TARGET INDUSTRY ANALYSIS

PREPARED FOR THE:

Springfield (IL) Chamber of Commerce

&

The Quantum Growth Partnership

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NORTILLO AND ASSOCIATES

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INTRODUCTION

The Springfield Area Chamber of Commerce contracted with Carter & Burgess, a major national site selection and architectural/engineering firm, in association with Nortillo & Associates, to complete this target industry analysis for the Springfield/Sangamon County Area. The objective of this multi-phased approach was to determine the best growth industry fits for Sangamon County and to develop a strategy to help these targets locate and expand here.

The analysis was carried out in a multi-phased approach, including:

1. Preliminary Target Industry Assessment
2. Target Match (Strength & Weakness) Analysis
3. Selection of the "Best Fit" Targets
4. Recommendations

PHASE I: PRELIMINARY TARGET INDUSTRY ANALYSIS

Introduction

Targeting is well recognized as the best method of attracting economic development. We utilize a unique methodology designed to identify the best target industries. We maintain a database of actual, major private sector site locations/expansions[1]. For this analysis we looked at activity that occurred between 2nd quarter 2005 and 4th quarter 2006.

This database assists us in predicting growth trends and we utilize this data for selecting the best initial communities for our site location clients. The methodology is sound and proven for the following reasons:

- Locations/expansions are driven by recent market conditions and these conditions will generally continue into the near future.

- Companies (and site selection consultants) select regions first and then communities within these regions with the best business climates. This may mean, for example, a good labor climate, good market proximity, good transportation, the availability of incentives, all positive business conditions. This will result in clustering, a concentration of like companies due to favorable business conditions.

- Clustering is a "green light" for other similar companies to take a look. But they will only locate if the good business conditions remain. For example, they may find the labor market for select skills depleted due to too much location/expansion activity. This is why we conduct careful fieldwork interviews with local companies for our site location clients, in order to help them to thoroughly understand the local business conditions.

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[1] We use Conway Data information, which tracts major locations and expansions (At least $1 million in capital investment, 50 new jobs or 20,000 square feet).

We also looked at existing County employment data in order to help determine growth (or declining) sectors.

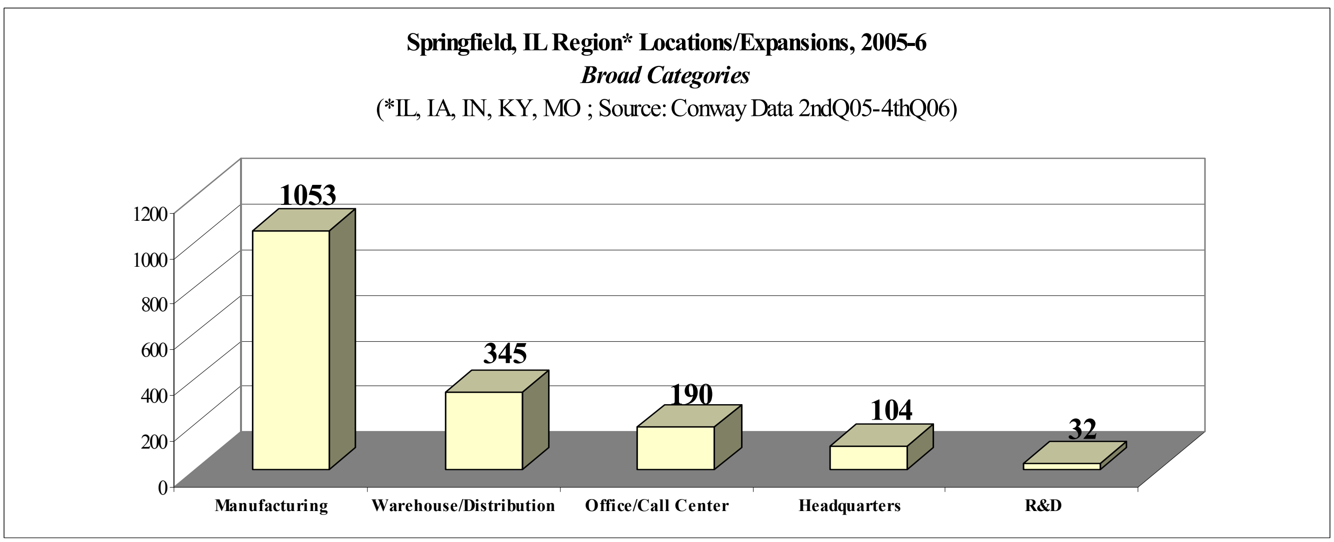
This methodology is also sound for economic development targeting. We reviewed and analyzed both regional growth cluster and sector projections in order to help local leaders understand which existing (and future) businesses will grow. It set the stage for the next portion of this assignment: understanding the needs of the most active, fastest growing company types. Cluster data is excellent for target planning because:

- It represents actual physical building activity (size and type of building).
- It represents actual economic development (both capital investment and jobs).

Multi-State Regional Location/Expansion Activity ("Growth" Clusters)

We screened location/expansion data to identify which industries (by NAICS Code[2]) located/expanded the most facilities in a multi-state region (Illinois[3], Indiana, Iowa, Kentucky and Missouri) during 2004-05 (2nd Quarter 2004-3rd Quarter 2005; 6 quarters). We define these as "growth clusters".

The following two graphs depict this information. The first one shows general industry categories and the second shows individual industry types.



- Manufacturing projects dominated.
- Warehouse/distribution (DC) had a significant number of projects.

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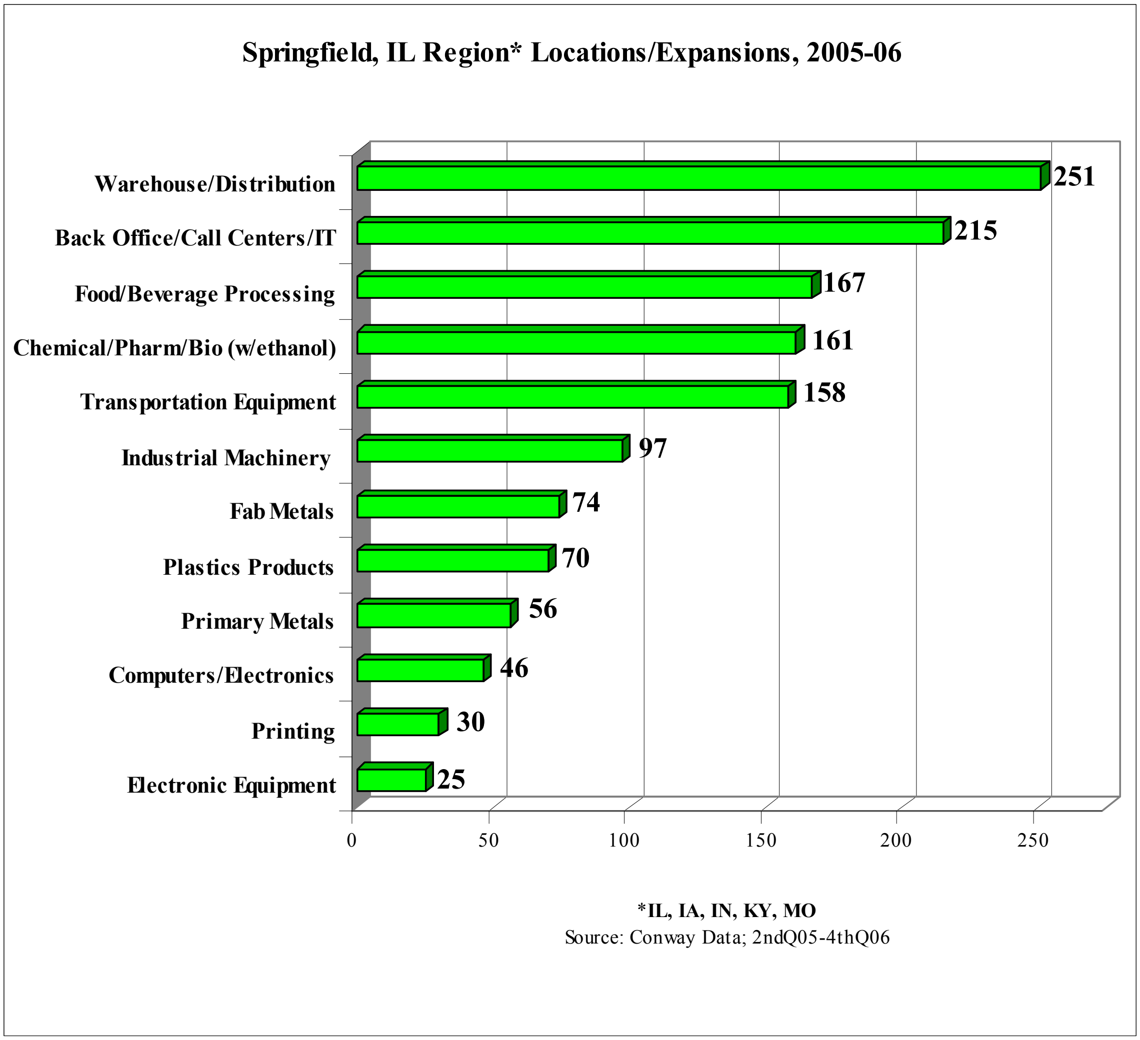
2 The North American Industry Classification System (NAICS) was formerly the Standard Industrial Classification (SIC) system.

3 In 2004, according to Conway Data, Inc., Illinois was the 5th most active state in the union with 356 new or expanded locations.



- Warehouse/distribution (DC) was the single largest sector, by far.
- Other significant manufacturing sectors include food processing; chemicals/pharmaceuticals/biotechnology; transportation equipment and industrial machinery.
- The most active non-manufacturing sector was back office/call centers/IT, which includes computer software.

The trend will be toward more locations/expansions in these general categories and industry types into the near term. They all, therefore, represent <u>potential</u> targets for the Sangamon County Area.

