

**OPPORTUNITIES
FOR AUTOMOTIVE COMPANIES
IN SOUTH CAROLINA**

South Carolina

JANUARY 2005

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EXECUTIVE SUMMARY

South Carolina: Driving the New Southeast Automotive Corridor

Since the turn of the century—when Milliken & Company was making fabric seats and roofs for Henry Ford’s gas-powered cars—South Carolina’s name has been synonymous with automotive success.

South Carolina has emerged as the driving force behind the Southeast’s growing automotive sector. With its exceptional operating advantages, the state has attracted the only **BMW** assembly plant in North America, the corporate headquarters for fire and emergency vehicle manufacturer **American LaFrance**, a **Honda** assembly plant for ATVs and watercraft, and nearly 200 automotive suppliers—including **Bosch**, **Delphi**, **Lear**, **Magna International**, and **Michelin**. These companies have found an environment that delivers bottom-line benefits, enabling them to meet the demands of just-in-time delivery, reduce costs, and enhance profitability.

These unparalleled operating advantages include:

Productive and Cost-Effective Labor—South Carolina has some of the lowest unionization rates and payroll costs in the country. In addition, South Carolina offers a world-class pre-employment training program and has the most productive workforce in the Southeast;

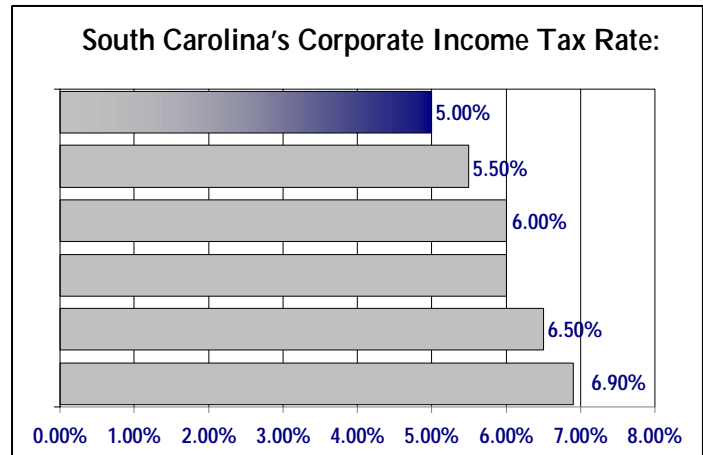
Market Access—South Carolina is home to a convenient intermodal transportation system that puts automotive companies in South Carolina within 500 miles of over 1,000 assemblers and suppliers;

Clemson’s International Center for Automotive Research—South Carolina boasts a revolutionary approach to automobile design and manufacturing with Clemson’s International Center for Automotive Research (ICAR). The campus-like environment integrates university research and academic programs with private sector R&D and testing.



Operating Costs—South Carolina maintains the lowest corporate income tax rate in the Southeast. In addition, South Carolina’s tax incentives are designed to reward new job creation, encourage growth, and reduce startup costs; and

New Sites, Buildings, and Construction—South Carolina maintains an extensive database of available industrial sites and buildings. Based on a company’s specifications, this database provides a location that best suits the needs of the individual company.



Automotive Supply Base— A full range of companies makes up South Carolina’s automotive sector, including assemblers, part suppliers, and some of the world’s top raw material producers. The proximity of suppliers gives automotive companies the speed and access necessary to accommodate just-in-time requirements.

The Automotive Sector: A Keystone of South Carolina’s Thriving Economy

With 37 of South Carolina’s 46 counties home to automotive-related companies, the transportation equipment industry has played a central role in fueling South Carolina’s economy. Since 2000, new and expanding automotive-related companies invested \$3.04 billion and created roughly 11,174 new jobs.

South Carolina is committed to the ongoing success of its automotive sector. When automotive companies come to this state, they can be confident that South Carolina will respond with policies that encourage and support quality manufacturing, performance excellence, and long-term profitability.

LABOR

South Carolina Reduces Labor Costs

South Carolina reduces labor costs for manufacturers and, in many cases, offers the lowest operating costs in the nation. The state's right-to-work labor environment, low employment costs, and available labor supply is conducive for automotive manufacturers to streamline costs and achieve profitability.

One of the Lowest Unionization Rates in the U.S.

As a right-to-work state, South Carolina's labor laws decrease costs and increase output by allowing workers to focus on productivity, innovation, and task diversification. In turn, this promotes higher output and enhanced quality, both of which are reflected in a low work stoppage rate that is far below the national average.

South Carolina has one of the **lowest unionization rates in the nation**. Approximately 4.5 percent of the state's workforce are union-affiliated (*Union Member and Earnings Data Book, 2004*).

Seventh Lowest Employment Costs in Nation

South Carolina ranks seventh in the nation in providing the lowest overall employment costs to manufacturers (*Expansion Management, March 2001*). The state's wage rates, mandated workers' compensation benefits, and unemployment insurance provide automotive manufacturers with significantly reduced labor costs.

Wages Among the Lowest in the Country, Highest Quality

Because of South Carolina's large and available labor pool, manufacturers have tremendous hiring flexibility. As a result, automotive companies produce a consistently high-quality product without having to pay inflated wage rates. In fact, at \$14.19 per hour, South Carolina's manufacturing wages are **among the lowest in the country**, according to the *May 2004 Employment and Earnings*, published by the U.S. Department of Labor Bureau of Labor Statistics.



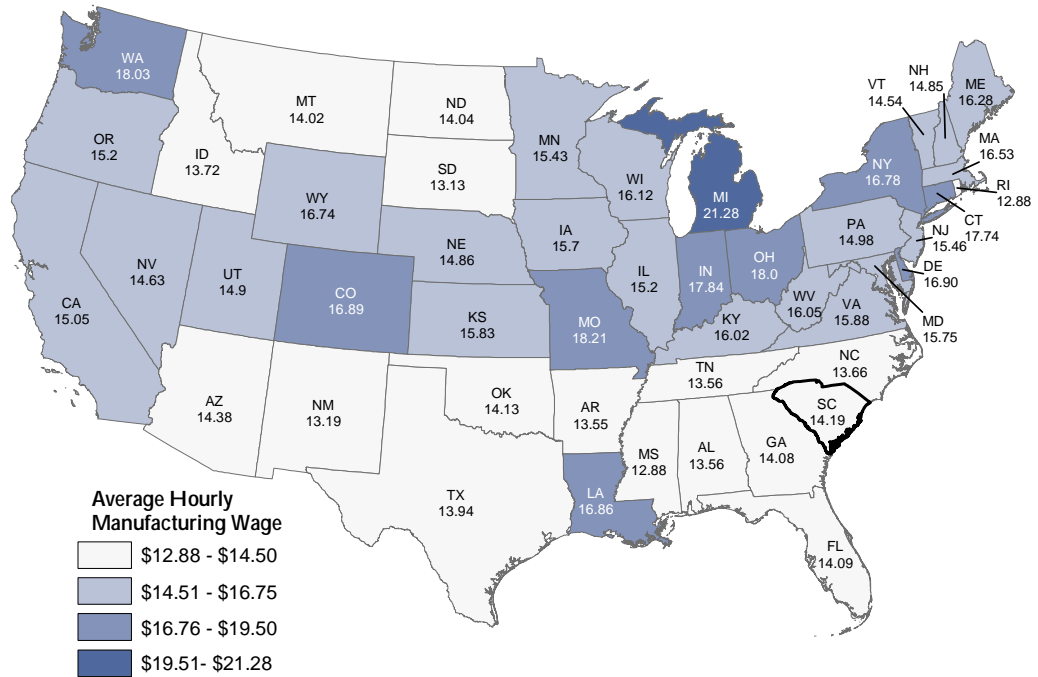
Honda South Carolina Applauds Enthusiastic and Innovative Workforce

"All our competitors can buy the same equipment that we buy, use the same suppliers, and they can build a plant exactly like ours. But, the quality of the workforce determines the success of a company, and **our South Carolina workforce is enthusiastic, innovative, and involved**. For example, associates in our packing area streamlined that process by building a ramp that allows the ATVs to be ridden directly onto the packing skid! They eliminated a hoist, counter-measured initial problems with the alternative approach, and it works great. I always say I have 240 engineers working here."

