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In spite of the hurdles,
there were stellar
performances
in 2020



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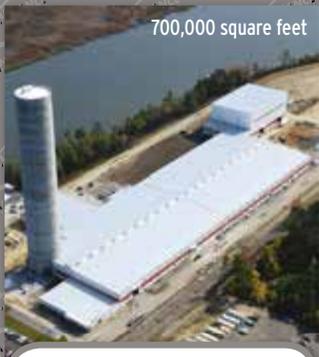
2.1 million square feet

2.5 million square feet




TORAY
Innovation by Chemistry

700,000 square feet







1 million square feet






500,000 square feet

2 million square feet





3.5 million square feet





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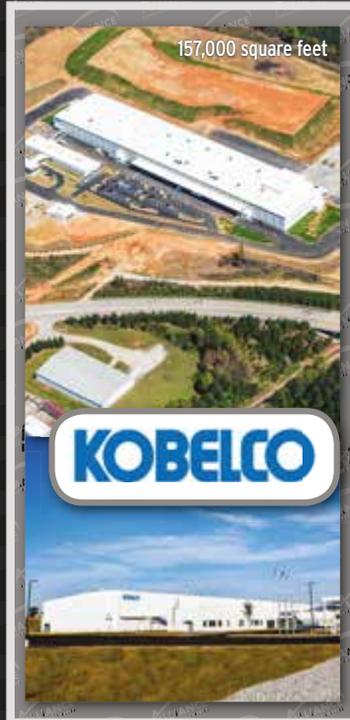


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monster

100,000 square feet



157,000 square feet

KOBELCO



513,000 square feet

Husqvarna



JUSHI

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nephron pharmaceuticals corporation

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457,000 square feet

IFA



SAMSUNG

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SOUTHBOUND

By Michael Randle, EDITOR

Why are former President Donald Trump's tariffs still in place?

SINCE ASSUMING OFFICE IN JANUARY, President Joe Biden nor Congress has struck down specific tariffs with our allies in Europe, Asia and North America. Trump's foolish trade restrictions are still in place as of mid-June.

The former president began a slew of trade wars and tariffs three years ago. He didn't stop with economic adversaries such as China. He laid down tariffs on economic and military allies in the European Union, Japan and Canada.

One of the worst decisions Trump made (remember, the tariffs were initiated by him, through an executive order, not by Congress) was to levy tariffs on \$50 billion worth of imported steel and aluminum and several billion more on lumber. These tariffs have had a dramatic effect on inflation in the U.S., especially in the building industry, specifically housing.

The tariffs on steel and aluminum were designed to punish the Chinese when they flooded the U.S. with their cheap metals. But, when Trump expanded the tariffs, he had already levied the restrictions on 90 percent of Chinese imported steel and aluminum. When he furthered the tariffs, he also slapped them on Canada, Mexico, Japan and countries in the EU in the midst of howls by almost all economists.

Project activity in the South in metals increased shortly after Trump's tariffs were put in place in 2018 and 2019. The domestic metals original equipment manufacturer industry saw a spark as the prices for imported steel and aluminum rose. Steel and aluminum mills expanded and there were several new greenfield announcements by metals plants here in the South. In fact, in calendar year 2018, there were 37 large projects announced in the region meeting or exceeding \$30 million and/or 200 jobs. . .the 28-year record of metals projects making our SB&D 100.

However, the expansion of the domestic metals industry as a result of Trump's tariffs was short-lived. After the 37 large projects in 2018, the number dropped to 19 in 2019 and just 12 in 2020, a collapse of almost 70 percent since the tariffs on metals were put in place.



Short term gains by steel and aluminum plants in the U.S. were smothered by long term losses by smaller companies that use cheaper foreign metals to make things here in the U.S. The higher costs of foreign metals, used by manufacturers of all kinds of things from screws to fenders to dishwashers, were passed along to us, the consumer. I know of one metal fabricator in Alabama who has seen 15 price increases in six months.

In May 2019, the Peterson Institute for International Economics calculated that U.S. consumers and businesses have paid more than \$900,000 a year for every job saved or created by Trump's steel tariffs. The cost is more than 13 times the average salary of a steelworker.

After all, the data does not lie. Those downstream domestic manufacturers/fabricators that make things from foreign metals employ more than 80 times more workers in the U.S. than OEM steel plants employ. So, any data that supported those tariffs was incredibly wrong.

Worse yet, the Trump administration said the tariffs were necessary to safeguard "national security". . .a slap in the face to our military allies such as the U.K., France, Canada and Japan. ☹

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AROUND THE SOUTH

For real-time news on business, politics and economic development in the South, go to RandleReport.com. For all economic development projects announced in the South, go to SB-D.com. For more information on the automotive industry in the South, go to SouthernAutoCorridor.com.

Reshoring surges to record high

Reshoring during the pandemic of 2020 exceeded foreign direct investment by nearly 100 percent. It was, however, the poorest showing of FDI in years as trade between nations cratered during the pandemic. According to the Reshoring Initiative's 2020 Data Report, reshoring deals created over 160,000 jobs in 2020, a record since the numbers were first published in 2010. Another report by Thomas, the 2021 State of North American Manufacturing Annual Report, showed that reshoring could add \$443 billion to the U.S. economy this year.

