

2010 McGraw-Hill Construction Outlook

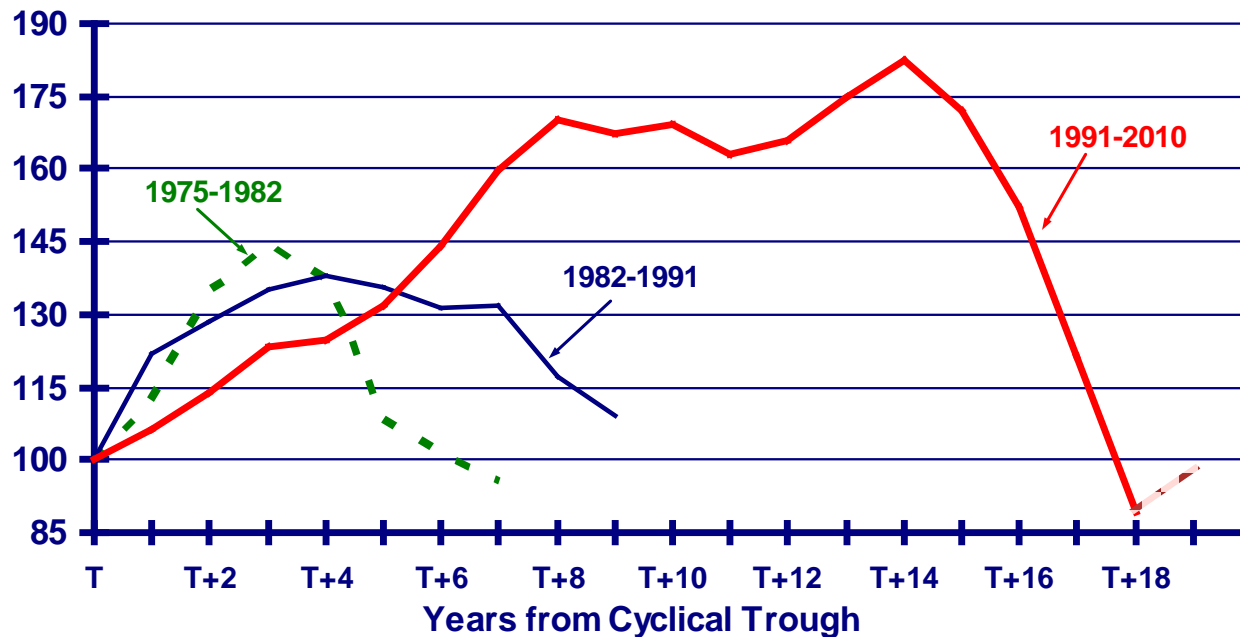
Cliff Brewis

*Senior Director Editorial Operations
McGraw-Hill Construction*

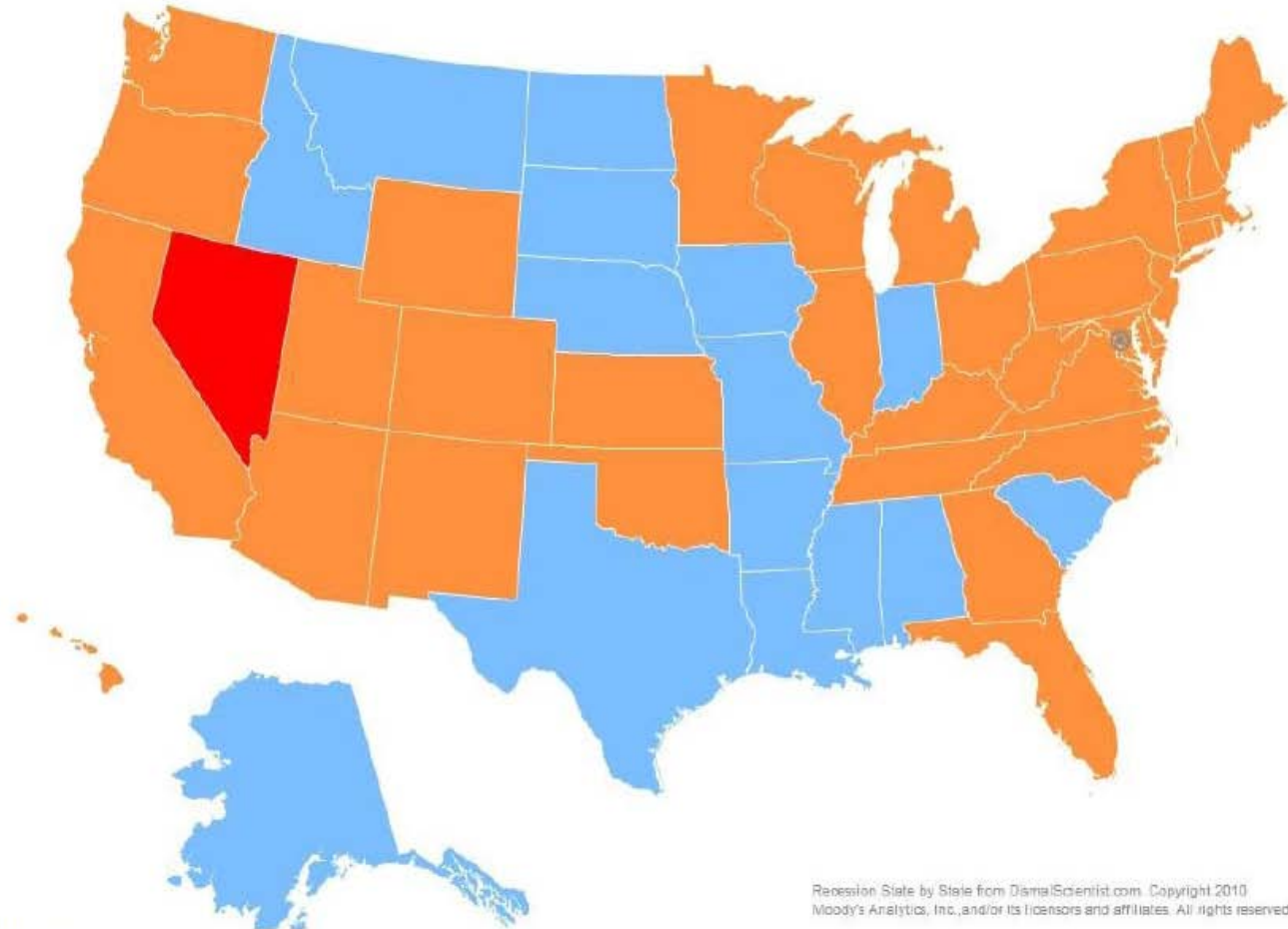
Points of Perspective – U.S. Construction