Bill Kalp
Senior Vice President
Honda South Carolina

(In 1998, Honda South Carolina located in Florence. The plant manufactures all-terrain vehicles for U.S. and world markets.)

2004 Average Hourly Manufacturing Wages



Workers' Compensation Costs:

Workers' compensation costs are among the **lowest in the nation**. South Carolina companies select agencies of their choice, and premiums may be adjusted 25 percent in either direction based on a company's claim experiences. The average cost of workers' compensation insurance is roughly 2.0 percent of payroll.

In addition, South Carolina's unemployment insurance rate is 3.34 percent on the first \$7,000 of earned income. This rate is in effect for two years for new companies; after which, the company will be re-rated each year based on experience. The contribution rates for South Carolina companies range from .54 percent to 5.4 percent, with an average rate of approximately 2.0 percent.

First in the Southeast in Productivity

South Carolina ranks third in aggregate productivity among the 48 contiguous states, according to the most recent available survey by *Business Review*. As demonstrated in the chart, **South Carolina leads the Southeast and is third highest in the nation in productivity, with a rate that is 77 percent higher than Tennessee, 73 percent higher than Kentucky, and 90 percent higher than Virginia.**

Aggregate Productivity Ranking for Selected States		
Ranking	State	Productivity
3rd	South Carolina	1.8830
8th	Kentucky	1.0880
9th	Alabama	1.0730
11th	North Carolina	1.0603
12th	Georgia	1.0604
13th	Tennessee	1.0595
16th	Michigan	1.0506
17th	Indiana	1.0481
22nd	Ohio	1.0005
26th	Virginia	0.9908

Source: Business Review, 2000

Linked to the state's high productivity is a disciplined, committed workforce dedicated to producing quality products in a team-oriented environment. The state's superior work ethic can also be seen in the widespread rejection of third-party interference when settling workplace issues.

South Carolina's Workforce Growing 10 Times Faster Than U.S. Average

Between 1998 and 2002, South Carolina employment in both the automotive equipment (motor vehicles, bodies, and parts) and automotive parts sectors grew over 18 percent, while the U.S. employment in these sectors declined by 3 percent. (*U.S. Department of Commerce, County Business Patterns*). Factors that contribute to this growing labor force include a strategic location, development of a strong automotive cluster, and available training resources.

Nation's Fifteenth Fastest-Growing State

Lured by job opportunity and an exceptional quality of life, workers from the Northeast, Mid-Atlantic, and Midwestern region are finding South Carolina accessible and hospitable. As a result of this in-migration, South Carolina is the nation's **15th fastest growing state** (*U.S. Census Bureau, 2001*), with a population that rose by 525,309 between 1990 and 2000—a 15.1 percent increase. More than 1.9 million people make up the state's labor force; over 20 percent are in the manufacturing sector, nearly double the national average of 12.7 percent. **Automotive companies employ approximately 42,300 South Carolinians.**

Bosch
Finds its Match in South Carolina

"The region, and indeed each of the South Carolina regions in which we operate, offers excellent benefits for business. But none is as **critical to our success as the shared spirit of hard work and the productivity of our associates.**"

John Moulton
President
Bosch Automotive Group

(Robert Bosch Corporation manufactures drum bell assemblies, fuel injectors, diesel injection pumps, anti-lock brake systems, oxygen sensors, ABX wheel speed sensors, ABS electronic control units, and gasoline fuel injection products for the automotive industry.)

An Available and Skilled Workforce

Within the state of South Carolina, 550,000 people—or roughly 29.5 percent of the state's labor force—are considered underemployed. These workers, whose individual gross earnings are \$12,000 or less, tend to have more skills than their jobs require, and are among the first to respond to more rewarding opportunities. As such, they are a valuable source of experienced, recruitable workers for new and expanding industry.

The availability of these workers—as well as a workforce that grows by 30,000 annually—has helped produce a labor pool that more than meets the hiring needs of South Carolina's automotive companies. For example:

- BMW in Spartanburg received **80,000 applications for 2,000 positions**. These applicants are also considered for current and future expansions.
- Bridgestone/Firestone in Aiken received **3,000 applications for 250 positions**.
- Sagem Inc. in Greenville received **115 applications for just 1 position**.
- McKechnie Vehicle Components in Newberry receives **25 applications weekly**.
- Williams Technologies in Summerville received **1,800 applications for 380 positions**.

TRAINING RESOURCES

South Carolina Technical Education System: Helping to Make Workers and Companies Productive from Day One

Widely regarded as one of the nation's best, South Carolina's Technical Education System (TECH) provides the automobile sector with comprehensive resources that enable companies to become operational quickly, with trained employees who have job-specific skills. Through a network of 16 colleges, TECH offers instruction in three areas:

- ◆ **The Center for Accelerated Technology Training**—A pre-employment training program providing workers with the job-specific skills companies need to be productive and profitable from day one.
- ◆ **Continuing Education**—Assisting companies with skills enhancement and development training at TECH or in the workplace. Training is tailored to meet the particular requirements of any company.
- ◆ **Technical Resource Centers**—Providing specialized training and equipment in high-tech fields.



The Center for Accelerated Technology Training: 100 Percent Customized

The centerpiece of TECH is the Center for Accelerated Technology Training (CATT), a pioneering pre-employment training program that is **provided at little or no cost to employers** and is **100 percent customized** to fit the needs of new and existing business. Working in partnership with industry, CATT screens, recruits, and trains employees to meet the demands of individual companies—ensuring a trained workforce **on the first day of operations for the company**. Instruction takes place either at the job site or at one of the state's 24 technical college campuses and is tailored for each employer. Services include:

- ◆ Pre-employment training
- ◆ Providing and training instructors

- ◆ Recruiting and screening applicants
- ◆ Preparing training sites
- ◆ Securing necessary equipment and supplies
- ◆ Post-employment training

With 16 colleges statewide, 24 campuses, and 12 resource centers, South Carolina's technical colleges are within a 30-mile commuting radius of 95 percent of the state's population and provide an invaluable continuing education and training resource.

An extra benefit of CATT is the **evaluation and assessment of trainees without the offer or guarantee of a job** with the participating company. This helps avoid costly labor expenses and ensures the best possible match between employer and employee. Since its inception in 1961, the program has successfully trained almost 200,000 workers for nearly 1,600 companies; including more than **19,000** employees for the state's automotive companies, such as BMW, Bosch, Dana, Honda, Michelin, and Rexroth.

Curriculum by Design

As automotive employees face increased responsibility in the workplace, CATT is proactive in addressing the industry's expanding needs. A full range of training is offered in technical and soft skills that are critical to the sector, such as:

Technical

Statistical Process Control
 CNC Machine Tool Operations
 Computer Skills
 Welding
 Electronics
 Just-in-Time Concepts

Soft Skills

Teamwork
 Communication
 Problem-Solving
 Motivation
 Leadership
 Interpersonal Skills

The Center for Accelerated Technology Training: Key to Michelin's Success

"The state TECH System has been the key to our success in North America. The programs they design, which were customized for Michelin, help us ensure that we have the employees who are trained to build the best tires manufactured in the world."

Jim Morton
 Former Vice President of Community
 Relations & Government Affairs
 Michelin, North America

(Michelin Tire Corporation is a world leader in tire manufacturing. The company located to South Carolina in 1975 and has since added six facilities including the company's North American headquarters.)

Continuing Education

The Continuing Education opportunities offered by TECH assure **ongoing skill development** even after the facility is operational. Like CATT, each program is client-driven; course content, schedule, methodology, and class location (either on campus or at the workplace) are determined by the company.

The Continuing Education program focuses primarily on the following:

Training Needs Assessment, which identifies gaps between existing and desired levels of employee performance, knowledge, and skill. A plan of action is then developed to enhance worker competence.

Job Task Analysis, in which employees are interviewed to determine what tasks are associated with their jobs, and what skills they need to perform better and more effectively.

Skills Assessment, which determines whether various employee skills, such as reading, math, mechanical knowledge, and teamwork need to be improved and, if so, what training programs should be designed to accomplish that objective.

Technical Resource Centers: Current, Relevant Training

The TECH system operates 12 innovative technical resource centers, using specialized equipment and industry expertise to provide current, relevant training in high-tech fields. Three of particular interest to the automotive sector include:

The Advanced Manufacturing Center in Charleston, which is the state's primary research and development site for **advanced manufacturing tool technology**. Training focuses on programming and operation of computer numerical controlled (CNC) machine tools.