U.S. factory activity strongest since 1983

In March, U.S. manufacturers grew at a faster pace than at any time since 1983. As the pandemic wanes and government aid dollars flow freely, manufacturers were full steam ahead as spring began. The Institute for Supply Management gave its measure of factory activity a score of 64.7 percent in March, the highest in 37 years.

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In March, U.S. manufacturers grew at a faster pace than at any time since 1983. Shown here (and on the previous page) are workers at the GE Appliance Park in Louisville, Ky., which has been a leader in reshoring jobs back from China.

Birth rate in U.S. lowest in more than 40 years

The birth rate in the U.S. fell 4 percent in 2020 to about 3.6 million babies. It is the sixth straight annual decline and the lowest since 1979, according to the U.S. Centers for Disease Control and Prevention (CDC).

New York City, a breeding ground for Southern deals, is experiencing an office space vacancy Armageddon

Vacant office space in New York City is at a point not seen since 1994, following the recession of 1993. Work-from-home has created all kinds of sublease situations in the “city.” Relocations of workers and companies have

also contributed. According to Cushman & Wakefield, the vacancy rate in Manhattan reached 16.3 percent in the first quarter of 2021. This has driven rents down dramatically and there seems to be no end to the glut of office space in New York City at this point.

Whoa! Number of available jobs sets record

Remember from 2015 to 2018 when the U.S. had over 7 million jobs available and virtually no takers? Back then we were averaging about 150,000 jobs created per month, or about 1.8 million jobs gained per year. No one seems to be focusing on the real root of this problem — massive cuts in immigration and the fact that 20- and 30-year-olds do



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not believe they can afford children. Population and fertility rates are at all-time lows in the U.S. the last several years. So, where are we now? In June, the U.S. Department of Labor reported that there are 9.3 million jobs available. That is the highest total on record by over 2 million.

Proposed LNG export terminals in Louisiana could capture tons of greenhouse gases

Arlington, Va.-based Venture Global LNG will use advanced technology to capture greenhouse gases from the export terminals in Louisiana that it plans to build. Already there are several active LNG terminals in Louisiana, including the giant Cheniere terminal in Southwest Lou-

isiana. Other billion-dollar deals are in play, and Venture Global LNG is planning its carbon capture efforts at all new LNG export facilities.

Move over natural gas; move in batteries

The proliferation of natural gas produced over the last 15 years by the fracking frenzy is waning. Coal power plants have been replaced by natural gas-fueled plants, and that transformation hasn't even come close to completing. Yet, there is a new power source in town — battery storage charged with wind and solar energy. Vistra Corp., one of the largest owners of natural gas power plants, announced this spring it is investing \$1 billion in battery storage.

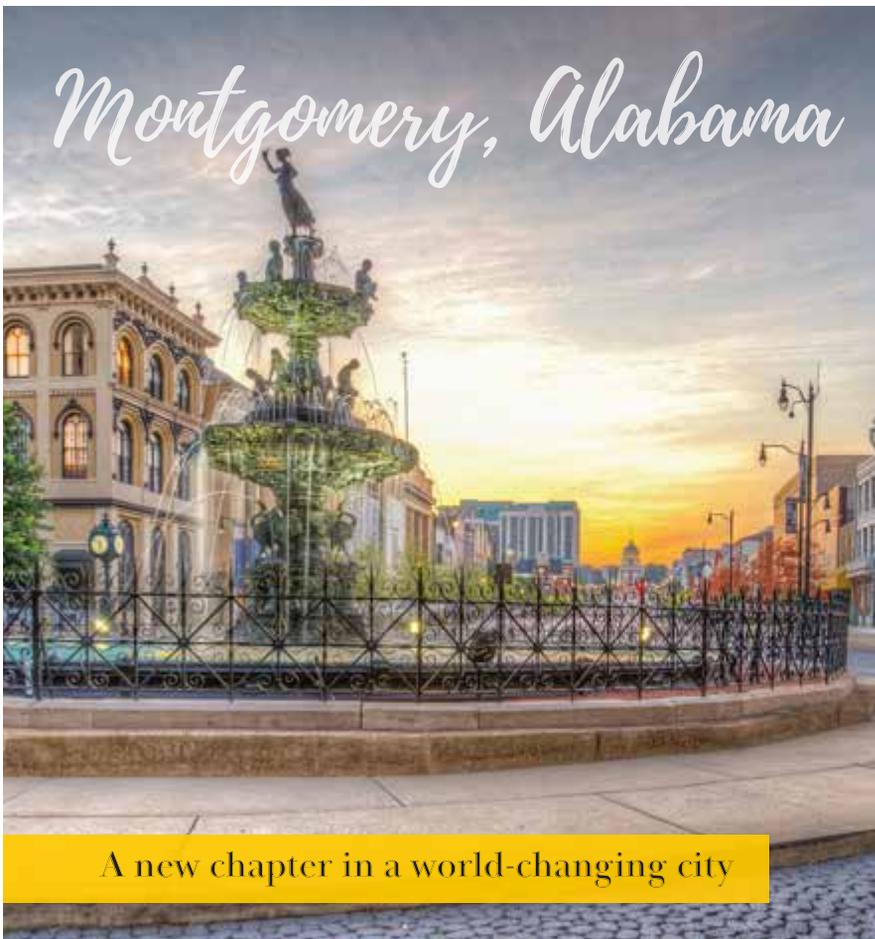
Nashville, the latest “it” city, may have seen its best days