Major new locations (250,000 square feet and over) in 2005-06 included:

City	State	Company	Size (SqFt)	Jobs	Invest ($mil)	Type
DeKalb	IL	Target	1,500,000	500	100	DC
Rockford	IL	Lowe's	1,400,000	500	90	DC
Ottawa	IL	PETsMART	1,000,000			DC[4]
Anderson	IN	Nestle	880,000	300	359	Food
Milwaukee	WI	Aldrich Chemicals	800,000			Chem
Hamlet	IN	Sysco	700,000	500		DC
Shely	IA	Midwest Manufacturing	735,000	300	34	Doors
Monee	IL	Michelin	720,000	100	20	DC
Kansas City	MO	Musician's Friend	702,000		45	DC
Hebron	KY	Innotrac	664,000	300		DC
Riverwoods	IL	Morgan Stanley	650,000		170	HQ
Bullitt Co	KY	Zappos.Com	624,000			DC
Beloit	WI	Staples	600,000	400	40	DC[5]
Cameron	MO	Case	500,000			DC
Louisville	KY	North Atlantic Tobacco	500,000	58	24	Tobacco
Beaver Dam	WI	Finlay Industries	508,000		15	DC
Chicago	IL	FBI	430,000		120	HQ
Richwood	KY	GSI Commerce	540,000	555	35	DC
Florence	KY	Kiswel USA	360,000	44	95	Metal
Joliet	IL	Hudd	352,000			DC
Belvidere	IL	DaimlerChryler	500,000	500		Auto
Wauwatosa	WI	GE Medical	475,000	700	85	Office
Dixon	IL	UPM Raflatac	300,000	115	100	Labels
Terre Haute	IN	Certail Teed	300,000	100		Building
Macomb	IL	Pella Windows	275,000	480		Wood
St. Charles	IL	Jacobson	256,000	10		DC
Des Plaines	IL	IMS	255,000	350		Metals
Chicago	IL	Gordon Foods	250,000			DC
Madisonville	KY	Land O'Frost	250,000	500	45	Meats[6]
Pewaukee	WI	Steinhafels	240,000		30	DC

Included are two projects that Carter & Burgess assisted with: the Staples DC location in Beloit, WI and the Land O' Frost location in Madisonville, KY.

State Competition - 2006

Site Selection Magazine recently came out with the 2006 state winners for the largest number of locations/expansions nation-wide. Ohio was the winner with 431 projects. Illinois finished fifth with 251 projects.

When we looked at 2006 totals for our five state study region, we found a total of 708 projects:

- Illinois – 251
- Indiana – 190

[4] Carter & Burgess client
[5] Carter & Burgess site location
[6] Carter & Burgess site location

- Iowa – 105
- Missouri – 117
- Kentucky - 45

Only one of these qualified projects were announced in Sangamon County, Waverly Ethanol. In comparison, when looking at Midwest metro areas of similar size as Springfield, Sioux City, IA had eleven location/expansions in 2006, Terre Haute, IN had nine and Ottawa-Streator and Galesburg had four. **Our objective is to help you capture more of your fair share of future projects!**

Local "Growth" Trends

The targeting process includes looking at local employment growth trends. (key sectors in **bold**).

Wage & Salary Employment - Sangamon County, IL - Major Categories

Source: 2000 & 2004 County Business Patterns; State Projections

NAICS	Industry	2004	2000	% Change	2012 Projections
	TOTAL EMPLOYED	**98828**	**96199**	**0.027**	
23	Construction	4461	4721	-0.055	5375
31	**Manufacturing**	**3367**	**4078**	**-0.174**	**3624**
321	*Wood Products*	*285*	*189*	*0.508*	*252*
323	*Printing*	*316*	*301*	*0.050*	*328*
325	*Chemicals*	*302*	*n/a*		*212*
326	*Plastics & Rubber*	*103*	*135*	*-0.237*	*183*
327	*Nonmetallic Mineral Products*	*160*	*150*	*0.067*	*137*
332	*Fabricated Metals*	*234*	*277*	*-0.155*	*170*
333	*Machinery Mfg*	*1085*	*1472*	*-0.263*	*n/a*
334	*Computer & Electronic Products*	*192*	*620*	*-0.690*	*431*
377	*Furniture Mfg*	*193*	*226*	*-0.146*	*224*
42	Wholesale Trade	3728	3902	-0.045	3621
44	**Retail Trade**	**12404**	**12301**	**0.008**	**12450**
48	**Transportation & Warehousing**	**1558**	**1908**	**-0.183**	**3135**
51	Information	3170	3359	-0.056	3302
52	**Finance & Insurance**	**6226**	**6361**	**-0.021**	**7360**
524	*Insurance & Related*	*3300*	*3836*	*-0.140*	*3639*
53	Real Estate, Rental & Leasing	978	971	0.007	1239
54	**Professional, Scientific & Tech**	**3874**	**4174**	**-0.072**	**5439**
56	Administrative & Support	5286	5486	-0.036	4841
61	Educational Services	1435	1298	0.106	
62	**Health Care & Social Assistance**	**17229**	**17858**	**-0.035**	**19952**
621	*Ambulatory Services*	*6338*	*6589*	*-0.038*	
622	*Hospitals*	*6785*	*6925*	*-0.020*	*8311*
71	Arts, Entertainment & Recreation	1219	981	0.243	1221
72	Accomodation & Food Services	8346	7141	0.169	10595
81	Other Services	6448	6642	-0.029	7112
	Government	**48649**	**57358**	**-0.152**	

- Sangamon County had very modest employment gains from 2000-2004 (2.7%).
    - All government and key non-government sectors, except retail trade, lost jobs.
    - A very small manufacturing sector continues to erode.
- 2012 projections show
    - Significant gains in the health care; finance/insurance; and professional, scientific and technical sectors.
    - Small gains projected for the manufacturing sector.

The Preliminary Targets

Based on the previous analysis where we looked at regional location/expansion activity and local growth trends, we feel that the best preliminary targets for the Sangamon County Area include (not by priority):

1. **Warehouse/distribution centers (DC)** (NAICS 421, 422, 484, 488, 492, 493)
2. **Back office/call centers/IT, professional, scientific and technical services** (NAICS 513, 514, 522, 523, 524, 541, 561)
3. **Food/beverage processing** (NAICS 311 & 312)
4. **Transportation equipment manufacturers** (NAICS 336)
5. **Chemical** (including ethanol), **pharmaceutical & biotechnology related** (NAICS 324 & 325)
6. **Health care related** (includes numerous sectors including those from the above call center, pharmaceutical and DC groups and Miscellaneous Manufacturers NAICS 339).

Retail (i.e. restaurants/hotels) should not be considered a primary target industry. Retail will naturally follow the attraction of targets over time.

PHASE II: TARGET MATCH (Strengths and Weaknesses) ANALYSIS

Introduction

In corporate site selection, we analyze communities in order to determine if they possess the attributes most important for our clients. Our objective in this phase of work is to:

1. Understand the general location needs of preliminary targets.
2. Understand the strengths and weaknesses of the Sangamon County Area.
3. Match these strengths with the needs of the preliminary targets.
4. Recognize the weaknesses for attracting some preliminary targets.
5. Determine the "best fit" targets based on these factors.
6. Make appropriate recommendations to improve elements that will attract/help expand the "best fit" targets.

The Location Needs of the Preliminary Targets

Introduction

First, we provide pertinent background information on each preliminary target. This includes a brief description and important trends. Next, based on our site selection experience, we have listed the top site selection criteria for each target.

Warehouse/Distribution (DC) - NAICS 421, 422, 484, 488, 492 and 493

Understanding the Sector

The warehouse/distribution (DC for distribution center) sector continues to boom. Locations/expansions have been driven by consumer demand for retail products.

The Midwest region has been a hot bed of DC activity as retailers strive to serve the burgeoning markets of Chicago, St. Louis and Indianapolis. The sector had 36 more locations/expansions in the region than the next most active sector (back office/call centers), a total of 251 over the last 7 quarters. This number is actually much larger as most manufacturing locations/expansions also include a warehousing function.

Regional types included general merchandise (i.e. Wal Mart/Target/Staples), grain, building materials, automotive supplies, foods/beverages (requiring refrigeration space), and boxes/containers.

We expect this rapid growth trend to continue. Carter & Burgess recently assisted Wal-Mart with site selection/design for a one million square foot DC employing nearly 600 in Sterling, IL, as well as the Staples location mentioned earlier. We continue to receive location inquiries from DC clients.

Warehouse/distribution falls under a number of NAICS codes, including 421 & 422 wholesale distribution, 484 truck transportation, 488 transportation support, 492 couriers and 493 warehouse/distribution.

Key Site Selection Needs (by priority)

1. Access to market/transportation/freight costs
   - Access to intermodal freight terminals and ports growing in importance
2. Labor costs/availability
   - key positions: material handlers, forklift drivers; truck drivers
3. Electric power (costs/reliability)
4. Access to Interstate highways (within 10 miles[7] of interchange)
5. Large sites (50 to 250 acres) or large buildings (40,000 square foot plus)
6. Rail service for select operations
7. Incentives
   - Infrastructure
   - Training
8. Good labor/management relations.

Back Office/Call Centers/IT including professional, scientific and technical services **-** NAICS 513, 514, 522, 523, 534, 531, 541 and 561.

Understanding the Sector

The back office/call center/IT sector continues to grow at a rapid pace nation-wide because:

1. the sector crosses virtually all industry types (every business has an administrative, IT and support components)
2. companies continue to seek ways to reduce costs. They therefore either outsource administrative functions to a third party provider or find a lower cost location outside corporate headquarters, and
3. software and related IT products have rebounded in recent years.

However, as in the manufacturing sector, more and more of this sector's jobs are moving off-shore. According to McKinsey Global Institute, the service-sector jobs ripe for off-shoring include:

- Engineering – Up 52% from 2000 to 2005.
- Accounting – Up to 31%
- Insurance – Up to 19%.

[7] This mileage requirement has gone down from 20 miles due to increased fuel costs.

Companies site lower costs, competitive pressures and access to greater numbers of qualified personnel as reasons for off-shoring.

The largest and fastest growing administrative back office segment is call centers. There has been rapid volume growth in this industry. Inbound minutes are increasing faster than outbound minutes, even though outbound represents 60% of all calls.

Generally, the call center industry is broken into three primary groups:

- Outbound telemarketing centers consisting of outbound sales, insurance, fundraising, polling, credit card acquisition, and related functions.
- Inbound call centers consisting of customer service, order fulfillment, insurance, health care, credit card authorization, and the like.
- Technical support centers at the high end of the industry, and often called technical help desks, offering computer software/hardware or financial support.

215 locations/expansions occurred during 2005-06 in the region. Back office/call centers/IT fall under a number of NAICS codes, including 513 broadcasting/telecommunications, 514 data services, 522 credit services, 523 financial services, 534 insurance, 531 general office, 541 professional services/software and 561 call centers.

Key Site Selection Needs for Call Centers (by priority)

1. Labor availability
    - key positions: customer service representatives (CSR), help desk reps, telemarketers, industry experts
2. Labor quality (turnover, absenteeism, etc.)
3. Labor costs
4. Telecommunications
5. Education/Training (and incentives)
6. Existing leased Class A/B buildings with ample parking and/or improved commercial sites
7. IT tech support
8. Commercial air service
    - Good access to corporate headquarters/related
9. Corporate income tax
10. Electric power (reliability & cost).