The Advanced Machine Tool Resource Center in Greenville, which also provides **CNC training** at well-equipped facilities at Greenville Technical College.

The Total Quality Education Resource Center in Greenwood, which provides training and services on **continuous improvement initiatives** at Piedmont Technical College.



The Center for Accelerated Technology Training: Cornerstone of BMW's decision to locate only North American facility in S.C.

“When you consider that a BMW is, after all, a German car and how critical Made in Germany is to the image and all it portrays, obviously when BMW left Germany, the No. 1 issue we faced was: Could we find that skilled labor force to provide and build the exact quality that we already have in Germany? That was critical. **The cornerstone of any decision for locating our plant outside of Germany had to be infrastructure that supported training.** And that makes South Carolina, frankly, unique here in the United States in that it has established a **wonderful system for assisting all companies such as BMW with training unskilled labor in whatever manner they need...The secret to our success here, frankly, is the people.**”

Carl Flesher
VP for Community and Corporate Relations
BMW Manufacturing Corporation

(BMW's only North American facility is located in Spartanburg. The plant is the exclusive manufacturer of BMW's Z3 Roadster and Sports Activity Vehicle.)

The Southeast's Only Center of Excellence

South Carolina's TECH system is the only technical program in the Southeast—and one of only ten in the country—to be awarded the Center of Excellence grant. This \$5.5 million grant, known as the Advanced Technical Education Initiative, is **designed to expand the pool of skilled technicians in advanced engineering technology fields.**

Companies in the automotive sector that have benefited from the initiative include Michelin, which developed a curriculum that integrates realistic workplace problems and solutions; and Bosch, whose programs in technology, mathematics, science, and communication have improved employee attendance and retention, and raised the overall skill base of workers.

CLEMSON'S INTERNATIONAL CENTER FOR AUTOMOTIVE RESEARCH

The Future of the Automotive Industry

If you're looking for the future of the automotive industry, look no further than South Carolina. The state is on the cutting-edge of automotive technology with Clemson University's International Center for Automotive Research (ICAR), which promises to revolutionize the industry with an innovative approach to automobile design and manufacturing.

Indeed, ICAR is on a mission to become the premier automotive and motorsports research and educational facility in the world, with internationally recognized graduate automotive engineering programs that bridge with real-world industrial disciplines.

"Clemson's International Center for Automotive Research is a unique campus concept that integrates university research and academic programs with private sector R&D and testing," said Chris Przirembel, Clemson University's Vice President for Research and Economic Development. "Innovation through collaboration is the driving force."



ICAR couldn't have a better home than South Carolina. The Southeast is now the largest U.S. regional automotive cluster, and more than 200 automotive companies are located in the state. In fact, you'll find two-thirds of major U.S. racing teams located between Charlotte and Atlanta.

What's more, South Carolina's location mid-way between Miami and New York provides easy access to materials and markets. The state is within one day's drive of half the nation's fastest growing markets via five interstate highways, nine commercial airports, and two national rail carriers.

Public-private partnerships are the engine fueling ICAR's mission. The players are Clemson, which is driven by its vision to be among the nation's top 20 public universities; the South Carolina Department of Commerce and the Upstate Alliance, which are spurring economic development by building knowledge-based cluster industries; and companies such as BMW, IBM, Microsoft, and Michelin, which have a strategic interest in automotive/motorsports R&D, education, or light manufacturing.

“In South Carolina, the government is extremely supportive of economic development efforts such as ICAR,” said Jack Ellenberg, Director of Business Development at the state Department of Commerce. “One of the many perks of doing business in South Carolina is the fact that business leaders have real access to all levels of state government, and the formation of public–private partnerships such as ICAR is just one of the ways that the state shows its commitment to the long-term success of the automotive industry.”

ICAR is a 252-acre project with Class A office and research laboratory facilities. ICAR has already posted key development milestones. Roads and infrastructure are complete. The 85,000-square-foot BMW-Information Technology Research Center is scheduled to open its doors in August 2005.

The 100,000-square-foot Graduate Engineering Center will be open to students in 2006. An Innovation Center is under consideration, and a High Performance Computing Center is planned for the purpose of studying aerodynamics and acoustics, static and dynamic structures, manufacturing, and combustion and emissions.

These new facilities will enable the production of a 21st century workforce for the automotive industry, breeding technical leaders with depth and breadth across engineering disciplines who are able to function in a global environment. The ICAR Graduate Program Concept includes Automotive Engineering (M.S. and PhD) with an emphasis in production realization and system integration. Graduates are marketable in all manufacturing environments.

ICAR offers key advantages unparalleled by other regions of the country, including a unique vision for a true university research campus community and an environment that fosters collaboration, networking, and technology transfer. ICAR’s close proximity to Clemson faculty, students, and equipment is integral to the center’s success. And ICAR is not a center unto itself. With public-private partnerships in place, the center is part of a bigger statewide economic development mission to transform South Carolina’s automotive cluster into the preeminent automotive presence worldwide.

MARKET ACCESS

South Carolina Delivers Just-in-Time

South Carolina's strategic location and superior transportation infrastructure assure fast, reliable just-in-time deliveries to automotive markets in the growing Southeast region, as well as national and international markets. The state's proximity to customers and raw materials reduces delivery time, cuts the costs associated with inventory storage, and streamlines transportation costs—all of which increase profitability of automobile assemblers and suppliers.



Located halfway between Miami and New York—within 1,000 miles (1,600 km) of 35 states and roughly 75 percent of the total U.S. population (over 206 million people)—the benefits of South Carolina's location are leveraged by an extensive intermodal transportation system that consists of:

- 3 seaports;
- 42,000 miles (67,200 km) of toll-free highways;
- 2,600 miles (4,160 km) of rail; and
- 8 commercial airports.

Port of Charleston: Gateway to International Markets

The Port of Charleston is an invaluable resource for South Carolina automotive manufacturers who export and import products. Many of the world's leading automakers, like BMW, rely on the Port for the delivery of products and raw materials. Charleston is one of the state's three deepwater ports, which provide access to 140 countries

and more than 40 steamship lines. In 1998, over 80,000 cars moved through South Carolina seaports.

Nation's Most Efficient Port

Cited as the nation's most efficient port, the Port of Charleston is also the largest container port in the South and second only to New York-New Jersey on the East Coast. Transit times between Charleston's

Port of Charleston	
Automotive Manufacturer	Tons Per Year
BMW	108,000
Mercedes	27-28,000
Volvo	5,000
GKN	4,000
Ford	2,000
Renault	2,000
GM	1,000

terminals and the open sea are among the shortest on the East Coast, allowing the automotive industry convenient access to raw materials and fast delivery to customers throughout the world. Among the Port of Charleston's many distinctions are:

- ◆ Fourth-busiest container port in the country (*Journal of Commerce*, 2000);
- ◆ Nation's largest export hub to South America (*Port Import/Export Recording Service*, 2000);
- ◆ Fastest-growing North American container port, with an increase of more than 16% in 2000 (*Journal of Commerce*, 2001);
- ◆ 2nd most productive port in the world, with 41 containers per hour processed on average (*Maersk Sealand*, 2001);
- ◆ 2nd highest in the nation for throughput per acre—a measure of land utilization and efficiency (*Charleston Business Journal*, 2000); and
- ◆ First-In/Last-Out port on many ocean carriers' rotations, minimizing transit times for importers and exporters (*Journal of Commerce*, 2000).

Port of Charleston Delivers for Lang-Mekra North America

"We are still very dependant on our supplies coming out of Germany...and the factor of distribution is we import about 80% by sea and 20% by air so it's very important for us to be very close to a port to be able to get merchandise out of customs. Being a "just-in-time" supplier to the heavy truck industry, it's very important that your supplies are in-house when you need them. **In cases of emergency, we have always been able to get supplies out of Europe within one or two days for overnight shipments.**"

**Sabine Lang
President
Lang-Mekra North America**

(In 1994, Lang-Mekra North America located in Fairfield. The company manufactures mirror systems for commercial vehicles, heavy trucks, step vans, and utility vehicles.)