Total Construction Activity by Cycle

Cyclical Trough (T) = 100, Based on Constant 2000 Dollars



In Recovery



Source: Moody's Economy

Red In Recession **Orange** Moderating **Blue** Recovering **Green** Expanding

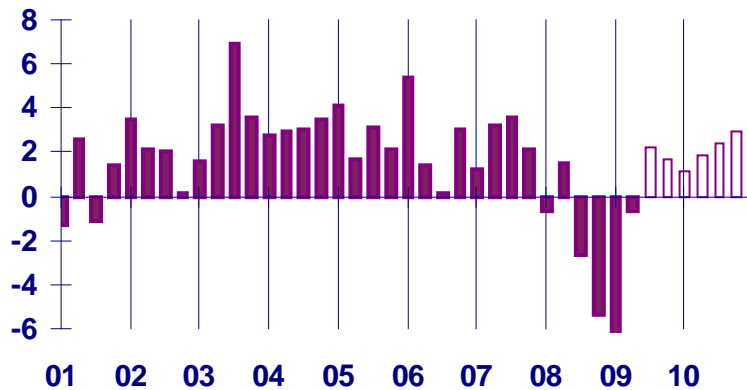
U.S. Macroeconomic Picture

The Recession and the fall in Demand

Real GDP Growth - Quarterly

Annualized Percent Change

'09 Q2
