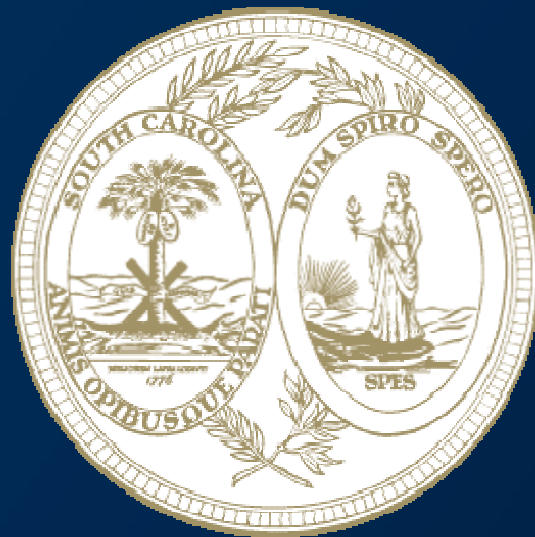


# South Carolina

## Department of Commerce



### 2005

## Capital Investment Report

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## Executive Summary

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The mission of the South Carolina Department of Commerce is to improve the economic well-being of all South Carolinians in a manner that supports and enhances a high quality of life. To accomplish this mission, the agency has developed a three-prong strategy for economic development in South Carolina:

- Diversifying our economy to recruit higher paying, knowledge-based industries to the state;
- Working with our existing industry, including small businesses, and our local communities to keep them competitive and growing; and
- Retooling our workforce to make sure they are better prepared to step into the higher paying, knowledge-based jobs on which we're focusing.

This is a long-term strategy that we are committed to pursuing as our state continues to adjust to the globalization of the marketplace and ongoing decline of agriculture and low-cost manufacturing, which have dominated South Carolina's economy for decades. This administration, led by Governor Sanford, has put this strategy in motion to secure new jobs and investment, retain existing industry and jobs, and raise income levels in our state.

The 2005 Capital Investment Report is an account of announced capital investment and job creation during 2005 resulting directly from the efforts of the South Carolina Department of Commerce's Division of Global Business Development to recruit and expand businesses in South Carolina. The results provided in this report focus primarily on our efforts to diversify our economy by targeting sustainable businesses that can solidify our state's long-term economic prosperity and working with our state's existing industry to keep them competitive and growing.

In 2005, Commerce's recruiting efforts resulted in record breaking investment of \$1.27 billion by new companies looking to start business operations in South Carolina. Investment by the state's existing industry continued to be strong, at \$1.39 billion for 2005. Altogether, there were 137 announcements of new businesses entering the state and existing industry expansions, with investments in excess of \$2.66 billion and 12,370 new jobs created.

Looking at the investment and job totals for the first three years in office, the Sanford administration has recruited more new jobs and new investment to the state than the three South Carolina governors who preceded him during the comparable three-year periods. Total new jobs recruited to the state for 2003-2005 were 16,969 as compared to 13,238 jobs (1999-2001), 16,388 jobs (1995-1997) and 10,775 jobs (1991-1993). New capital investment for the same periods totaled \$2.65 billion, \$1.03 billion, \$2.49 billion and \$2.06 billion, respectively.

In addition, building on the momentum of gains made in 2004, this administration once again made progress in helping to raise income levels in the state. The projected average wage for new jobs recruited in 2005 is \$39,283. This is 45% higher than the state's current per capita income and represents a 13% increase over income levels recruited in 2004. Income levels are a priority for this administration and we continue to follow Governor Sanford's lead on targeting industry clusters that will help us raise per capita income in South Carolina.

Both of these accomplishments, the record setting investment by new firms and continued increase in higher wages being paid by these new companies, are helping us make real progress in raising our state's per capita income and fulfilling Commerce's overall mission of enhancing a high quality of life.

Our state's rural communities benefited from Commerce's efforts, with 46 announcements creating \$1.16 billion in investment and 3,685 new jobs. Announcements like Grant Forest Products in Allendale and Clarendon Counties and Tech-Wood in Greenwood, not only brought important jobs and investments to rural areas, they also helped build on the development of the Wood Products Cluster, which posted \$585 million in capital investment in 2005.

Manufacturing continues to be a critical part of South Carolina's economy, accounting for 81% of the capital investment and 56% of the new job creation in the state in 2005. With the new technology requirements that many manufacturing jobs require, continued emphasis on highly-skilled workers remains a priority for Commerce and its economic development allies to ensure we are successful in winning manufacturing jobs that pay higher wages.

Direct foreign investment was another prominent source for new business, accounting for \$1.26 billion in investments and more than 3,000 new jobs, with companies headquartered in Canada, Germany and France leading the way. In December, South Carolina was ranked first in the nation in the share of its private sector workforce supported by U.S. subsidiaries of companies headquartered abroad, according to the Organization for International Investment. Direct foreign investment employment accounts for some 127,500 jobs in South Carolina, or 8.4 percent of its private industry employment. Business investment trips to Europe and the Far East continue to help build relationships that are fostered continually to support ongoing direct foreign investment in the state.

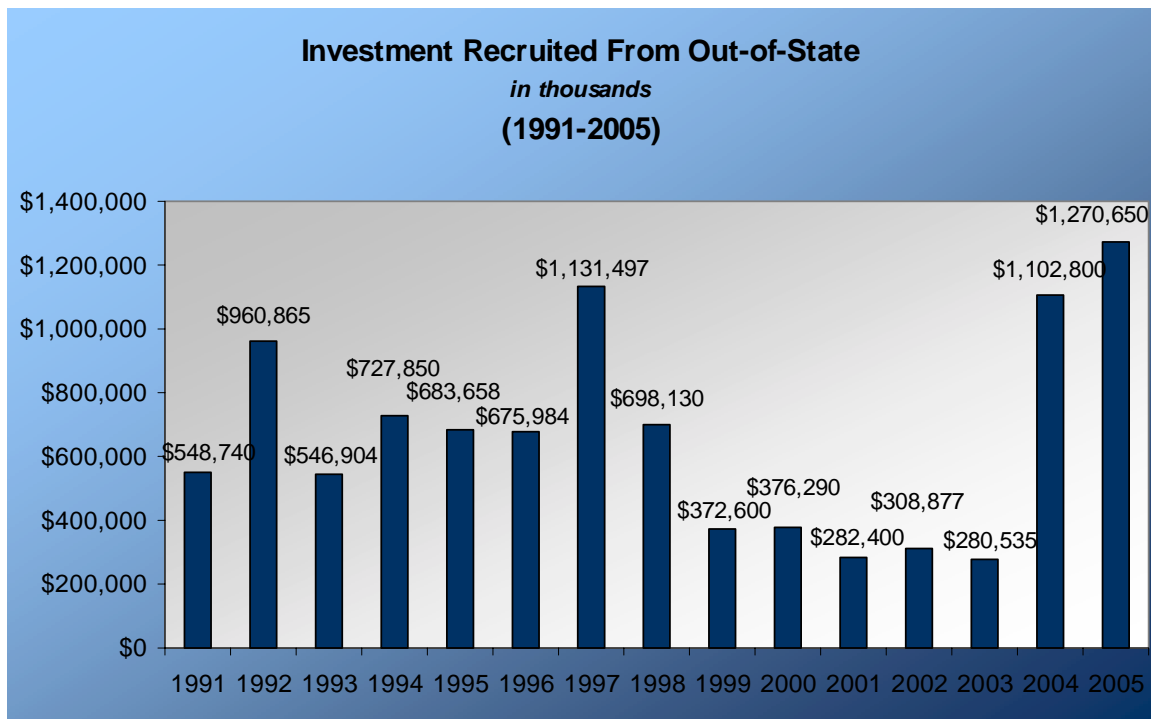
Focusing on knowledge-based, high technology jobs, as well as our established competitive clusters and new emerging clusters, like aerospace and the growing hydrogen economy, are priorities for 2006. Working with our workforce development allies to make sure our labor pool can meet the ever-changing needs of our new and existing industries is also a critical part of our 2006 work plan. We will continue to work with the Governor, General Assembly, local officials and our other economic development allies to recruit new businesses and foster existing industry expansions to create more jobs and raise income levels for the state's citizens.