Food/Beverage Processing - NAICS 311 & 312

Understanding the Sector

Food processing is a dominant sector in the Midwest due to the direct access to an abundance of raw food materials and access to large consumer market areas such as Chicago, Indianapolis and St. Louis. 167 locations/expansions occurred in 2005-06 within the region. Major project types included:

- additives,
- baked goods,
- candy,
- cereals,
- coffee,
- corn/soybean processing/R&D,
- dairy products,
- deserts.
- dry goods,
- frozen foods,
- fruit/vegetables
- meat processing
- milling,
- pasta,
- pet food/feed,
- seeds,
- snack foods,
- soft drinks.

Carter & Burgess assisted Land O'Frost locate a deli meat processing plant in Madisonville, KY in 2005 and directed a fruit/vegetable processor to look at a building in Springfield in 2006.

Key Site Selection Needs (by priority)

1. Available labor skills
   - key positions: machine operators (cutting, blending & PLC[8]); food technicians, maintenance mechanics and warehouse workers)
2. Labor costs
3. Access to Midwest markets & raw materials/transportation costs
4. Good water and sanitary sewer capacities
5. Electric power costs/reliability
6. Fully improved industrial sites/specialized buildings (may require rail service)
7. Incentives
   - Equipment tax exemptions (large capital investment)
   - Infrastructure
   - Training
8. Good highway access
9. Good labor/management relations.

[8] PLC – Programmable Logic Control

Transportation Equipment – NAICS 336

Understanding the Sector

This sector involves operations that manufacture and assemble transportation equipment such as automobiles, trucks, aircraft/aerospace, watercraft, farm and rail equipment. The NAICS code is 336.

158 locations/expansions occurred in this sector within the region in 2005-06. The vast majority of these were auto and truck related, but other project categories included aircraft and aircraft parts, railroad equipment, trailers, bicycles, barges and boats.

Research and development (R&D) operations which lead to new innovative products are significant in this sector, particularly in the automotive (as struggling companies such as Ford and GM seek new market share) and aerospace field. Private industry still funds over 68% of all R&D operations.

Key Site Selection Needs (by priority) for an Auto Parts Supplier

1. Access to main plant/transportation costs/Just In Time (JIT) service
2. Available labor
   - key positions: Engine/Machine Assembler; and Machine Operator, Machinist, Welder and Maintenance Mechanic
   - 43% skilled
3. Labor costs
4. Interstate highway access
5. Electric power (reliability & costs)
6. Improved sites and/or existing buildings (minimum of 20,000 square feet)
7. Incentives
   - Equipment tax exemptions (large capital investment)
   - Infrastructure
   - Training
8. Good access to suppliers
9. Good labor/management relations.

Chemicals/Pharmaceuticals – NAICS 324 & 325

Understanding the Sector

This is a large and diverse sector which includes growth segments such as health care related, biotechnology and ethanol. Looking globally, nine of the top 10 largest chemical/pharmaceutical projects in 2006 all took place overseas with China capturing three of these. Only one of these projects took place in the USA, Renewable Energy in Moses Lake, WA.

However, looking at our six-state Midwest region, the sector has been very active with 161 new location/expansions in 2005-2006. 96 of these were biodiesel/ethanol related. Other project types in the region included: phosphorous, petrochemicals, fertilizer, carbon dioxide, stains and pharmaceuticals. This helps support the argument the U.S. is still effectively competing for chemical/pharmaceutical investment

Pharmaceutical/biotechnology/related R&D is a growing sector with 14 projects (more detail is found in the Health Care section). The largest new location was Mentor Corporation into Madison, WI. The largest expansion was Fujisawa Health in Deerfield, IL with 150 jobs and a $42 million capital investment.

The price of crude oil today is making the economics of ethanol/biodiesel production much more feasible. The most critical factor is access to raw materials (corn for ethanol; canola for biodiesel). NAICS code is 325193.

The newest product craze is cellulosic ethanol derived from plant waste left in the fields after harvest. By 2020 its production costs could be less than $.80 a gallon. Traditional ethanol still costs $1.40 a gallon to produce, roughly twice as much as gasoline. Early plants are locating in Canada, but U.S. locations will be sought soon. Iogen, a Canadian corporation is the early leader in production, but Cargill-Dow is exploring projects as well.

The largest regional ethanol/biodiesel projects in 2005-06 included:

City	State	Company	Jobs	Invest ($mil)
Belle Plaines	IA	Ethanol IDEA	200	400
Waverly	**IL**	**Waverly Ethanol**		**110**
Cape Girardeau	MO	Ethanex		260
Hartford City	IN	Hartford Bio	40	200
Emmetsburg	IA	Voyager Ethanol		200

Key Site Selection Needs for Ethanol Manufacturing (by priority)

1. Local grain supply and basis (grain represents 65%-70% of total operating exp.)
2. Highway access
3. Rail access to isolated industrial site (70 acre minimum)
4. Utility infrastructure (natural gas pipeline, electricity, water)
5. Labor costs and availability
6. Rural, remote, lower wage areas.

Key Site Selection Needs for Pharmaceutical (Drug) Manufacturing (by priority)

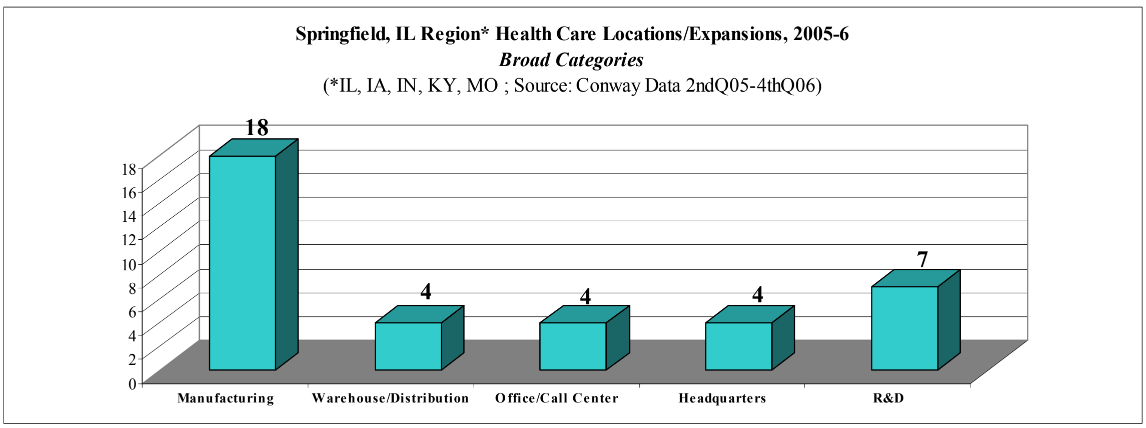
1. Skilled/technical workers
    - 60% skilled operators
    - 25% professional/technical
2. Labor costs
3. Class A business park
4. Electric power costs/reliability
5. Highway access
6. Incentives
    - Equipment tax exemptions (large capital investment)
    - R&D tax credits (moderate R&D investment)
    - Training

Health Care Related (Manufacturing, R&D and Office)

Understanding the Sector

The health care sector is massive and covers many different sectors ranging from patient care to manufacturing, to research and development to warehousing. The 2003 Lockwood Greene Report, previously commissioned by the Sangamon County EDC, gives an excellent understanding of past trends, clusters and general location requirements and should continue to be used as a reference.

However, in order to understand the most recent regional growth trends, we again looked at location/expansion data (2005-06). The following depicts these results (details are found on the next page).



- Significant health care related manufacturing occured in the Midwest. The most active sectors were:
    - Pharmaceuticals (NAICS 325412)
    - Orthopedics (NAICS 339112)
    - Surgical Instruments (NAICS 339)
    - Diagnostics (NAICS 339112)

- Research and development (R&D) active segments included:
  - Pharmaceuticals
  - Genetics (NAICS 514 & 541)
- There were four health care related call centers (NAICS 56199).

2005-06 Regional Health Care Related Locations/Expansions

Jobs	Size	City	ST	Product	NAICS	Company	New/Exp	Type
800		Clayton	MO	Healthcare Solutions	541	Centene Corp.	E	HQ
500	81,000	Radcliff	KY	Health Care	621999	Cardinal Health	N	Call Center
450		Terre Haute	IN	Pharmaceuticals	325	Phizer	E	Mfg
343		Fort Wayne	IN	Pharmaceuticals	325	Mogul Enterprises	N	Mfg
315		Ames	IA	Pharmaceuticals	325412	NewLink Genetics	N	Mfg
300	170,000	Pierceton	IN	Surgical Instruments	339	Paragon Medics	N	Mfg
270		Warsaw	IN	Orthopedics	339114	Zimmer, Inc.	E	Mfg
220	40,000	Newport	KY	Health Care	621	Humana	N	Call Center
160	60,000	Warsaw	IN	Orthopedics	339	Biomet, Inc.	N	Mfg
126		Carmel	IN	Pharmaceuticals	325	PhySci Pharm	N	Mfg
108		Warsaw	IN	Orthopedics	339112	Biomet, Inc.	E	Mfg
103		Columbia City	IN	Orthopedics	339	Micropulse	E	Mfg
100	30,000	Warsaw	IN	Orthopedics	339	Biomet, Inc.	N	Mfg
80		Plainfield	IN	Pharmaceuticals	325410	Eli Lilly	E	Mfg
80		Kansas City	MO	Pharmaceuticals	325412	B&B Clinical	E	R&D
74		Dubuque	IA	Health Services	56199	McKesson	E	Call Center
50	622,000	Chicago	IL	Hospital	541	Mercy	E	HQ
47	50,000	St. Joesph	MO	Pharmaceuticals	325	Boehringer Industries	E	Mfg
47		West Lafayette	IN	Pharmaceuticals	325	QuadraSpec	E	Mfg
40	50,000	Des Moines	IA	Nutriceuticals	325412	Kemin Industries	E	HQ
36	20,000	Iowa City	IA	Biobank	541	National Genetics	E	R&D
34		Rosemont	IL	Cardiac Monitors	339	LifeWatch Inc.	E	Mfg
30	10,000	Louisville	KY	Medical Health	524	Medassist	E	HQ/Call Center
24	58,000	Algona	IA	Health Insurance	524298	Pharmacists	E	HQ
22	20,000	Charles City	IA	Pharmaceuticals	325	Cambrex, Inc.	E	Mfg
22			IN	Surgical Implants	339	Medtronic	N	
20	60,000	St. Joesph	MO	Pharmaceuticals	325	IVX Animal Health	E	Mfg/R&D
19		Fort Wayne	IN	Surgical Instruments	421	United Surgical	N	DC
17	7,000	Kansas City	MO	Pharmaceuticals	325	Proteon	N	Mfg
15		Newton	IL	Genetic Breeding	311	Pitchco III	N	R&D
12		Boone	IA	Biologicals	325	Proliant Health	E	Mfg
12	8,000	West Lafayette	IN	Vitamins	325412	Endocyte	E	R&D
	72,000	Coralville	IA	Pharmaceuticals	325	National Genetics	N	R&D
	24,000	Portage	IN	Pharmaceuticals	325	Monosol RX	E	R&D
		Seymour	IN	Pharmaceuticals	325412	Schwarz	E	Mfg
	150,000	Fort Dodge	IA	Animal Pharm	325412	Fort Dodge Animal	N	Mfg/DC
	53,000		IL	Diagnostics	339112	Sysmex	N	Mfg
	655,000	Plainfield	IN	Medical Products	423450	BD	N	DC
	205,000	Joliet	IL	Supplies	424	Tyco Healthcare	N	DC

Source: Conway Data; Region: IL, IN, IA, KY, MO; 2ndQ05-4thQ06

The majority of these locations/expansions were small. Over 50% had job growth of 100 or fewer. Many went into Class A spaces or incubators with specialized requirements such as wet labs.