-0.7%

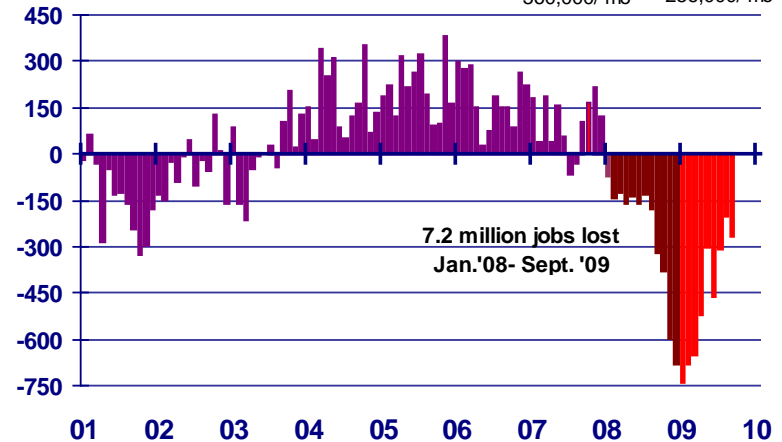


Change in Employment

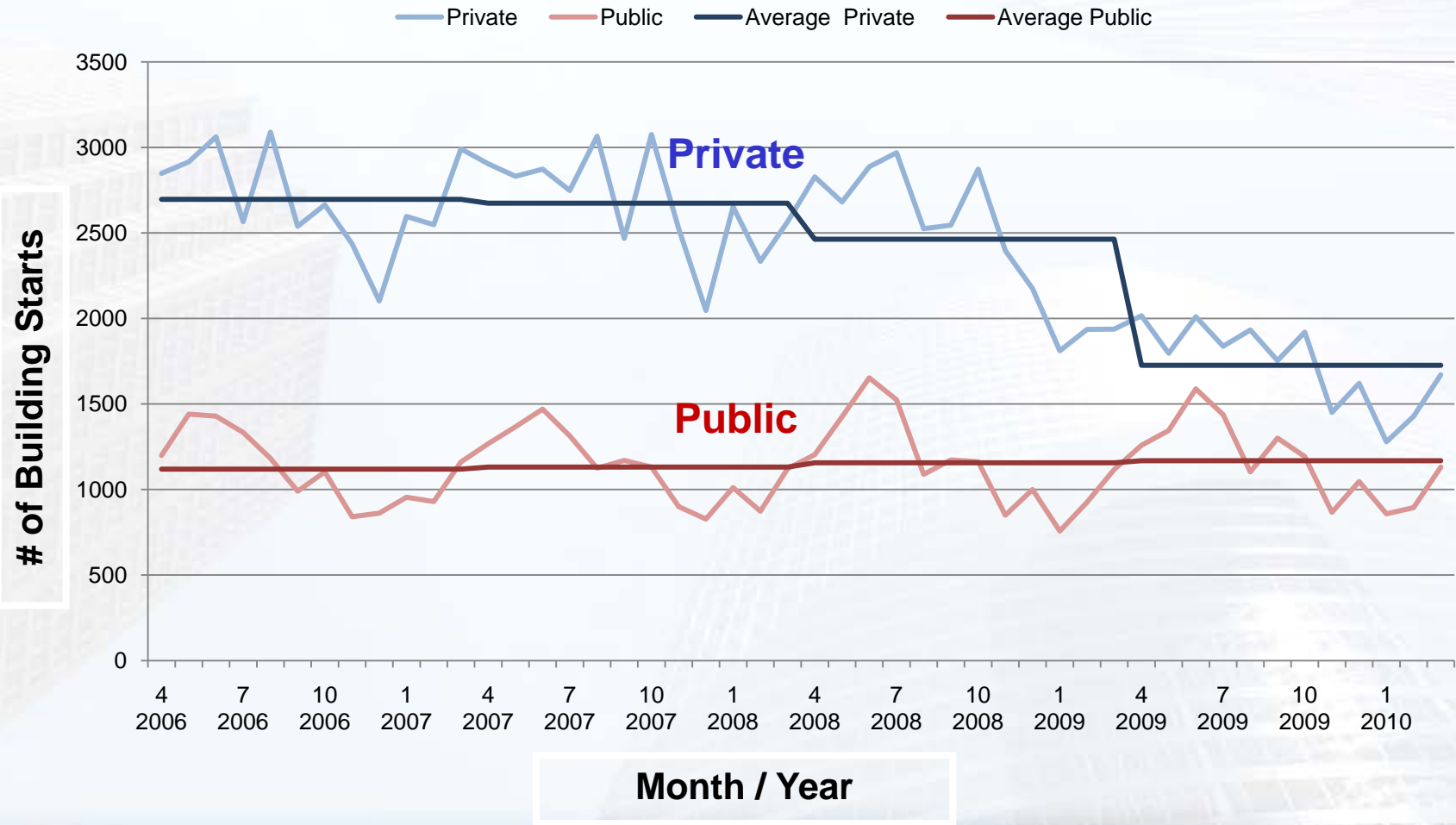
Thousands of Workers

Jan-June '09
-560,000/ mo

Jul-Sept. '09
-256,000/ mo



Building Starts – Public and Private

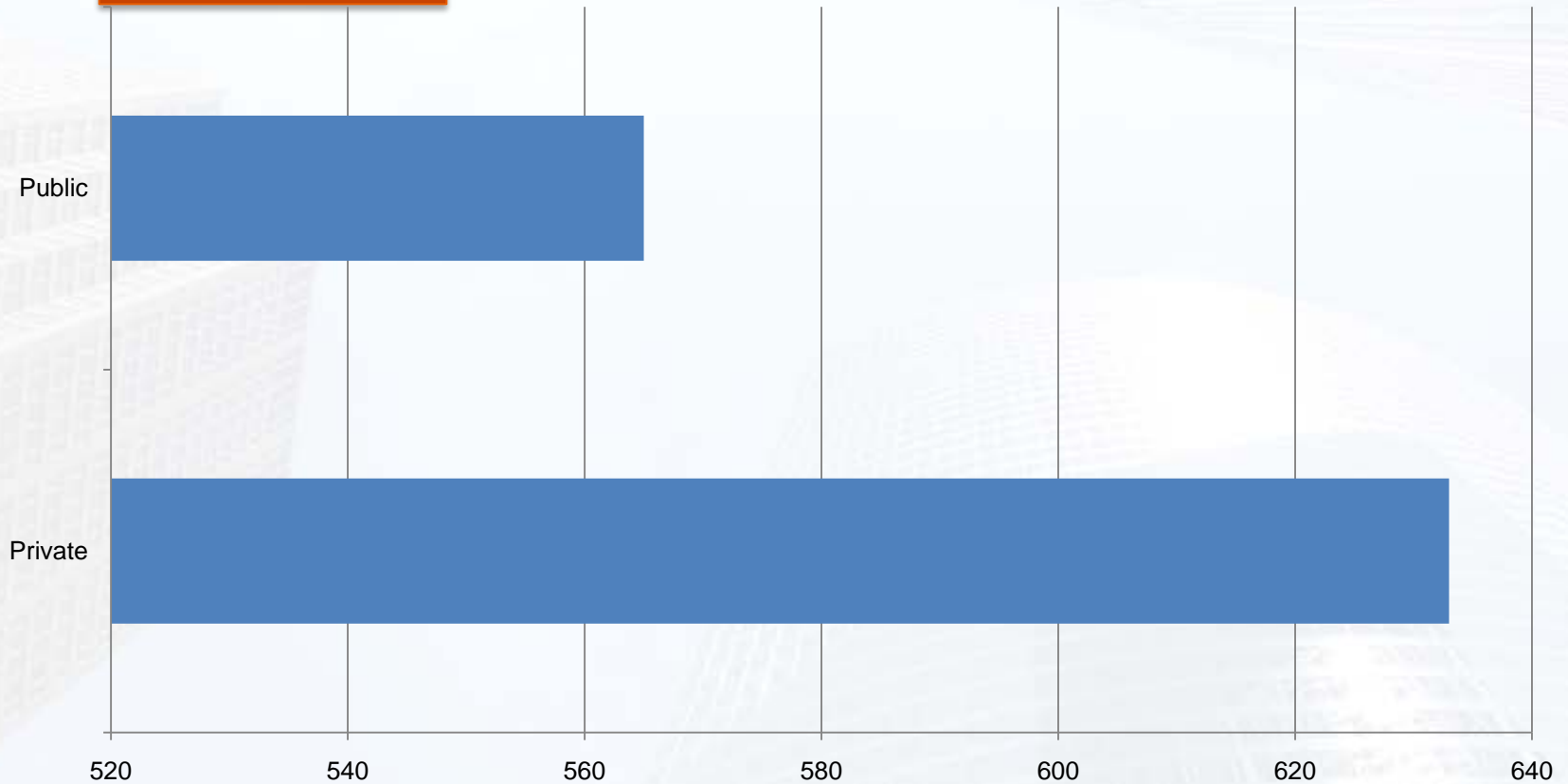


Commercial and Public Building Starts – Construction Value of \$500,000 and Above (excluding Residential & Engineering)