## SC Department of Commerce Capital Investment Activity

### Historical Capital Investment

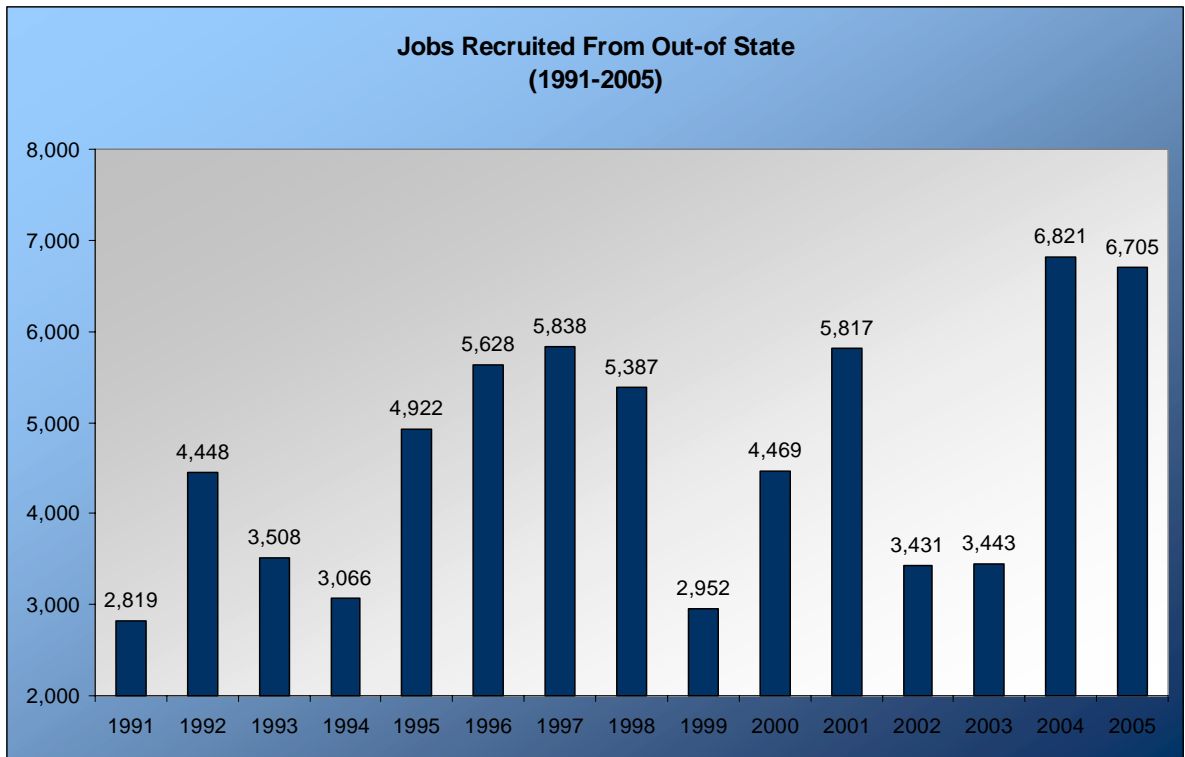
#### Capital Investment

This has been a successful year for the recruiting of new companies and new investment. The total capital investment for 2005 is \$2.66 billion. Of this, the net capital investment (investment from new companies) was \$1.27 billion. The net investment is the highest since 1991. The following table illustrates this success.



## Job Creation

In 2005, the South Carolina Department of Commerce continued to be effective in creating new jobs and attracting new companies. This year the Department of Commerce has created 12,370 total jobs. The net jobs created (jobs from new companies) is 6,705. This is the second highest since 1991, only 2004 was higher with its record setting job creation. This is illustrated on the following table.



## Average Wages

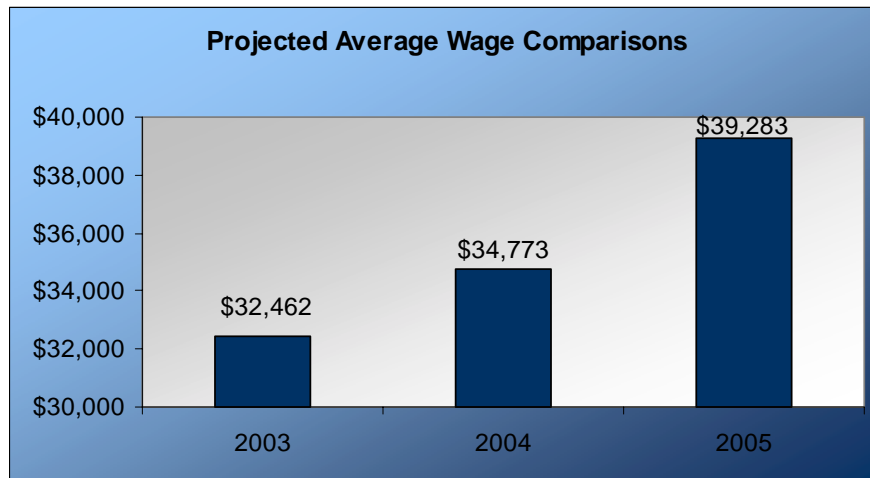
During 2005, jobs created through Commerce activity will pay an average annual salary of \$39,283, which is a 13% increase over jobs created in 2004. Much of this increase is due to success in creating jobs in industry clusters that pay higher than average wages.

*Methodology*—the average wage for new jobs recruited by the Department of Commerce is calculated using a weighted average of two factors:

- The number of jobs recruited in each industry, as classified using the North American Industry Classification System (NAICS), and;
- The associated average wages for all jobs associated with the NAICS code as reported in the Quarterly Census of Employment and Wages, 2<sup>nd</sup> Quarter 2005. (S.C. Employment Security Commission).

This methodology has been used by Commerce for 10 years, but only published since 2003.

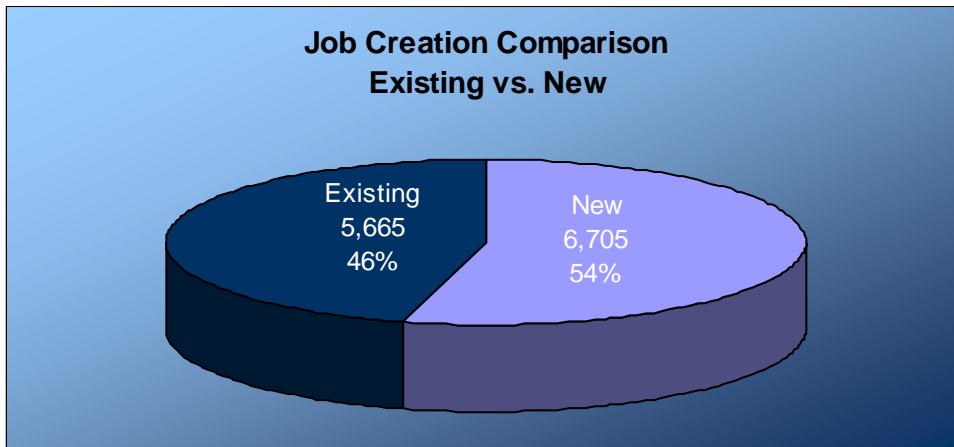
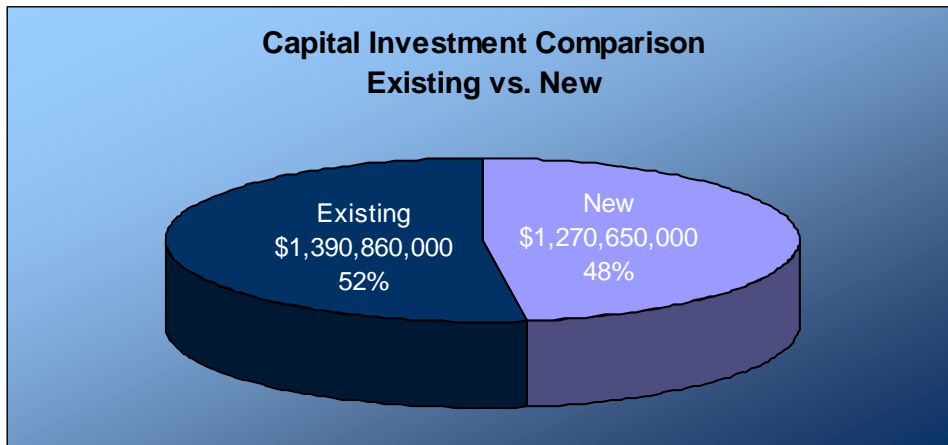
Projected Average Wage for New Jobs Created In 2005		
Year	Jobs	Projected Avg. Wage
2005	12,370	\$39,283
2004	13,491	\$34,773
2003	8,700	\$32,462



## New and Existing Industries

In 2005, Commerce assisted with 83 existing industry expansions, which created 5,665 new jobs (45.8% of total job creation) and \$1.39 billion (52.3% of total investment.) Commerce recruited 54 new companies to South Carolina, which created 6,705 new jobs (54.2% of total job creation) and \$1.27 billion (47.7% of total investment.)

2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS						
	PROJECTS	%	JOB	%	INVESTMENT (\$000)	%
NEW	54	40%	6,705	54%	\$1,270,650,000	48%
EXISTING	83	60%	5,665	46%	\$1,390,860,000	52%
TOTALS	137	100%	12,370	100%	\$2,661,510,000	100%





## Industry Sectors

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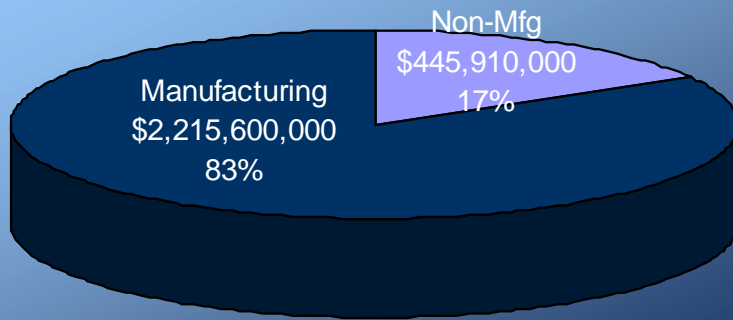
### ***Manufacturing vs. Non-Manufacturing***

The Department of Commerce has maintained its strategy of diversifying the state's economy while building on the strength of existing industries in South Carolina. South Carolina enjoyed significant success in attracting large investments and job creation in wood products with the announcement of Grant Forest Products in Allendale and Clarendon Counties and Tech-Wood in Greenwood County. Additionally, the state continues to excel in attracting automotive investment, as exemplified by the DaimlerChrysler announcement of its new Sprinter van assembly plant to be located in North Charleston.

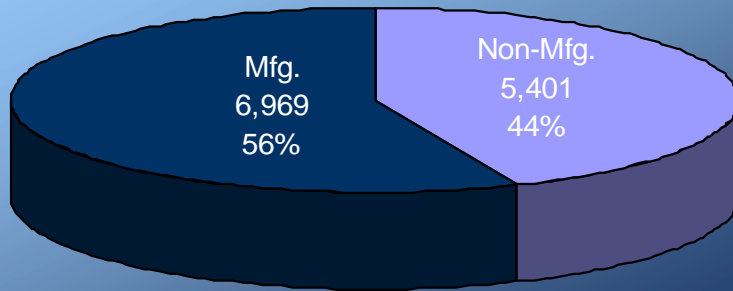
Manufacturing continues to be a critical part of South Carolina's economy, accounting for 83% of the capital investment and 56% of the new job creation in the state in 2005. Non-manufacturing industries also provided significant job gains, particularly in distribution and financial services.

