

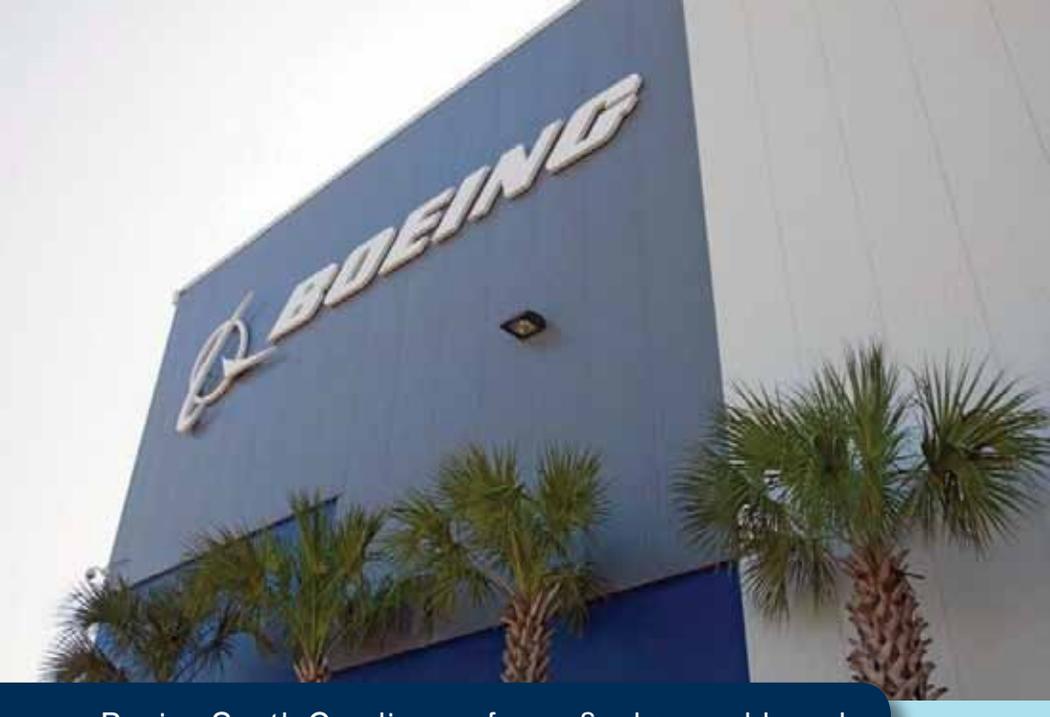
state of business. world of opportunity.



aerospace

South Carolina, USA

33° 49' 8" N / 80° 54' 23" W



Boeing South Carolina performs final assembly and will deliver 787s from North Charleston to customers around the world.

Home to more than 180 aerospace-related companies employing more than 20,000 people, South Carolina has a strong aerospace industry that is rapidly growing.

The **top five** reasons aerospace companies choose to locate in the Palmetto State:

- Low Cost to Operate and a Business-Friendly Climate* •
- A Right-to-Work State* •
- Market Access and Quality Infrastructure* •
- A Skilled Workforce* •
- Reliable and Affordable Energy* •

low cost to operate and a business-friendly climate

South Carolina is committed to enhancing its business-friendly climate and establishing an environment where businesses can prosper. In fact, South Carolina consistently ranks as one of the most business-friendly states in the nation with a low cost of doing business.

Pollina Corporation: South Carolina has been named a “**Top 10 Pro-Business State**” for each of the eight years of the Illinois-based corporate real estate consultant’s survey.

According to **Chief Executive** magazine’s annual poll of CEOs rating states on taxation and regulation, workforce quality and quality of life, South Carolina ranks as **one of the 10 best states** in the nation to do business.

Forbes magazine ranks South Carolina **9th best** in 2011 for its pro-business regulatory environment. **Forbes** considered the state’s regulatory, tort climate and incentives.

South Carolina consistently ranks among **Site Selection** magazine’s “Top State Business Climates” and took the **5th spot** for 2011.

CNBC: Ranks South Carolina **6th best** in the nation for workforce quality and availability.



“Our decision to come to South Carolina was good for our competitiveness, for our customers, and for our country.”

