

# Alabama Wins State of the Year Lake Charles, Louisiana, Wins Ninth Consecutive Small Market of the Year

## A GUIDE TO THE SB&D 100

### *SB&D 100 Introductions and Methodology*

We can't think of a better way to judge a state or a community's attractiveness to industry than to count and identify the companies making significant financial commitments to that state or community. That's what we do with the annual SB&D 100. We count the number of companies making public commitments that meet or exceed 200 jobs and/or \$30 million in investment, and highlight market peer groups that captured the most of those game-changing deals.

All announcements found in the SB&D 100 were made public by a representative of the company. Job and investment totals are those that have been projected by a company spokesperson over a three-to-five-year period. Only new, expanded and relocated manufacturing and selected service projects are eligible for the ranking. Government projects such as prisons and military bases are eligible; however, retail, lodging and some entertainment-based announcements are not. Real estate investments such as office buildings, convention centers and industrial parks are not eligible.

Ten points are earned for each SB&D 100 announcement and five points are given for each JMD (just missed deal). This year's SB&D Job 100 threshold is 400 jobs — the number of jobs for the 100th largest project — so all announcements made of 400 jobs or more earned 10 points. Five points are given for announcements of 200 to 399 jobs. This year's Investment 100 threshold is \$125 million, meaning 10 points are awarded for announcements meeting or exceeding that total, and five points for deals \$30 million to \$124.99 million in investment.

After points are tallied in the state division, almost all of the judging for State of the Year and Honorable Mention honors is based on points per million residents, or points per capita. In each market division, those cited are based on points only.

Recognizing outstanding economic  
development performances  
in the South for calendar year 2018.

### 2019 SB&D 100 State Scores\*

State	Projects	Points
Texas	98	710
North Carolina	63	425
Alabama	55	380
Louisiana	50	345
Tennessee	49	315
Kentucky	47	315
Georgia	49	305
Virginia	38	275
South Carolina	42	260
Florida	35	215
Mississippi	19	145
Oklahoma	23	120
Missouri	14	95
Arkansas	8	60
West Virginia	4	30

\*Five or 10 points are earned for each project announced that meets or exceeds 200 jobs and/or \$30 million in investment. Points are based on the size of the project.

Source: SB&D

### 2019 SB&D 100 State Scores PPM\*\*

State	Points (PPM)
Alabama	79.7
Louisiana	73.4
Kentucky	70.0
South Carolina	50.1
Mississippi	50.0
Tennessee	46.3
North Carolina	40.8
Virginia	32.4
Oklahoma	30.7
Georgia	29.0
Texas	24.7
Arkansas	23.3
West Virginia	16.6
Missouri	15.6
Florida	10.1

\*\*PPM = Points per million residents is determined by dividing population into the points earned by states for projects of 200 jobs and/or \$30 million. or more.

Source: SB&D

### SB&D State of the Year Winners 1994-2019

2019	Alabama
2018	Kentucky
2017	South Carolina
2016	Tennessee
2015	Kentucky
2014	Louisiana and Texas
2013	Louisiana and Texas
2012	North Carolina
2011	Louisiana
2010	Louisiana and Tennessee
2009	Louisiana and Tennessee
2008	Alabama
2007	Louisiana
2006	Alabama and North Carolina
2005	Alabama and North Carolina
2004	Alabama
2003	Alabama
2002	Florida
2001	Virginia
2000	Tennessee
1999	Virginia
1998	North Carolina
1997	Texas
1996	Virginia
1995	Florida and Texas
1994	Texas

State of the Year honors were chosen based on PPM scores and other factors from projects announced the previous calendar year.  
Source: SB&D



In June 2018, Facebook announced plans to build a \$750 million data center in Huntsville, Ala., that will create 100 high-paying jobs.