Design Lifespan

Number of Days in Database

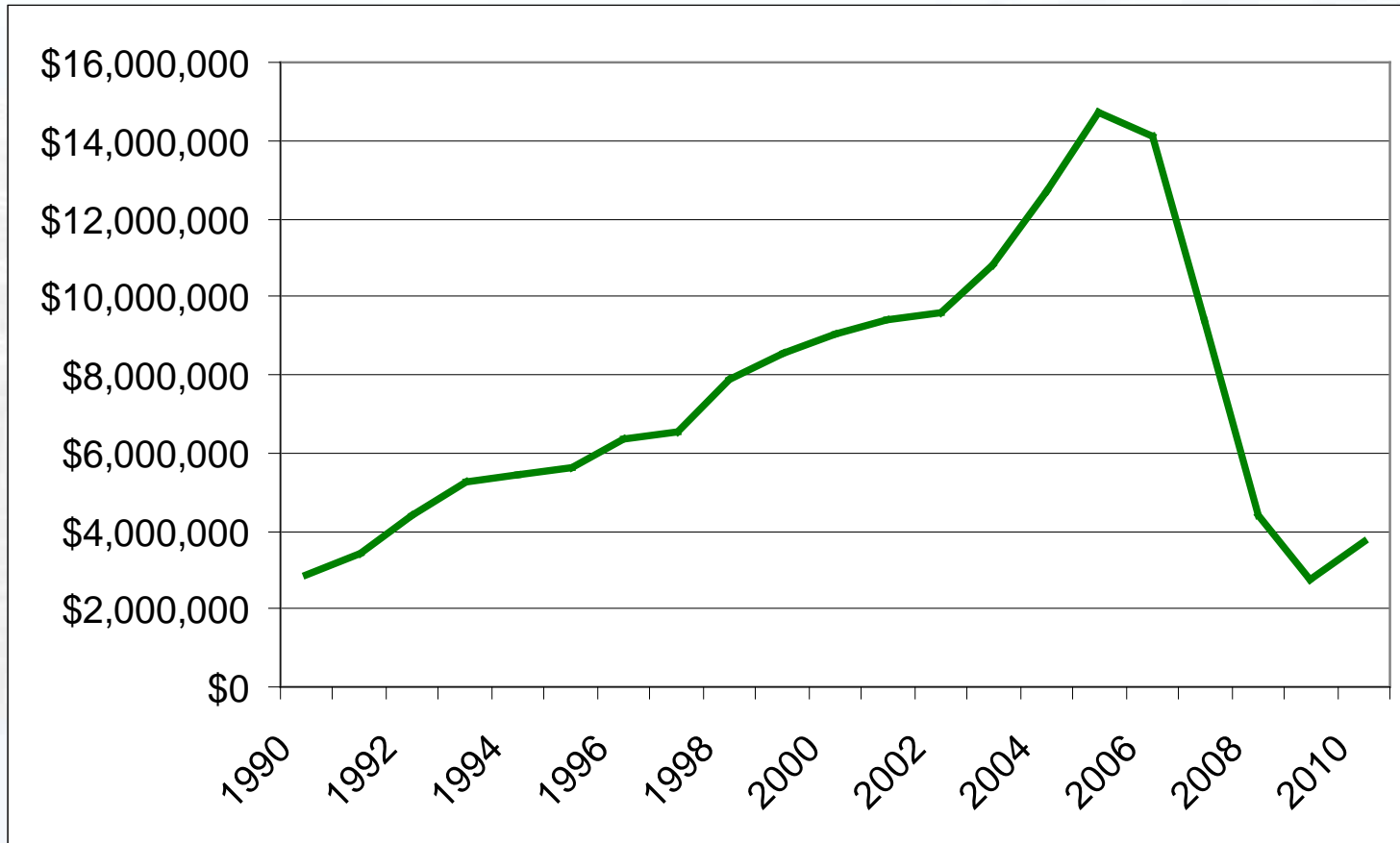
\$500,000 And Above



Commercial & Public Buildings

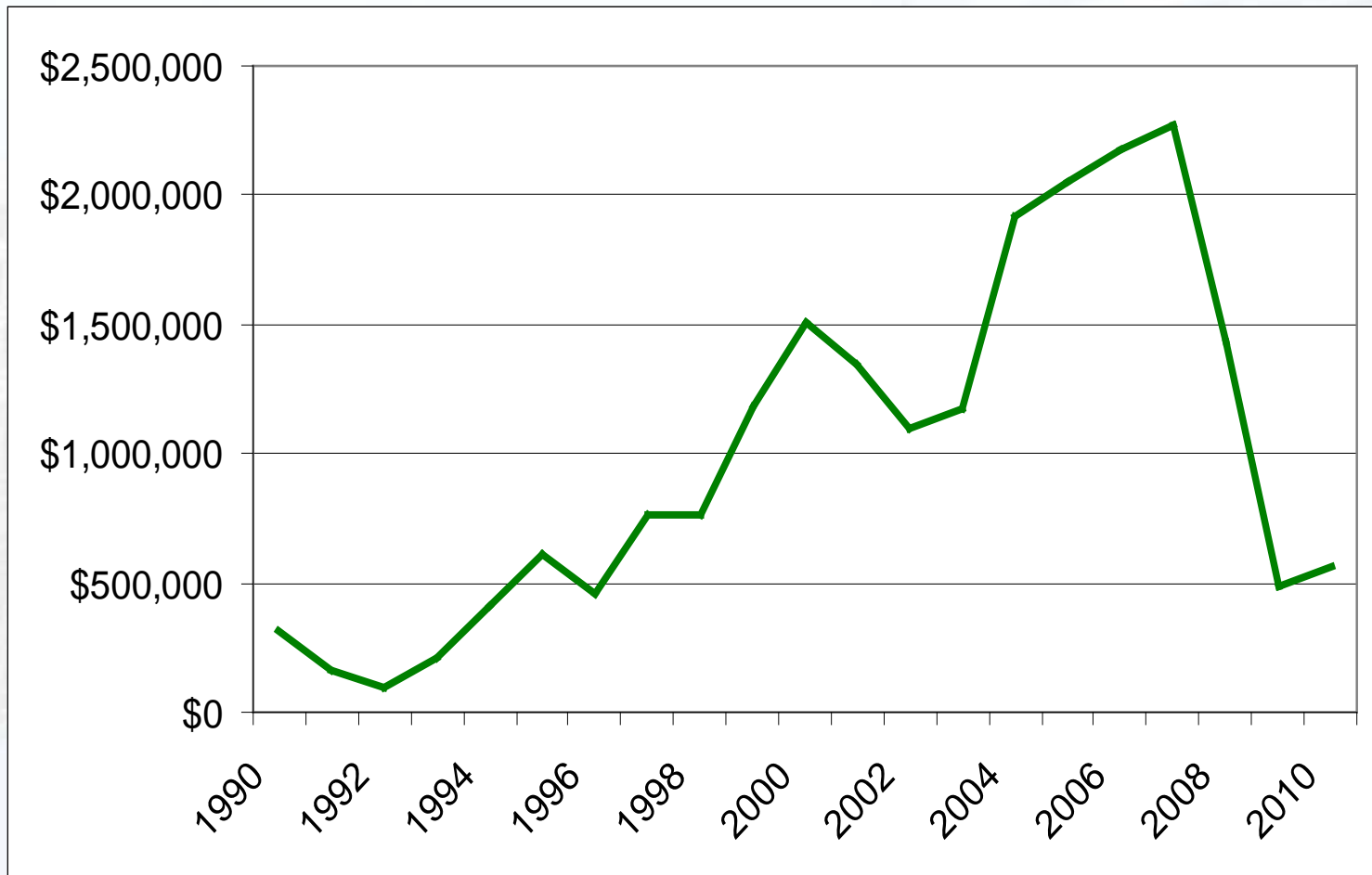
Annual Averages 2nd Quarter through 1st Quarter of Subsequent Year