Key Site Selection Needs for Pharmaceutical/Biomedical R&D (by priority)[9]

1. Technical talent
   - scientists and technicians - 70%
2. Access to a major research university (and/or related hospital)
3. Leased Class A office/lab space
4. Excellent quality of life (i.e. good schools, low crime rate, reasonable cost of living)
5. Good commercial air service
6. R&D tax credits.

Key Site Selection Needs for Surgical Instruments (Prosthetics) (by priority)

1. Skilled workers
   - 29% professional/technical
   - 34% operators
2. Labor costs
3. Class A industrial park/building
4. Electric power cost/reliability
5. Highway access
6. Incentives
   - Equipment tax exemptions (moderate capital investment)
   - R&D tax credits (moderate R&D investment)
   - Training

Key Site Selection Needs for Clinical Trials (by priority)

1. Access to trial patients (Phase I – 20-80; Phase II – 100-300; Phase III – 1,000+)
2. Skilled workers
   - Clinical trial administrators - 76% of work force in a typical project
3. Close association with area hospitals
4. Leased Class A office/lab
5. Excellent quality of life
6. Incentives
   - R&D tax credits
   - Training

[9] Chuck Manula, VP, Global R&D Facilities, Wyeth, Inc. (at Spring IAMC Conference, Amelia Island, FL)

Sangamon County Area's Key Economic Development Strengths & Weaknesses

Introduction

Carter & Burgess examined key site selection criteria prevalent in all the preliminary targets as they relate to Sangamon County Area. Each was rated a strength, a weakness or both. Criteria include:

- Transportation/Logistics
- Labor Costs
- Labor Availability & Quality
- Electric Power
- Sites & Buildings
- Incentives
- Education/Training
- Community Services
- Cost of Living/Quality of Life

The analysis included extensive fieldwork interviews (over 30) with company, training/education, and development officials.

We compared the Sangamon County area against several competitor cities for select criteria: Chicago, IL; Des Moines, IA; Indianapolis, IN; St. Louis, MO and Minneapolis, MN.

Transportation/Logistics — Strength

The ability of a company to receive and deliver goods economically is often a determining site selection factor. Sangamon County Area has strong transportation/logistics features, including:

- Ideal for serving Midwest markets
- Outstanding access to two Interstate highways (I-55 & I-72)
- Outstanding rail connections

Key Conclusion: *The Sangamon County Area is an obvious distribution center location from a transportation/logistics viewpoint. Logistics modeling (determining inbound/outbound freight costs) will help document these advantages.*

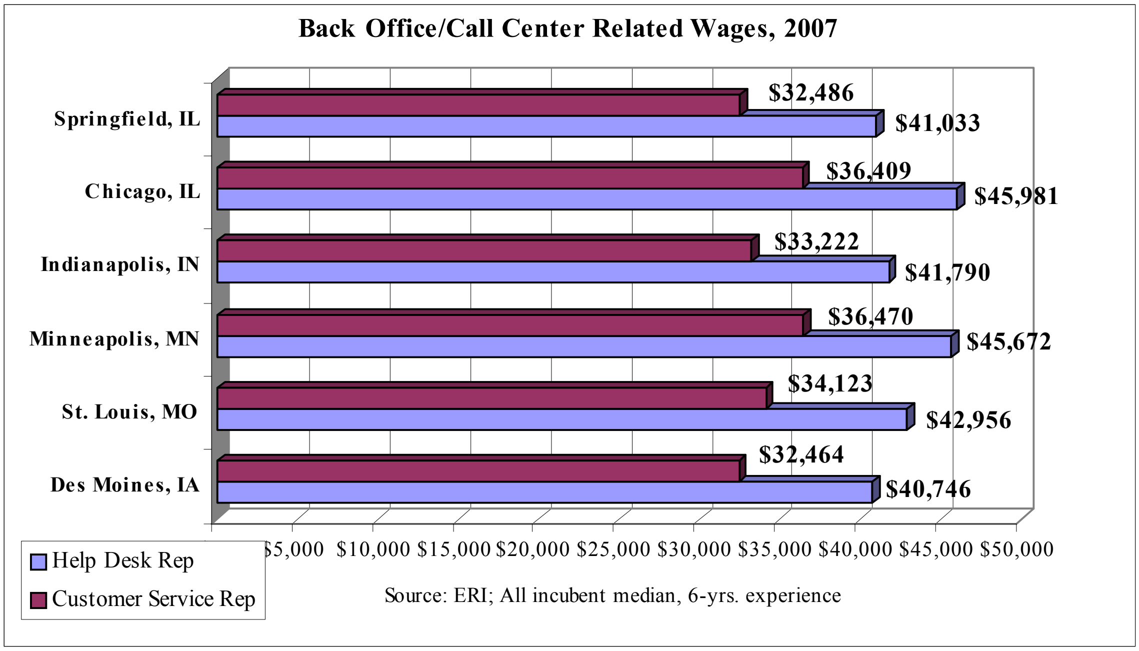
Labor Costs **_Strength_**

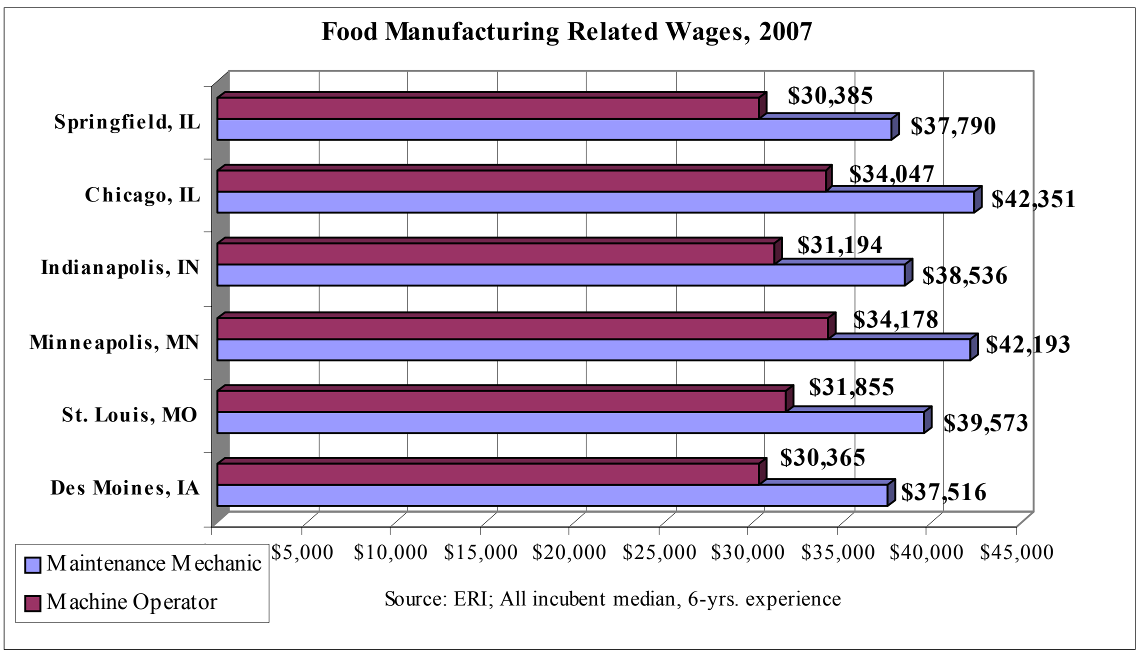
Wage rates and salaries are the single most important labor factor both affecting the availability of good quality workers in a marketplace and affecting a company's competitive position. Up to 80% of the annual operating costs of a project can be labor.

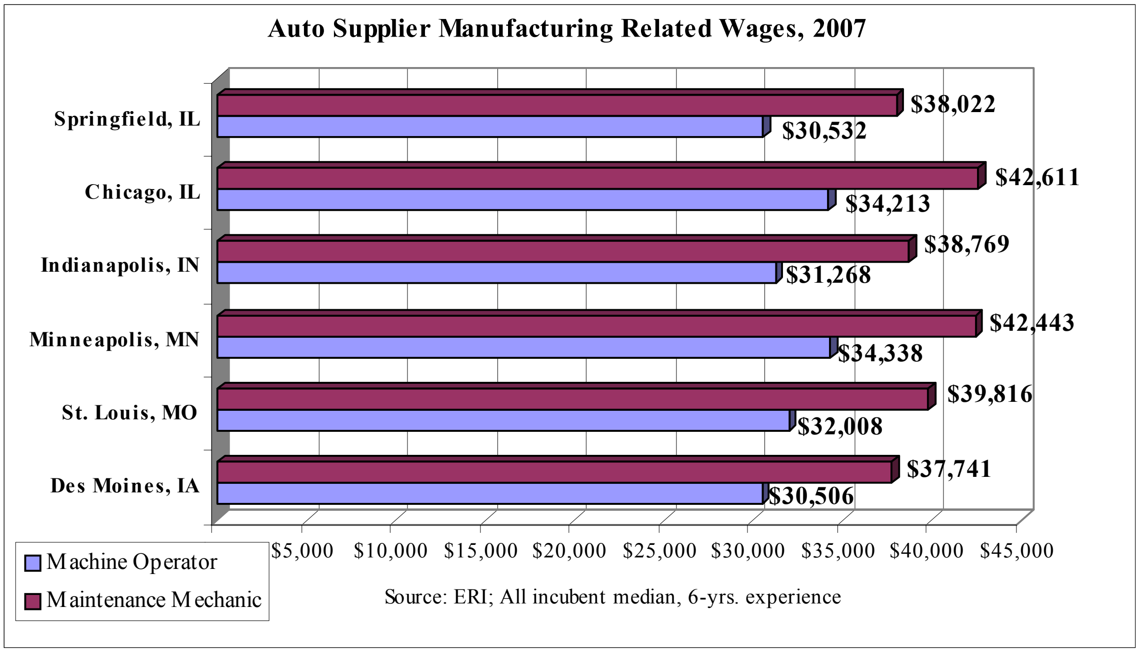
Select preliminary target wages follow. We utilized wage data from our Economics Research Institute (ERI) data base and actual field work. Wages are for workers with one-year experience, median without benefits.