<b>2005 CAPITAL INVESTMENT ACTIVITY BY MANUFACTURING AND NON-MANUFACTURING</b>						
	PROJECTS	%	JOBS	%	INVESTMENT	%
MANUFACTURING	111	81.1%	6,969	56.4%	\$2,215,600,000	83.3%
NON-MANUFACTURING	26	18.9%	5,401	43.6%	\$445,910,000	16.7%
TOTALS	<b>137</b>	100%	<b>12,370</b>	100%	<b>\$2,661,510,000</b>	100%

### Capital Investment Comparison Mfg. vs. Non-Mfg.



### Job Creation Comparison Mfg. vs. Non-Mfg.

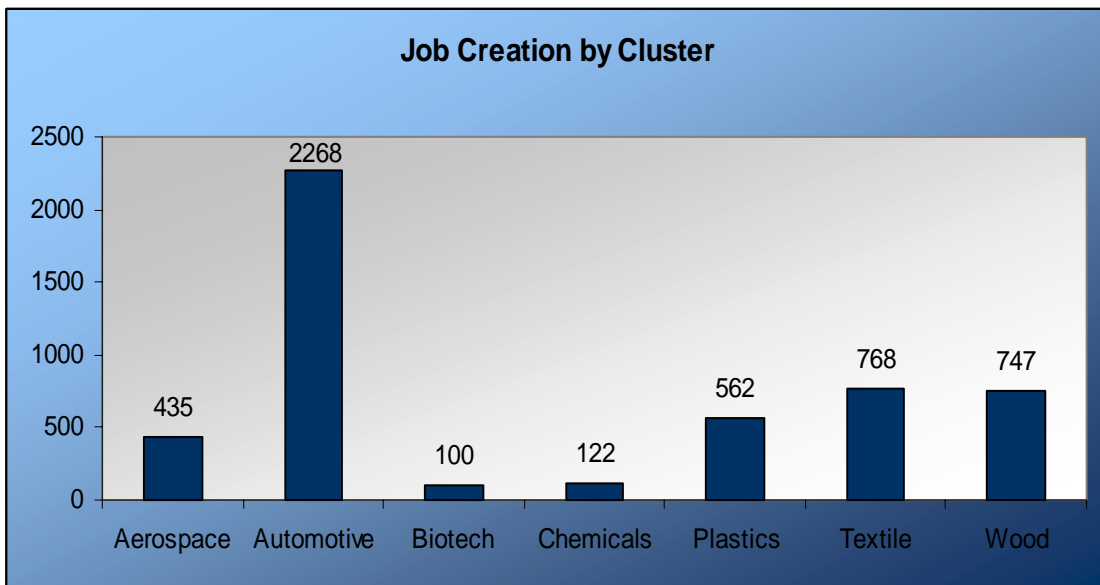
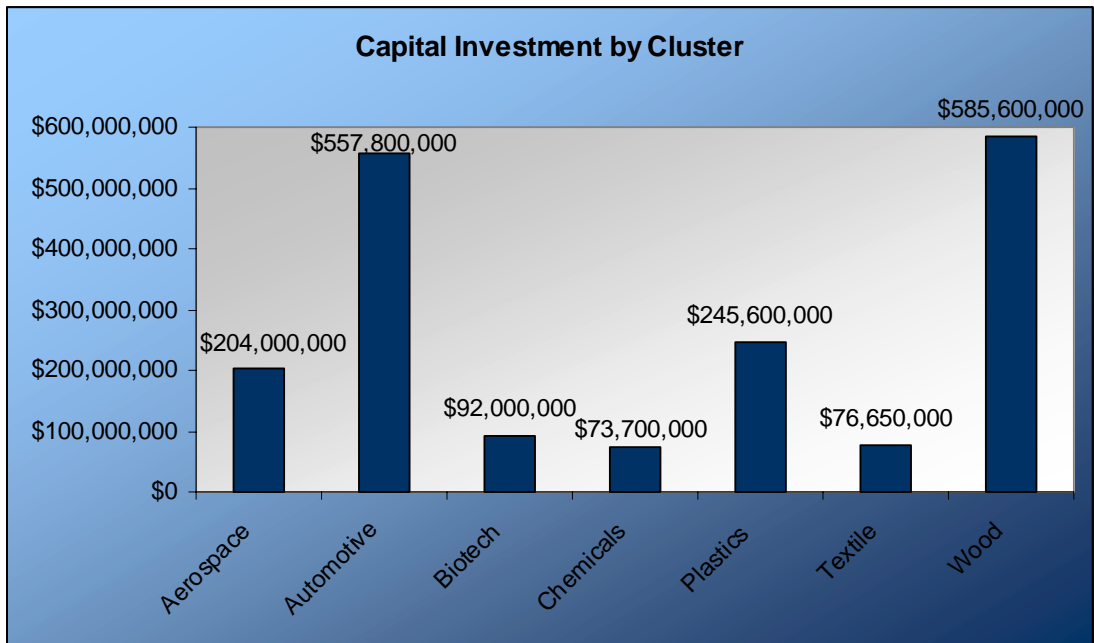


## Cluster Analysis

The South Carolina Department of Commerce continues to focus on creating and sustaining major industry clusters. The clusters making the largest capital investment in 2005 were the Wood Products Cluster with \$585.6 million and the Automotive Cluster with \$557.8 million. The Automotive Cluster also led the way in job creation with 2,268 jobs, followed by the Textiles and Wood Products. South Carolina continues to play a major role in the Automotive Industry with the addition of companies like DaimlerChrysler, several BMW suppliers, and expansions like Michelin and Draexlmaier.

Besides growth in target industry clusters, the Department of Commerce also attracted industries such as distribution, financial services, and industrial equipment. Some of the top companies in these industries include QVC, HSBC, and FG Wilson (Caterpillar).

2005 CAPITAL INVESTMENT ACTIVITY BY CLUSTER (IN ALPHABETICAL ORDER)						
CLUSTER	PROJECTS	%	JOB	%	INVESTMENT	%
Aerospace	3	2.2%	435	3.5%	\$204,000,000	7.7%
Automotive	33	24.1%	2,268	18.3%	\$557,800,000	21.0%
Biotech	2	1.5%	100	0.8%	\$92,000,000	3.5%
Chemicals	4	2.9%	122	1.0%	\$73,700,000	2.8%
Plastics	12	8.8%	562	4.5%	\$245,600,000	9.2%
Textile	8	5.8%	768	6.2%	\$76,650,000	2.9%
Wood	10	7.3%	747	6.0%	\$585,600,000	22.0%
Other	65	47.4%	7,368	59.6%	\$826,160,000	31.0%
<b>TOTALS</b>	<b>137</b>	<b>100%</b>	<b>12,370</b>	<b>100%</b>	<b>\$2,661,510,000</b>	<b>100%</b>



## Top Announcements

### ***Largest Capital Investment and Job Creation Announcements***

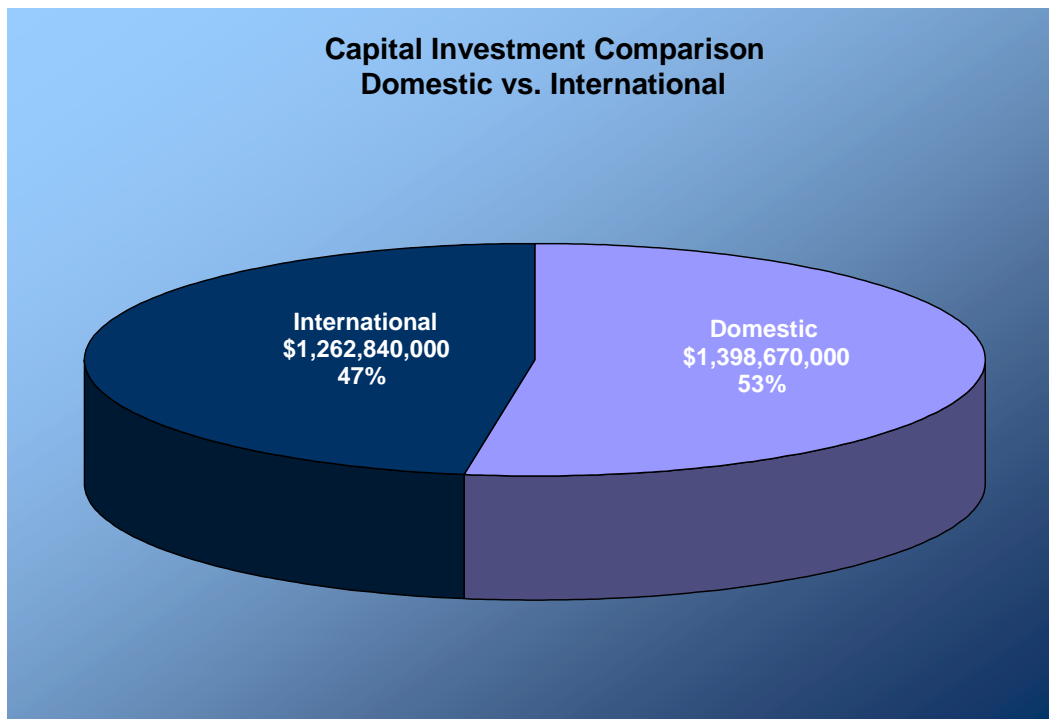
<b>TOP 10 PUBLICLY ANNOUNCED CAPITAL INVESTMENTS IN 2005</b>				
<b>Company</b>	<b>Type</b>	<b>Product</b>	<b>Investment</b>	<b>County</b>
Grant Forest Products	New	Wood	\$200,000,000	Allendale
Grant Forest Products	New	Wood	\$200,000,000	Clarendon
Tech-Wood	New	Wood/Plastic	\$150,000,000	Greenwood
American Gypsum	New	Gypsum Wallboard	\$125,000,000	Georgetown
LSP Automotive Systems LTD	New	Sheet Metal Stamping	\$96,000,000	Union
QVC	New	Distribution	\$87,760,000	Florence
Michelin	Existing	Heavy Equipment Tires	\$85,000,000	Lexington
Michelin	Existing	Rubber Mixing	\$80,000,000	Anderson
LaFarge North America	Existing	Cement	\$57,200,000	Dorchester
Avery Dennison	Existing	RFID Labels	\$50,000,000	Laurens