In the spring quarter, Oracle announced it would bring 8,500 jobs to Nashville's downtown riverfront. It is one of the South's most impressive economic development announcements in history. Nashville is also the latest major market in the South to become an “it” city joining Atlanta, Dallas, Charlotte and others. But there is a problem in Nashville, one of the nation's fastest growing cities. The Institute for Truth in Accounting recently ranked it one of the country's five worst “sinkhole” cities, with \$22,000 in debt per resident. Its bonded debt has increased by more than \$1.25 billion in

10 years. Much if not all of the city's reserve funds have been spent and new property tax increases have been passed to fill in the financial gaps. The state has even considered a state takeover of the city's finances. What goes up must come down.

Raytheon CEO says the Biden corporate tax plan will reduce the company's investments

Raytheon CEO Greg Hayes, in a speech to the Economic Club of Washington, D.C., in the spring quarter, said that President Biden's corporate tax increases, infrastructure plan and other initiatives to raise revenue will reduce investment by the aerospace and defense giant by about \$1 billion a year. Hayes said



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AROUND THE SOUTH

that Raytheon spends about \$5 billion a year on R&D and other expenditures, and if the corporate tax rate is raised from 21 percent to 28 percent, it would cost the company about \$1 billion more in taxes.

Majority of small businesses expect revenue to grow this year

According to a report by Bank of America, 60 percent of small businesses expect their revenue to increase over the next 12 months (as of spring quarter). Just 34 percent of those same businesses thought revenue would increase this time last year.

Virginia taking up rural jobs act

Sen. Mark Warner is heading up an effort in the Commonwealth of Virginia to expand the New Markets Tax Credit that will set aside \$1 billion for communities in the state with less than 50,000 people. Rebranded as the Rural Jobs Act, the incentives will give rural communities in the state — particularly those in Southwest Virginia — a leg-up when it comes to job creation.

Charlotte-based Bank of America raising wages to \$25 an hour

Charlotte-based Bank of America announced this

spring that it will raise its minimum hourly wage to \$25 by 2025. The massive bank (the second largest in the country) just completed a plan to raise employee wages to a minimum of \$20 an hour.

Source: Alabama "economic momentum" near the top in the U.S.

According to *State Policy Reports*, a Washington, D.C.-based publication, Alabama ranks No. 8 in the Index of State Economic Momentum for the first quarter of 2021. The state's score was 1.31, with a national average of zero.

Survey: Austin most vibrant U.S. tech city

A survey this spring by Blind, an online community that

enables professionals to share their opinions anonymously, showed that Austin is the most dynamic tech city in the U.S. Ninety-two percent of tech execs in Austin believe the city fosters a vibrant environment for tech companies. San Francisco and Seattle came in second in the survey with 85 percent, and New York City with 83 percent.

Census: Austin is America's fastest growing city

In the spring quarter, the U.S. Census Bureau released its "New Vintage 2020 Population Estimates Available for Nation, States, Counties and Puerto Rico Commonwealth." The fastest growing metro areas in the U.S. in 2020 were Austin; Boise; Lakeland, Fla.; Fayetteville, Ark.; and Cape Coral-Fort Myers, Fla. Making the top 10 in the South were Raleigh, North Port-Sarasota, and Charleston, S.C.

Elon Musk wants to create a city at South Texas rocket launch base

Not too long ago, Elon Musk and his SpaceX startup chose a site near Brownsville, Texas, to launch rockets and land them. The private space-flight company has already launched large rockets in tests in Boca Chica, Texas, a beachside community that is so tiny (other than in the summer) only a few dozen homes are occupied. Now Musk would like to create a community in Boca Chica. He tweeted in April, "Please consider moving to Starbase or greater Brownsville/South Padre area in Texas & encourage friends to do so! SpaceX's hiring needs for engineers, technicians, builders & es-



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sential support personnel of all kinds are growing rapidly.” So remember the “company towns” that were made up of textile and apparel company-owned homes and stores? Well, today, Elon Musk is trying to build a town based on space called “Starbase.”

\$200 with a “B” — the economic effect on South Carolina’s economy from manufacturing

The manufacturing sector in South Carolina has a \$200 billion impact on the Palmetto State’s economy, according to the South Carolina Manufacturers Alliance. South Carolina is one of the South’s most highly concentrated manufacturing states with the likes of BMW, Boeing, Michelin,



A survey this spring by Blind, an online community that enables professionals to share their opinions anonymously, showed that Austin is the most dynamic tech city in the U.S.