### State Division

With 55 projects (including Mazda Toyota's new assembly plant in Huntsville), 380 points and the high state PPM score of 79.7, Alabama is the 2019 SB&D 100 "State of the Year." Alabama was on a roll from 2003 to 2008, winning at least a share of "State of the Year" five out of six years, so it's been more than 10 years since Alabama sat at the top. In addition to the \$1.6 billion, 4,000-job Mazda Toyota deal, Alabama also landed a \$750 million Facebook data center and the new Mercedes-Benz battery plant with its \$268 million price tag. While automotive is struggling in the Southern Automotive Corridor, you wouldn't know it in Alabama. The state's fourth auto assembly plant is under construction and Mercedes-Benz just finished one expansion as has Hyundai.

By virtue of their points per million residents, Louisiana, Kentucky, South Carolina and Mississippi earned "Honorable Mention" in the state category. Virginia earned an "Honorable Mention" for its solid year, but mostly because it captured the largest project in the South's history — Amazon's HQ2 and its 25,000 jobs.

CONTINUED



Amazon's operations hub in Nashville — 5,000 jobs and a \$230 million investment — is the largest single deal ever announced in Tennessee. The project catapulted Nashville into first place in the Major Market category. Pictured are former Tennessee Gov. Bill Haslam, Amazon's Holly Sullivan, Nashville Mayor David Briley and Tennessee Economic Development Commissioner Bob Rolfe.

### **Mega-Markets** (2.5 million-plus-population)

Dallas-Fort Worth continues its surge in project activity, topping all mega-markets with population of 2.5 million-plus, with 235 points. That is down from Dallas-Fort Worth's 300 points in 2018 and 295 points in 2017, but still, no market in the South is announcing more deals than DFW. For the third consecutive year, Dallas-Fort Worth outpointed eight states in the South.

Of the many markets making the Dallas-Fort Worth metro area, Irving, Texas, contributed the most points with 60. Irving has become a headquarter juggernaut, as have Plano, Frisco and others. Charlotte, Northern Virginia and Atlanta made up the top mega-markets, however, Atlanta dropped 135 points from last year.

### **Major Markets** (750,000-2.5 million population)

New Orleans and Nashville tied for "Major Market of the Year" with 135 points. It's the third consecutive year that Nashville has either tied or won "Major Market of the Year." Baton Rouge, Austin and Louisville saw decent years as well and earned "Honorable Mentions." Austin was positively assisted by neighboring San Marcos, which is part of the Austin MSA. Deals in San Marcos accounted for 40 of Austin's 105 points.

### **Mid-Markets** (250,000-749,999 population)

Charleston, S.C., continues its deal surge for another year. In just 10 years, Charleston has landed the Boeing 787 plant, the Mercedes-Benz Van facility and the Volvo plant. Huntsville, which captured Mazda Toyota and Facebook (the two largest

Alabama projects this year), had an outstanding year, as did Mobile, Durham and Spartanburg.

### **Small Markets** (50,000-249,999 population)

Well, they did it again. Lake Charles, La., and the Southwest Louisiana region has earned "Small Market of the Year" for the ninth consecutive year. No market in the South has earned its peer's highest ranking more than nine consecutive times. (Dallas-Fort Worth has earned six consecutive "Mega-Market of the Year" twice in 25 years.) The Lake Charles region has been a nationwide leader in the petrochemical and LNG industries for years, however, this latest run is unprecedented. Tens of billions of dollars have been invested in Southwest Louisiana in those nine years and the Lake Charles MSA has seen greater job growth than any market in America. The fracking frenzy has certainly benefited Southwest Louisiana's economy in a grand way.

Lake Charles was followed by economic development small market legends — Tupelo, Miss.; Columbus, Miss.; and Tuscaloosa, Ala. Also earning an "Honorable Mention" in the small market division was Jackson County, Ga.

### **Rural Markets** (Less than 50,000 population)

Troy, Ala., a market that we have recognized two or three times in 25 years, helped Alabama win "State of the Year." Henry County, Va., which we have named "Small Market of the Year" numerous times, earned an "Honorable Mention," along with Marshall County, Miss.; Wickliffe, Ky.; and Covington County, Ala.