<b>TOP 10 PUBLICLY ANNOUNCED JOB CREATIONS IN 2005</b>				
<b>Company</b>	<b>Type</b>	<b>Product</b>	<b>Jobs</b>	<b>County</b>
HSBC	New	Financial services	900	Lancaster
Urban Outfitters	New	Distribution/Call center	500	Edgefield
QVC	New	Distribution	400	Florence
Trumbull Services	New	Insurance services	300	Richland
Tech-Wood	New	Wood/Plastic	250	Greenwood
BenefitFocus.com	New	Corporate HQ/Software Development	245	Charleston
DaimlerChrysler	New	Sprinter vans	220	Charleston
Trenton Plastic Products	New	Plastic injection parts	200	Edgefield
Ventus Capital	New	Financial services	200	Greenville
Citi Trends	New	Distribution	200	Darlington

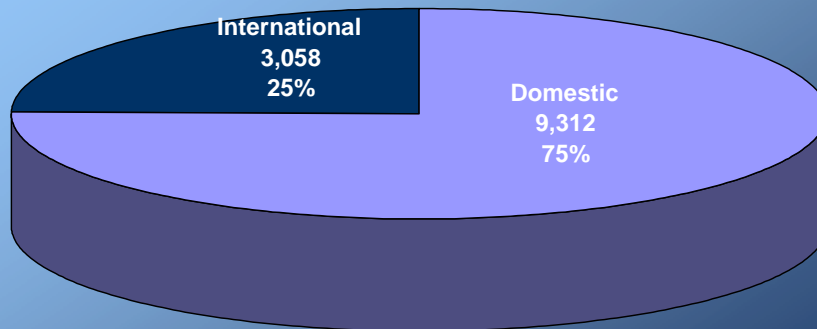
## International Firms

Direct foreign investment in South Carolina continued to be strong in 2005. The South Carolina Department of Commerce assisted 41 international firms, which produced more than \$1.26 billion announced investment and 3,058 announced new jobs. Canadian-owned firms led the way in capital investment, accounting for 33.7% of the total international capital investment. German-owned companies accounted for 45.1% of jobs created by international companies with 1,378 jobs. French-owned firms represented the third highest in international capital investment and the second highest in job creation.

2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS						
	FIRMS	%	JOB	%	INVESTMENT	%
INTERNATIONAL	41	30.0%	3,058	24.8%	\$1,262,840,000	47.5%
DOMESTIC	96	70.0%	9,312	75.2%	\$1,398,670,000	52.5%
TOTALS	<b>137</b>	<b>100%</b>	<b>12,370</b>	<b>100%</b>	<b>\$2,661,510,000</b>	<b>100%</b>



**Job Creation Comparison  
Domestic vs. International**



2005 INTERNATIONAL CAPITAL INVESTMENT ACTIVITY BY COUNTRY (IN ALPHABETICAL ORDER)						
Country	Firms	%	Investment	%	Jobs	%
BELGIUM	1	2.4%	\$10,000,000	0.8%	100	3.3%
CANADA	5	12.2%	\$425,480,000	33.7%	327	10.7%
GERMANY	16	39.0%	\$310,660,000	24.6%	1,378	45.1%
GREECE	1	2.4%	\$15,000,000	1.2%	60	2.0%
FINLAND	1	2.4%	\$9,000,000	0.7%	170	5.6%
FRANCE	5	12.2%	\$231,800,000	18.4%	333	10.9%
ITALY	2	4.9%	\$13,000,000	1.0%	95	3.1%
JAPAN	6	14.6%	\$34,100,000	2.7%	104	3.4%
NETHERLANDS	2	4.9%	\$153,000,000	12.1%	260	8.5%
SWEDEN	1	2.4%	\$43,000,000	3.4%	44	1.4%
UNITED KINGDOM	1	2.4%	\$17,800,000	1.4%	187	6.1%
<b>TOTAL INTERNATIONAL</b>	<b>41</b>	<b>100.0%</b>	<b>\$1,259,840,000</b>	<b>100.0%</b>	<b>3,048</b>	<b>100.0%</b>

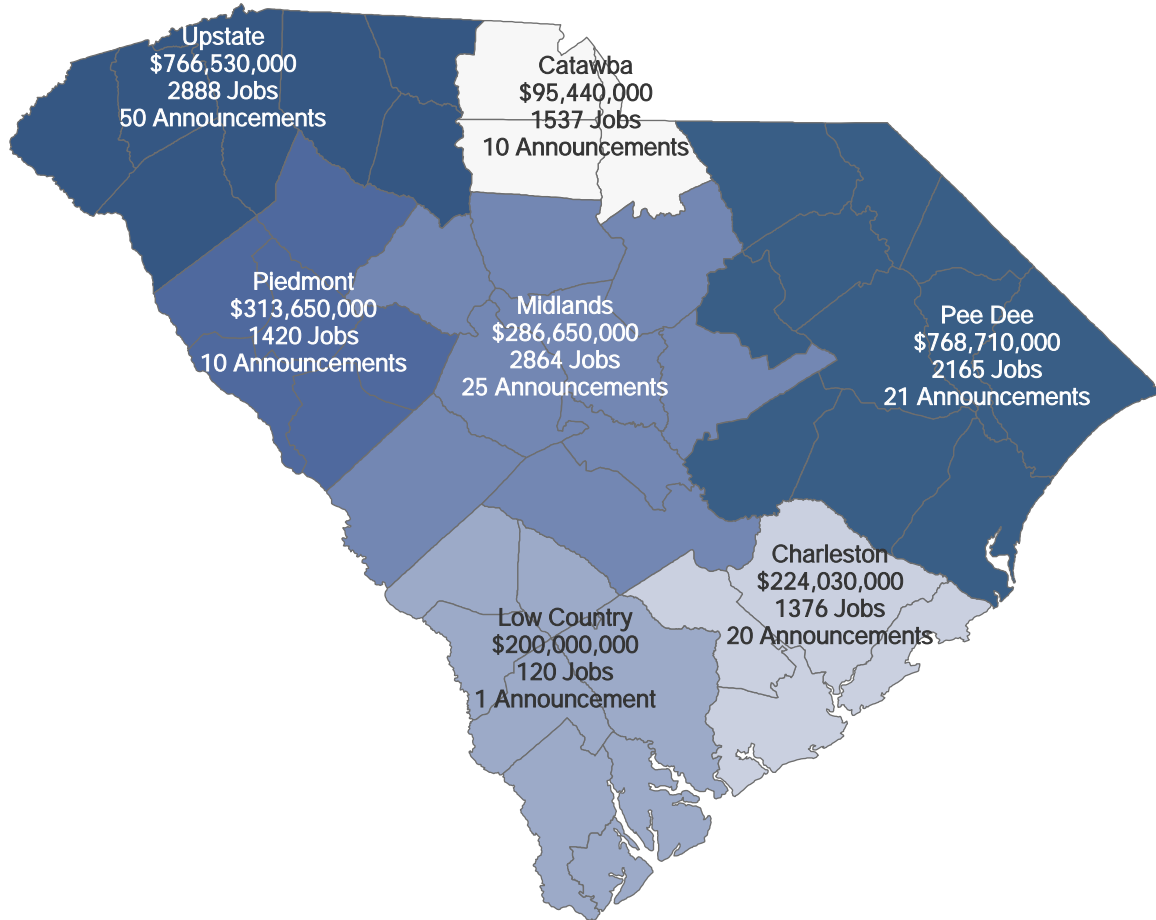
<b>TOP 5 PUBLICLY ANNOUNCED CAPITAL INVESTMENTS BY INTERNATIONAL COMPANIES</b>					
<b>Company</b>	<b>County</b>	<b>Type</b>	<b>Investment</b>	<b>Product</b>	<b>Country</b>
Grant Forest Products	Allendale	New	\$200,000,000	Wood	Canada
Grant Forest Products	Clarendon	New	\$200,000,000	Wood	Canada
Tech-Wood	Greenwood	New	\$150,000,000	Wood/Plastic	Netherlands
LSP Automotive Systems LTD	Union	New	\$96,000,000	Sheet Metal Stamping	Germany
Michelin	Lexington	Existing	\$85,000,000	Heavy Equipment Tires	France

<b>TOP 5 PUBLICLY ANNOUNCED JOB CREATIONS BY INTERNATIONAL COMPANIES</b>					
<b>Company</b>	<b>County</b>	<b>Type</b>	<b>Jobs</b>	<b>Product</b>	<b>Country</b>
Tech-Wood	Greenwood	New	250	Wood/Plastic	Netherlands
DaimlerChrysler	Charleston	New	220	Sprinter Vans	Germany
FG Wilson (Caterpillar)	Newberry	New	187	Generator Sets	United Kingdom
Metso Minerals	Richland	Existing	170	Mining Equipment	Finland
Draexlmaier	Spartanburg	Existing	165	Automotive Supplier	Germany