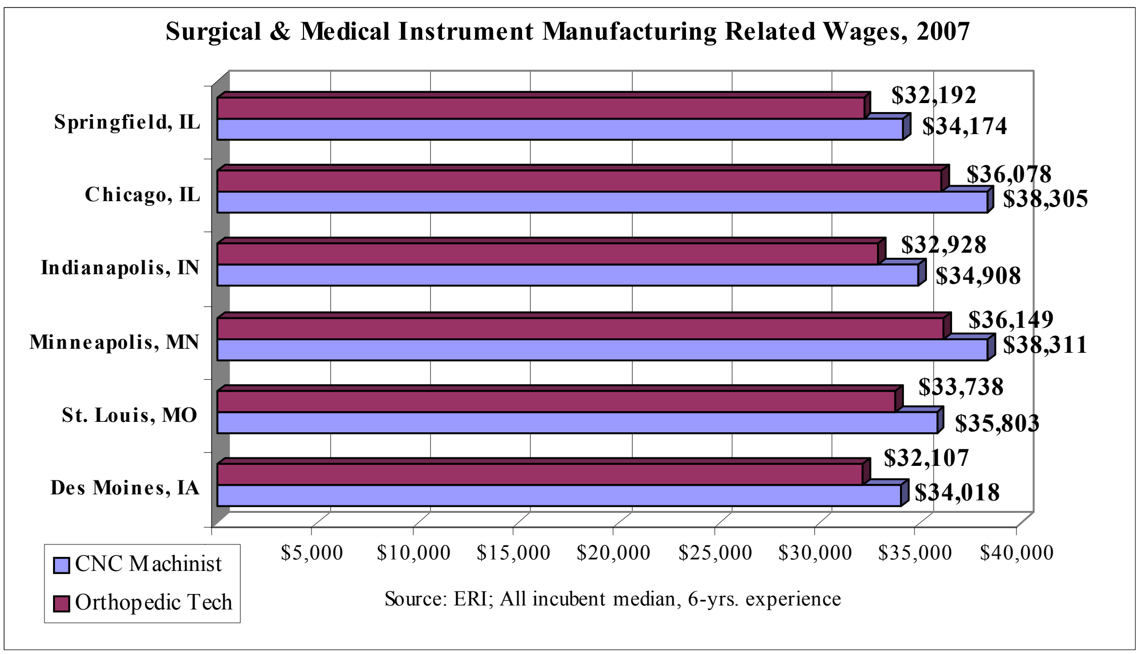
Sangamon County will not be able to compete with some U.S. and overseas competitors on wages. Manufacturing wages in China, for example, average $.75 - $1.00 per hour versus $14.00 per hour in Sangamon County.

- **Sangamon County Area wages are generally lower than all competitors, except Des Moines. In some cases Sangamon is the lowest overall.**


Back Office/Call Center Related Wages, 2007
Springfield, IL
$32,486
$41,033
Chicago, IL
$36,409
$45,981
Indianapolis, IN
$33,222
$41,790
Minneapolis, MN
$36,470
$45,672
St. Louis, MO
$34,123
$42,956
Des Moines, IA
$32,464
$40,746
$5,000 $10,000 $15,000 $20,000 $25,000 $30,000 $35,000 $40,000 $45,000 $50,000
Help Desk Rep
Customer Service Rep
Source: ERI; All incubent median, 6-yrs. experience


Food Manufacturing Related Wages, 2007
Springfield, IL
$30,385
$37,790
Chicago, IL
$34,047
$42,351
Indianapolis, IN
$31,194
$38,536
Minneapolis, MN
$34,178
$42,193
St. Louis, MO
$31,855
$39,573
Des Moines, IA
$30,365
$37,516
$5,000 $10,000 $15,000 $20,000 $25,000 $30,000 $35,000 $40,000 $45,000
Maintenance Mechanic
Machine Operator
Source: ERI; All incubent median, 6-yrs. experience



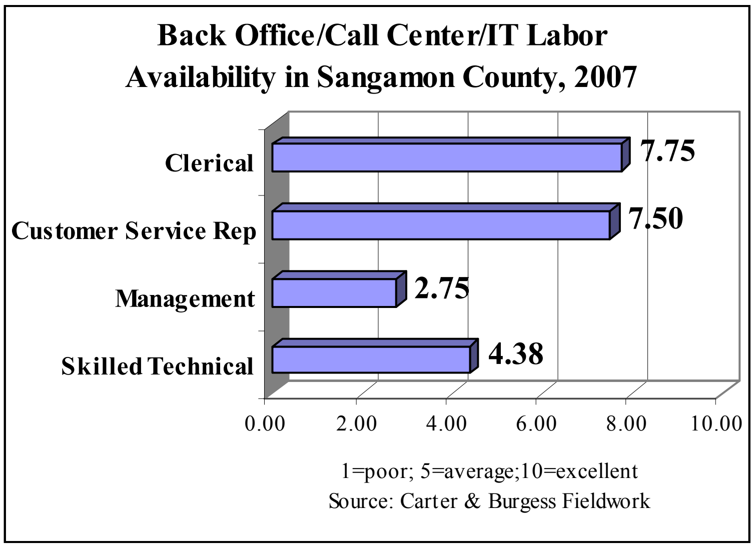


Key Conclusion: *By locating in the Sangamon County Area, target employers will save between 12% (over Chicago) and 0.5% (over Indianapolis), but will pay 1% more than Des Moines. In order to compete with Des Moines, Sangamon County must offset these costs through other criteria including incentives.*

Labor Availability **Strengths & Weaknesses**

The ability to attract the right amount of labor in the right skill categories is critical to the success of a project. We use an *Availability Index,* which measures labor availability on a one to ten point scale (1= very poor; 5=average; and 10=excellent). We use the same index in all of our labor market analysis nation-wide and this gives a true "apples to apples" comparison of different communities. Generally, scores of 3 to 4 are "below average", 4 to 6 are "average"; 6 to 7 are "above average"; 7 to 8 are "good"; and 8 to 9 are "very good" and 9 to 10 are excellent (see below).

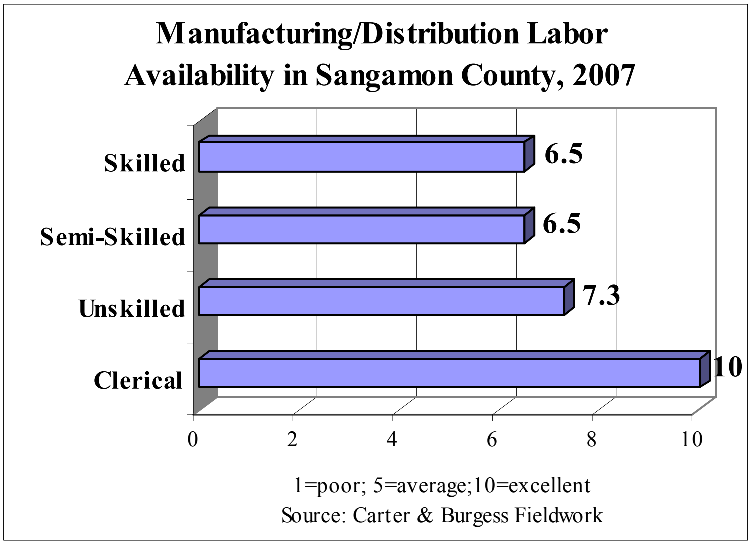
The following rates labor availability by preliminary target categories:



- Customer service representative (CSR)-type and clerical talent is plentiful.
- More skilled technical talent such as underwriters, actuaries and business analysts are tough to find.
- Management talent is difficult to recruit and relocate.

The following are employer quotes regarding availability:

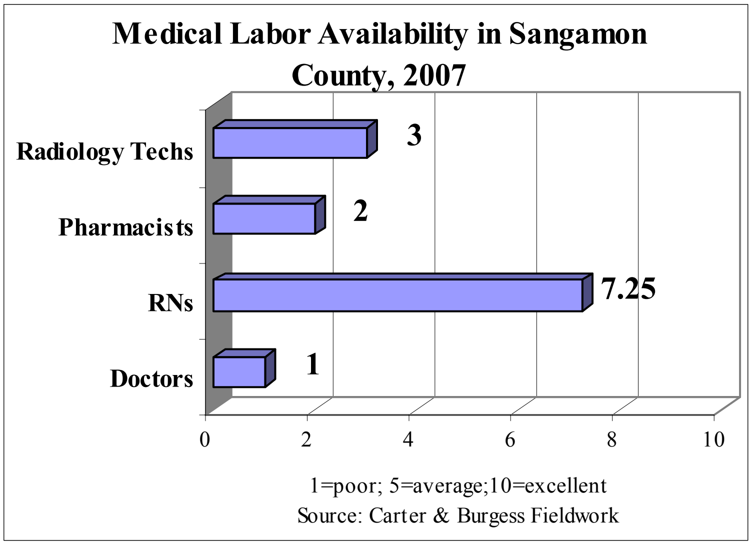
- *Cannot attract upper level management to Springfield - Lack of cultural activities, lack of restaurants, limited resources*
- *Had to hard time finding a Business Manager (mid $30s)*
- *We don't have a problem filling positions, however we have to sift through a lot of applicants. 50% of those coming in the door are not qualified.*
- *We need Spanish/bi-lingual speaking skills.*



- Skilled and semi-skilled worker availability is only above average
- Unskilled and clerical rated good to excellent.

The following are employer quotes regarding availability:

- *Availability is better here than in Bloomington and Chicagoland.*
- *Availability is excellent due to the Cisco pull-out…we have a waiting list!*
- *CNC operators we're getting from Eaton Corporation which shut down in Petersburg – not a shortage in this area.*
- *In the past the State was tough competition for jobs, but now State jobs are not as attractive due to potential cutbacks…past State employees are now often looked at as "damaged goods." due to poor State services.*
- *Many HR people are not using the most up-to-date recruiting methods.*
- *State and City are strong competition for jobs*
- *Tough to fill: CNC Operators (So little industry here, but grow our own); truck drivers (there is a good CDL License program at Lincolnland)*
- *We do a lot of temp to perm…"dating before marriage works well."*
- *Workman's Compensation and Unemployment Insurance are still a mess, even though there has been some improvement.*



- Radiology Techs, pharmacists and doctors of many types are hard to find.
- RN availability is pretty good at the moment, but RNs are always in demand and future shortages are likely.