Single Family GA



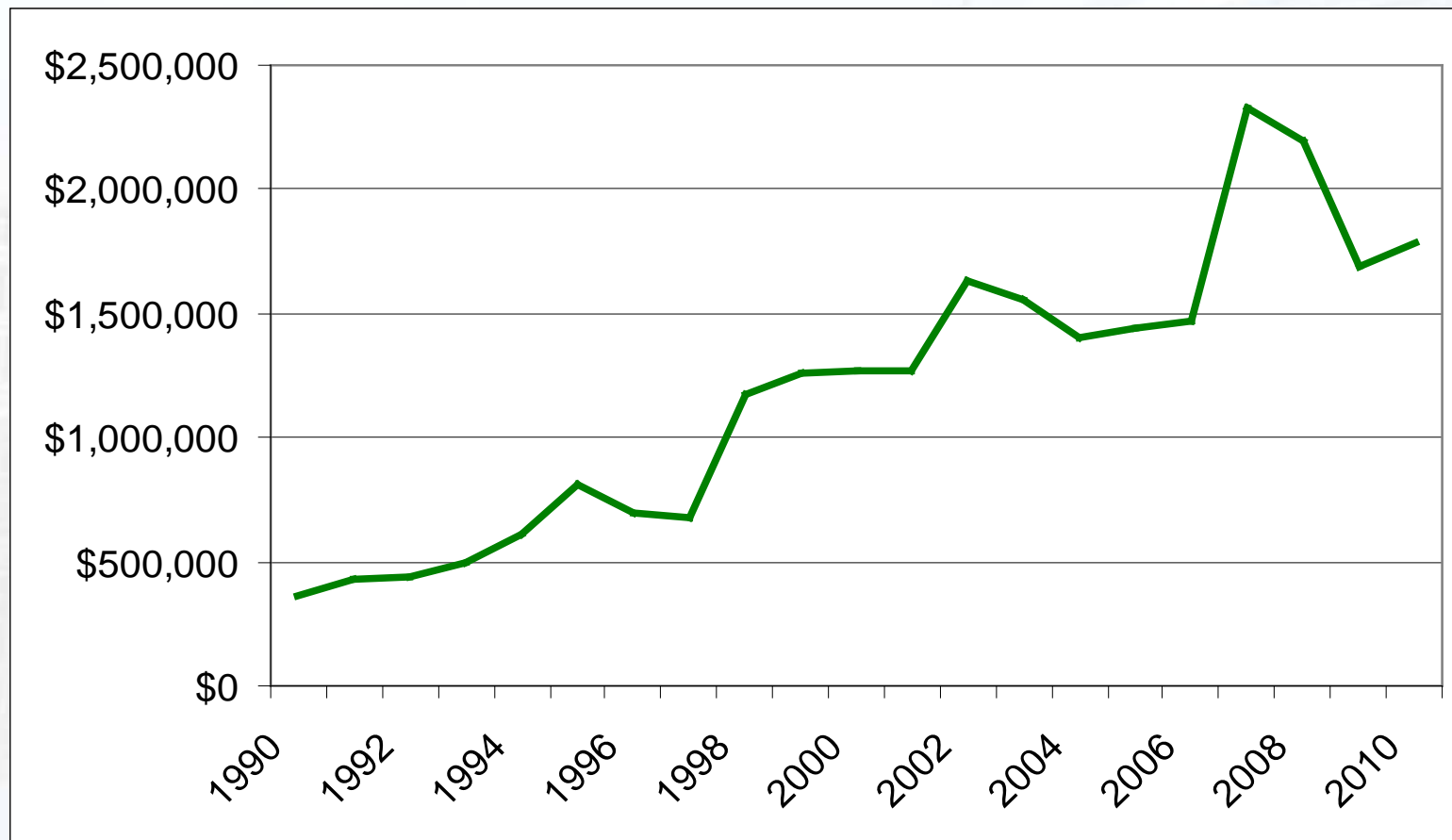
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Multi Family GA