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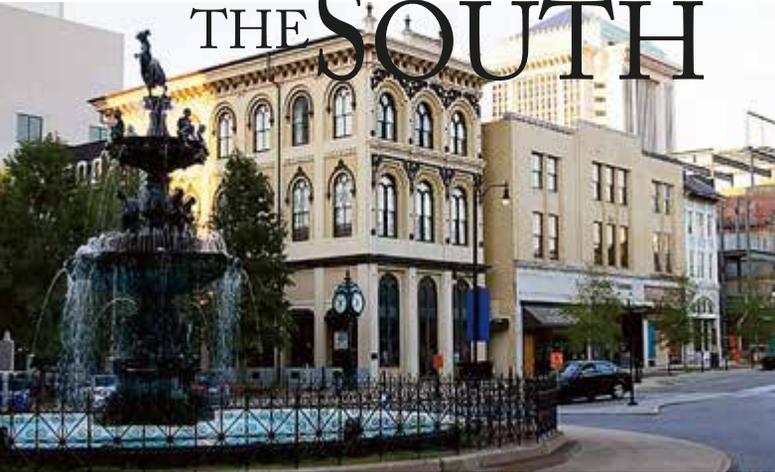
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The Alabama Business Confidence Index has Montgomery topping all other cities in the state in the first quarter of 2021. The index is done by the University of Alabama's Center for Business and Economic Research. Montgomery led all cities in Alabama with a score of 58.8 in the first quarter of 2021.

Volvo and Mercedes-Benz leading the way. The study examined 127 specific manufacturing occupations to determine the industry's footprint across the state and the economic stability it creates, according to a news release.

Space centers in Louisiana and Mississippi to develop lands and more product

NASA's Michoud Assembly Facility in East New Orleans and the John C. Stennis Space Center just to the east in Hancock County, Miss., are planning on developing business parks on their grounds to lure suppliers and other space-related companies. The space centers are modeling the business parks on other successful projects at the Kennedy Space Center in Cape Canaveral, Fla., and at the Marshall Space Flight Center in Huntsville, Ala.

Port of Virginia to be deepest on the East Coast

By 2024, the Port of Virginia

will be the deepest port on the East Coast at 55 feet. At that time, the port will be able to accommodate two-way traffic for some of the world's largest maritime vessels. The port has invested over \$1 billion in its facilities since 2015.

Virginia is first state in the South to legalize marijuana

Virginia lawmakers in the spring quarter legalized marijuana, the first state in the South to do so. Under the law, adults 21 and older will be able to use and grow marijuana, beginning in July. The state will also launch a legal and regulated market with tax revenues going toward education and equity initiatives as well as addiction treatments and public health services.

State of Georgia buys megasite near Savannah

When looking to locate in the U.S., Volkswagen and Volvo checked out the megasite in Bryan County, Ga., near Savannah. Both passed, even though officials there thought

they had landed Volvo, which eventually chose a site near Charleston, S.C., in Berkeley County. Volvo has expanded several times at its facilities in Berkeley County. Now, the 2,284-acre Bryan County megasite has been purchased by the Savannah Harbor-Interstate 16 Corridor Joint Development Authority. The strategic purchase of the Bryan County Mega-Site is the largest in Georgia state history, according to a press release from the governor's office.

Life sciences have a good year in North Carolina

Life sciences firms in North Carolina had an excellent year in 2020 as many are expanding their capacities to make pharmaceuticals and biological therapies in the state. Expansions in North Carolina in 2020 saw \$2.3 billion in investment with about 2,800 new jobs created.

Apple's North Carolina deal could garner \$1 billion in incentives

Apple's announcement this spring that it will set up a billion-dollar campus that will house 3,000 workers in the Research Triangle region of North Carolina is expected to garner \$845 million in tax breaks over the next 40 years. When local incentives are included, the total is close to \$1 billion in incentives to the tech giant.

North Carolina No. 1 in the nation for rural clean energy jobs

A new report from E2 showed that North Carolina ranks first in the nation for rural clean energy jobs. The report stated that over 25 percent of clean energy jobs are located in rural regions of the state.

West Virginia is offering remote workers \$12,000 to move there

West Virginia, the South's smallest state in terms of population, launched a program to recruit remote and self-employed workers. The state is offering \$12,000 and a free, year-long pass for outdoor activities for those who relocate to the state for at least two years.

Business confidence is high in Montgomery, Ala.

The Alabama Business Confidence Index has Montgomery topping all other cities in the state in the first quarter of 2021. The index is compiled by the University of Alabama's Center for Business and Economic Research. Montgomery led all cities in Alabama with a score of 58.8 in the first quarter of 2021.

Forbes: UAB is America's best large employer

The University of Alabama at Birmingham (UAB) was named "America's Best Large Employer" by *Forbes* magazine. UAB was picked ahead of other schools such as Yale University, as well as 500 public and private companies. UAB is Alabama's largest public employer and home to one of the region's largest academic medical centers. UAB employs more than 23,000 people.

