airport in St. Louis County
- St. Louis Downtown Airport in Sauget, Ill.
- St. Louis Regional Airport in East Alton, Ill.

Airlines Serving

Lambert-St. Louis International Airport

Air Canada Jazz with United	KLM with Northwest
Allegiant Airlines	Northwest
America West	Skyway
American	United
Comair	USAirways Express
Continental	Southwest
Delta	USA 3000 Airlines
Frontier Airlines	

Highway

The easy-to-navigate transportation infrastructure includes four interstate highways and four interstate linkages, which place the region at the nexus of the nation’s north/south and east/west interstate highway systems. The system totals more than 325 miles, making travel easy and convenient.

Rail

The St. Louis region is one of the leading rail centers in the United States with more than 5,000 people employed in the rail industry.

Class 1

- Burlington Northern Santa Fe
- Canadian Northern
- CSX Transportation
- Kansas City Southern
- Norfolk Southern
- Union Pacific

Regional

- Central Midland Railway
- Kansas City Southern

Switching and Terminal

- Alton and Southern Railway
- Manufacturers Railway Company
- Terminal Railroad

Water

Situated at the confluence of the Mississippi, Missouri, and Illinois rivers, St. Louis is home to the nation’s second-largest inland port by trip ton-miles — in excess of 24 billion trip ton-miles a year. Our position as the northernmost year-round ice-free port increases our competitive advantage. Our port is served by all major barge lines and offers more than 100 docks and terminal facilities.

Foreign Trade Zones

The St. Louis region has two foreign trade zone sites and four subzone sites located conveniently close to truck, rail, and air access.

Foreign Trade Zone (FTZ) No. 31 is a public/private sector venture operated by the Tri-City Regional Port District, providing 423,000 square feet of flexible warehouse/ industrial space with excellent multimodal transportation access. FTZ 31 will soon have a total of six FTZ sites equaling nearly 8,000 acres.

Foreign Trade Zone (FTZ) No. 102 is situated at the Red Arrow Corporation warehouse and distribution facility near Lambert-St. Louis International Airport. It provides 8,100 square feet of bonded warehouse space for foreign trade use.



CENTRAL WEST END DINING



FOREST PARK



DOWNTOWN



CENTRAL WEST END
NEIGHBORHOODS

Whether you're single or have a family, a sports fan or connoisseur of the arts, a fitness fanatic, or a film aficionado, Greater St. Louis has something for you. Although the 18th-largest metropolitan area in the United States, St. Louis offers remarkable convenience and ease of access with a low cost of living for all of the comforts and attractions it affords.

QUALITY OF LIFE

Neighborhoods

Much of Greater St. Louis' character and charm arises from its rich variety of distinct neighborhoods, which foster a connectedness that is rare today in large metropolitan areas. With a choice of urban, suburban, small town, and even rural lifestyles in its 16 counties in two states, the St. Louis region offers multiple options for singles and families alike.

Sports

We're No. 1 and proud of it. The *Sporting News* named St. Louis the "Best Sports City" in 2000 and the "Best Baseball Town" in 2005. We're home to the Super Bowl champion Rams, the National League champion Cardinals, and the Stanley Cup-hungry Blues along with many other fun-to-watch teams. The St. Louis region is also home to the Gateway International Raceway for auto sports and Fairmount Park for horse racing. And we're right in the middle of the Big 10 and Big 12 college athletic conferences.

Recreation

In addition to the nationally acclaimed and recently renovated Forest Park — one of the largest urban parks in the country at 1,300 acres and the object of a recent \$100 million renovation — the St. Louis area has more than 100 parks and nearly as many public and private golf courses. Greater St. Louis is also home to some 200 miles of trails for cycling, running, and walking. A network of hiking and bicycle trails that follows the area's great rivers is emerging as one of the best in the country.

Arts and Entertainment

Few cities can match the set of world-class cultural institutions in Greater St. Louis. We're home to the internationally acclaimed Saint Louis Symphony, Missouri Botanical Garden, and Saint Louis Zoo. The Saint Louis Science Center and Missouri History Museum both are among the nation's most highly regarded. You can explore artistic masterpieces inside the Saint Louis Art Museum or outdoors at Laumeier Sculpture Park. The St. Louis Black Repertory Company is one of the top three African-American theater companies in the country, and the Opera Theatre of St. Louis is nationally renowned. The Project for Public Spaces cited the City Museum as one of the "World's 10 Best Public Spaces." Not surprisingly, *Family Fun* magazine named St. Louis the "Top Midwestern City for Visitors."



