

With a point total of 295, Dallas-Fort Worth has entered another dimension in economic development. The total is the highest earned by any market in the history of the SB&D 100.

Who's holding the cards?

Outstanding economic development performances in the South in 2016

State Division

South Carolina had an outstanding year, winning “State of the Year” for the first time. The Palmetto State has won a slew of honorable mentions over the last 23 years and it's good to see that state break through to the top.

By virtue of their points per million scores (per capita), Alabama, Kentucky and Louisiana earned honorable mentions this year. All three had outstanding years.

Mega-Markets

In the mega-market division, there is no question that metro Dallas-Fort Worth has entered another dimension in economic development. DFW earned 295 points in this year's SB&D 100, a record for any market in the South over the past 23 years. That was after posting a high of 245 points last year. Submarkets like Plano, Irving, Frisco, Richardson and others are turning some of the largest projects we've ever seen, like Toyota's new North American headquarters (4,000 employees) and Liberty Mutual's 5,000-employee expansion.

Atlanta has also had a good run over these last three years, coming in second to Dallas-Fort Worth the last two years in the mega-market division. Midtown Atlanta is on a roll, with a very impressive tech cluster growing there. Northern Virginia is also on a roll and St. Louis, which has never challenged in the mega-market division, came in fourth this year.

It should be noted that two new mega-markets have arrived on the scene in the South and they are Charlotte and Or-

lando. Both markets recently topped the 2.5 million population mark, putting them in the mega-market division.

Major Markets

In the major market division, Nashville once again is “Major Market of the Year” for 2017. It's the second consecutive year The Music City has topped all others in the major category. Jacksonville had its best year, coming in second. One major market to watch is Charleston-North Charleston, S.C. Other than Nashville, there may not be a market of any size with more momentum. Charleston placed third in the majors and Louisville fourth.

Mid-Markets

There are two really strong showings in the mid-market category. Augusta, Ga., had a banner year and so did Brevard County, Fla. (Melbourne). Durham, N.C., Montgomery, Ala., and Spartanburg, S.C. also saw big gains and earned honorable mentions.

Small Markets

Three very familiar places are at the top of the small market division this year. Lake Charles, La., which has seen one of the greatest petrochemical growth periods in history, is the “Small Market of the Year” for the fifth straight time. Aiken, S.C., along with Martinsville, Va., is second and third to Lake Charles in the number of small market of the year honors over the years. Aiken tied for second this year. Also coming on strong the last few years in the small market division is Bowling Green, Ky., and they also earned an honorable mention.