- *Jim Albaugh, president and CEO of Boeing Commercial Airplanes*

a right-to-work state

South Carolina is a right-to-work state with one of the lowest unionization rates in the nation, ranking **2nd** lowest in the U.S. for both total workforce and manufacturing workforce. South Carolina's low unionization rate of 3.4% overall and 1.6% in manufacturing results in one of the lowest work-stoppage rates in the nation with minimal working time lost due to strikes.

South Carolinians take great pride in their work, and time and again the state's workforce chooses to work directly with management.

The **2nd** lowest unionization rate in the U.S. overall and in manufacturing. (U.S. Bureau of Labor Statistics)



market access and quality infrastructure

Located halfway between New York City and Miami and within **1,000 miles** of approximately **67 percent** of the U.S. population, South Carolina's unparalleled transportation opportunities make reaching any market an easy task.

South Carolina boasts four primary commercial airports, two Class I railroads along with several short line systems, the **world-class** Port of Charleston and a dedicated breakbulk and bulk port facility in Georgetown.

South Carolina is crisscrossed by five interstate highways: **I-85, I-26, I-77, I-95** and **I-20** offering excellent east-west and north-south access. Almost one-fifth of the country's population is within a one days' drive of South Carolina, and any location in the state is within one hour of a commercial airport with daily nonstop flights to major cities and connections worldwide.

The natural deep-water Port of Charleston is one of the busiest container ports along the Southeast and Gulf Coasts with five public terminals handling cargo of all kinds. More than 30 shipping lines serving 150 countries call on the Port of Charleston, and the port's deep channels and existing infrastructure position it to welcome larger vessels today. The Port of Charleston is also an efficiency leader among North American ports which includes the fastest travel time from ocean to dockside on the East Coast.

The Journal of Commerce acknowledged the Port of Charleston "as the **most productive** East Coast port."

Inbound Logistics magazine named the Port of Charleston to its annual **Top 50** Green Supply Chain Partners (G50) list. Charleston was **one of only 5 ports** selected for this honor.

CNBC - Ranks South Carolina **6th best** in the nation based on the quality and availability of workers, low union membership and the success of its worker training program in placing participants in jobs

a skilled workforce

South Carolina offers a highly-skilled and productive workforce that has long been a draw to world-class companies looking to locate or expand their business. The nationally recognized workforce training program, readySC™, is one of the nation's premier training programs with more than 2,000 companies served and 266,000 workers trained. Another program for employers, Apprenticeship Carolina™, has been nationally recognized as one of ten innovative workforce development practices.

South Carolina's 16 technical colleges partner with readySC™ to provide companies with customized programs that include recruiting, screening and training at little or no cost for companies and driven exclusively by company needs. Another example of South Carolina's workforce training efforts includes Trident Technical College in Charleston which, in addition to hosting training for Boeing, features an Aeronautical Studies Division with programs for both Aircraft and Avionics Maintenance and Aircraft Assembly Technology. To create a skilled workforce for South Carolina's aviation and automotive industries, Clemson University is partnering with three technical colleges dispersed across the state to train technicians for the state's advanced manufacturers.

South Carolina has a high employment concentration in a number of occupations applicable to aerospace, including industrial and mechanical engineers and technicians, engine and machine assemblers, computer-controlled machine tool operators, machinists and materials scientists.



"Lockheed Martin's Greenville, South Carolina workforce is highly skilled in the areas of aircraft maintenance, modifications and upgrades. Over our 28 years in South Carolina, we have continued to grow thanks to the strength of our local workforce and synergies with local and state workforce development entities."
– Stefanie Moody, human resources director,
Lockheed Martin Greenville Operations

Business Facilities' 2011 Rankings Report placed South Carolina among the top ten states for both workforce training and low cost of labor.

reliable affordable energy

South Carolina has one of the lowest industrial power rates in the nation, costing an average of only 5.9 cents per kilowatt hour – more than **10 percent less** than the national average – without sacrificing service or reliability. Over the years, South Carolina's strong tradition in manufacturing has shaped an ample and durable energy infrastructure that meets the needs of today's capital intensive industry.

South Carolina consistently has some of the lowest motor fuel costs in the country, for both gasoline and diesel fuel.

"I can't emphasize enough how critical South Carolina's commitment to high quality utility supply was to our decision because carbon fiber production is dependent on strong electric, gas, water and sewage support."
– Patricia Harrison, director of marketing and business development,
Cytec Engineered Materials, Inc.