## Regional Capital Investment Activity

### 2005 South Carolina Department of Commerce Investment and Announcements by Region

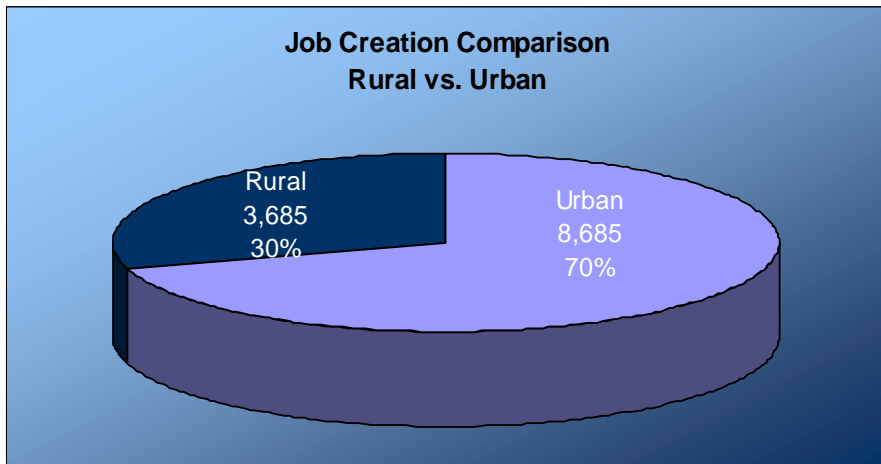
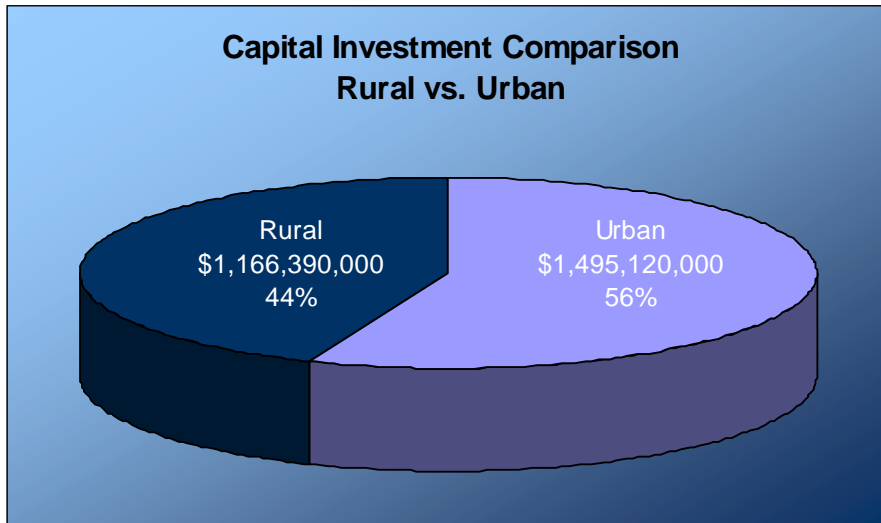


2005 CAPITAL INVESTMENT ACTIVITY by Region (IN ALPHABETICAL ORDER)						
County Classifications	Investment	%	Jobs	%	Firms	%
Catawba	\$95,440,000	3.6%	1,537	12.4%	10	7.3%
Charleston	\$224,030,000	8.4%	1,376	11.1%	20	14.6%
Low Country	\$200,000,000	7.8%	120	1.0%	1	0.7%
Midlands	\$286,650,000	10.8%	2,864	23.2%	25	18.2%
Pee Dee	\$768,710,000	28.9%	2,165	17.5%	21	15.3%
Piedmont	\$313,650,000	11.8%	1,420	11.5%	10	7.3%
Upstate	\$766,530,000	28.8%	2,888	23.3%	50	36.5%
<b>South Carolina</b>	<b>\$2,661,510,000</b>	<b>100.0%</b>	<b>12,370</b>	<b>100.0%</b>	<b>137</b>	<b>100.0%</b>

## Urban and Rural Capital Investment and Job Creation

In 2005 the South Carolina Department of Commerce contributed to the growth of the rural areas in the state. Rural counties accounted for 43.9% of the total capital investment in 2005. The Rural capital investment in 2005 was 387% higher than 2004. Job creation in Rural counties was also above that of 2004 with 3,685 jobs.

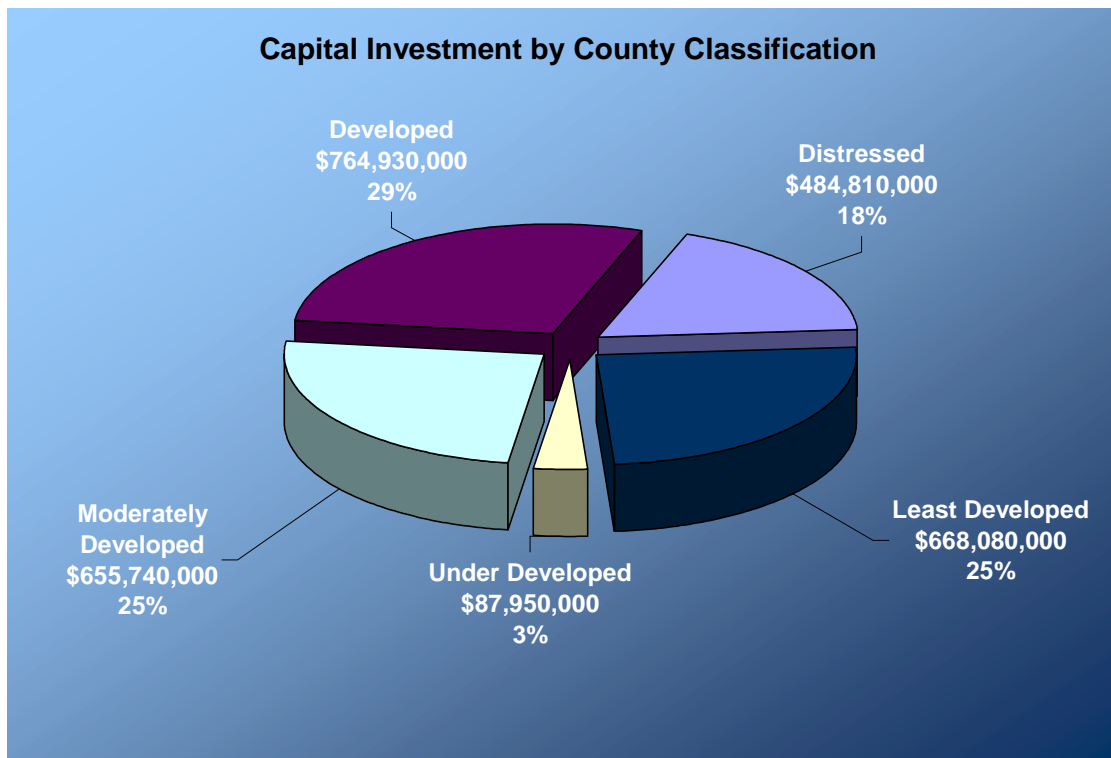
2005 CAPITAL INVESTMENT ACTIVITY By South Carolina's Urban v. Rural Counties						
	Investment	%	Jobs	%	Firms	%
Rural Counties	\$1,166,390,000	43.9%	3,685	29.8%	46	33.4%
Urban Counties	\$1,495,120,000	56.1%	8,685	70.2%	91	66.6%
<b>South Carolina</b>	<b>\$2,661,510,000</b>	<b>100%</b>	<b>12,370</b>	<b>100%</b>	<b>137</b>	<b>100%</b>



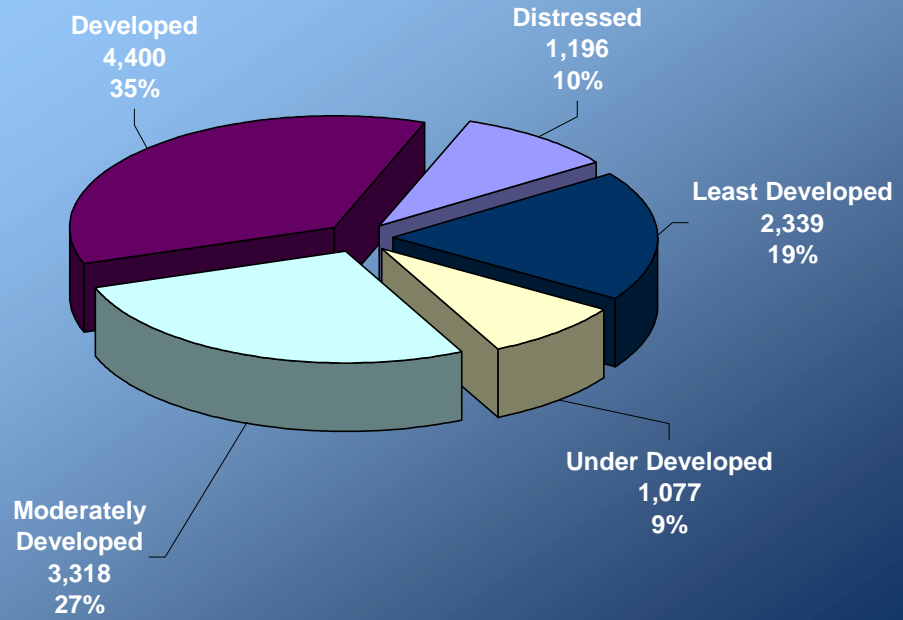
### **Capital Investment Activity by Rural Development Act County Classification**

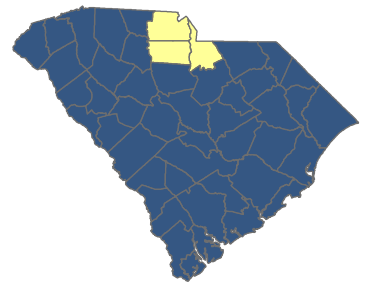
South Carolina's Distressed and Least Developed Counties accounted for 43.3% of Commerce assisted investment and 28.6% of job creation in 2005. The counties in the top two development tiers (Moderately Developed and Developed) accounted for 53.3% of investment and 62.7% of job creation in South Carolina.