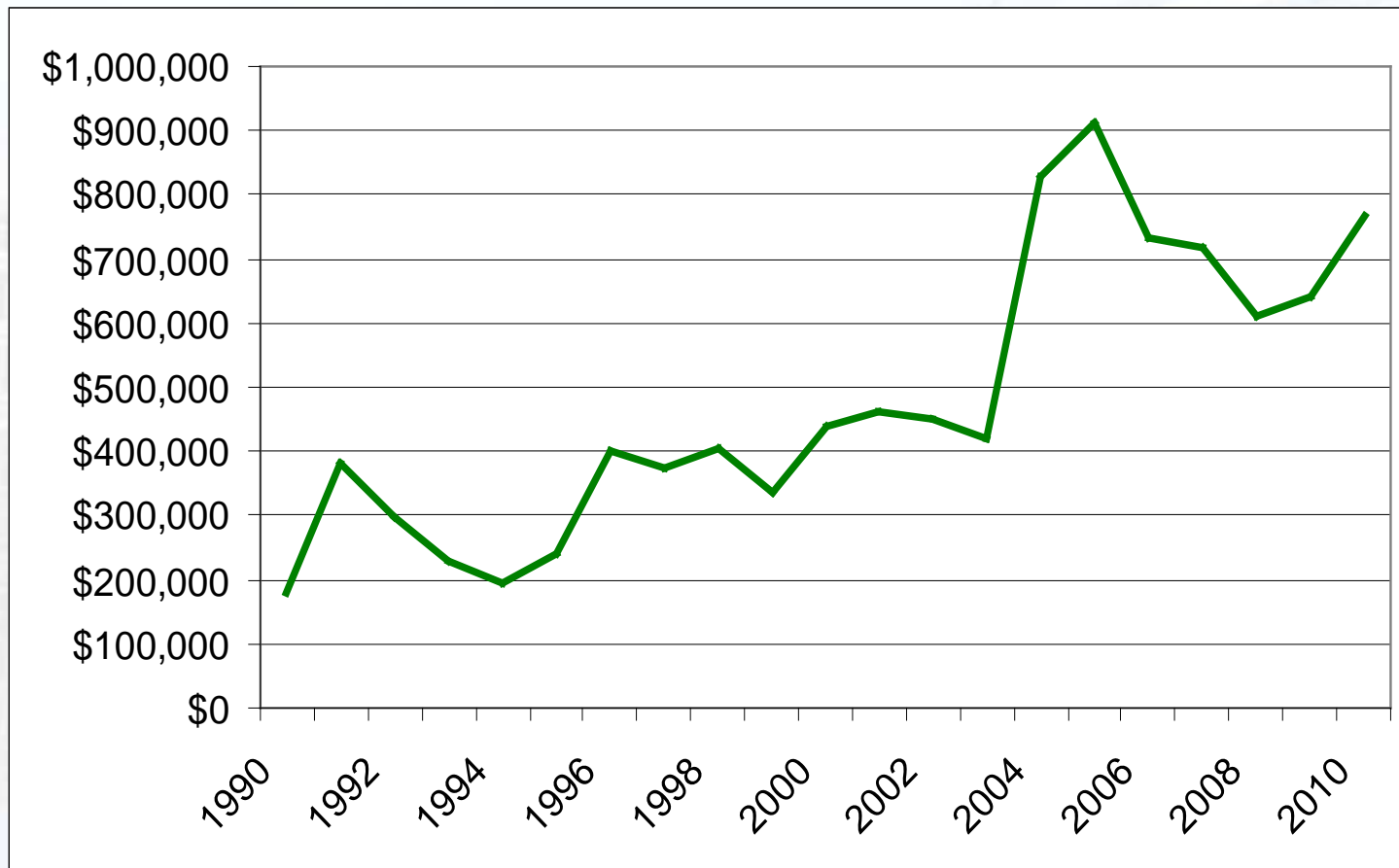
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Education GA



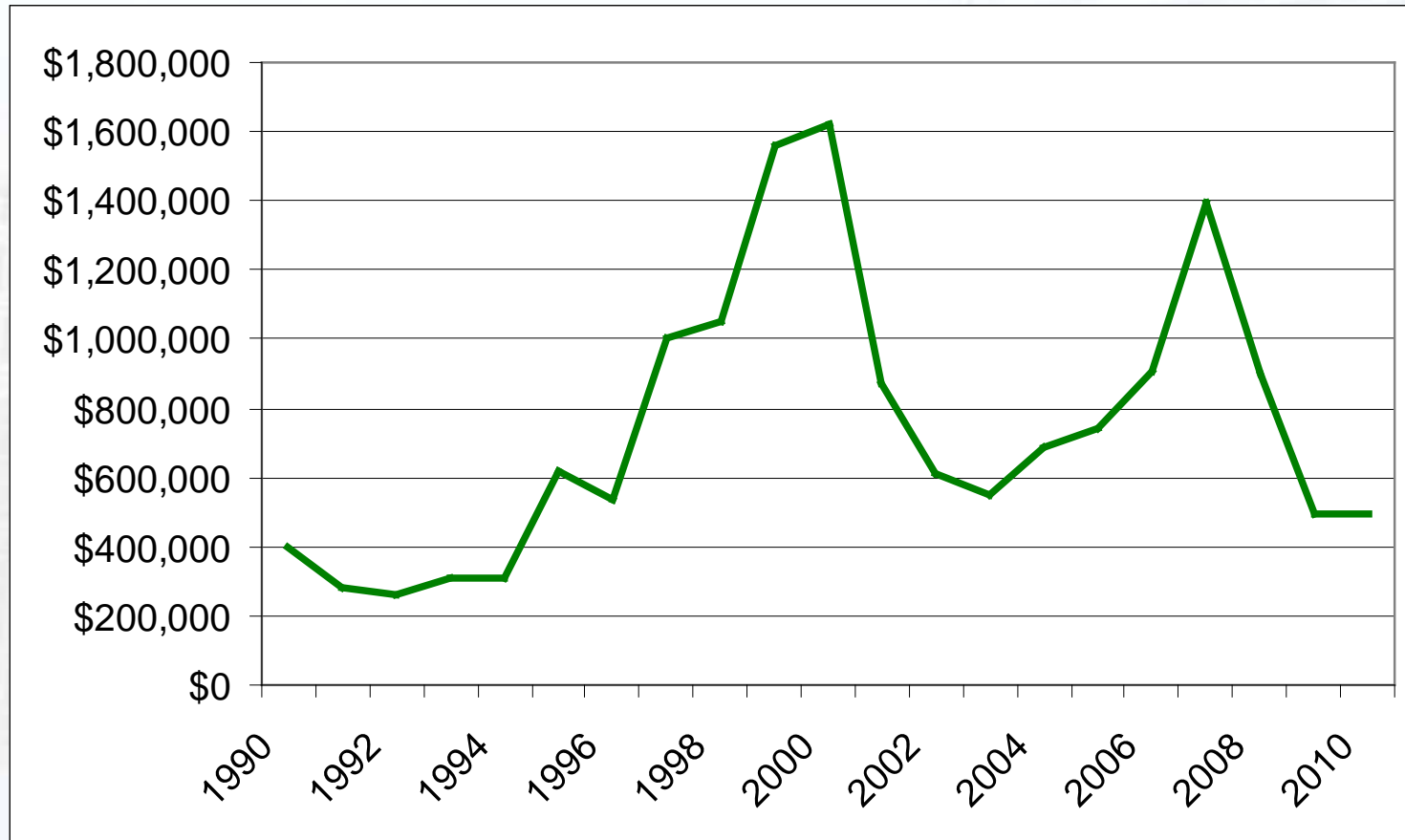
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Health GA