2017 SB&D 100 State Scores*			2017 SB&D 100 State Scores PPM**		SB&D State of the Year Winners 1995-2017
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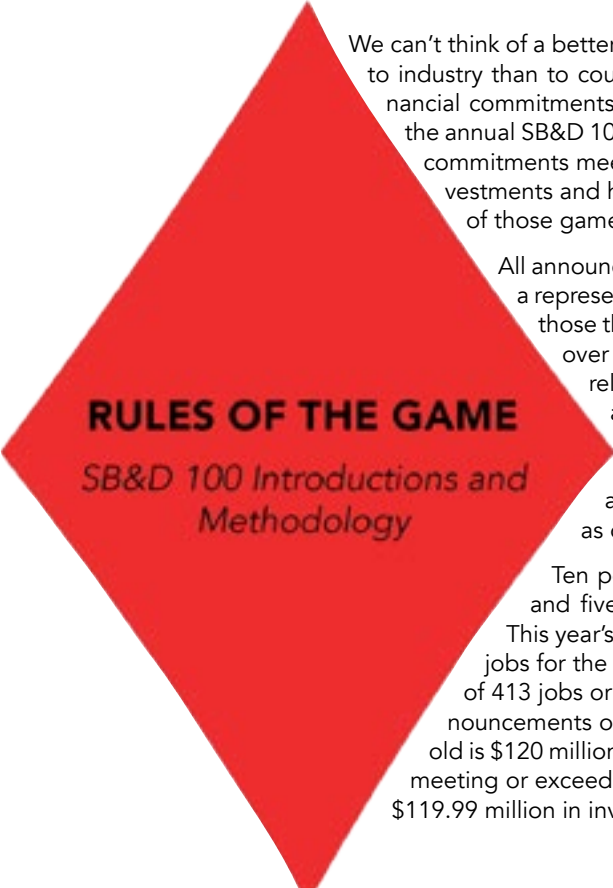
State	Projects	Points	State	Points PPM	
Texas	95	655	Louisiana	84.4	2017 South Carolina
Florida	64	455	South Carolina	80.6	2016 Tennessee
Georgia	57	410	Alabama	65.8	2015 Kentucky
South Carolina	66	400	Kentucky	61.3	2014 Louisiana and Texas
Louisiana	56	395	Tennessee	55.2	2013 Louisiana and Texas
Tennessee	58	370	Mississippi	43.6	2012 North Carolina
Virginia	57	360	Virginia	42.9	2011 Louisiana
North Carolina	56	355	Oklahoma	42.3	2010 Louisiana and Tennessee
Alabama	52	320	Georgia	39.8	2009 Louisiana and Tennessee
Kentucky	39	270	Arkansas	37.9	2008 Alabama
Missouri	29	180	North Carolina	35.1	2007 Louisiana
Oklahoma	23	165	Missouri	29.5	2006 Alabama and North Carolina
Mississippi	18	130	Texas	23.6	2005 Alabama and North Carolina
Arkansas	15	110	Florida	22.0	2004 Alabama
West Virginia	3	25	West Virginia	13.8	2003 Alabama

*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

**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

2002 Florida
2001 Virginia
2000 Tennessee
1999 Virginia
1998 North Carolina
1997 Texas
1996 Virginia
1995 Florida and Texas

State of the Year honors were chosen based on performances the previous calendar year.
Source: SB&D



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 meeting or exceeding 200 jobs and/or \$30 million in investments and highlight market peer groups who 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 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 413 jobs – the number of jobs for the 100th largest project — so all announcements made of 413 jobs or more earned 10 points. Five points are given for announcements of 200 to 412 jobs. This year's Investment 100 threshold is \$120 million, meaning 10 points are awarded for announcements meeting or exceeding that total, and five points for deals \$30 million to \$119.99 million in investment.



South Carolina Gov. Henry McMaster (left) and South Carolina Department of Commerce Secretary Bobby Hitt (right). After a slew of honorable mentions over the last 23 years, South Carolina earned its first “State of the Year” in this year’s SB&D.



Louisiana led all states in points per million residents in this year’s SB&D 100. Pictured is Don Pierson, Secretary of Louisiana Economic Development, at SB&D’s Southern Economic Development Roundtable earlier this year.

STATE OF THE YEAR

SOUTH CAROLINA

400 Points, 80.6 PPM (2nd)

Notable South Carolina Deals:

Company	Jobs	Investment
CompuCom	1500	\$41m
Michelin	350	\$270m
PL Developments	450	\$45m
Blackbaud	300	\$154m

HONORABLE MENTION

ALABAMA

320 Points, 65.8 PPM (3rd)

Notable Alabama Deals:

Company	Jobs	Investment
Kronospan	160	\$362m
Lenzing Fibers	163	\$293m
Boeing	470	\$78m
Lear Operations	535	\$27m

HONORABLE MENTION

KENTUCKY

270 Points, 61.3 PPM (4th)

Notable Kentucky Deals:

Company	Jobs	Investment
GM	620	\$290m
Charter	1297	\$5m
Evolent Health	647	\$41m
Thai Summit	216	\$110m

HONORABLE MENTION

LOUISIANA

395 Points, 84.4 PPM (1st)

Notable Louisiana Deals:

Company	Jobs	Investment
Ochshner Clinic	3227	\$360m
Driftwood LNG	551	\$11.8b
Venture Global	300	\$8.5b
PBF Energy	N/A	\$382m