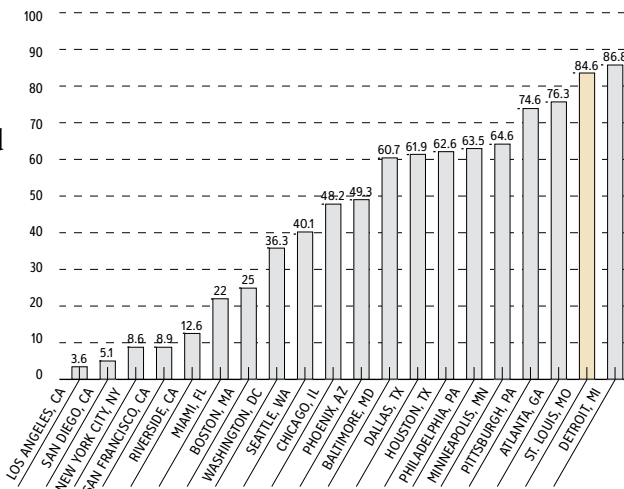
“St. Louis’ historic, gorgeous buildings give its neighborhoods exceptional charm and character. Restoring these buildings and helping these neighborhoods regain their vitality and diversity have been immensely rewarding. St. Louis is a terrific place to build a business, raise a family, and it’s the best place to eat in the U.S. — bar none. Fantastic food at reasonable prices.”

Amy and Amrit Gill, developers and owners of Coronado Place, The Moolah, and Lindell Towers in the City of St. Louis

Home Price Comparisons

The housing stock is large, diverse, and affordable in Greater St. Louis. The National Association of Home Builders ranked the region **the second-most affordable** among the 20 largest metropolitan areas in the country, based on home prices and household incomes. Illinois, in particular, has seen an unprecedented level of new home construction and sales in recent years, with many residents able to build their “dream homes” on affordable acreage in Madison and St. Clair counties.

Share of Homes Affordable for Median Income



Source: National Association of Home Builders Housing Opportunity Index Q2 2005

Climate

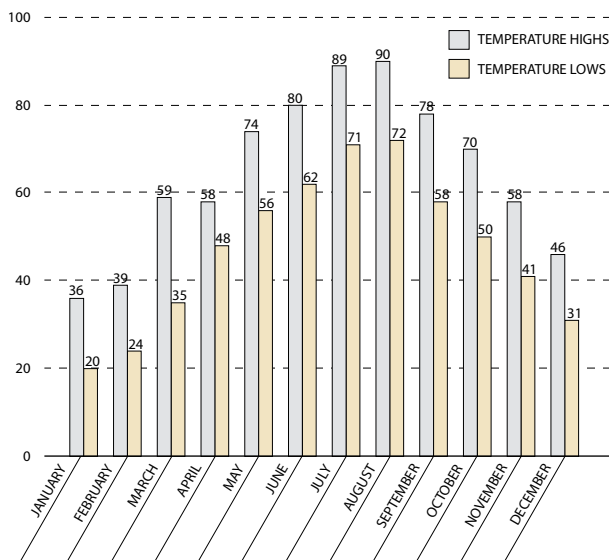
The climate of the St. Louis area is like the character of the region: balanced. St. Louis enjoys the advantages of four full seasons with few extremes. Average monthly temperatures range from 31.3° in January to 87.4° in July.

Spring arrives generally in mid-March and is spectacular.

Fall is equal to anything to be found in New England, but longer — sometimes extending even into November.

Summers are warm and sometimes hot — we admit it — but usually without long spells of excessive temperatures and on a par with many midlatitude communities.

Winters are relatively short and mild, with cold spells always interrupted by milder temperatures and just enough snowfalls to satisfy children and romantics.