Foreign Trade Zones Save Automobile Industry Time and Money

Three strategically located Foreign Trade Zones (FTZ), whose 18 sites serve the entire state, are a critical part of South Carolina's world-class transportation system. Just 12 miles north of Charleston, FTZ 21 is readily accessible to Charleston's port. FTZ 127 in Columbia serves the central areas of the state, and FTZ 38 serves the Upstate; both are adjacent to major metropolitan airports, facilitating airfreight service worldwide.

Foreign Trade Zones of South Carolina



Operating within an FTZ offers several benefits:

- ◆ Possible reduction or elimination of customs duty;
- ◆ Deferral of duty payment until the time of delivery of the final product into U.S. commerce; and
- ◆ Increased efficiency because customs can be bypassed through direct delivery.

With the arrival of BMW in 1992, a sub FTZ was established to provide the German automaker with duty savings and just-in-time delivery; it has become an integral part of the company's international production and logistics network. Other automotive manufacturers using sub zones in South Carolina include Autecs and Borg-Warner.

Five Interstates Connect the Automotive Corridor

South Carolina's five interstates (I-95, I-85, I-77, I-26, and I-20) provide fast and efficient access to automobile assemblers and suppliers throughout the U.S. This network provides one-day trucking to half of the nation's fastest-growing markets.

Rail Access Statewide

South Carolina's rail service consists of 2,600 miles (4,160 km) of track. Norfolk-Southern, CSX, and seven affiliated and independent lines serve the state.

The two major long-haul rail carriers, CSX and Norfolk-Southern, operate large, well-equipped rail yards throughout the state. Both companies offer daily, double-stack express services (inbound and outbound) that ensure fast, economical transit to the Northeast, Midwest, Canada, and Mexico, while eliminating costly double handling of goods.

Drive Times Between Selected South Carolina Cities and Major Motor Vehicle Production Centers			
	Columbia	Charleston	Greenville
Alabama			
Tuscaloosa	7.6	9.6	6.5
Birmingham	6.6	8.7	5.4
Georgia			
Atlanta	3.9	6.0	2.7
Doraville	4.0	6.0	2.5
Kentucky			
Georgetown/ Lexington	8.2	10.3	6.8
Louisville	9.3	11.4	7.9
Ohio			
Lorain	11.6	13.7	11.7
Marysville	11.0	13.1	10.5
Michigan			
Dearborn	13.9	16.0	12.8
Detroit	13.9	16.1	12.8
Tennessee			
Nashville/ Smyrna	8.1	10.1	6.7
Madison	8.2	10.2	6.8

Source: Rand McNally Standard Highway Mileage Guide
Based on 60 miles per hour; rounded to the closest half hour

South Carolina's rail service extends to the Port of Charleston and greatly benefits the automotive sector. For example, BMW uses the triple stack rail service at the port to export Z3 Roadsters and to import its 3-, 5- and 7-series sedans.

Airports and Freight Services

Most South Carolina locations, including rural areas, are within a one-hour drive of major air service. Five primary airports serve the state, and three others are located just across South Carolina's borders in Charlotte, NC, and Augusta and Savannah, GA.

The state's airports have extensive airfreight and temporary storage facilities, which afford automotive suppliers overnight freight service to most of the U.S.; it is available from Charleston, Columbia, Greenville/Spartanburg, and Myrtle Beach. Major carriers include **UPS—which has its Southeastern hub in Columbia**—Federal Express, Emery, and Airborne.

Railway Distances Between Major Cities in South Carolina and Automotive Corridor			
	Charleston	Columbia	Greenville/ Spartanburg
Atlanta, GA	383	254	160
Chicago, IL	996	867	773
Cleveland, OH	975	846	752
Detroit, MI	973	844	750
Knoxville, TN	422	293	199
Louisville, KY	710	581	487
Nashville, TN	638	509	415

Source: Rand McNally Commercial Atlas & Marketing Guide



OPERATING COSTS

Pro-Business Tax Policies Reward Industries for Growth

South Carolina's reputation as a superior business location has captured national attention. This is largely due to an exceptional economic climate that successfully holds down operating costs.

Ranked fourteenth lowest in the nation in per capita tax burden, and offering the Southeast's lowest corporate income tax rate—just 5 percent—South Carolina provides a tax climate that encourages investment, employment, and profitability. The state's probusiness policies are demonstrated by the following:

- ◆ No tax on intangibles;
- ◆ No property taxes on inventory;
- ◆ No local income taxes;
- ◆ No unitary tax;
- ◆ No wholesale sales tax;
- ◆ No value-added tax;
- ◆ No commercial occupancy taxes; and
- ◆ No sales tax on machinery and equipment, repair parts, materials that are an integral part of the finished products, manufacturing electricity, pollution control equipment, research and development equipment, packaging materials, and long distance telecommunications, including 800 service.

Job Development Credit: Letting Automotive Companies Retain and Re-Invest Taxes

South Carolina's Enterprise Program Job Development Credit **enables companies to offset the cost of locating or expanding a business facility in the state.** Qualifying companies are allowed to retain a certain percentage of their employees' wages for up to 15





Photo Courtesy of Michelin

Michelin

“One of the reasons we decided to put our \$900 million plus expansion in South Carolina was the experience we'd had here for more than 20 years. From administration to General Assembly session, we can count on a consistent policy that is probusiness. We tell anyone that asks that if we had the investment decision to make again today that we made back in 1973 and again in the mid '80s on expansions and again in 1995 and 1999, that **we would make the same decision.** That is, to put our investment here in South Carolina and our North American headquarters.”

Michael Fanning
Vice President of Community Relations & Government Affairs
Michelin, North America

years; the funds are collected from income tax withholdings that the company would otherwise pay to the state, so they do not affect the employee's take-home wages. This money can be used for qualified capital expenditures—such as real property, infrastructure, pollution control equipment, and/or employee training.

The level of wages and the level of development status of the county in which the project locates determine the amount withheld. The net percentage can be as high as 5 percent of employees' wages and can provide companies with millions to invest in their project. (To qualify for this incentive, a company must meet certain requirements and must apply to the South Carolina Coordinating Council for Economic Development.)

South Carolina Offers a Range of Financial Incentives

In addition to the Job Development Credit, South Carolina offers automotive companies a full range of tax credits and incentives that reduce operating costs and increase profitability:

- ◆ A credit that **potentially eliminates corporate income tax** is available to qualifying corporate headquarters. It totals 20 percent of the costs incurred in the design, preparation, development, and direct construction of the headquarters facility.
- ◆ A **Jobs Tax Credit** for new job creation is available to new or expanding companies in the state. Eligible manufacturing companies must increase their annual average monthly employment by 10 or more new jobs to qualify.
- ◆ An **Economic Impact Zone** credit for investment in new production equipment is available in 27 of 46 South Carolina counties. This credit can be used to eliminate 100 percent of corporate income tax.
- ◆ A **five-year abatement on the county operating portion of property taxes** (excluding school and special-purpose taxes) is available to manufacturers investing more than \$50,000 in new facilities. New distribution, corporate headquarters, and corporate office facilities are also eligible for this abatement if construction costs are at least \$50,000, and the company creates 75 or more new full-time jobs.
- ◆ A **fee-in-lieu of property taxes** is available to companies investing over \$5 million in the state. This incentive helps reduce tax payments to local government over the life of the fee agreement (20 years). Beyond that, it makes long-term planning easier because companies know what their tax payments will be year after year.
- ◆ **Sales tax caps** of a maximum of \$300 on the sale or lease of automobiles, trucks, boats, and aircraft.