(LEFT) Alabama won its sixth "State of the Year" in 25 years and its first since 2008 with an outstanding performance in calendar year 2018. Pictured is Alabama Commerce Secretary Greg Canfield at SB&D's Southern Economic Development Roundtable. (RIGHT) Virginia captured the largest project in the South's history with Amazon's HQ2 and its 25,000 jobs. Pictured is Stephen Moret, CEO of the Virginia Economic Development Partnership, at SB&D's Southern Economic Development Roundtable@WaterColor.

### STATE OF THE YEAR

#### ALABAMA

380 Points, 79.7 PPM (1st)

Notable Alabama Deals:

Company	Jobs	Investment*
Mazda Toyota	4,000	\$1,600
Facebook	100	\$750
Mercedes Benz	0	\$495
Mercedes Benz	325	\$268
Amazon	1,500	\$325
Airbus	432	\$264

HONORABLE MENTION

#### LOUISIANA

345 Points, 73.4 PPM (2nd)

Notable Louisiana Deals:

Company	Jobs	Investment*
Venture Global LNG	300	\$8,500
SCT&E LNG	300	\$5,500
Commonwealth LNG	N/A	\$3,900
Accruent	350	N/A

HONORABLE MENTION

#### KENTUCKY

315 Points, 70.0 PPM (3rd)

Notable Kentucky Deals:

Company	Jobs	Investment*
GE Appliance Park	400	\$200
Global Win	500	\$150
Century Aluminum	250	\$116
Independent Stave	220	\$66

HONORABLE MENTION

#### SOUTH CAROLINA

260 Points, 50.1 PPM (4th)

Notable South Carolina Deals:

Company	Jobs	Investment*
ServiceMac	1,000	N/A
W International	600	\$35
Keurig Dr Pepper	500	\$350
Becton, Dickinson	N/A	\$150

HONORABLE MENTION

#### MISSISSIPPI

145 Points, 50.0 PPM (5th)

Notable Mississippi Deals:

Company	Jobs	Investment*
Steel Dynamics	45	\$200
Toyota	400	\$170
Raytheon	45	\$100
Amazon	850	\$45

HONORABLE MENTION

#### VIRGINIA

275 points, 32.4 PPM (8th)

Notable Virginia Deals:

Company	Jobs	Investment*
Amazon	25,000	\$2,500
Micron Technology	1,100	\$3,000
Facebook	200	\$750
Press Glass	212	\$43

\* Investment in millions



Irving, Texas, helped Dallas-Fort Worth win another mega-market title. Pictured are members of the Irving Economic Development Partnership, including Erica Mulder, VP of Communications & Governmental Affairs; Joe Chapa, VP of International Affairs & Sister Cities; Beth A. Bowman, President & CEO; Kyle Touchstone, VP of Economic Development; Chris O'Brien, Director of Economic Development - BRE; Joe Lopez, Manager of International Affairs & Sister Cities.

## Special Recognition

*In most years, individual markets inside large MSAs go unnoticed for their contributions of large job generating projects. Here are three markets in Northern Virginia, Dallas-Fort Worth and Austin that stood out in project activity.*

### ARLINGTON COUNTY, VA.

Company	Jobs	Investment*
Amazon	25,000	\$2,500
Accenture	500	\$1.6

### IRVING, TEXAS

Company	Jobs	Investment*
Cognizant	1,090	\$8
Reece Supply	800	\$12
Gartner	800	\$5
Mercury Operating	800	\$2.8

### SAN MARCOS, TEXAS

Company	Jobs	Investment*
Urban Mining	542	\$25
Katerra	542	\$1

\* Investment in millions



## MEGA-MARKETS

(2.5 million-plus population)

### DALLAS-FORT WORTH

235 Points

Notable Dallas-Fort Worth Deals:

Company	Jobs	Investment*
AmerisourceBergen	1,000	\$20
Paycom	1,000	N/A
Reece Supply	800	\$12
Gartner	800	\$5

HONORABLE MENTION

### CHARLOTTE

155 Points

Notable Charlotte Deals

Company	Jobs	Investment*
Honeywell	750	\$248 million
Amazon	1,500	\$200 million
AvidXchange	1,229	\$41 million

HONORABLE MENTION

### NORTHERN VIRGINIA

140 Points

Notable Northern Virginia Deals:

Company	Jobs	Investment*
Amazon	25,000	\$2,500
Micron Technology	1,100	\$3,000
Appian Corporation	600	\$28

HONORABLE MENTION

### ATLANTA

100 Points

Notable Atlanta Deals:

Company	Jobs	Investment*
Norfolk Southern	850	\$575
Blackrock	1,000	\$42
Inspire Brands	1,120	\$32

\* Investment in millions



While Atlanta earned an Honorable Mention in the mega-market division with 100 points this year, that total is 130 points below their score last year. . .a sure sign of a slowdown.



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(TOP) More than any other submarket, San Marcos helped Austin to a great year. Pictured are members of the Greater San Marcos Partnership. (l to r) Laurie Hartz, Jacob Combs, Marissa Cooney, Chris Duran, Adriana Cruz, Jason Giulietti, Giselle Myers, John Ellis.

(CENTER) Louisville Mayor Greg Fischer and the Louisville Forward team celebrate a recent economic development win.

(LOWER) Baton Rouge captured an "Honorable Mention" in the major market division. Pictured are members of the Baton Rouge Area Chamber. SVP of Business Development Russell Richardson, Director of Business Development Donnie Miller, Director of Business Retention and Expansion Chandra Williams, Director of Business Development Rachel Pierson, Senior Director of Business Intelligence Andrew Fitzgerald.



## MAJOR MARKETS

(750,000-2.49 million population)

CO-MAJOR MARKET OF THE YEAR

### NEW ORLEANS

135 Points

Notable New Orleans Deals:

Company	Jobs	Investment*
Venture Global	300	\$8,500
Accruent	350	N/A
Tallgrass Energy	N/A	\$2.,500

CO-MAJOR MARKET OF THE YEAR

### NASHVILLE

135 Points

Notable Nashville Deals:

Company	Jobs	Investment:
Amazon	5,000	\$623
AllianceBernstein	1,050	\$71
Asurion	400	\$288





Austin earned an “Honorable Mention” in the major market category. The Austin Chamber economic development team is the backbone of Opportunity Austin, the Chamber’s five-year regional prosperity initiative. Opportunity Austin has helped create more than 400,000 jobs since 2004.



#### HONORABLE MENTION

##### BATON ROUGE

125 Points

Notable Baton Rouge Deals:

Company	Jobs	Investment*
Methanex Fortier	N/A	\$1,600
Exxon Mobil	N/A	\$410
Exxon Mobil	N/A	\$400

#### HONORABLE MENTION

##### AUSTIN

105 Points

Notable Austin Deals:

Company	Jobs	Investment*
Apple	4,000	\$400
Oracle	1,000	N/A
Urban Mining	542	\$25

#### HONORABLE MENTION

##### LOUISVILLE

85 Points

Notable Louisville Deals:

Company	Jobs	Investment*
GE Appliance Park	400	\$200
Chewy	300	\$7
Santa Rosa Systems	300	\$21

\* Investment in millions

## Chapin Business & Technology Park at Brighton



An innovative hub with an urban edge, this multi-use Park which features premier office space along with luxurious housing and first-class shopping, allows entrepreneurs and residents the ability to work and thrive in a spirit of collaboration.