South Carolina Ports opens new terminal

The South Carolina Ports welcomed the first vessel to the Hugh K. Leatherman Terminal in the spring quarter. The terminal is the first container terminal to open in the United States since 2009. 🌟

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SNAPSHOTS FROM THE ROAD

For the 15th month, SB&D did not travel. This is the last quarter that will be the case as the virus has subsided. It's time to pack up and go to the next great place in the South. Next quarter we start anew and we also begin the process of building the next live version of the Southern Economic Development Roundtable in January of 2022.



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1: Economic development veteran Mac Holladay at SEDR5@WaterColor.
2: Michael Olivier, Michael Randle, Don Pierson, Matthew Randle and Henry Florsheim at SEDR6@WaterColor. **3:** Ed Castile and Neal Wade at one of the SEDR@WaterColor events **4:** The late Melissa Medley of Vision First Advisors and Crystal Stiles of FP&L. **5:** J.D. Lowery, SEDC's Gene Stinson and Matt Randle. **6:** Former Louisiana Secretary of Commerce Michael Olivier, current Louisiana Secretary of Commerce Don Pierson at SEDR@WaterColor3 in 2016. Former South Carolina Secretary of Commerce Wayne Sterling is behind them. **7:** Workforce development educator extraordinaire Glen Fenter. **8:** Kentucky Sec. of Commerce Larry Hayes with Randle. **9:** SEDR7@WaterColor. **10:** Walter Sprouse, Michael Randle, Will Williams and Robbie Bennett.

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12

11: Chuck Whipple and Bob Leak, Jr., at SEDR4@WaterColor
12: South Carolina's Hal Johnson and Deepal Eliatamby.
13: Matthew Randle with Virginia's Victor Hoskins and Stephen Moret. **14:** Ted Abernathy, Jeff McKay and Chris Masingill at SEDR7@WaterColor.
15: Glenn McCullough, Jr., at SEDR6@WaterColor. **16:** Michael Olivier involved in the SEDR4@WaterColor discussions.
17: Mark Heath and Mark Williams. **18:** SB&D'S Stacy Randle and Shelly Jo Jacobs.
19: SB&D owner Michael Randle speaking at Freightwaves in Atlanta shortly before the pandemic began. **20:** Attendees at SEDR5@WaterColor. 🍷



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RELOCATIONS & EXPANSIONS

For real-time news on business, politics and economic development in the South, go to RandleReport.com. For all economic development projects announced in the South, go to SB-D.com. For information on automotive in the South, go to SouthernAutoCorridor.com.



Airbus set to report uptick in deliveries for the month of May at its Alabama plant

Airbus maintained a brisk pace of jet deliveries in May, handing over more jets to customers than in the previous month, according to sources familiar with the matter. The European plane maker is likely to report about 50 handovers for the month, after making 45 deliveries in April.

At that level, May's performance would take Airbus to roughly 220 deliveries so far in 2021, ahead of the 160 tallied at the same time last year — an indication of why the Toulouse, France-based company is optimistic about an eventual recovery in demand. Airbus announced recently that it has told suppliers to prepare for a production ramp-up of its best-selling A320-series jets to 64 per month by the second quarter of 2023.



ALABAMA

Mohawk to expand into yarn production at Alabama plant

Mohawk Industries is introducing yarn production at its plant in Roanoke, Ala. The yarn will be used in the carpet manufacturing process. The deal will create 130 jobs.

Amazon reveals new Alabama warehouse and 500 jobs

Amazon announced plans to open a 1 million-square-foot fulfillment center in Huntsville, a project that will create more than 500 jobs. The company said the facility will be built near the new Mazda Toyota vehicle factory that's under construction west of Huntsville in Limestone County.

Manufacturer bringing 50 jobs to Auburn

After surviving Chapter 11 bankruptcy, an Auburn manufacturing company specializing in building engines is

looking to add people to its team. Briggs & Stratton now has a new owner and a new CEO and is looking to fill 50 positions.

ARKANSAS

Amazon to fill 1,500 jobs in Little Rock

Amazon is ready to hire 1,500 people to work at two new facilities in Central Arkansas. Staffing the new fulfillment centers — one at the Port of Little Rock and the other in North Little Rock — is the largest single such effort that Jay Chesshir said he can remember in his time leading the Greater Little Rock Chamber of Commerce, and will elevate the online retail company to one of the top employers in Central Arkansas.

FiberPro plans \$3 million expansion, 69 new jobs in Hot Springs

FiberPro of Hot Springs announced plans to expand its manufacturing facility there,

Poultry operator adding 290 jobs in Little Rock, Ark.

Arkansas-based Custom Craft Poultry is opening a new poultry processing plant in Little Rock. The company has repurposed the former Odom's Tennessee Pride sausage plant and invested nearly \$10 million in the project. It is expected to create 290 new jobs.

investing more than \$3.1 million and creating 69 jobs over three years. FiberPro designs and builds log and lumber handling equipment.

Packaging manufacturer is expanding in Northeast Arkansas

Anchor Packaging, which makes packaging materials from recycled materials, is expanding its Paragould manufacturing plant. The \$21 million investment will create 45 jobs.