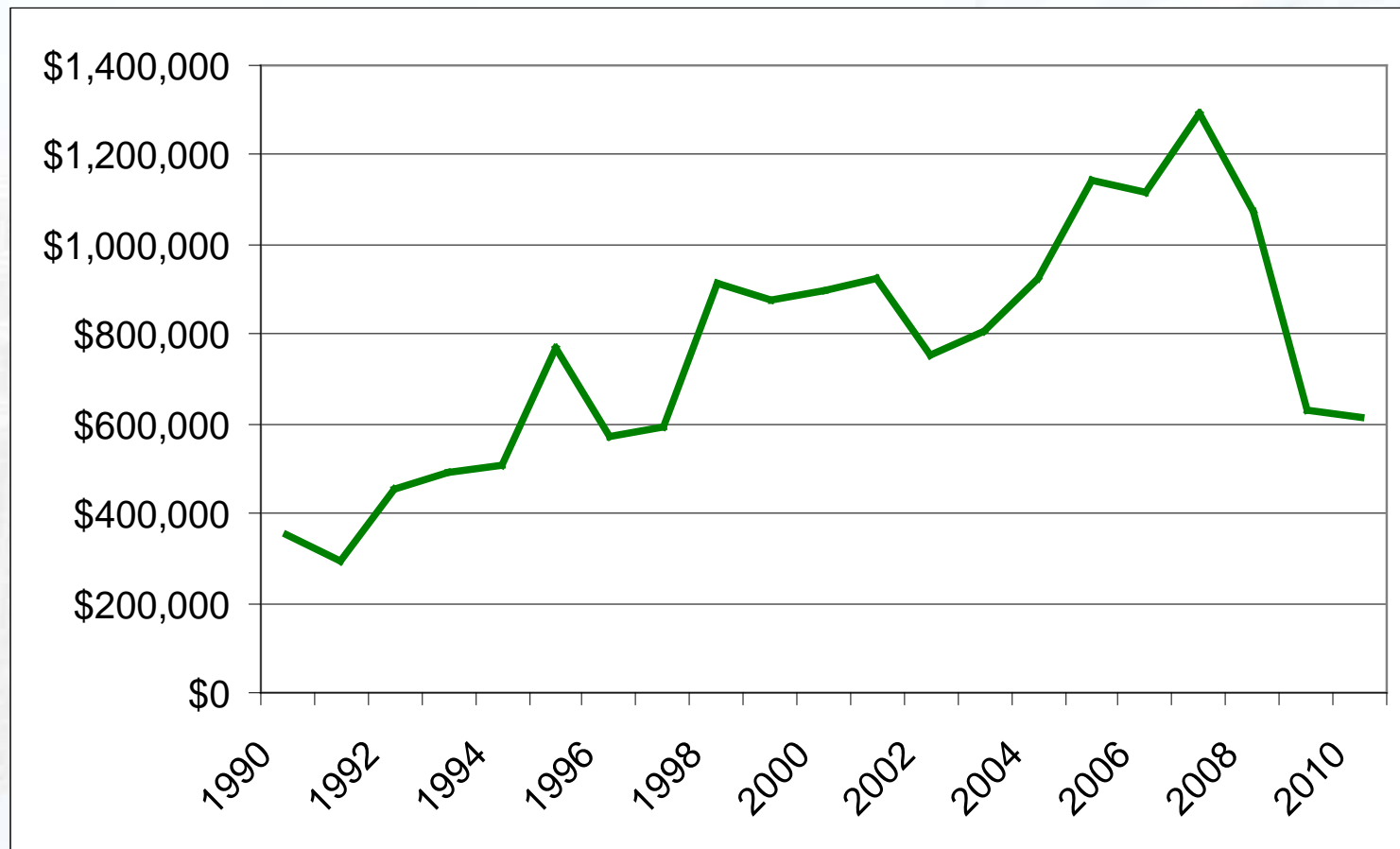
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Office GA