Employers tell us:

- *Hot Recruiting Needs: RNs, Pharmacists; Physical Therapist, Radiology Techs, teachers (PhDs).*
- *Recruiting often a spousal issue.*
- *SIU Med School is currently recruiting 50-60 doctors.*

Key Conclusions: *Back office related customer service personnel, the backbone of this industry are plentiful and there is a good critical mass here. This critical mass translates into the strong potential of attracting more sophisticated CS operations such as technical support.*

Manufacturing availability is only average and likely tighter regionally than reported (based on our experience in Macon County where recruiting for top skills is difficult). Very skilled machine/maintenance-types are always hard to find. Unskilled workers are readily available.

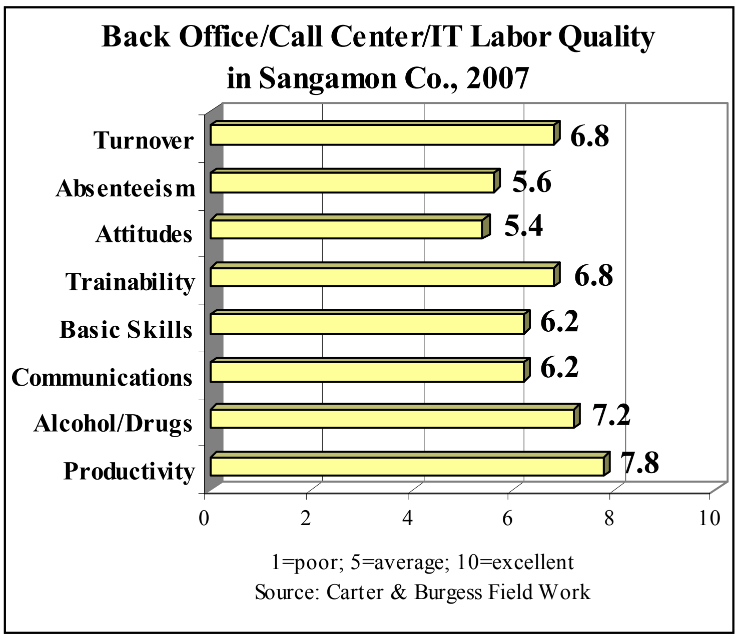
Medical shortages are critical for many professional (doctors) and technical positions. RNs availability is good right now, but always in demand and future shortages are likely. Some R&D talent is employed here for good collaboration and recruitment but the market is thin and talent for future operations will need to relocated.

Labor Quality **Strength**

<u>The ability to find quality workers will be critical to the success of any target company project.</u> Through interviews with the local employers we were able to determine current labor quality in the Sangamon County Area market.

We use a *Quality Index,* which measures labor quality on a one to ten point scale (1= very poor; 5=average; and 10=excellent). We use the same index in all of our labor market analysis nation-wide and this gives a true "apples to apples" comparison of different communities. Generally, scores of 3 to 4 are "below average", 5 to 6 are "high average"; 6 to 7 are "above average"; 7 to 8 are "good"; 8 to 9 are "very good" and 9 to 10 are excellent (see below).

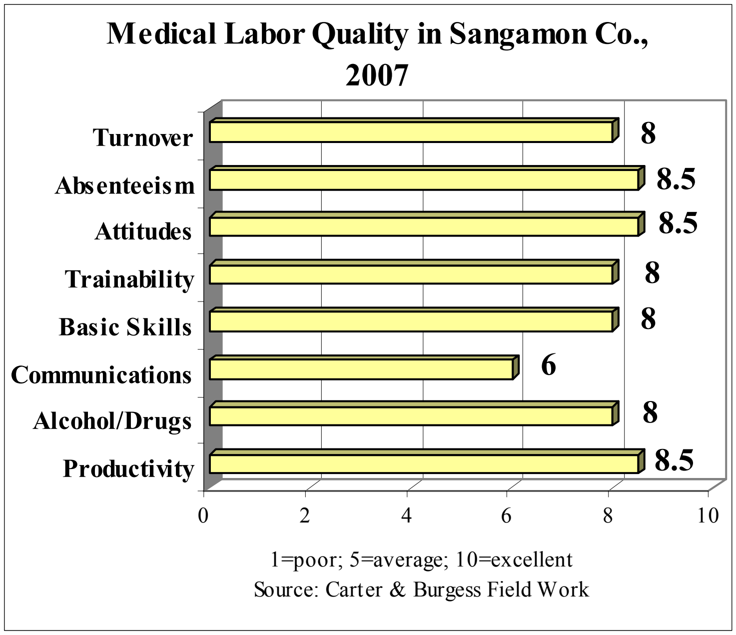
The following are labor quality ratings by preliminary target sector:



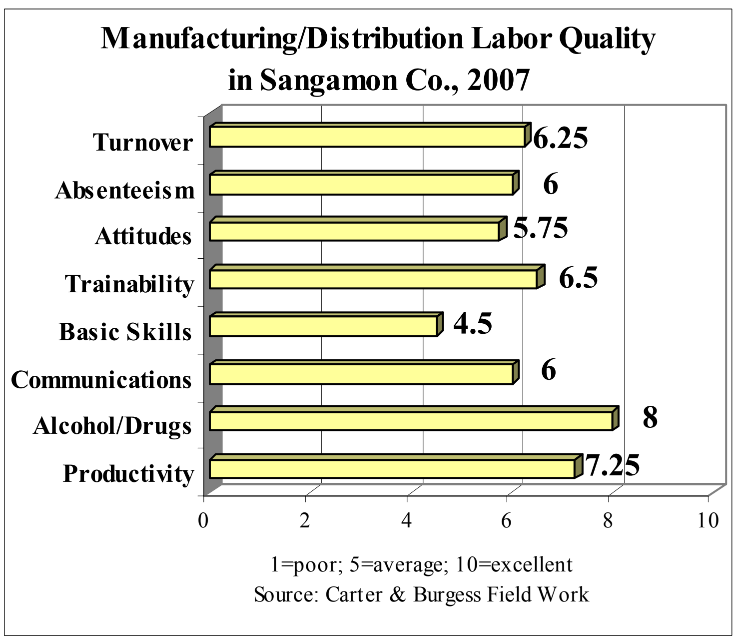
- All factors for back office/call center/IT companies were rated above average to good, except absenteeism and attitudes.

Employers say:

- *Very proud of the quality of our workforce – we really tout our workforce ethic here in Springfield.*
- *Our productivity here is better than our Phoenix operation…one of the best!*



- All factors, except communications for medical providers were rated good to excellent.



- Manufacturing/DC labor quality is only above average overall.
  - Productivity and the alcohol/drug situation are good-excellent
  - Basic skills of applicants are below average.

Manufacturing employers tell us:

- *Basic skills of applicants varies…we hire about 1 in 4.*
- *Employers need to be more realistic regarding the quality they get for the price.*
- *Good longevity…we treat our people well.*
- *There are some work ethic and reliability problems here.*
- *Turnover in production is very high. Trying to get people to come in on time and understand the time issue on a production line - Not easy.*
- *We have good relations with our union.*

Key Conclusion: *Target prospects will be generally satisfied with labor quality issues in the Sangamon County Area, particularly customer service and medical related. There are some concerns with basic skills of applicants, turn-over/absenteeism of customer service positions and attitudes of manufacturing and customer service workers. Productivity is very good in all sectors.*

Electric Power — ***Strengths & Weaknesses***

Electric power costs and reliability are critical site selection factors in all projects.

- Sangamon County has an investor owned full deregulated utility allowing it to compete with other electric systems
- The City of Springfield has its own municipal electric system which allows it to provide low cost utility service for companies that locate within the City
- Ameren's rate structure has recently been modified to prohibit cross-subsidization between rate classes. With this modification, some customers have experienced a rate increase, while others have experienced a rate decrease
- A progressive approach to deregulation of the electric utility industry in Illinois has resulted in commercial and industrial customers having a number of retail energy suppliers from which to choose

Key Conclusion*: Local employers are generally satisfied with the supply and delivery of electric power services in Sangamon County, but* some *are concerned with Illinois' deregulated utility industry and what this means for future service and rates.*

Sites/Buildings ***Strengths & Weaknesses***

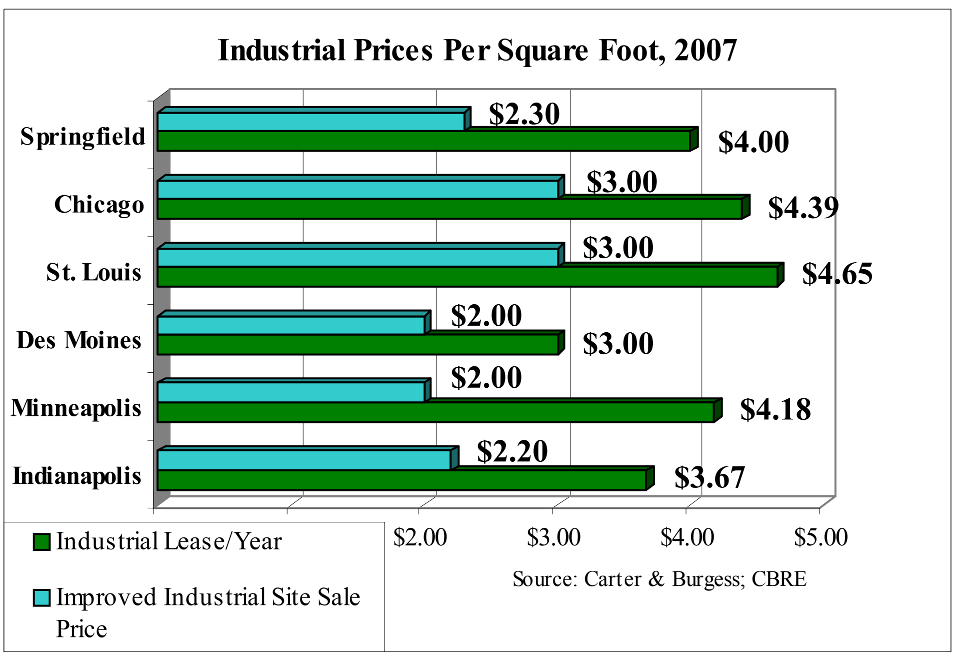
Good product (sites and buildings) must be available in order to attract economic development. Two out of three site searches begin with a building search. However, the majority of lookers still end up building a building since it turns out that the existing spaces don't work.

Many communities have addressed their building void through a speculative ("spec") building program. An available "spec" building will keep them in many more searches. Generally parameters include: 30,000-40,000 square feet; 20'to 30' clear span height; overhead /dock doors; no floor (install after client determines) and unfinished office of 10%.

Sangamon County has both strengths and weaknesses here:

Strengths

- Attractive industrial areas with up to 50 acre sites
- Good variety of Class A &B office buildings/sites
- Prices are generally competitive, less than Chicago and St. Louis, but higher than Des Moines and Indianapolis.