MEGA-MARKETS

(2,500,000-plus population)

MEGA-MARKET OF THE YEAR

DALLAS-FORT WORTH

295 points

Notable Dallas-Fort Worth Deals:

Company	Jobs	Investment
GM Financial	1300	\$35m
AmerisourceBergen	800	\$113m
Lockheed Martin	1000	\$1.2b
McKesson	975	\$157m

Dallas-Fort Worth has set itself apart the last several years in the Mega-Market division. Again, DFW earned Mega-Market of the Year for 2017 with 295 points, a market record. Pictured below is the \$3 billion Legacy West project in Plano, Texas where Toyota is moving its North American headquarters.



Alabama earned an honorable mention in the state division in this year's SB&D 100. Pictured at right is Greg Canfield, Secretary of the Alabama Department of Commerce, at SB&D's SEDR event earlier this year.



MEGA-MARKETS

HONORABLE MENTION

ATLANTA

175 points

Notable Atlanta Deals:

Company	Jobs	Investment
Kaiser Permanente	900	\$22m
Mercedes-Benz	800	\$74m
State Farm	1,500	N/A
NCR	310	\$108m

HONORABLE MENTION

WASHINGTON DC-NORTHERN VIRGINIA

140 points

Notable Washington DC-Northern Virginia Deals:

Company	Jobs	Investment
General Dynamics	25	\$138m
GEICO	798	\$1m
JK Moving	751	\$19m
Notarize	454	N/A

HONORABLE MENTION

ST. LOUIS

125 points

Notable St. Louis Deals:

Company	Jobs	Investment
Boeing	500	\$300m
Cushman & Wakefield	600	\$17m
Pfizer	80	\$200m
Virbac	144	\$37m

Performances of Other Mega-Markets in the South

Houston 105 points; Miami-Fort Lauderdale-West Palm Beach 90 points; Charlotte 75 points; Orlando 55 points; Tampa-St. Pete-Clearwater 55 points.

MAJOR MARKETS

(750,000-2,499,999 population)

MAJOR MARKET OF THE YEAR

NASHVILLE

165 points

Notable Nashville Deals:

Company	Jobs	Investment
General Mills	117	\$250m
Nissan	1000	\$160m
CHS	1500	\$66m
Aegis Sciences	740	\$31m



(TOP PHOTO) Pictured are team members of the JAXUSA Partnership, a division within the JAX Chamber. Jacksonville had its best year in SB&D 100 history with 105 points and a second place in the highly competitive Major Market division. (BOTTOM PHOTO) Gathered here are team members of Louisville Forward. Louisville had a strong year, earning 100 points and an honorable mention in the Major Market division.

MAJOR MARKETS

HONORABLE MENTION

JACKSONVILLE

105 points

Notable Jacksonville Deals:

Company	Jobs	Investment
Vistakon Vision	100	\$301m
UPS	10	\$196m
Anheuser-Busch	75	\$175m
Citibank	800	N/A

HONORABLE MENTION

CHARLESTON-NORTH CHARLESTON

100 points

Notable Charleston Deals:

Company	Jobs	Investment
Robert Bosch	150	\$175m
Blackbaud	300	\$154m
Comcast	550	\$21m
Evonik Industries	50	\$120m

HONORABLE MENTION

LOUISVILLE

100 points

Notable Louisville Deals:

Company	Jobs	Investment
Evolent Health	647	\$41m
RxCrossroads	400	\$24m
Computershare	850	\$19m
Charter	1297	\$5m

Performances of Other Major Markets in the South

New Orleans 95 points; Oklahoma City 90 points; Greenville, S.C. 80 points; Baton Rouge 75 points; Virginia Beach-Norfolk-Newport News 70 points; Birmingham 60 points; Memphis 55 points; Columbia, S.C. 45 points; Kansas City 45 points; Knoxville 45 points; Richmond 40 points; San Antonio 40 points; Austin 35 points; Raleigh 30 points.