<b>2005 CAPITAL INVESTMENT ACTIVITY by South Carolina's Rural Development Act County Classifications</b>						
<b>County Classifications</b>	<b>Investment</b>	<b>%</b>	<b>Jobs</b>	<b>%</b>	<b>Firms</b>	<b>%</b>
Distressed	\$484,810,000	18.2%	1,196	9.7%	20	14.6%
Least Developed	\$668,080,000	25.1%	2,339	18.9%	20	14.6%
Under Developed	\$87,950,000	3.3%	1,077	8.7%	7	5.1%
Moderately Developed	\$655,740,000	24.6%	3,318	26.8%	39	28.5%
Developed	\$764,930,000	28.7%	4,440	35.9%	51	37.2%
<b>South Carolina</b>	<b>\$2,661,510,000</b>	<b>100%</b>	<b>12,370</b>	<b>100%</b>	<b>137</b>	<b>100%</b>



### New Jobs by County Classification





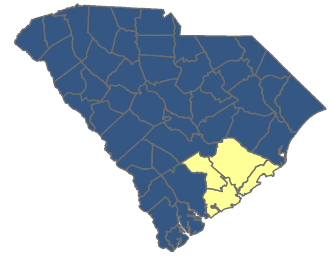
**Catawba Region Capital Investment Activity**  
(Chester, Lancaster and York Counties)

<b>2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
EXISTING	4	40.0%	371	24.1%	\$24,400,000.00	26.0%
NEW	6	60.0%	1,166	75.9%	\$71,040,000.00	74.0%
TOTALS	10	100%	1,537	100%	\$95,440,000.00	100%

<b>2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
INTERNATIONAL	2	20.0%	180	11.7%	\$18,440,000	19.3%
DOMESTIC	8	80.0%	1,357	88.3%	\$77,000,000	80.7%
TOTAL	10	100%	1,537	100%	\$95,440,000	100%

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
Company	Type	Product	Investment	Jobs	County
3D Systems LLC	New	Lithography printers	\$13,000,000	144	York
Beckenbach	New	Automotive supplier	\$5,440,000	30	York
Filtration Group	Existing	Air filters for air purifiers	\$2,000,000	50	York
Hella Lighting	Existing	Car headlights	\$13,000,000	150	York
HSBC	New	Financial Services - Regional HQ	\$20,300,000	900	Lancaster
Morcon Paper	Existing	Paper napkins	\$400,000	50	Chester
Solostructures	New	Steel frames	\$4,300,000	35	Chester
Tyndall Furniture	New	Distribution Center	\$3,100,000	25	Lancaster
Wellman Industries	Existing	HQ	\$9,000,000	121	Lancaster

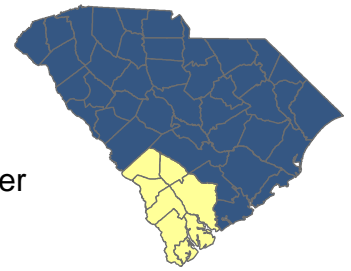
**Charleston Region Capital Investment Activity**  
 (Berkeley, Charleston and Dorchester Counties)



<b>2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
EXISTING	9	45.0%	354	25.7%	\$114,680,000	51.2%
NEW	11	55.0%	1,022	74.3%	\$109,350,000	48.8%
TOTALS	20	100%	1,376	100%	\$224,030,000	100%

<b>2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
INTERNATIONAL	5	25.0%	267	19.4%	\$110,200,000	49.2%
DOMESTIC	15	75.0%	1,109	80.6%	\$113,830,000	50.8%
TOTAL	20	100%	1,376	100%	\$224,030,000	100%

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
<b>Company</b>	<b>Type</b>	<b>Product</b>	<b>Investment</b>	<b>Jobs</b>	<b>County</b>
Albert Weber	Existing	Automobile crankshafts	\$11,000,000	25	Dorchester
AM Conservation	New	Conservation products	\$2,200,000	11	Berkeley
American Cyber Logistics	New	Distribution & logistics Service	\$3,500,000	10	Charleston
DaimlerChrysler	New	Sprinter vans	\$35,000,000	220	Charleston
FoodHandler	New	Food distribution	\$1,200,000	30	Charleston
Global Building Solutions	New	Structural insulated panels (SIPs)	\$5,000,000	150	Berkeley
Hagemeyer	Existing	Electric industry safety product distribution	\$6,000,000	75	Charleston
Holset Engineering	New	Turbochargers	\$13,000,000	180	Charleston
Interwrap	New	Packaging products	\$2,000,000	7	Charleston
LaFarge North America	Existing	Cement & related products	\$57,200,000	0	Dorchester
MeadWestvaco	Existing	Lumber	\$9,000,000	19	Dorchester
Road King Trailers	New	Boat & utility trailers	\$600,000	30	Dorchester
Scout Boats	Existing	Non-rigid hull boats	\$5,500,000	50	Dorchester
Union Underwear	New	Distribution	\$28,850,000	133	Berkeley
Valley Forge Flag Company	Existing	Manufacturing/Distribution of flags	\$3,000,000	70	Berkeley
Verdi	New	SIP walls for buildings	\$2,000,000	6	Charleston



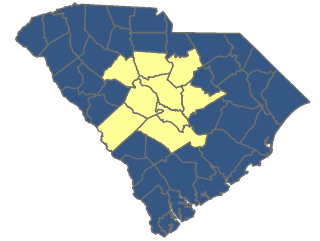
**Low Country Region Capital Investment Activity**  
 (Allendale, Bamberg, Barnwell, Beaufort, Colleton, Hampton and Jasper Counties)

<b>2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS</b>						
	FIRMS	%	JOBS	%	INVESTMENT	%
EXISTING	0	0%	0	0%	0	0%
NEW	1	100%	120	100%	\$200,000,000	100%
TOTALS	1	100%	120	100%	\$200,000,000	100%

<b>2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS</b>						
	FIRMS	%	JOBS	%	INVESTMENT	%
INTERNATIONAL	1	100%	120	100%	\$200,000,000	100%
DOMESTIC	0	0%	0	0%	0	0%
TOTAL	1	100%	120	100%	\$200,000,000	100%

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
Company	Type	Product	Investment	Jobs	County
Grant Forest Products	New	Wood	\$200,000,000	120	Allendale





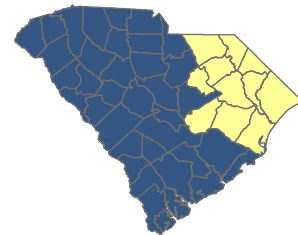
**Midlands Region Capital Investment Activity**  
 (Aiken, Calhoun, Fairfield, Kershaw, Lee, Lexington, Newberry,  
 Orangeburg, Richland and Sumter Counties)

<b>2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS</b>						
	FIRMS	%	JOBS	%	INVESTMENT	%
EXISTING	18	72.0%	2,032	70.9%	\$227,350,000	79.3%
NEW	7	28.0%	832	29.1%	\$59,300,000	20.7%
TOTALS	25	100%	2,864	100%	\$286,650,000	100%

<b>2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS</b>						
	FIRMS	%	JOBS	%	INVESTMENT	%
INTERNATIONAL	8	32.0%	746	26.0%	\$153,400,000	53.5%
DOMESTIC	17	68.0%	2,118	74.0%	\$133,250,000	46.5%
TOTAL	25	100%	2,864	100%	\$286,650,000	100%

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
<b>Company</b>	<b>Type</b>	<b>Product</b>	<b>Investment</b>	<b>Jobs</b>	<b>County</b>
Alliance Wholesale	Existing	Warehouse	\$350,000	50	Richland
Builders FirstSource	New	Building Materials	\$1,000,000	50	Orangeburg
Carolina Ceramics	Existing	Bricks	\$10,000,000	25	Richland
Dana	Existing	Trailer chassis	\$5,000,000	65	Kershaw
Decolam, Inc.	Existing	Laminator - wood products	\$1,500,000	41	Orangeburg
FG Wilson (Caterpillar)	New	Generator sets	\$17,800,000	187	Newberry
FN Mfg.	Existing	Rifles & machine guns	\$10,000,000	100	Richland
Forgitron LLC	New	Truck wheels	\$14,000,000	35	Kershaw
Hengst	New	Filter element mfg.	\$12,000,000	60	Kershaw
Lang-Mekra	Existing	Truck mirrors	\$13,000,000	50	Fairfield
Metso Minerals	Existing	Mining equipment	\$9,000,000	170	Richland
Michelin	Existing	Heavy equipment tires	\$85,000,000	70	Lexington
Owens Corning	Existing	Composite coated fiber material	\$25,000,000	30	Aiken
Pactiv	Existing	Plastic food utensils & packaging	\$25,000,000	30	Aiken
SC Metal Products	New	Metal Stampings	\$7,000,000	100	Aiken
SC Yutaka Technologies	Existing	ATV/automotive parts	\$4,000,000	14	Kershaw
Sea Max Boats (Northlake Performance)	New	Fiberglass fishing boats	\$500,000	100	Fairfield
Square D	Existing	Electric switching devices	\$2,600,000	95	Richland
UPS	Existing	Distribution	Confidential	50	Lexington

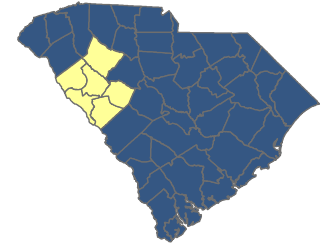
***Pee Dee Region Capital Investment Activity***  
 (Chesterfield, Clarendon, Darlington, Dillon, Florence, Georgetown,  
 Horry, Marion, Marlboro and Williamsburg Counties)



<b>2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS</b>						
	FIRMS	%	JOBS	%	INVESTMENT	%
NEW	12	57.1%	1,510	69.7%	\$439,950,000	57.2%
EXISTING	9	42.9%	655	30.3%	\$328,760,000	42.8%
TOTALS	21	100%	2,165	100%	\$768,710,000	100%

<b>2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS</b>						
	FIRMS	%	JOBS	%	INVESTMENT	%
INTERNATIONAL	4	19.0%	335	15.5%	\$217,540,000	28.3%
DOMESTIC	17	81.0%	1,830	84.5%	\$551,170,000	71.7%
TOTAL	21	100%	2,165	100%	\$768,710,000	100%