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## MID-MARKETS

(250,000-749,999 population)

MID-MARKET OF THE YEAR

### CHARLESTON, S.C.

55 Points

Notable Charleston Deals:

Company	Jobs	Investment*
W International	600	N/A
JW Aluminum	N/A	\$255
Google	N/A	\$600

HONORABLE MENTION

### HUNTSVILLE, ALA.

50 Points

Notable Huntsville Deals:

Company	Jobs	Investment*
Mazda Toyota	4,000	\$1,600
Facebook	100	\$750
BAE Systems	200	\$49

HONORABLE MENTION

### MOBILE, ALA.

45 Points

Notable Mobile Deals:

Company	Jobs	Investment*
Airbus	432	\$264
Kimberly-Clark	9	\$101
SSAB	50	\$100

HONORABLE MENTION

### DURHAM, N.C.

40 Points

Notable Durham Deals:

Company	Jobs	Investment*
Avexis	200	\$55
LabCorp	422	\$30
Pairwise	201	\$11

HONORABLE MENTION

### SPARTANBURG, S.C.

40 Points

Notable Spartanburg Deals:

Company	Jobs	Investment*
*Keurig Dr Pepper	500	\$350
DAA Draxlmaier	460	\$42
Huvis Indorama	N/A	\$48

## SMALL MARKETS

(100,000-249,999 population)

SMALL MARKET OF THE YEAR

### LAKE CHARLES, LA.

45 Points

Notable Lake Charles Deals:

Company	Jobs	Investment*
SCT&E LNG	300	\$5,500
Citadel Completions	256	N/A
Commonwealth LNG	N/A	\$3,900

HONORABLE MENTION

### TUPELO, MISS.

35 Points

Notable Tupelo Deals:

Company	Jobs	Investment*
Toyota	400	\$170
Auto Parts Mfg	50	\$100
Williams-Sonoma	350	\$18

HONORABLE MENTION

### JACKSON COUNTY, GA

30 Points

Notable Jackson County Deals:

Company	Jobs	Investment*
SK Innovation	2,032	\$1,700
GE-Haier	1,100	\$55
SELIT	N/A	\$42

HONORABLE MENTION

### COLUMBUS, MISS.

25 Points

Notable Columbus Deals:

Company	Jobs	Investment*
Steel Dynamics	45	\$200
Peco Foods	300	\$40

HONORABLE MENTION

### TUSCALOOSA COUNTY, ALA

25 Points

Notable Tuscaloosa County Deals:

Company	Jobs	Investment*
Mercedes-Benz	0	\$495
Warrior Met Coal	20	\$86
Nucor Steel	0	\$46

Southwest Louisiana, specifically Lake Charles, earned its ninth straight "Small Market of the Year," an unprecedented honor. Job growth in Lake Charles leads the country among all markets. Pictured is George Swift, CEO of the Southwest Louisiana Economic Development Alliance, with SB&D's Matthew Randle.

## RURAL MARKETS

(Fewer than 50,000 population)

### RURAL MARKET OF THE YEAR

#### TROY, ALA

25 Points

Notable Troy, Ala. Deals:

Company	Jobs	Investment*
Lockheed Martin	60	\$130
Rex Lumber	110	\$110
Kimber Mfg	336	\$38

#### HONORABLE MENTION

#### HENRY COUNTY, VA.

20 Points

Notable Henry County Deals:

Company	Jobs	Investment*
Monogram Snacks	300	\$30
Press Glass	212	\$43

#### HONORABLE MENTION

#### MARSHALL COUNTY, MISS.

20 Points

Notable Marshall County Deals:

Company	Jobs	Investment*
Cooper Tire	98	\$50
Amazon	850	\$45

#### HONORABLE MENTION

#### WICKLIFFE, KY.

20 Points

Notable Wickliffe Deals:

Company	Jobs	Investment*
Global Win	500	\$150

#### HONORABLE MENTION

#### COVINGTON COUNTY, ALA

20 Points

Notable Covington County Deals:

Company	Jobs	Investment*
Shaw Industries	0	\$250
DynCorp Aviation	60	\$152

\* Investment in millions



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