L'Oréal to add 45 jobs with \$12 million expansion of North Little Rock plant

New York City-based L'Oréal USA announced in May that it will invest more than \$12 million to expand its plant in North Little Rock. The project is estimated to add 45 jobs to the 350 jobs at the plant.

FLORIDA

ID.Me bringing 500 jobs to its new Tampa office
Virginia-based ID.me is opening a new office in Tampa, and will bring 500 jobs with it. The digital security firm, which is headquartered in the Washington, D.C. suburbs, says it hopes to hire employees for the new office by the end of this year.

FedEx to hire nearly 500 in Port St. Lucie, Fla.

FedEx will build a new sortation facility at Legacy Park in Port St. Lucie. The project will create 475 jobs.

Chicago company relocating HQ to Tampa
Signode Industrial Group, a maker of packaging tools and equipment, is relocating its headquarters from Chicago to Tampa. The deal will create 200 jobs.

City Furniture expected to bring 500 new jobs to Plant City

A national furniture chain is opening an operation in Plant City, bringing in 500 new jobs. City Furniture's new complex is a \$125 million project that will include a warehouse and corporate offices.

Paper plant coming to Tampa Bay

Port Tampa Bay has agreed to lease 37 acres to the Celadon Development Corporation to build and run a paper-fiber manufacturing plant. The plant will recycle paper products that would normally go to fields, but will now be processed and shipped in container loads primarily to Asia to be turned into paper products. The plant represents a \$400 million invest-

ment and at least 100 jobs in this first phase.

Amazon adding 400 jobs in South Florida

Amazon says it hopes to create more than 400 jobs with the opening of four new delivery stations in Homestead, Kendall, Miramar and Fort Lauderdale. The new facilities are designed to ease same-day or even two-hour deliveries to residences in high-density neighborhoods.



Feit Electric bringing 120 new jobs to Henry County, Ga.

Feit Electric, a smart home and energy-efficient lighting brand, will invest more than \$25 million to open a distribution center in Henry County. This will be the company's first distribution center on the East Coast and will create 120 jobs in McDonough.

GEORGIA

FanDuel bringing 900 jobs to new Atlanta tech hub

Mobile gaming site FanDuel has announced plans for a tech hub, with anticipated 900-plus jobs, in Atlanta. The proposed 68,000-square-foot operations center will host hundreds of high-paying jobs focused on software engineering, information technology and product development.

Minute Maid moving to Atlanta

Coca-Cola is moving its Texas-based Minute Maid operation to Atlanta. The decision will end a 57-year relationship Coke's flagship juice brand has had with the Houston area. The Sugar Land-based offices house 120 employees who have been working remotely for the past

New Boston Whaler factory opens in Florida

Brunswick Corporation and Boston Whaler recently held a groundbreaking ceremony ahead of the reopening of its 225,000-square-foot Flagler County manufacturing facility. The expansion will bring more than 400 jobs to the local economy.



RELOCATIONS & EXPANSIONS



Gov. Beshear announces projects in Eastern Kentucky

Governor Andy Beshear, Congressman Hal Rogers and local leaders held a news conference recently to announce Abandoned Mine Land projects in several Eastern Kentucky counties. The projects, funded by more than \$14 million in grants, will take place in Floyd, Harlan, Laurel, Morgan and Perry counties. "These projects are creating good jobs and a healthier future for Eastern Kentuckians," Gov. Beshear said. "These projects mean drinkable water and training and re-employment for those who have been laid off."

year during the coronavirus pandemic. Some of them may stay in the Houston area, a company spokeswoman said. The Minute Maid employees who move to Atlanta will be integrated into the company's main headquarters complex near Georgia Tech.

Second Amazon facility to open in Appling

Columbia County, Ga., recently announced that a second Amazon facility will break ground in the area. This new sortation center will employ hundreds of full-time and part-time employees. It will be located in the same business park as an Amazon fulfillment center that promises 800 jobs and significant growth for the area.

PAC Worldwide investing \$47 million in Fulton County with 400 jobs

PAC Worldwide, a global manufacturer of custom packaging, will open its first location in Georgia with a \$47 million investment in Fulton County. The company's new advanced manufacturing facility in Union City is expected to open in summer 2021 and will create 400 jobs.

Danimer Scientific planning \$700 million, 400-job expansion in Georgia

Danimer Scientific, a developer and manufacturer of biodegradable materials, plans to invest \$700 million in expanding its Bainbridge

manufacturing operations, nearly quadrupling its workforce in Decatur County. In March, Danimer and Mars-Wrigley announced a partnership to develop an innovative home compostable packaging, with Skittles candy as the brand's first product to use the new packaging.

Sumter County to gain 1,000 jobs with new call center

A ribbon-cutting was recently hosted as TLC Associates opened its new call center facility in the Ted Baldwin Business and Technology Park Complex in Americus, Ga. The company will hire 1,000 staff members.