Weaknesses

- No 100+ acre sites controlled.
- Candidate sites have been identified, but not optioned.
- Limited rail sites
- No industrial parks (defined with set prices and protective covenants)
- Very few industrial buildings *(i.e. Roberts Foods)*
- No wet lab space for lease.

Key Conclusion: *The lack of large sites with rail and the lack of existing buildings will eliminate Sangamon County from some searches. In order for the community to compete for large scale DCs, suitable large tracts (100 acres or more) must be identified and adequate infrastructure and site control issues addressed.*

Incentives____Weakness

Economic development incentives are usually not a top location criteria. However, they are critical when a company is down to a few finalist communities and everything else is equal. They are often the "hidden" criteria, so be aware of your prospects needs early on.

We feel today the most important incentives are (in order of priority):

- Training related – with flexibility.
- Tax credits tied to job creation and other property tax relief
- Site infrastructure assistance
- Building/site financing.

The City of Springfield currently has some attractive programs available:

- Illinois Enterprise Zone – offer tax abatement, investment tax credits, reduced permit fees
- EDGE
- TIF
- Large Business Development Cash Grants – at least 300 jobs
- Infrastructure Assistance – County and/or city has ability to assist with improvements for select projects on a case by case basis.
- Training Funds – Employer Training Investment Program (ETIP) and related through DCEO and WIB are available to many Illinois deals.

However, Sangamon County is limited in its ability to offer large financial incentives.

- A number of traditional programs are either under or unfunded, including CDBG (Springfield cut 19%).

Illinois has a tough time competing with neighboring states for many targets, for example:

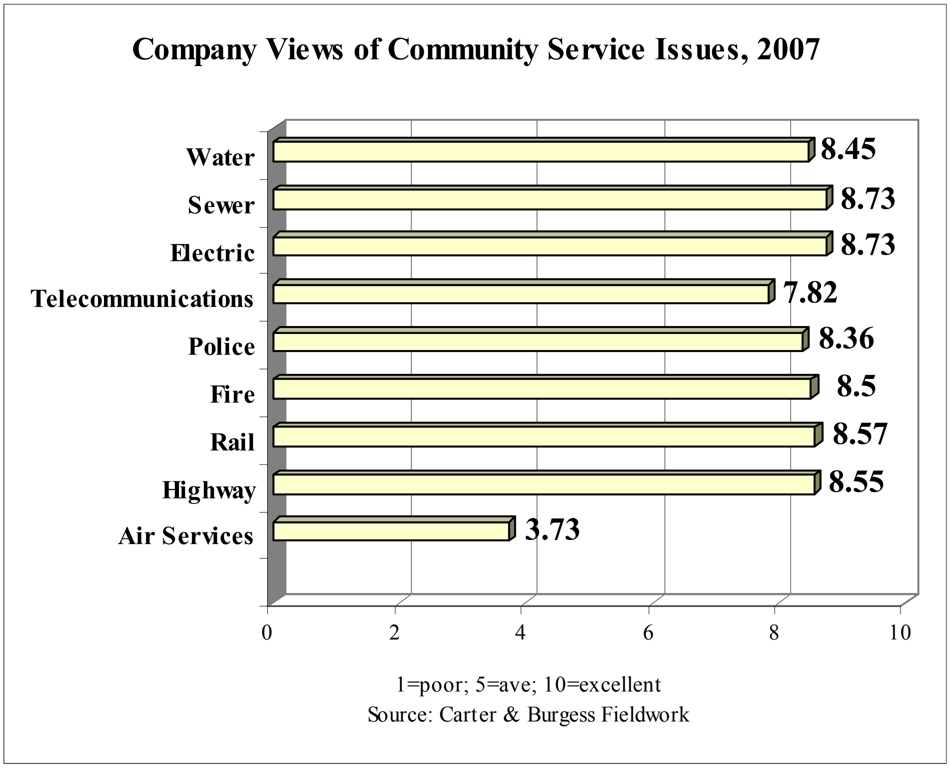
- Missouri has a Small Business Incubator Tax Credit and a venture capital biomedical fund of $400,000 for business start-ups.

- Iowa has an impressive training program tied to Work Keys.

Key Conclusion: *Sangamon County and Illinois have a tough time competing with surrounding states on incentives. It is therefore especially important to be aware of possible new revenue sources and options being considered and the potential negatives impacts that any of those options may have on business expansion and attraction.*

Community Services **_Strengths & Weaknesses_**

Community services (water, sanitary sewer, police, fire, air service, etc.) are all essential to the attraction/expansion of a target industry project. During interviews we asked corporate officials to rate a series of local services.

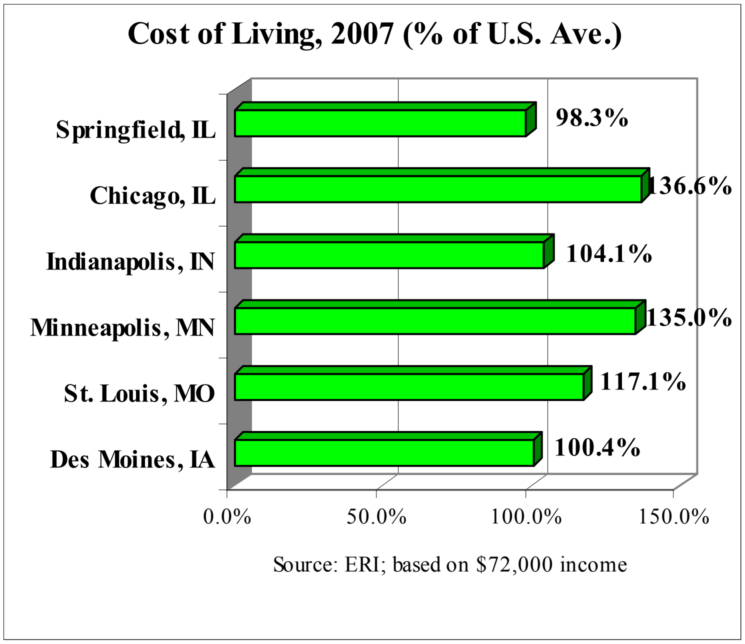


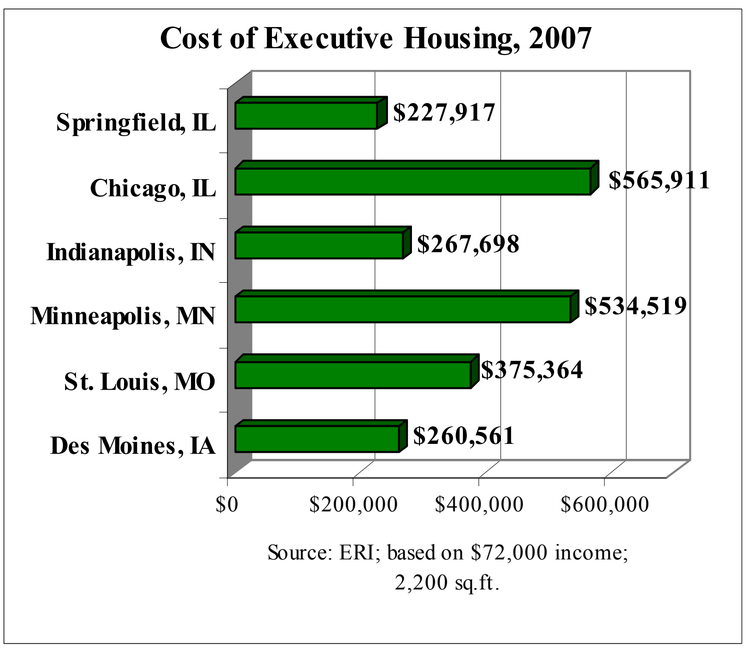
Key Conclusion: *Sangamon County Area companies rate all services as good to very good, except air services. While there are concerns about the development process and obstacles to expansion, the public and private sectors have committed to work together to address these issues to clarify the development process and related costs and strengthen the long term planning process. This is a necessity if the Sangamon County area is to capture its share of future growth.*

Cost of Living/Education/Quality of Life — ***Mostly Strengths***

Cost of living[10] and quality of life aspects (recreation, schools, shopping & culture) are important to relocating and retaining employees. If managers refuse to take the move or leave, the project could be in jeopardy.

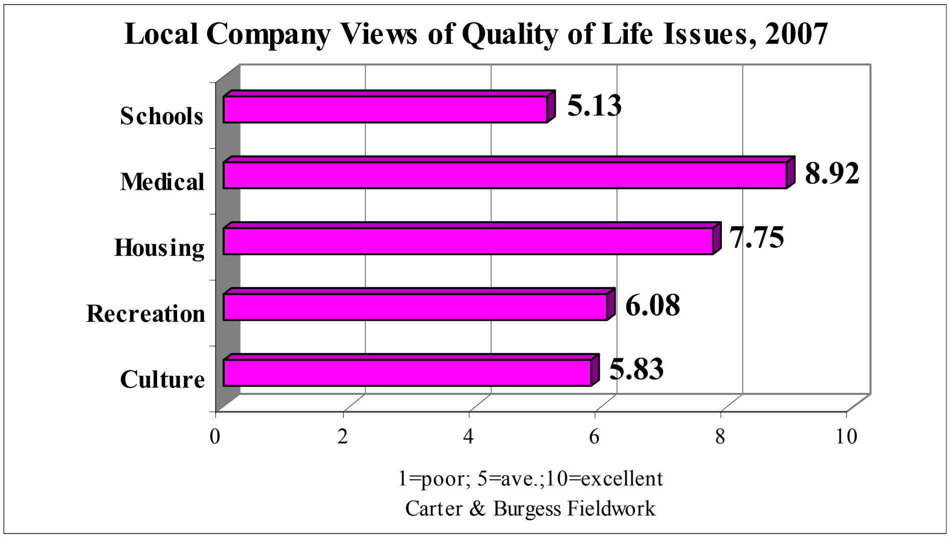
- **The Sangamon County Area cost of living is lowest of all competitors.**





[10] All data comes from our ERI Relocation Assessor database. Cost of living items include: consumables, transportation, health services, housing/utilities/property taxes and miscellaneous items.

- **Most quality of life factors are positive, but there are some negative feelings regarding Springfield schools (city only).**



<u>Education is the key to the future work force an area</u>. Local businesses rate Lincolnland Community College (2-year community) highly, but have some concerns regarding Springfield secondary schools. Lincolnland Community College offers many disciplines from which target industries will benefit.