MID-MARKETS

(250,000-749,999 population)

MID-MARKET OF THE YEAR

AUGUSTA, GA.

95 points

Notable Augusta Deals:

Company	Jobs	Investment
U.S. Army	1200	\$85m
Textron	400	N/A
Unisys	700	N/A
ADP Augusta	450	\$32



(TOP PHOTO) With 60 points, Montgomery, Ala., tied for third in the highly competitive Mid-Market division. Pictured are members of the Montgomery Chamber of Commerce's economic development team. (BOTTOM PHOTO) Walter Sprouse is Executive Director of the Augusta EDA. Augusta, Ga., earned Mid-Market of the year in the 2017 SB&D 100 .

MID-MARKETS

**HONORABLE MENTION
BREVARD COUNTY, FLA.**

75 points

Notable Brevard County Deals:

Company	Jobs	Investment
Blue Origin	330	\$205m
Embraer	500	N/A
Harris Corp	.300	N/A
Lockheed Martin	300	N/A

**HONORABLE MENTION
DURHAM-CHAPEL HILL, N.C.**

60 points

Notable Durham-Chapel Hill Deals:

Company	Jobs	Investment
FedEx	350	\$39m
Peter Millar	200	\$9m
Aurobindo Pharma	275	\$31m
Nutanix	250	\$3m

**HONORABLE MENTION
MONTGOMERY, ALA.**

60 points

Notable Montgomery Deals:

Company	Jobs	Investment
ASK Telemarketing	435	\$2m
Gerhardi Kunststoff	235	\$37m
ALFA Financial	0	\$100m
Hyundai	38	\$52m

**HONORABLE MENTION
SPARTANBURG, S.C.**

60 points

Notable Spartanburg Deals:

Company	Jobs	Investment
Michelin	350	\$270m
Magna Seating	480	\$29m
Sitel	400	\$2m
Ritrama	150	\$66m

Performances of Other Mid-Markets in the South

Northern Kentucky 50 points; Gulfport-Biloxi-Pascagoula, Miss. 45 points; Kingsport-Bristol, Tenn. 40 points; Roanoke, Va. 40 points; Corpus Christi, Texas 35 points; Huntsville, Ala. 35 points; Lexington, Ky. 25 points.

(RIGHT) Members of the Southwest Louisiana Economic Development Alliance team at The SEED Center, a business incubator and economic development center on the campus of McNeese State University in Lake Charles. Lake Charles earned "Small Market of the Year" for the fifth consecutive year.



SMALL MARKETS

(Under 250,000 population)

**SMALL MARKET OF THE YEAR
LAKE CHARLES, LA.**

65 points

Notable Lake Charles Deals:

Company	Jobs	Investment
Driftwood LNG	551	\$11.8b
Eagle US 2	N/A	\$359m
RD Juniper	N/A	\$176m
Bio-Lab	N/A	\$56m



**HONORABLE MENTION
AIKEN, S.C.**

25 points

Notable Aiken Deals:

Company	Jobs	Investment
Autoneum NA	40	\$35m
SRNL	N/A	\$150m
SRNL	200	N/A



**HONORABLE MENTION
BOWLING GREEN, KY.**

25 points

Notable Bowling Green Deals:

Company	Jobs	Investment
GM	620	\$290m
Kobelco Aluminum	105	\$46m

Performances of Other Small Markets in the South

Clark County, Ark. 20 points; Lafourche Parish, La. 20 points; Nelson County, Ky. 20 points; Sullivan County, Tenn. 20 points; Troup County, Ga. 20 points; Lee County, Miss. 20 points.

(CENTER PHOTO) Team members of the Economic Development Partnership in Aiken, S.C. Aiken earned an honorable mention in the Small Market division. Pictured are Will Williams, Theresa Daugherty and Jonathan Larry.
(BOTTOM PHOTO) Ron Bunch is President and CEO of the Bowling Green Area Chamber. Bowling Green, Ky., earned an honorable mention in the Small Market division.