KENTUCKY

Update: Amazon begins hiring 2,000 new jobs at CVG

Amazon announced that it has begun hiring for jobs at its \$1.5 billion air cargo hub at the Cincinnati/Northern Kentucky International Airport, where it plans to create 2,000 new positions. The jobs — loading and unloading aircraft and sorting packages — will pay at least \$17.50 per hour and include a signing bonus of \$2,000.

TVA to build Kentucky's largest solar site

The Tennessee Valley Authority has announced plans to build the largest solar-plus-storage project in its Kentucky service area, which will benefit two well-known companies. The new Logan County solar farm, part of the TVA's Green Invest program, will provide Facebook's regional data center operations with 145 megawatts of solar power and General Motors' Corvette Plant in Bowling Green with 28 megawatts of solar power.

Kentucky glass plant getting \$45 million from Apple

Apple is strengthening ties to Corning's plant in Mercer County, Ky., announcing it will award another \$45 million to support Corning's work to supply glass for the tech giant's iPhones and other devices. This latest investment will expand Corning's manufacturing capacity and "drive research and development," according to Apple.

Tofu maker announces big Kentucky deal

House Foods, a maker of tofu, will locate its first Ken-

tucky facility in Louisville. The company is investing \$146 million and will create 109 full-time jobs.

Manufacturer adding 700 jobs in Kentucky

KCC Manufacturing, a manufacturer of commercial HVAC products, is expanding in Simpsonville, Ky. The company will invest \$60 million and is adding 700 jobs.

Nucor adding a tube mill in Kentucky

Nucor Tubular Products, a division of steel products manufacturer Nucor Corp., plans to build a \$164 million tube mill and create 72 full-time jobs in Gallatin County. With this investment, Nucor will add to its already significant presence there.

LOUISIANA

Amazon creating 1,000 jobs in Northwestern Louisiana

Amazon has planned a 650,000-square-foot fulfillment center in the northwestern Louisiana city of Shreveport. The development will generate \$200 mil-

lion in capital investment and add more than 1,000 jobs to the local economy.

ExxonMobil plans \$334 million expansion at Baton Rouge chemical plant

ExxonMobil is planning to invest \$334 million on an expansion and maintenance project at its chemical plant in Baton Rouge. The project will create about 750 temporary construction jobs over the next two years, according to the company in its filing with the state. Upgrades at the chemical plant, which employs 3,700 workers, has begun and is expected to complete by 2023.

MISSISSIPPI

Amazon to open new facility in Mississippi

Amazon plans to open a new fulfillment center in Byhalia, Miss. The company expects to hire 500 in the deal.

Red Land Cotton bringing 40 jobs to Tylertown

Red Land Cotton, a manufacturer of high-end linens,

Big deal in North Central Mississippi

Milwaukee Tool announced in the spring it will build a facility in Grenada, Miss., that will house 800 workers. The company will also add another 400 jobs at other plants it operates in the state along with a \$60 million investment. The Greater Grenada Partnership and the Tennessee Valley Authority (TVA) also are assisting with the project. The Greater Grenada Partnership donated 40 acres in the Grenada County Business and Technology Park to help capture the deal.

has located sewing operations in Tylertown. The project is a \$375,000 investment and will create 40 jobs.

Mississippi sawmill adds 43 jobs

Hankins Lumber in Grenada, Miss., is adding new sawmill operations, Hankins Timbers, to its existing business enterprise. The project is a \$12.5 million corporate investment and will create 43 jobs.

MISSOURI

Impressive job-making deal in Missouri

Carlisle Construction Materials, a manufacturer of building products for the real estate markets, announced in April it is investing \$62 million in a new deal in Sikeston, Mo. The project will create 100 new jobs.

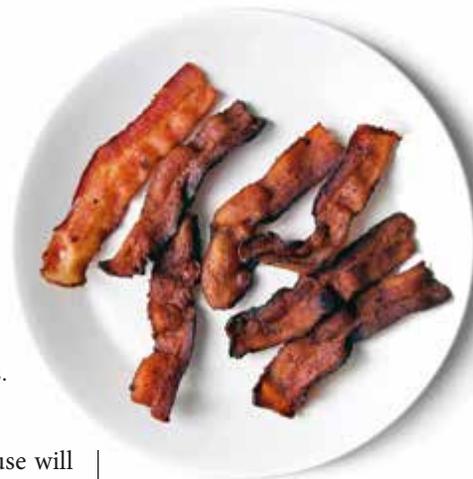
CONTINUED



Lineage Logistics investing \$42 million in New Orleans expansion

Michigan-based Lineage Logistics will build a \$42 million expansion of its cold storage facility at Port of New Orleans. Lineage plans to create 50 new jobs there.

RELOCATIONS & EXPANSIONS



Meat processor to create jobs in Missouri

Chicago-based Swift Prepared Foods, a maker of sausages and other meat products, is opening a new meat processing facility in Columbia, Mo. The \$200 million development will create 251 jobs.

John Deere Reman expands in Springfield, creating 130 new jobs

Deere & Company, a world leader in agriculture and construction, is expanding operations in Springfield. The re-manufacturing division of Deere & Company — John Deere Reman — will add drivetrain and hydraulic re-manufacturing operations to its existing facilities, creating 130 new jobs.