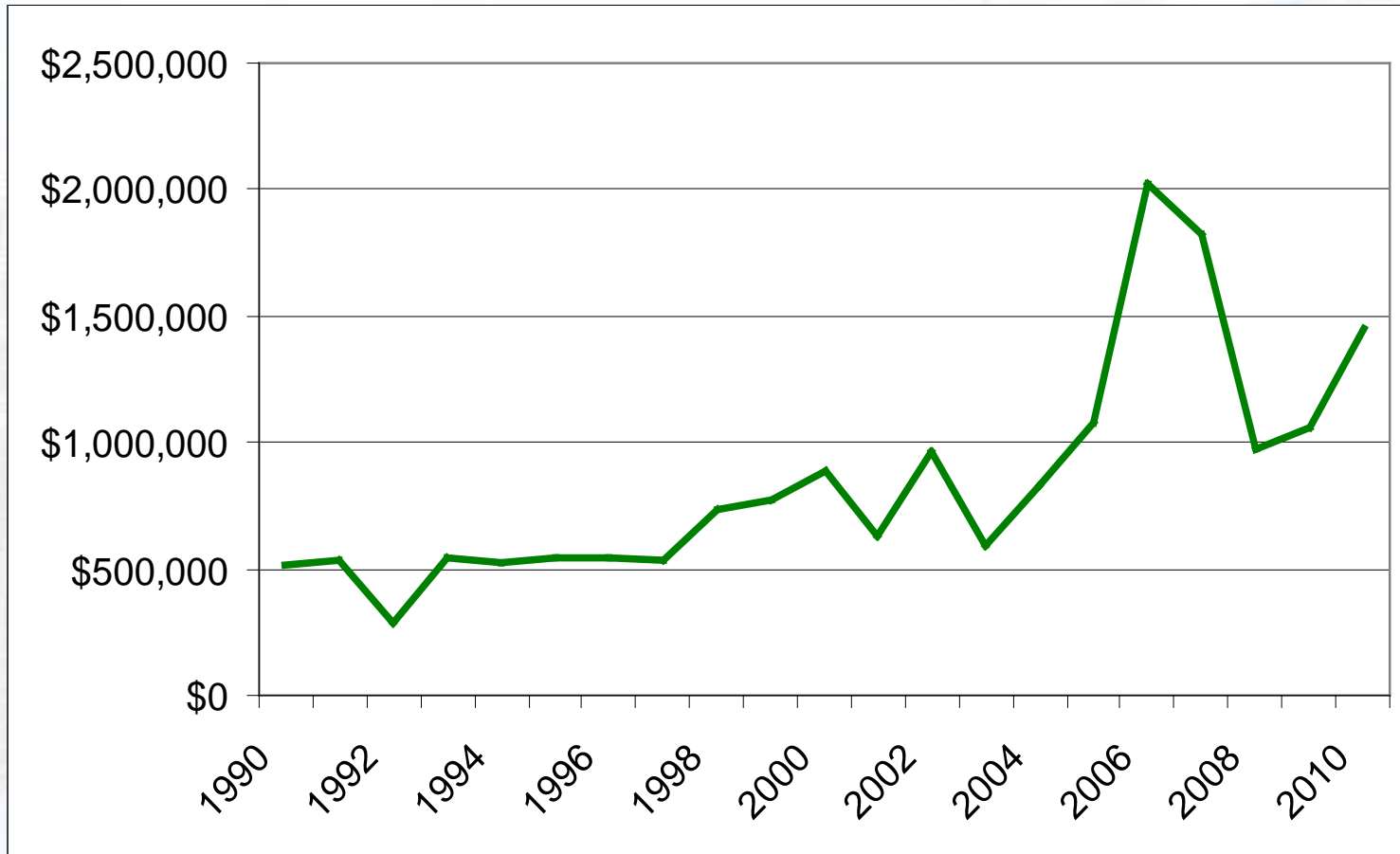
'\$000.00

Retail GA



'\$000.00

Highways GA



'\$000.00

Interesting Projects

PROJECT TITLE	PROJECT TYPE	STAGE	VALUATION
Public Safety & Municipal Court Building (Design/Build)	Capitol/ Courthouse/City Hall	Start	\$17,000,000
Student Wellness & Recreation Center	College/University	Sub Bidding / CD's	\$23,000,000
RFP/DB: Fort Benning Martin Hospital (Repl) (Design/Build)	Hospital	Pre-Design / GC Bidding	\$336,994,217
Mitsubishi Manufacturing Plant (Expansion) - Phase II	Manufacturing Building	Sub Bidding / DD's	\$73,000,000
Wind Turbine Manufacturing Plant (Project Wind)	Manufacturing Building	Start	\$20,000,000
RFQ/AE: 2010 Capital Improvement Projects (Renov/Add & New)	Middle/Senior High School	Negotiating / RFQ	\$50,000,000
RFQ/CM:Beach High School (Replacement)	Middle/Senior High School	Schematics / Bidding	\$26,300,000
Benjamin E Mays High School (Renovations)	Middle/Senior High School	Start	\$25,365,175
Marion County Middle/High School	Middle/Senior High School	GC Bidding	\$20,753,089
Lakeside High School (Addition/Renovations)	Middle/Senior High School	GC Bidding	\$17,800,000
Combined Arms Collective Training Facility	Military Facility	GC Bidding	\$10,000,000
RFQ: Student Center & Stadium / Savannah State University	Miscellaneous Recreational	Pre-Qualification / DD's	\$13,500,000
Wellstar Community Hospice Facility (NEGOTIATED)	Nursing/Convalescent Center	CD's	\$12,750,000
4th Brigade Combat Team Complex Company Operation Facility	Office	GC Bidding-Invitation	\$100,000,000
Quality Technology Services Data Center (Expan) Design/Build	Office	Start	\$50,000,000
GA/DOT Widening & Reconstruction (I-75/SR 401) (Call 001)	Paving	Start	\$54,559,432
Mattie Lively Elementary School (Replacement)	Primary School	CD's / GC Bidding	\$11,500,000
Cornelia (GA) Wal-Mart Supercenter Store #1403-04 (Relo)	Retail (Other)	GC Bidding-Invitation	\$10,000,000
Water Treatment Plant (Improvements)	Water Treatment Plant	GC Bidding	\$13,000,000

GEORGIA

(\$000.00)	2004	2005	2006	2007	2008	2009	2010
EDUCATION	\$1,404,547	\$1,445,002	\$1,471,035	\$2,326,005	\$2,191,344	\$1,688,764	\$1,786,023
		102.9%	101.8%	158.1%	94.2%	77.1%	105.8%
GOV'T	\$305,319	\$344,259	\$307,367	\$745,934	\$512,840	\$521,133	\$625,304
		112.8%	89.3%	242.7%	68.8%	101.6%	120.0%
HEALTH	\$827,808	\$910,983	\$732,598	\$718,060	\$612,019	\$642,865	\$765,735
		110.0%	80.4%	98.0%	85.2%	105.0%	119.1%
HIGHWAY	\$831,933	\$1,082,095	\$2,020,234	\$1,820,150	\$970,569	\$1,061,075	\$1,450,473
		130.1%	186.7%	90.1%	53.3%	109.3%	136.7%
HOTEL	\$147,304	\$127,488	\$429,165	\$415,435	\$538,110	\$141,892	\$131,221
		86.5%	336.6%	96.8%	129.5%	26.4%	92.5%
MFG	\$272,234	\$218,350	\$165,617	\$714,664	\$620,433	\$172,695	\$145,759
		80.2%	75.8%	431.5%	86.8%	27.8%	84.4%
MULTI FAM	\$1,922,573	\$2,055,041	\$2,171,144	\$2,268,409	\$1,428,238	\$487,062	\$558,234
		106.9%	105.6%	104.5%	63.0%	34.1%	114.6%
OFFICE	\$686,243	\$741,102	\$905,478	\$1,398,071	\$899,588	\$493,079	\$464,740
		108.0%	122.2%	154.4%	64.3%	54.8%	94.3%
RETAIL	\$925,751	\$1,143,423	\$1,117,541	\$1,292,264	\$1,072,794	\$631,940	\$613,100
		123.5%	97.7%	115.6%	83.0%	58.9%	97.0%
SINGLE FAM	\$12,702,035	\$14,689,897	\$14,086,813	\$9,390,098	\$4,371,876	\$2,751,320	\$3,702,396
		115.6%	95.9%	66.7%	46.6%	62.9%	134.6%
WATER SUPPLY	\$362,539	\$298,464	\$292,149	\$356,107	\$326,188	\$336,163	\$436,359
		82.3%	97.9%	121.9%	91.6%	103.1%	129.8%
TOTAL	\$23,906,610	\$27,515,613	\$28,895,422	\$26,814,558	\$17,560,313	\$12,604,113	\$13,068,070
		115.1%	105.0%	92.8%	65.5%	71.8%	103.7%

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