The following are important quotes from the corporate interviews:

- *Easy to recruit families to Springfield…single adults - very hard to recruit*
- *Executive end of the housing market has poor resale.*
- *Fine quality of life!*
- *Good highway system/access.*
- *Great place to raise kids!*
- *Lincolnland is crafting a applied tech degree*
- *Medical services are incredible!*
- *Need for unity in training; a formal Workforce Development System*
- *Public schools are OK, not great…Board does the best they can, but are strapped.*
- *Public schools have a bad reputation…may not be deserved.*
- *Realtors pushing buyers toward Chatham school district or private schools.*
- *Slim air service.*
- *Training needs: Supervisory: Senior Level Leaders; math; grammar skills.*

Key Conclusion: *Relocation of corporate employees, especially those with families, should be a relatively "easy sell" when you combine competitive prices and the good quality of life offered in the Sangamon County Area. Sangamon County colleges will be a tremendous asset to new companies looking to jump-start a new work force.*
If Sangamon County companies are going to continue to grow, the quality of its public education system must continue to improve and policy makers must be committed to working with employers and continuing education providers to provide students with skills necessary to transition to the workplace.

Sangamon County Area's Strengths & Weaknesses Versus Preliminary Target Needs

We next assessed Sangamon County Area's strengths and weaknesses versus preliminary target needs.

Sangamon County Area Strength	*Sangamon County Area Weakness*
Warehouse/Distribution • Access to Midwest markets • I-55/I-72 access • Intermodal access (St. Louis/Decatur) • Electric power reliability • Improved sites (25-50 acre) • Labor costs/availability/quality • Incentives/No state inventory tax • Good labor/management relations • Large regional location activity	• Large (100+ acre) sites with rail • Motor fuel taxes • Rural electric rates • Back haul costs
Biomedical R&D • Select medical talent/quality • Medical talent on loan/for lease • Collaboration with SIU College of Medicine and Medical District • Clinical trial support • Class A office sites • Quality of life/cost of living/schools	• Scientists, doctors and technician talent • Competition for talent with hospitals • Class A incubator facility • Commercial air service
Health Care Manufacturing • Operator availability/quality • Collaboration with hospitals/SIU • Improved sites • Electric power cost/reliability • Highway access • Incentives (R&D tax credits/training)	• Professional/technical talent • Labor costs (versus Indianapolis) • Medical product machine skills • Existing buildings
Clinical Trials • Access to clinical trial patients • Medical talent on loan/for lease • Incentives (R&D tax credits/training) • Quality of life	• Class A office/labs (incubator) • Clinical trial administrator availability

Sangamon County Area Strength	*Sangamon County Area Weakness*
Auto Parts Manufacturing • Market access • Labor costs/some quality • Interstate access • Electric power costs/reliability • Incentives • Good labor/management relations • Large regional location activity	• Access to auto plants • Labor availability/some quality • Larger sites with rail • Rural electric rates • Regional suppliers
Chemical/Ethanol Manufacturing • Access to raw materials • Highway access • Electric power costs/reliability • Water and sanitary sewer capacity • Labor availability • Good regional activity, especially ethanol	• Labor costs • Some labor quality • Remote industrial sites with rail • Natural gas pipeline access • Water in rural areas • Rural electric rates • Waverly plant (ethanol) may be all market can handle.
Back Office/Call Centers/IT • Labor availability (CSRs) • Labor quality • Labor costs • Telecommunications/IT tech support • Training incentives • Existing buildings/office sites • Electric power rates/reliability • Large regional location activity • Presence of other operations	• Management/technical talent • Commercial air service
Food Processing • Access to raw materials • Labor costs/availability • Market access • Excess water & sewer capacity • Electric power rates/reliability • Incentives • Highway access • Good labor/management relations • Large regional location activity	• Larger sites with rail • Some availability • Available buildings • Rural electric rates

Strengths and Weaknesses Conclusions

The following are key conclusions regarding the preceding match analysis:

Health Care Related

- Sangamon County is a dominant health care community
  - Medical District/Hospitals/SIU highly regarded!
  - Tech transfer/spin-off activity is growing.
  - Outstanding clinical trial pool.
  - Some labor shortages, especially doctors.
  - Need for incubator/wet lab space.

Back Office/Call Center/IT Related

- Back Office/call center critical mass is here.
  - Good customer service availability.
  - Strong work ethic.
  - Management talent is tough to find.
  - Limited commercial air service.
  - Area is ready to attract higher-end support functions.

Warehouse/Distribution (DC) Related

- Sangamon County is “right in the center” for Midwest distribution
  - Two Interstates
  - Good labor availability; competitive wages
  - Need for large sites with rail.

Manufacturing Related

- Manufacturing is growing regionally, but limited locally
  - Auto and food related are most active.
  - Some labor skills are tight locally.
  - Basic and soft skills need improvement.
  - Hard to compete on incentives.

PHASE III: THE "BEST FIT"TARGET INDUSTRIES

We identified the "best fit" targets for Sangamon County Area (by priority) based on the Phase II analysis and the results of a Focus Group help on March 20, 2007. A number of community interests were represented at the Focus Group (i.e. railroad, developer, local government, workforce etc.). During the Focus Group a weighted rating matrix was developed base on the following factors: 1) Attainability, 2) Attributes, 3) Attention Intensity, 4) Resource Needs, and 5) Economic Impact (see Appendix for details).

1. **Back Office/Call Centers/IT**
    a. Medical (Help Desk, Administration/Business Services)
    b. Insurance
    c. Financial Services

2. **Warehouse/distribution (DC)**
    a. Retailers
    b. Pharmaceuticals and medical
    c. 3rd party providers

3. **Health Care - Clinical Trials**
4. **Health Care - Manufacturing**
5. **Health Care - Biomedical R&D**
    - Health care focus on:
        - Orthopedics (NAICS 339112)
        - Surgical Instruments (NAICS 339)
        - Cardiology
        - Cancer Treatment/Oncology
        - Alzheimer Disease Related
        - Pharmaceuticals (NAICS 325)
        - Related incubator candidates.

6. **Food processing**
7. **Chemicals Manufacturing** (farm related, ethanol and related)
8. **Auto Parts Manufacturing**

PHASE IV: RECOMMENDATIONS

The following are economic development recommendations designed to guide the Chamber.

<u>Target Industry Marketing</u>

- **Aggressively pursue the top targets.**

    - **Back Office/Call Centers/IT**
    - **Distribution Centers (DC)**
    - **Health Care**
        - Clinical Trials
        - Medical Manufacturing
        - Biomedical R&D

- **Develop a detailed marketing plan for the top three targets.** Plan elements should include:
    - **Economic *tele*-development (direct mail, telemarketing and direct calls) into select markets.** Utilize the initial target list.
        - Back Office/Call Centers/IT – Chicago, St. Louis, Minneapolis and select national site selectors/developers/brokers
        - Health Care – Indianapolis, Chicago, Minneapolis and select national site selectors/developers/brokers
        - DC – Chicago, St. Louis and select national retailers/3rd Party Providers/ site selectors/developers/brokers.

    - **Cost comparison reports (and logistics model for DC) for each target promoting strengths** such as labor/wages, transportation/logistics, education/training, infrastructure, electric power, incentives, and quality of life/cost of living.

    - **Trade Shows** – Attend at least two shows per target per year (total of six). Work cooperatively (with DCEO, other communities, railroad/utility and/or business partners) when appropriate. See potential shows in Appendix.

    - **Collecting positive testimonials for use in the campaign** (i.e. AIG and Brain Bits)

    - **Building research files**

    - **Improving economic development profile and web-site**

        - Add a one-page target profile for each of the top targets
        - Add testimonials.

<u>Labor Related</u>

- **Encourage Lincolnland Community College, the WIB, high school vocational officials and other training providers to focus skill training support on areas that will fulfill the most critical identified local needs:**

    - Medical (Lab Techs, RN, pharmacists, radiology/imaging, etc.)
    - Customer service – particularly higher-end such as tech support and medical.
    - “Cross over” training needs/opportunities in order to prepare for future medical-related machining/operating skill needs.

- **Explore the hiring of an economic development health care specialist.** This person would conduct more detailed site selection research and lead the marketing efforts.

- **Encourage skill training support toward select soft/ “life style” skills, which will help existing business and future targets:**
    - Communications
    - Language (English & Spanish)
    - Safety
    - Understanding business principles
    - Work ethic.

- **Encourage the creation and/or enhancement of internship opportunities involving local businesses, high schools and colleges**. An area-wide “interns for industry” program should include:
- Job shadowing
- Exposing educators to the work place
- Advertising real work elements to parents.

- **Involve the Workforce Investment Board (WIB) in all labor-related aspects of the target industry process.** They will be a critical partner in training design and implementation.

- **Conduct a more detailed labor analysis, which includes an underemployment/commuting patterns study, designed to document potentially available skills in the work force.**

- **Utilize this report to educate regional business interests regarding the “best fit” target industries and their location and skill needs.**

Sites/Buildings

- **Conduct a site selection analysis to identify the best potential large sites (100+) and potential park sites.**
    - Option/control and set fixed prices for the best sites that result.
    - Riverton/I-72 is a good potential area.

- **Work towards improving all aspects of the development/permit process to make it "smoother and friendlier."**

- **Conduct a "spec" building study to determine the best type and location.**

Incentives

- **Sangamon County will need to be aggressive with incentives in order to compete.** Local programs will need to be developed pertaining to the selected targets that set Sangamon County apart (i.e. like the Texas sales tax program).

- **Conduct an incentives analysis comparing the Sangamon County area to your competitors.** Identify new local programs (i.e. economic development sales tax and relocation incentives) that can offset higher business costs and make up for under funded state programs.

For More Information Regarding This Report, Please Contact:

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Appendix

<u>Focus Group Scoring Matrix</u>

Insert here

Appendix

Potential Trade Shows

Back Office/Call Center/IT

Call Center 2.0
September 10-12, 2007
Los Angeles Convention Center
Los Angeles, CA
www.tmcnet.com

ITEXPO East
January 22-25, 2008
Miami Beach Convention Center
Miami Beach, Fl
www.tmcnet.com

Communications Developer Conference
May, 2008
TBA
www.tmcnet.com

Health Care

Medical Design and Manufacturing (MD&M)
October 16-18, 2007
Minneapolis Convention Center
Minneapolis, MN
Equipment and Technologies for Medical and Surgery

Pharma Med Device
April, 2008
TBA
Medical Devices, Pharmaceutical and Biologic Industries

FIME International Medical Expo
August 15, 2007
Miami Beach, FL
Hospital Equipment

MD & M East
June 12, 2007
New York, NY
Equipment and Technologies for Medical and Surgery

<u>DC</u>

Warehousing Education & Research Council (WERC)
Nashville, TN; April 22-25, 2007

ProMat
Chicago, 2009 (odd years)
In the even years, there is a sister show held in Cleveland called NA 2008.

National Conference on Operation and Fulfillment (NCOF)
This show is directed to the fulfillment centers which are those that respond and fill orders direct to consumers.