Source: National Oceanic and Atmospheric Administration, 2003 Averages

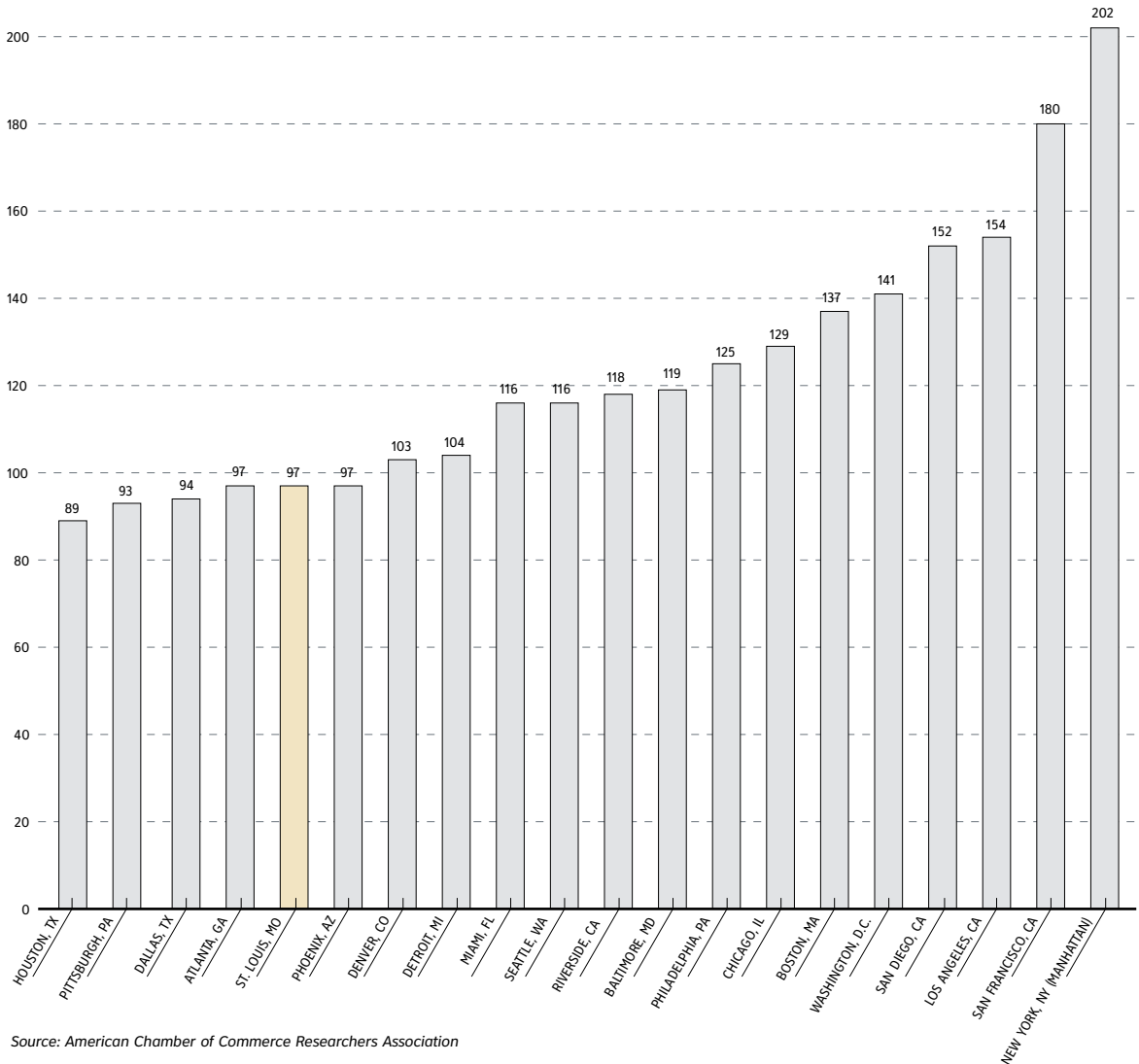
Inc. Magazine rated St. Louis as the 44th-best place in the country — out of 274 regions — to do business in 2005, noting “a growing array of technology and business firms” have located here, partly because of the area’s “lower costs.”

84.6%

SHARE OF HOMES
AFFORDABLE FOR
MEDIAN INCOME

Cost of Living

For all that Greater St. Louis has to offer, the cost of living is considerably low. In fact, the community tied for **the nation’s fourth-lowest cost of living** among the nation’s 20 largest metropolitan areas in the first quarter of 2005, according to the American Chamber of Commerce Researchers Association.



Source: American Chamber of Commerce Researchers Association

CONTACT INFORMATION

The St. Louis Regional Chamber & Growth Association (RCGA) is the chamber of commerce and economic development organization for Greater St. Louis, which includes 16 counties in Missouri and Illinois. RCGA markets the St. Louis region nationally and internationally to attract targeted industries to the area. It further spurs economic development by aiding the expansion and startup of companies within the region.

St. Louis Regional Chamber & Growth Association

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