Environmental Permitting

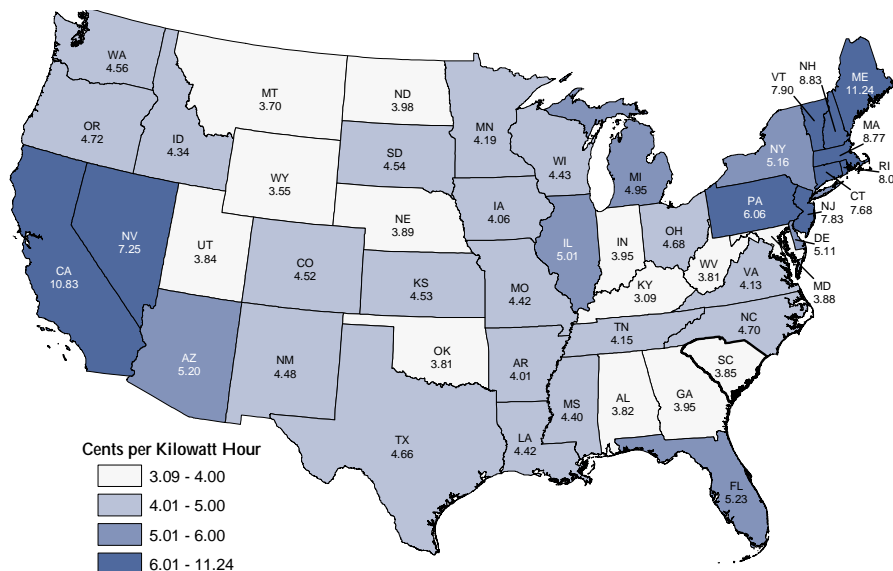
Environmental issues in South Carolina are administered by the Department of Health and Environmental Control (SCDHEC), which works cooperatively with businesses to foster economic and environmental excellence.

The cooperation between SCDHEC and South Carolina industry is demonstrated by the fact that **less than one percent of all environmental permits are contested.** The agency oversees all state and federal permits issued for South Carolina. This not only enables businesses to work with local agents on most environmental issues but also ensures the convenience and cost-effectiveness of "one-stop permitting."

Industrial Power Rates Rank Far Below U.S. Average

South Carolina's utility service providers include investor-owned companies, electric cooperatives, a state-owned supplier, and municipal systems. Because of this variety of energy providers, a competitive environment exists that holds costs down. This pays off for industrial customers throughout the state, who pay about **24 percent less** than the national average for power.

In addition, automotive companies enjoy the benefits of ample, low-cost natural gas, water, and sewer infrastructure that can handle facilities of any size and scope, and a comprehensive, high-tech telecommunications system.



Graphic Courtesy of Bridgestone/Firestone, Inc.

Fastest Start-up for a Tire Manufacturing Plant in the World Bridgestone/Firestone in Aiken, South Carolina

Bridgestone/Firestone Tire Corporation needed a new site within a short period of time. They needed to streamline all the steps and cut through any red tape quickly. So, South Carolina made the company's deadline their own and condensed what would typically be a year-long process into four months; securing permits efficiently and getting top-level clearance overnight when needed.

(Aiken is the home to Bridgestone/Firestone, the world's largest tire and rubber company. The company invested \$435 million in South Carolina in 1997.)

SITES, BUILDINGS, AND CONSTRUCTION

South Carolina Has Buildings and Sites for Every Need

South Carolina maintains a sizable database of available buildings and development sites. In addition, construction costs in South Carolina are typically more than **24 percent below national averages**. These factors reinforce South Carolina's status as a preferred location for automotive manufacturers and suppliers.

Industrial Sites

More than 1,000 industrial site locations, ranging in size from five- to 5,000-acres, are available. The industrial sites can accommodate a variety of special requirements such as facility size, parking requirements, and buffer zones, and include campus-like parks in rural settings surrounded by undeveloped lands. **Prices vary from \$2,000 to over \$45,000 per acre.**

Buildings

South Carolina typically maintains an inventory of over 250 available buildings and spec buildings. These range from 5,000 to 725,000 square feet and cost between \$50,000 and \$10 million. The majority are in the 20,000- to 90,000-square foot range; many of which are priced from **\$10 to \$30 per square foot.**

Real Estate and Construction

Complementing South Carolina's numerous available sites and buildings are industrial construction costs that are **the lowest in the Southeast—25 percent below the national average**. Combined with low comparative land costs and a sizable inventory of available buildings and industrial parks, the state provides a cost-effective foundation for automotive companies to locate, grow, and prosper.

Availability and Attractiveness of Site Leads Bridgestone/Firestone to South Carolina

"We selected South Carolina and Aiken County specifically because of the quality and quantity of the local workforce, its transportation infrastructure, proximity to customers, the availability of the appropriate site, and the overall attractiveness of the area."

**Masatoshi Ono,
Former Chairman and CEO,
Bridgestone/Firestone**

(Bridgestone/Firestone, Goodyear, and Michelin are 3 of 12 tire manufacturers in South Carolina who have invested nearly \$1.8 billion in the last 10 years.)

Availability of Industrial Buildings Leads American LaFrance to South Carolina

"We have ambitious growth plans and moving into this larger, state-of-the-art facility will both help us accelerate growth and streamline our order-to-delivery processes for our customers."

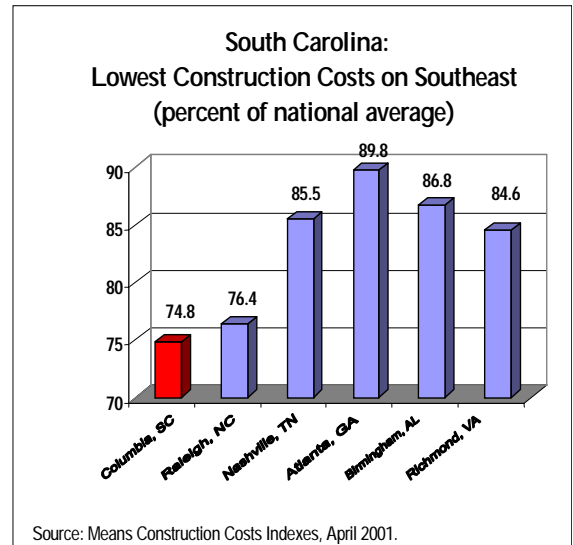
**Don Stewart,
President,
American LaFrance**

(In May 2002, American LaFrance announced that it would move its corporate headquarters and Cleveland, NC, manufacturing operations to the North Charleston, SC, facility owned by parent company Freightliner LLC.)

South Carolina is home to a number of nationally recognized engineering, architectural, and construction firms. These include: Fluor Daniel and John Brown, both of which are headquartered in Greenville, Lockwood Greene in Spartanburg, and Wilbur Smith Associates in Columbia.

Selected Sites for the Automotive Industry

The following pages represent a small sample of the quality locations available to automotive companies in South Carolina. The strength and attributes of these sites include:



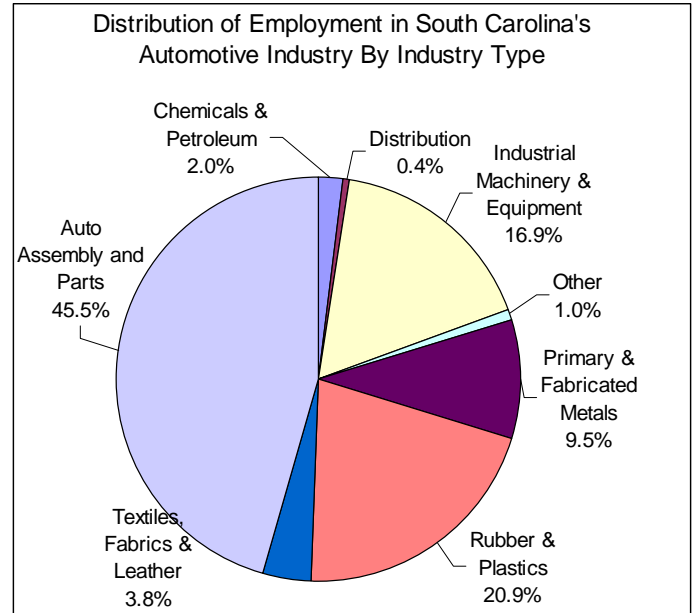
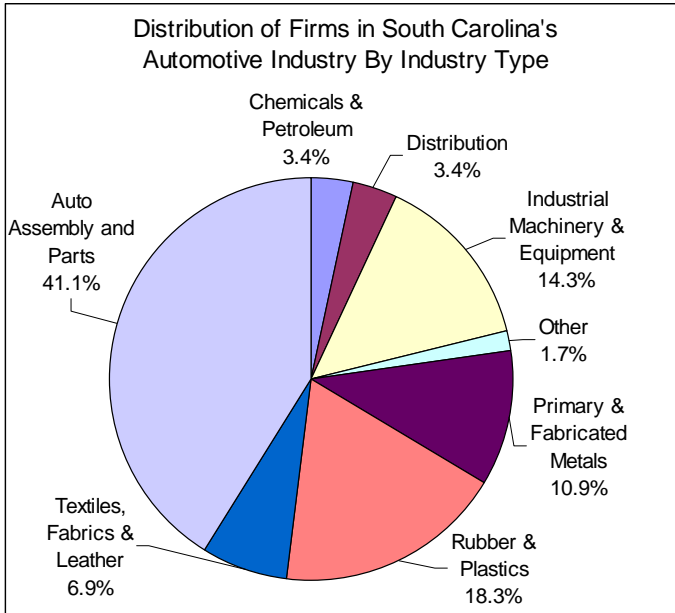
- ◆ Strategic geographic location that is within 300 miles (480 km) of 14 car, truck, and all-terrain vehicle assemblers and within one day's drive of over 50 percent of the nation's fastest growing markets, almost 50 percent of the nation's population (196 million people), and 27 percent of the nation's manufacturing facilities;
- ◆ Proximity to suppliers and expanding automotive markets for just-in-time delivery and stream-lining costs;
- ◆ Comprehensive network of infrastructure, including port facilities to handle global markets;
- ◆ Highly qualified and motivated workforce;
- ◆ Ample land and buildings that allow automotive manufacturers to build-to-suit, upfit, and expand;
- ◆ Abundant utilities minimize operating costs;
- ◆ Environmental permitting for quick startup; and
- ◆ Excellent quality of life that attracts and retains a skilled workforce.