South Carolina ranks **5th** on "Movement Toward a Green Economy" on the 2010 State New Economy Index, based on electricity generated from non-carbon energy sources.



Manufactures turbine airfoils and blades for commercial jet aircraft engines at their facility, located in Greenville, SC.



soaring to the top

South Carolina has a rich history in aviation, and today is on the cutting edge with a growing aerospace industry – making the state well positioned for future success. This becomes more and more evident as industry leaders continue to invest in South Carolina.

Significant announcements include:

In 2009, The Boeing Co. chose North Charleston as the location for its second final assembly site and delivery center to support the company's 787 Dreamliner program. The following year, Boeing chose to increase its footprint in South Carolina and is now manufacturing interior components, such as stow bins and partitions, for the 787. Boeing's final assembly building was completed seven months ahead of schedule, and the first Boeing 787 rolled out of the South Carolina plant in April 2012

"Establishing a second 787 assembly line in Charleston expands our production capability to meet the market demand for the airplane."
– Jim Albaugh, president and CEO of Boeing Commercial Airplanes

In 2011, **Winbro Group Technologies**, a manufacturer of advanced machining technologies, opened a new facility in Rock Hill to serve the aviation and gas turbine industries.

"...South Carolina offers us an excellent business environment in which to operate and the skilled workforce we need,"
– Mike Arbon, Winbro CEO

In 2009, GE Aviation celebrated the grand opening of its Greenville facility at its new location and confirmed its commitment to continue to expand and invest in the state.

"GE Aviation is proud to be a part of economic development in the state of South Carolina. The facility continues to ramp up production and will produce 350,000 high pressure turbine blades this year."
– Jamie Regg, general manager of the Turbine Airfoils Center of Excellence at GE Aviation

BAE Systems recently consolidated its three area facilities into one 74,000-square-foot electronics engineering facility in North Charleston and added jobs to meet the demand for its electronic security and communications systems design, manufacturing and integration services.

GKN Aerospace is establishing a new manufacturing operation in Orangeburg County to assemble the all-composite fuselage for the new HondaJet light business jet. The facility will eventually supply components and structures to other aerospace customers in the southeast region of the U.S.

Honeywell International is expanding its repair and overhaul services and capabilities for propulsion engines and component repair for commercial and military customers in Greenville County. Honeywell is investing in new equipment and adding jobs at its Greer facility which is also the OEM source for more than 300 part numbers. Honeywell has operated in Greer since 1982.

TIGHTCO Inc., a supplier to Boeing and other aerospace companies, recently broke ground on an airplane structures plant in North Charleston.

Carbures LLC established a U.S. headquarters and design and manufacturing facility for carbon fiber structures at the South Carolina Technology & Aviation Center in Greenville.

"We're in the business of simplifying complicated systems and programs. That requires extremely skilled, knowledgeable workers, which we have found in South Carolina."
– Richard Anderson, vice president and general manager of BAE Systems' Integrated Technical Solutions division

South Carolina was nationally recognized for its economic development efforts in 2010 as *Area Development* magazine's 2011 Gold Shovel Award winner.



aerospace and aviation industry call South Carolina home

Some of these companies include:

- AAI Corp. •
- ADEX Machining Technologies LLC •
- ATI Allvac •
- BAE Systems •
- The Boeing Co. •
- Champion Aerospace LLC •
- Cytec Carbon Fibers LLC •
- Composite Resources •
- Eaton Corp. •
- GE Aviation •
- Honeywell International Inc. •
- KEMET Electronics •
- Lockheed Martin •
- Michelin Aircraft Tire Co. •
- Venture Aerobearings •
(a joint venture between GE Aviation and the SKF Group)
- Zeus Industrial Products •

military installations

South Carolina features several military installations important to the aerospace industry:

- Fort Jackson (Military Entrance Processing Command), Columbia
- Joint Base Charleston (Charleston Air Force Base), Charleston
 - Marine Corps Air Station, Beaufort
 - Marine Corps Recruit Depot, Parris Island
- McEntire Joint National Guard Base, Eastover
 - Shaw Air Force Base, Sumter
- SPAWAR Systems Center Atlantic, Charleston

Charleston came in **2nd** as an Aerospace/Defense Manufacturing center on *Business Facilities* magazine's 2011 Metro Rankings Report.





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