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
<b>Company</b>	<b>Type</b>	<b>Product</b>	<b>Investment</b>	<b>Jobs</b>	<b>County</b>
3D Metal Works	Existing	Metal products	\$1,000,000	110	Williamsburg
American Gypsum	New	Gypsum wallboard	\$125,000,000	100	Georgetown
Arvin Meritor	Existing	Auto window regulators	\$1,760,000	40	Marion
Citi Trends	New	Distribution	\$3,000,000	200	Darlington
East Coast Erosion Blankets	New	Erosion control products	\$2,000,000	18	Florence
EGS Inc.	New	Gun locks	\$0.00	100	Chesterfield
Envirogard	Existing	Treated wood	\$1,200,000	20	Georgetown
Firestone Bldg. Products	Existing	Building products	\$2,100,000	50	Williamsburg
Grant Forest Products	New	Oriented Strand Board	\$200,000,000	120	Clarendon
Margaritelli	New	Wood flooring	\$4,000,000	65	Chesterfield
Meyers	New	Wood cabinets	\$250,000	50	Williamsburg
Musashi	Existing	Automotive parts	Confidential	120	Marlboro
Palmetto Brick	Existing	Bricks	\$28,000,000	20	Marlboro
PWG	New	Sun roofs	\$4,940,000	100	Horry
QVC	New	Distribution center	\$87,760,000	400	Florence
SafeRack	Existing	Steel platforms, stairs	\$2,500,000	10	Georgetown
Sid Harvey	New	HVAC parts/equip.	Confidential	100	Georgetown



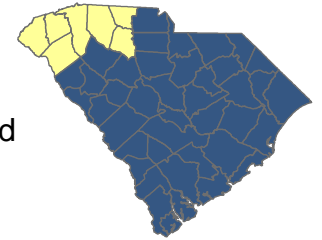
**Piedmont Region Capital Investment Activity**  
 (Abbeville, Edgefield, Greenwood, Laurens, McCormick and Saluda Counties)

<b>2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
NEW	3	30.0%	950	66.9%	\$184,000,000	58.7%
EXISTING	7	70.0%	470	33.1%	\$129,650,000	41.3%
TOTALS	10	100%	1,420	100%	\$313,650,000	100%

<b>2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
INTERNATIONAL	1	10.0%	250	17.6%	\$150,000,000	47.8%
DOMESTIC	9	90.0%	1,170	82.4%	\$163,650,000	52.2%
TOTAL	10	100%	1,420	100%	\$313,650,000	100%

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
Company	Type	Product	Investment	Jobs	County
Avery Dennison	Existing	RFID Labels	\$50,000,000	100	Laurens
Country Fresh	Existing	Fruit/Vegetable processor	\$5,000,000	100	Laurens
Edgefield Mfg.	Existing	Recycled yarns	\$650,000	40	Edgefield
ISO Poly	Existing	Mfg. - plastics	\$28,000,000	50	Laurens
Parkdale America	Existing	Cotton yarns	\$22,000,000	0	Edgefield
Tech-Wood	New	Plasticized wood building products	\$150,000,000	250	Greenwood
Timken	Existing	Bearings	\$23,000,000	130	Laurens
Trenton Plastic Products	New	Plastic injection parts	\$5,000,000	200	Edgefield
Urban Outfitters	New	Distribution/Call Center	\$29,000,000	500	Edgefield

**Upstate Region Capital Investment Activity**  
 (Anderson, Cherokee, Greenville, Oconee, Pickens, Spartanburg and Union Counties)



<b>2005 CAPITAL INVESTMENT ACTIVITY BY NEW AND EXISTING FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
EXISTING	14	28.0%	1,105	38.3%	\$200,510,000	26.2%
NEW	36	72.0%	1,783	61.7%	\$566,020,000	73.8%
TOTALS	50	100%	2,888	100%	\$766,530,000	100%

<b>2005 CAPITAL INVESTMENT ACTIVITY BY INTERNATIONAL AND DOMESTIC FIRMS</b>						
	FIRMS	%	JOB	%	INVESTMENT	%
INTERNATIONAL	20	40.0%	1,097	38.0%	\$406,760,000	53.1%
DOMESTIC	30	60.0%	1,791	62.0%	\$359,770,000	46.9%
TOTAL	50	100%	2,888	100%	\$766,530,000	100%

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
Company	Type	Product	Investment	Jobs	County
Automation Engineering	Existing	Engineering/manufacturing	\$1,200,000	25	Greenville
B&B Plating	Existing	Electroplated materials	\$1,500,000	35	Anderson
Benteler	New	Automotive	Confidential	115	Spartanburg
Boysen	New	Mufflers	\$8,000,000	70	Cherokee
CG Roxane	Existing	Bottled Water	\$12,420,000	10	Oconee
Cognis Corporation	Existing	Specialty chemicals	\$25,000,000	10	Greenville
Compact Automation	Existing	Industrial products	\$2,000,000	35	Oconee
CompX National	Existing	Security mechanisms	\$12,500,000	0	Greenville
D3 Technologies	Existing	Aviation	\$3,000,000	100	Greenville
Diamond Hill Plywood	Existing	Building products and distribution	\$5,500,000	12	Greenville
Draexlmaier	Existing	Automotive supplier	\$16,900,000	165	Spartanburg
Firestone Bldg. Products	Existing	Roofing material	\$14,000,000	0	Spartanburg
Freightliner	Existing	Truck chassis	\$1,300,000	63	Cherokee

Company	Type	Product	Investment	Jobs	County
Hi-Tech Molding & Tooling	New	Plastics	\$5,600,000	100	Anderson
Innertech	New	Plastic injection molding	\$8,000,000	70	Spartanburg
Invista	Existing	Polymers for plastic bottle resin	\$11,000,000	0	Spartanburg
Ionic Technologies	Existing	Machining industry services	\$3,000,000	10	Greenville
LSP Automotive Systems LTD	New	Sheet metal stampings	\$96,000,000	130	Union
Magna Donnelly	New	Rearview mirrors	\$4,080,000	30	Spartanburg
Maillis Strapping Systems USA	New	Polyester strapping	\$15,000,000	60	Greenville
Medline Industries	Existing	Medical gloves	\$15,000,000	20	Anderson
Michelin	Existing	Rubber mixing	\$80,000,000	25	Anderson
MPI Southern Fineblank	Existing	Automobile components	\$8,000,000	30	Spartanburg
Owens Corning	Existing	Roofing materials	\$40,000,000	0	Anderson
Pierburg	Existing	Auto parts	\$20,000,000	100	Greenville
Plastic Omnium - Spartanburg	Existing	Bumpers	\$7,000,000	80	Spartanburg
Raynor USA	Existing	Garage doors	\$3,500,000	80	Spartanburg
Sargent Metal Fabrication	Existing	Fabricated metal parts	\$3,000,000	30	Anderson
Sealed Air Cryovac Corporation	Existing	Plastic medical bags	\$16,000,000	30	Spartanburg
Seeber	Existing	Auto parts	Confidential	60	Spartanburg
Spartanburg Steel Products	Existing	Auto products	\$25,000,000	0	Spartanburg
SpectAL	New	School bus windows	\$480,000	50	Cherokee
Suminoe Textiles of America	Existing	Mfg. seat covers	\$8,000,000	0	Cherokee
Tahoe LLC	New	Woven fabric	\$3,000,000	50	Cherokee
Timken	Existing	Bearings	\$10,000,000	0	Anderson
Timken	Existing	R&D powertrain	\$17,000,000	110	Greenville
Tuffaloy Products	Existing	Electrodes	\$8,000,000	30	Greenville
Unaflex	New	Expansion joints	\$7,000,000	150	Anderson
Universal Molding	New	Mfg. CD & DVD boxes	\$10,000,000	30	Cherokee
Valenite	Existing	Machine tools	\$43,000,000	44	Oconee
Ventus Capital	New	Financial services	\$2,000,000	200	Greenville
Vetroresina LLC	New	Fiberglass panels	\$9,000,000	30	Greenville
Wilson Sporting Goods	New	Distribution	\$350,000	20	Greenville

## Complete List of Publicly Announced Investment

<b>PUBLICLY ANNOUNCED CAPITAL INVESTMENT AND JOB CREATION</b>					
<b>Company</b>	<b>Type</b>	<b>Product</b>	<b>Investment</b>	<b>Jobs</b>	<b>County</b>
3D Metal Works	Existing	Metal products	\$1,000,000	110	Williamsburg
3D Systems LLC	New	Lithography printers	\$13,000,000	144	York
Albert Weber	Existing	Automobile crankshafts	\$11,000,000	25	Dorchester
Alliance Wholesale	Existing	Warehouse	\$350,000	50	Richland
AM Conservation	New	Conservation products	\$2,200,000	11	Berkeley
American Cyber Logistics	New	Distribution & logistics Service	\$3,500,000	10	Charleston
American Gypsum	New	Gypsum wallboard	\$125,000,000	100	Georgetown
Arvin Meritor	Existing	Auto window regulators	\$1,760,000	40	Marion
Automation Engineering	Existing	Engineering/manufacturing	\$1,200,000	25	Greenville
Avery Dennison	Existing	RFID Labels	\$50,000,000	100	Laurens
B&B Plating	Existing	Electroplated materials	\$1,500,000	35	Anderson
Beckenbach	New	Automotive supplier	\$5,440,000	30	York
Benefitfocus.com	New	Corp. HQ/software development	Confidential	245	Charleston
Benteler	New	Automotive	Confidential	115	Spartanburg
Boysen	New	Mufflers	\$8,000,000	70	Cherokee
Builders FirstSource	New	Building Materials	\$1,000,000	50	Orangeburg
Carolina Ceramics	Existing	Bricks	\$10,000,000	25	Richland
CG Roxane	Existing	Bottled Water	\$12,420,000	10	Oconee
Citi Trends	New	Distribution	\$3,000,000	200	Darlington
Cognis Corporation	Existing	Specialty chemicals	\$25,000,000	10	Greenville
Compact Automation	Existing	Industrial products	\$2,000,000	35	Oconee
CompX National	Existing	Security mechanisms	\$12,500,000	0	Greenville
Country Fresh	Existing	Fruit/Vegetable processor	\$5,000,000	100	Laurens
D3 Technologies	Existing	Aviation	\$3,000,000	100	Greenville
DaimlerChrysler	New	Sprinter vans	\$35,000,000	220	Charleston
Dana	Existing	Trailer chassis	\$5,000,000	65	Kershaw
Decolam, Inc.	Existing	Laminator - wood products	\$1,500,000	41	Orangeburg
Diamond Hill Plywood	Existing	Building products and distribution	\$5,500,000	12	Greenville
Draexlmaier	Existing	Automotive supplier	\$16,900,000	165	Spartanburg
East Coast Erosion Blankets	New	Erosion control products	\$2,000,000	18	Florence
Edgefield Mfg.	Existing	Recycled yarns	\$650,000	40	Edgefield
EGS Inc.	New	Gun locks	\$0.00	100	Chesterfield
Envirogard	Existing	Treated wood	\$1,200,000	20	Georgetown
FG Wilson (Caterpillar)	New	Generator sets	\$17,800,000	187	Newberry
Filtration Group	Existing	Air filters for air purifiers	\$2,000,000	50	York
Firestone Bldg. Products	Existing	Building products	\$2,100,000	50	Williamsburg
Firestone Bldg. Products	Existing	Roofing material	\$14,000,000	0	Spartanburg
FN Mfg.	Existing	Rifles & machine guns	\$10,000,000	100	Richland
FoodHandler	New	Food distribution	\$1,200,000	30	Charleston
Forgitron LLC	New	Truck wheels	\$14,000,000	35	Kershaw
Freightliner	Existing	Truck chassis	\$1,300,000	63	Cherokee
Global Building Solutions	New	Structural insulated panels (SIPs)	\$5,000,000	150	Berkeley
Grant Forest Products	New	Wood	\$200,000,000	120	Allendale
Grant Forest Products	New	Oriented Strand Board	\$200,000,000	120	Clarendon