The state's exceptional economic climate, probusiness tax policies, excellent training, and low cost of doing business provide the automotive industry with unparalleled operating advantages. These advantages help meet the demands of just-in-time delivery, reduce costs, and enhance profitability.

AUTOMOTIVE SUPPLY BASE

Broad Spectrum of Automotive Companies Based in South Carolina

A full range of companies makes up South Carolina's automotive sector, including assemblers, part suppliers, and some of the world's top raw material producers. A major attraction for these companies is the state's strategic location—which is central, convenient, and easily accessible to the growing southeast automotive corridor. The proximity of suppliers, along with a comprehensive transportation system, gives automotive companies the speed and access necessary to accommodate just-in-time requirements.



Top Automotive Facilities in South Carolina based on Employment

Company	County	City	Employment	Product Description
BMW Manufacturing Corp	Spartanburg	Greer	4,300	Automobiles
Robert Bosch Corp	Dorchester	Charleston	2,400	Fuel injectors (gasoline & diesel)
Honda of South Carolina Manufacturing Inc	Florence	Timmonsville	1,500	All-terrain Vehicles
Michelin North America Inc	Greenville	Greenville	1,468	Radial tires
Michelin North America Inc	Lexington	Lexington	1,250	Radial automobile passenger tires
Robert Bosch Corp	Anderson	Anderson	1,200	Automotive components (oxygen sensors)
Michelin North America Inc	Spartanburg	Spartanburg	1,132	Radial truck tires
Michelin North America Inc	Anderson	Sandy Springs	1,100	Semi-finished rubber products
Timken-Clinton	Laurens	Clinton	1,010	Roller bearings
The Timken Company	Cherokee	Gaffney	1,000	Tapered roller bearings
Bridgestone Firestone	Aiken	Graniteville	941	Passenger and light truck tires
Arvin Meritor	Marion	Marion	734	Gas lift supports
Collins & Aikman-Greenville Operations	Greenville	Greenville	700	Tufted & molded automotive carpet
Solutia Inc	Greenwood	Greenwood	700	Nylon fiber manufacturing

South Carolina's Automotive Industries and Suppliers

Sectors	Company	County	City	Employment	Product Description
Textiles, Fabrics & Leather	Collins & Aikman-Greenville Operations	Greenville	Greenville	700	Tufted & molded automotive carpet
Textiles, Fabrics & Leather	Grammer Industries	Greenville	Piedmont	100	Automobile armrests and headrests
Textiles, Fabrics & Leather	Highland Industries Inc	Chesterfield	Cheraw	378	Industrial synthetic material
Textiles, Fabrics & Leather	Kawashima Textiles USA	Kershaw	Lugoff	Not Available	Textiles-automotive
Textiles, Fabrics & Leather	Michelin North America Inc	Fairfield	Winnsboro	178	Tire cord: rayon and polyester
Textiles, Fabrics & Leather	Milliken & Co-Abbeville Mill	Abbeville	Abbeville	Not Available	Synthetic fabric
Textiles, Fabrics & Leather	Milliken & Co-DeFore Plant	Oconee	Clemson	Not Available	Weft knit fabrics
Textiles, Fabrics & Leather	Milliken & Co-Sharon Pit	Abbeville	Abbeville	Not Available	Automotive fabric
Textiles, Fabrics & Leather	Milliken-Sommer-Hillcrest Pit	Greenville	Simpsonville	Not Available	Nonwoven textile goods
Textiles, Fabrics & Leather	Reeves Brothers Inc-Sam Plant	Spartanburg	Spartanburg	112	Auto air bag fabric
Textiles, Fabrics & Leather	The Bag Lady, Inc	Kershaw	Lugoff	20	Nylon bags
Textiles, Fabrics & Leather	US Auto Seatcovers LLC	Anderson	Anderson	90	Automotive soft good accessories
Chemicals & Petroleum	Aiken Chemical Co Inc	Greenville	Greer	40	Automotive chemicals
Chemicals & Petroleum	Chemlan Colors & Chemicals Inc	Lancaster	Lancaster	11	Textile specialties
Chemicals & Petroleum	Fehrer South Carolina LLC	Laurens	Fountain Inn	80	Polyurethane foam cushions for the auto industry
Chemicals & Petroleum	Lubri Source Inc	Florence	Florence	7	Grease/industrial & automotive
Chemicals & Petroleum	Luther Chemical Co Inc	Greenville	Greenville	8	Automotive & janitorial cleaning products
Chemicals & Petroleum	Solutia Inc	Greenwood	Greenwood	700	Nylon fiber manufacturing
Primary & Fabricated Metals	Alcoa Mt Holly	Berkeley	Goose Creek	650	Primary aluminum
Primary & Fabricated Metals	ByrTech Custom Machine Works Inc	Greenville	Greenville	35	Anodizing
Primary & Fabricated Metals	Carlisle Tire & Wheel	Aiken	Aiken	200	Metal stamping
Primary & Fabricated Metals	Columbia Auto Springs Co Inc	Richland	Columbia	5	Auto & truck springs
Primary & Fabricated Metals	Drive Automotive Industries of America Inc	Greenville	Piedmont	483	Major body panels & assemblies for autos
Primary & Fabricated Metals	Emitec Inc	Laurens	Fountain Inn	72	Metallic substrates - catalytic converters
Primary & Fabricated Metals	Fisher Barton Inc	Laurens	Fountain Inn	125	Metal stampings & welded assemblies
Primary & Fabricated Metals	Hansen International, Inc	Lexington	Lexington	86	Locks, visors, roll-up doors for transportation equipment
Primary & Fabricated Metals	Kiswire Inc	Newberry	Newberry	75	Bead wire
Primary & Fabricated Metals	Michelin North America- Steel Wire Div	Anderson	Sandy Springs	450	Steel wire processing

Automotive Industries and Suppliers (Continued)