Company	Type	Product	Investment	Jobs	County
Hagemeyer	Existing	Electric industry safety product distribution	\$6,000,000	75	Charleston
Hella Lighting	Existing	Car headlights	\$13,000,000	150	York
Hengst	New	Filter element mfg.	\$12,000,000	60	Kershaw
Hi-Tech Molding & Tooling	New	Plastics	\$5,600,000	100	Anderson
Holset Engineering	New	Turbochargers	\$13,000,000	180	Charleston
HSBC	New	Financial Services - Regional HQ	\$20,300,000	900	Lancaster
Innertech	New	Plastic injection molding	\$8,000,000	70	Spartanburg
Interwrap	New	Packaging products	\$2,000,000	7	Charleston
Invista	Existing	Polymers for plastic bottle resin	\$11,000,000	0	Spartanburg
Ionic Technologies	Existing	Machining industry services	\$3,000,000	10	Greenville
ISO Poly	Existing	Mfg. - plastics	\$28,000,000	50	Laurens
LaFarge North America	Existing	Cement & related products	\$57,200,000	0	Dorchester
Lang-Mekra	Existing	Truck mirrors	\$13,000,000	50	Fairfield
LSP Automotive Systems LTD	New	Sheet metal stampings	\$96,000,000	130	Union
Magna Donnelly	New	Rearview mirrors	\$4,080,000	30	Spartanburg
Mailis Strapping Systems USA	New	Polyester strapping	\$15,000,000	60	Greenville
Margaritelli	New	Wood flooring	\$4,000,000	65	Chesterfield
Martek	Existing	Biosciences	\$85,000,000	50	Williamsburg
MeadWestvaco	Existing	Lumber	\$9,000,000	19	Dorchester
Medline Industries	Existing	Medical gloves	\$15,000,000	20	Anderson
Metso Minerals	Existing	Mining equipment	\$9,000,000	170	Richland
Meyers	New	Wood cabinets	\$250,000	50	Williamsburg
Michelin	Existing	Heavy equipment tires	\$85,000,000	70	Lexington
Michelin	Existing	Rubber mixing	\$80,000,000	25	Anderson
Morcon Paper	Existing	Paper napkins	\$400,000	50	Chester
MPI Southern Fineblank	Existing	Automobile components	\$8,000,000	30	Spartanburg
Musashi	Existing	Automotive parts	Confidential	120	Marlboro
Owens Corning	Existing	Composite coated fiber material	\$25,000,000	30	Aiken
Owens Corning	Existing	Roofing materials	\$40,000,000	0	Anderson
Pactiv	Existing	Plastic food utensils & packaging	\$25,000,000	30	Aiken
Palmetto Brick	Existing	Bricks	\$28,000,000	20	Marlboro
Parkdale America	Existing	Cotton yarns	\$22,000,000	0	Edgefield
Pierburg	Existing	Auto parts	\$20,000,000	100	Greenville
Plastic Omnium – Spartanburg	Existing	Bumpers	\$7,000,000	80	Spartanburg
PWG	New	Sun roofs	\$4,940,000	100	Horry
QVC	New	Distribution center	\$87,760,000	400	Florence
Raynor USA	Existing	Garage doors	\$3,500,000	80	Spartanburg
Road King Trailers	New	Boat & utility trailers	\$600,000	30	Dorchester
SafeRack	Existing	Steel platforms, stairs	\$2,500,000	10	Georgetown
Sargent Metal Fabrication	Existing	Fabricated metal parts	\$3,000,000	30	Anderson
SC Metal Products	New	Metal stampings	\$7,000,000	100	Aiken
SC Yutaka Technologies	Existing	ATV/automotive parts	\$4,000,000	14	Kershaw
Scout Boats	Existing	Non-rigid hull boats	\$5,500,000	50	Dorchester
Sea Max Boats (Northlake Performance)	New	Fiberglass fishing boats	\$500,000	100	Fairfield
Sealed Air Cryovac Corporation	Existing	Plastic medical bags	\$16,000,000	30	Spartanburg
Seeber	Existing	Auto parts	Confidential	60	Spartanburg

Company	Type	Product	Investment	Jobs	County
Sid Harvey	New	HVAC parts/equip.	Confidential	100	Georgetown
Solostructures	New	Steel frames	\$4,300,000	35	Chester
Spartanburg Steel Products	Existing	Auto products	\$25,000,000	0	Spartanburg
SpectAL	New	School bus windows	\$480,000	50	Cherokee
Square D	Existing	Electric switching devices	\$2,600,000	95	Richland
Suminoe Textiles of America	Existing	Mfg. seat covers	\$8,000,000	0	Cherokee
Tahoe LLC	New	Woven fabric	\$3,000,000	50	Cherokee
Tech-Wood	New	Plasticized wood building products	\$150,000,000	250	Greenwood
Timken	Existing	Bearings	\$10,000,000	0	Anderson
Timken	Existing	R&D powertrain	\$17,000,000	110	Greenville
Timken	Existing	Bearings	\$23,000,000	130	Laurens
Timken	Existing	Bearings	\$3,200,000	34	Union
Trenton Plastic Products	New	Plastic injection parts	\$5,000,000	200	Edgefield
Trumbull Services	New	Insurance Services	\$4,000,000	300	Richland
Tuffaloy Products	Existing	Electrodes	\$8,000,000	30	Greenville
Tyndall Furniture	New	Distribution Center	\$3,100,000	25	Lancaster
Unaflex	New	Expansion joints	\$7,000,000	150	Anderson
Union Underwear	New	Distribution	\$28,850,000	133	Berkeley
Universal Molding	New	Mfg. CD & DVD boxes	\$10,000,000	30	Cherokee
UPS	Existing	Distribution	Confidential	50	Lexington
Urban Outfitters	New	Distribution/Call Center	\$29,000,000	500	Edgefield
Valenite	Existing	Machine tools	\$43,000,000	44	Oconee
Valley Forge Flag Company	Existing	Manufacturing/Distribution of flags	\$3,000,000	70	Berkeley
Ventus Capital	New	Financial services	\$2,000,000	200	Greenville
Verdi	New	SIP walls for buildings	\$2,000,000	6	Charleston
Vetroresina LLC	New	Fiberglass panels	\$9,000,000	30	Greenville
Wellman Industries	Existing	HQ	\$9,000,000	121	Lancaster
Wilson Sporting Goods	New	Distribution	\$350,000	20	Greenville

*\* This chart does not represent 19 confidential announcements. The total number of announcements for 2005 was 137.*

## Methodology

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### ***Purpose of this Report***

The Capital Investment report provides an account of announced capital investment and job creation during 2005 resulting directly from the efforts of the Global Business Development Division of the South Carolina Department of Commerce to recruit and expand businesses in South Carolina. The report is intended as a tool for benchmarking the annual performance of the South Carolina Department of Commerce. The data contained in this report reflects only the Department of Commerce's contribution to the economic progress of South Carolina. A true measure of the state's overall economic progress must include business growth connected to the Department of Commerce, as well as business growth that occur without the assistance of the Department of Commerce.

### ***What are Capital Investments?***

Capital investments are expenditures by new and expanding industries for capital equipment, buildings and land.

### ***What is Tracked?***

Investment and job creation by manufacturing, distribution/warehousing, research and development, headquarters, computer related services, privately owned for-profit health services, financial services, privately owned power generation, and corporate office facilities.

### ***Sources of Data***

Companies assisted by South Carolina Department of Commerce project managers resulting in a 2005 announcement or commitment to expand, relocate or start-up a business in South Carolina.

*Please note 2003 change in methodology:* Beginning in 2003, capital investment totals include South Carolina Department of Commerce projects only. In years prior to 2003, other sources of data were used, including a survey of South Carolina facilities and counties. This change was initiated to better reflect Commerce's true impact on economic development efforts in the state.

### ***Confidential Investment Data***

Many companies that invest in South Carolina request confidentiality, usually to protect competitive information. Confidential investment data are tracked and included in overall state totals; however, confidential data may be suppressed when displaying investment figures by local, industry sector, or any other category of information where investment subtotals are derived.