Sectors	Company	County	City	Employment	Product Description
Primary & Fabricated Metals	Mid-Am Metal Forming of South Carolina Inc	Barnwell	Williston	20	Curve metal/ stretch form bending of metal
Primary & Fabricated Metals	Midwest Stamping-Sumter Plt	Sumter	Sumter	101	Metal stampings & welded assemblies
Primary & Fabricated Metals	Spartanburg Steel Products Inc	Spartanburg	Spartanburg	585	Automotive stampings & assemblies
Primary & Fabricated Metals	Steel Technologies	Berkeley	Huger	38	Steel processing
Primary & Fabricated Metals	Stueken LLC	Greenville	Fountain Inn	21	High precision "deep drawn" metal parts
Primary & Fabricated Metals	The Metal Works Inc	Lexington	Lexington	12	Structural & misc fabrication, stainless steel
Primary & Fabricated Metals	Timken Co	Anderson	Honea Path	540	Screw machine parts and bearing rollers
Primary & Fabricated Metals	Timken USA	Union	Union	434	Anti-friction roller bearings
Primary & Fabricated Metals	Ware Shoals Industries	Abbeville	Ware Shoals	24	Electroplating of metals and formed products
Industrial Machinery & Equipment	2 Stroke International	Beaufort	Burton	30	Engines & parts
Industrial Machinery & Equipment	AMBAC International Corp	Richland	Elgin	107	Fuel injection pumps
Industrial Machinery & Equipment	Arvin Meritor	Marion	Marion	734	Gas lift supports
Industrial Machinery & Equipment	Calhoun Trading Co Inc	Calhoun	St Matthews	8	Bulk packaging equipment
Industrial Machinery & Equipment	Caterpillar Inc	Sumter	Sumter	134	Planetary shafts
Industrial Machinery & Equipment	Caterpillar Inc-Greenville Plt	Greenville	Fountain Inn	335	Small diesel engines
Industrial Machinery & Equipment	Champion Laboratories Inc	York	York	350	Automotive oil filters
Industrial Machinery & Equipment	Federal-Mogul Corp	Sumter	Sumter	320	Diesel pistons
Industrial Machinery & Equipment	Hindon Corp	Charleston	Charleston	9	Industrial rotary electric vibrators
Industrial Machinery & Equipment	JBA Corporation	Cherokee	Pacolet Mills	7	Job shop
Industrial Machinery & Equipment	Kaydon Corp-Plant 12	Sumter	Sumter	120	Bearings
Industrial Machinery & Equipment	Koyo Corp of USA	Orangeburg	Orangeburg	570	Ball & roller bearings
Industrial Machinery & Equipment	Koyo Corp of USA-Manufacturing Div	Richland	Blythewood	220	Bearing hub assemblies
Industrial Machinery & Equipment	METCO Inc	Anderson	Anderson	18	Industrial machinery, NEC
Industrial Machinery & Equipment	PBR Columbia LLC	Lexington	West Columbia	210	Brake calipers
Industrial Machinery & Equipment	Rockwell Automation	Greenville	Greenville	330	Speed reducers
Industrial Machinery & Equipment	Siemens Diesel Systems Technology LLC	Richland	Blythewood	490	Diesel injectors
Industrial Machinery & Equipment	Sodetal USA Inc	Greenville	Fountain Inn	120	Draw steel wire for tires
Industrial Machinery & Equipment	The Timken Company	Cherokee	Gaffney	1,000	Tapered roller bearings
Industrial Machinery & Equipment	Timken	Oconee	Walhalla	360	Thrust Bearings
Industrial Machinery & Equipment	Timken-Clinton	Laurens	Clinton	1,010	Roller bearings
Industrial Machinery & Equipment	Trucast Inc	Newberry	Newberry	104	Investment casting-foundry

Automotive Industries and Suppliers (Continued)

Sectors	Company	County	City	Employment	Product Description
Industrial Machinery & Equipment	US Engine Valve Company	Oconee	Westminster	288	Engine valves
Industrial Machinery & Equipment	WABCO Compressor Mfg Co	Charleston	Charleston	76	Air compressor
Industrial Machinery & Equipment	Woodward	Greenville	Greenville	100	Turbine combustion system
Rubber & Plastics	Bridgestone Firestone South Carolina	Aiken	Graniteville	941	Passenger and light truck tires
Rubber & Plastics	Carlisle Tire & Wheel, Molded Plastics Div	Edgefield	Trenton	180	Custom blow & injection molding
Rubber & Plastics	Consolidated Tires Inc	Anderson	Pelzer	43	Retread truck tires
Rubber & Plastics	Cooper-Standard Automotive	Spartanburg	Spartanburg	167	PVC fascia trim
Rubber & Plastics	Datwyler Rubber + Plastics Inc	Marion	Marion	143	Plastic and rubber moldings
Rubber & Plastics	Dayco Products LLC	Colleton	Walterboro	155	Automotive belts
Rubber & Plastics	Friedrichs and Rath Inc	Anderson	Anderson	76	Plastic injection molded parts
Rubber & Plastics	Gates Rubber Co	Berkeley	Moncks Corner	285	Timing belts, rubber
Rubber & Plastics	Gerrard Tire Co Inc	Chesterfield	Ruby	24	Recap truck tires
Rubber & Plastics	Gibbon Fiberglass Reproduction, Inc	Darlington	Darlington	16	Fiberglass Antique Automobiles
Rubber & Plastics	Goodyear Tire & Rubber Co	Spartanburg	Spartanburg	200	Tire retreading material
Rubber & Plastics	Greenville Industrial Rubber & Gasket Co Inc	Greenville	Greenville	25	Hose & couplings
Rubber & Plastics	Johnson Controls-Oconee Plt	Oconee	West Union	238	Plastic components for auto batteries
Rubber & Plastics	Lacks Trim Systems	Laurens	Fountain Inn	32	Plastic molded parts for the auto industry
Rubber & Plastics	Mack Molding Co Inc	Spartanburg	Inman	230	Plastic injection molding
Rubber & Plastics	Michelin North America Inc	Anderson	Sandy Springs	1,100	Semi-finished rubber products
Rubber & Plastics	Michelin North America Inc	Greenville	Greenville	1,468	Radial tires
Rubber & Plastics	Michelin North America Inc	Spartanburg	Spartanburg	1,132	Radial truck tires
Rubber & Plastics	Michelin North America Inc	Lexington	Lexington	250	Earthmover tires
Rubber & Plastics	Michelin North America, Inc	Lexington	Lexington	1,250	Radial automobile passenger tires
Rubber & Plastics	Parker Hannifin	Lee	Bishopville	40	Molded plastic parts for auto industry
Rubber & Plastics	PART Inc (Plastics Advanced Research Technology)	York	Clover	35	Plastics molding for auto industry
Rubber & Plastics	Pine River Plastics Inc	Oconee	Westminster	72	Plastic injection molding
Rubber & Plastics	Plastic Omnium & Inergy Automotive Inc	Spartanburg	Duncan	84	Plastic finishing
Rubber & Plastics	Progressive Plastics Inc	York	Clover	9	Injection molded automotive components
Rubber & Plastics	Recticel North America	Greenville	Fountain Inn	52	Polyurethane dashboard skins for cars
Rubber & Plastics	Soliant	Lancaster	Lancaster	85	Decorative automotive product plastic film
Rubber & Plastics	Stankiewicz International Corp	Spartanburg	Spartanburg	150	Sound insulation materials - auto industry

Automotive Industries and Suppliers (Continued)

Sectors	Company	County	City	Employment	Product Description
Rubber & Plastics	TBMC Inc	Greenville	Greenville	45	Timing belts
Rubber & Plastics	TechSeal Div-Parker Hannifin	Spartanburg	Spartanburg	175	Fabricated rubber, gaskets & seals
Rubber & Plastics	Vaughn Belting Co Inc	Spartanburg	Spartanburg	14	Conveyor & transmission belting
Rubber & Plastics	Virgil Hartman Enterprises	Anderson	Williamston	18	Plastic auto parts, custom injection molds & molding
Assembly and Parts	A Berger Inc	Spartanburg	Spartanburg	Not Available	Automotive components
Assembly and Parts	Albert Weber Manufacturing Corporation	Dorchester	Summerville	7	Engine components
Assembly and Parts	Alfmeier Corp	Greenville	Greenville	122	Fuel modules, pump housings
Assembly and Parts	American Eagle Wheel Corp	York	York	310	Aluminum Wheels
Assembly and Parts	American Luxury Coach	Florence	Florence	25	Van bodies
Assembly and Parts	American Metric Corp	Laurens	Laurens	70	Metric standard power transmission prod
Assembly and Parts	ArvinMeritor	York	York	260	On-highway brakes & components
Assembly and Parts	Associated Fuel Pump Systems Corp (AFCO)	Anderson	Anderson	359	Automotive fuel pumps
Assembly and Parts	Behr Heat Transfer Systems Inc	Charleston	Charleston	400	Engine cooling systems
Assembly and Parts	BMW Manufacturing Corp	Spartanburg	Greer	4300	Automobiles
Assembly and Parts	Bode Corp	Spartanburg	Spartanburg	40	Automatic door systems for buses
Assembly and Parts	Borg Warner Torq Transfer Systems	Oconee	Seneca	270	Transfer cases
Assembly and Parts	Bosch Rexroth Corp	Greenville	Fountain Inn	330	Hydraulic fluid pumps
Assembly and Parts	Buck Enterprises LLC	Richland	Columbia	5	Damper cushion (exhaust part)
Assembly and Parts	Cambridge Metals & Plastics	Greenwood	Greenwood	117	Front and rear racks for ATV's
Assembly and Parts	Carolina Cranes & Lift Gates	Spartanburg	Spartanburg	2	Platform stake truck bodies
Assembly and Parts	Compucar of South Carolina Inc	Aiken	North Augusta	5	Fuel injection parts for vehicles
Assembly and Parts	CV Unlimited	Williamsburg	Hemingway	60	CV axels
Assembly and Parts	DAA Draexlmaier Automotive of America LLC	Spartanburg	Duncan	280	Wire harnesses
Assembly and Parts	Dixie Products Inc	Sumter	Sumter	15	Camper tops - pick-up truck tops and accessories
Assembly and Parts	Double A Body Builders	Florence	Pamplico	30	Truck bodies
Assembly and Parts	Dynamic Filtration Inc	Anderson	Anderson	15	Filters
Assembly and Parts	Erhardt + Leimer Inc	Spartanburg	Duncan	66	Electronic & mechanical guiding devices
Assembly and Parts	Excalibur Tool & Equipment Co Inc	Greenville	Greenville	37	Hydraulic auto repair equipment
Assembly and Parts	E-Z On Auto Tops Inc	Anderson	Iva	90	Convertible replacement auto tops
Assembly and Parts	Federal-Mogul Friction Products	Orangeburg	Orangeburg	262	Disk brakes
Assembly and Parts	Freightliner Custom Chassis Corp	Cherokee	Gaffney	650	Motor home chassis

Automotive Industries and Suppliers (Continued)

Sectors	Company	County	City	Employment	Product Description
Assembly and Parts	Getrag Precision Gear	Charleston	Charleston	150	Gears for autos & trucks
Assembly and Parts	GKN Driveline	Richland	Columbia	250	Wheel & main drive assemblies (automotive part)
Assembly and Parts	Hella Lighting	York	York	200	Automotive lighting fixtures
Assembly and Parts	Holset Engineering Co	Charleston	North Charleston	314	Turbo charging equipment trucks & autos
Assembly and Parts	Honda of South Carolina Mfg Inc	Florence	Timmons ville	1500	All terrain vehicles
Assembly and Parts	Honeywell Consumer Products	Spartanburg	Duncan	180	Spark plug shells
Assembly and Parts	John Evans Mfg Co	Sumter	Sumter	39	Flatbed, logging, low-bed trailers
Assembly and Parts	Kaiser Aluminum-Greenwood Forge	Greenwood	Greenwood	146	Aluminum forgings for auto applications
Assembly and Parts	Laughlin Racing Products	Greenville	Simpsonville	20	Race care chassis
Assembly and Parts	Long Trailer & Body Service Inc	Greenville	Greenville	20	Trailer parts & service
Assembly and Parts	Mark IV Automotive	Pickens	Easley	390	Power steering assemblies
Assembly and Parts	McKechnie Vehicle Components	Newberry	Newberry	171	Automotive wheel trim
Assembly and Parts	McKinney Brothers Core	Laurens	Gray Court	11	Automotive cores
Assembly and Parts	Meritor Heavy Vehicle Systems LLC	Clarendon	Manning	123	Truck brake systems
Assembly and Parts	Milliken & Co-Cotton Blossom Plt	Spartanburg	Spartanburg	Not Available	Broad-woven fabric mills, cotton
Assembly and Parts	Modine Manufacturing Co	Richland	Blythewood	119	Oil Coolers for Autos
Assembly and Parts	MSI-Mechforge Inc	Chester	Chester	12	Forklift parts
Assembly and Parts	Musashi South Carolina	Marlboro	Bennettsville	230	Precision parts for ATVs
Assembly and Parts	Neil Parts Rebuilders Inc	Richland	Columbia	6	Cracked cylinder head repair, water pumps
Assembly and Parts	Oilmen's Truck Tanks Inc	Spartanburg	Spartanburg	98	Tank trucks
Assembly and Parts	Old South Mfg	Berkeley	Summerville	19	Custom built fire engines
Assembly and Parts	Ox Bodies Inc	Marlboro	Bennettsville	121	Dump trucks
Assembly and Parts	Perfection Clutch	Darlington	Timmons ville	133	Clutches
Assembly and Parts	Performance Friction Corp	York	Clover	500	Carbon metallic disc brake pads
Assembly and Parts	Pierburg Inc	Greenville	Fountain Inn	94	Fuel pumps & auto components
Assembly and Parts	Plastic Omnium, LLC	Anderson	Anderson	340	Bumpers
Assembly and Parts	PRETTL North America	Greenville	Greenville	180	Wire harness for automotive
Assembly and Parts	Ram Automotive Co	Richland	Columbia	14	Automotive clutches
Assembly and Parts	Rieter Automotive North America	Aiken	Aiken	50	Thermal & acoustical management for auto and truck industry
Assembly and Parts	Robert Bosch Corp	Anderson	Anderson	1,200	Automotive components (oxygen sensors)
Assembly and Parts	Robert Bosch Corp-Automotive Group	Dorchester	Charleston	2,400	Fuel injectors (gasoline & diesel)
Assembly and Parts	SAI Automotive dba Faurecia	Laurens	Fountain Inn	650	Interior plastic trim (various parts)
Assembly and Parts	Seeber USA	Spartanburg	Duncan	330	Plastic injection and molding automotive parts

Automotive Industries and Suppliers (Continued)

Sectors	Company	County	City	Employment	Product Description
Assembly and Parts	SKF Automotive Division	Aiken	Graniteville	256	Automotive hub units
Assembly and Parts	South Carolina Yutaka Technologies (SCYT)	Kershaw	Lugoff	183	ATV steering
Assembly and Parts	Superior Engineering Inc	Anderson	Anderson	9	Lift truck attachments
Assembly and Parts	Thermo Heating Elements LLC	Anderson	Piedmont	9	Mirror heating systems
Assembly and Parts	Tyco Electronics Corp	Spartanburg	Spartanburg	400	Electronic connectors
Assembly and Parts	United Brake Systems Inc	Richland	Columbia	13	Motor vehicle parts and accessories
Assembly and Parts	Wabco	Spartanburg	Duncan	310	Passenger (mass) transit braking systems
Assembly and Parts	Wal-Mar Co	Spartanburg	Greer	4	Control panels HVAC & process (fabrication)
Assembly and Parts	Williams Technologies	Berkeley	Summerville	550	Remanufacture transmissions
Assembly and Parts	Yanagawa of South Carolina (YSC)	Clarendon	Manning	162	Critical components for ATVs
Assembly and Parts	Zeuna Staerker USA Inc	Spartanburg	Spartanburg	176	Automobile exhaust systems (gasoline & diesel)
Assembly and Parts	ZF Lemforder Corp	Lancaster	Lancaster	134	Component supplier to transportation industry
Assembly and Parts	ZF Lemforder Corp	Spartanburg	Duncan	180	Automotive axle modules
Other Manufacturing	Greenville Glass Industries Inc	Greenville	Piedmont	5	Automotive replacement glass
Other Manufacturing	Lang-Mekra North America LLC	Fairfield	Ridgeway	153	Mirror systems for commercial vehicles
Other Manufacturing	Lear Corp	Spartanburg	Duncan	252	Automotive seats
Distribution	Delphi Automotive Systems	Spartanburg	Duncan	135	Automotive wiring systems
Distribution	Insepta Tire Industries Inc	Greenville	Greenville	2	Tire distribution: passenger & light truck
Distribution	Klann Tools Inc	Charleston	North Charleston	3	Precision automotive tools
Distribution	MECO Inc	Florence	Florence	25	Distributor - Fuel Dispensing Equipment
Distribution	Renk Corp	Spartanburg	Duncan	11	Sleeve bearings
Distribution	VICO Co	Sumter	Sumter	7	Auto break parts