Big distribution deal in Joplin

This spring, Casey's General Stores cut the ribbon on its new \$62 million distribution center in Joplin. The state-of-the-art warehouse, logistics and distribution facility will add 125 jobs to the region.

NORTH CAROLINA

Apple announces 20,000 new U.S. jobs, 3,000 in Research Triangle

In April, Apple announced it

would add 20,000 new jobs in the U.S., and invest over \$400 billion in new projects around the country. At the same time, Apple revealed plans for a new \$1 billion, 3,000-employee campus between the cities of Raleigh, Durham and Chapel Hill in the Research Triangle. The new campus will involve machine learning, artificial intelligence and software engineering. According to the *Charlotte Observer*, the incentives to Apple could reach \$1 billion. If so, that would be the largest in North Carolina history.

Amazon bringing \$100 million distribution center to Johnston County

Amazon is planning another major expansion in the Triangle, with a \$100 million distribution and fulfillment center in the works for Smithfield in Johnston

County. The warehouse will create 500 jobs paying at least \$15 an hour.

Amazon announces new facilities for Charlotte

Amazon plans to open a new fulfillment center and two delivery stations that will bring hundreds of new jobs to the Charlotte area. The news comes after Amazon last fall announced the opening of new distribution centers in the Charlotte area that would create more than 1,000 jobs.

Aluminum can maker expands in Winston-Salem

Ardagh Group, a supplier of infinitely recyclable metal and glass packaging, will add 94 new jobs in Forsyth County. The company will invest at least \$195 million to expand its current beverage can metal manufacturing facility in Winston-Salem.

Google bringing engineering hub and 1,000 jobs

Google is opening a cloud engineering hub in Durham, the California-based tech

giant announced recently. The company said the office could eventually support more than 1,000 jobs and grow into one of Google Cloud's top five engineering hubs in the U.S. The company's Google Cloud division will initially lease space in downtown Durham from Duke University and is "evaluating several locations" for a permanent home.

Credit Karma expanding in Charlotte with 600 jobs

Credit Karma announced that it is expanding its operations in Charlotte, adding 600 new jobs and investing \$13 million to transform its existing operations into an East Coast Headquarters.

British pharmaceutical manufacturer opening new facility

Abzena, a British pharmaceutical manufacturer, will invest \$213 million in Sanford, N.C., for a new plant that will house 325 workers.

Chicken coop company returns to North Carolina

A custom chicken coop manufacturer is returning to North Carolina with plans to create hundreds of new jobs. Carolina Coops was founded in Durham in 2009. As it expanded, it opened in upstate New York. Now, a \$2.1 million investment will bring a new manufacturing location to Butner. Carolina Coops will create 147 new jobs over the next three years in Granville County. By 2026, the company expects to have created as many as 500 new jobs.





Oracle to bring 8,500 jobs, invest \$1.2 billion in Nashville

In one of the South's largest economic development deals in history, Austin, Texas-based Oracle via its previous headquarters in Redwood Shores, Calif., announced in the late spring it is building a campus on the east bank of the Cumberland River in downtown Nashville. Oracle is purchasing the land and investing \$1.2 billion in the deal that will create over 8,000 jobs.

Biopharma company creating 725 new jobs in North Carolina

North Carolina's largest biopharmaceutical manufacturing organization, Fujifilm Diosynth Biotechnologies, plans to create 725 jobs and invest \$2 billion in Wake County. The subsidiary of Japanese conglomerate Fujifilm is building a new cell culture manufacturing facility in Holly Springs, N.C. The project was announced in January 2021, and the location finalized in March, with construction beginning immediately.

Red Hats for 500 new employees

IBM acquired Raleigh-based

Red Hat two years ago for a whopping \$34 billion. Now, the company plans to hire more than 500 new associates, concentrating on adding staff in the Triangle area of North Carolina and in Boston. The new talent will help develop products to meet the emerging edge computing needs of its clients.

OKLAHOMA

Whirlpool announces a major expansion in Tulsa

Whirlpool announced it is investing \$15 million into its factory in Tulsa, where the company produces free-standing and slide-in ranges under the Whirlpool, Amana, Maytag, KitchenAid and

JennAir brands. The expansion will also mean the addition of 150 jobs there.

Trailer manufacturer adding jobs in Oklahoma

Cimarron Trailers, a manufacturer of aluminum trailers, is adding jobs at its plant in Chickasha, Okla. The plant will house 40 new workers.

SOUTH CAROLINA

Another deal for Clarendon County

Clarendon County continues its run of projects announced over the last year or two. This time, Palmetto Yacht Management, a marine transport firm for luxury and oversized yachts,

announced plans to invest nearly \$4 million to establish operations in Clarendon County. More than 200 jobs will be created.

QVC expands operations in Florence County

QVC, the home shopping television network, is expanding its fulfillment center in Florence County, S.C. The \$27.5 million project will generate 360 new jobs.

TENNESSEE

New manufacturer will bring 625 jobs to Orinda, Tenn.

Puritan Medical Products, North America's largest manufacturer of COVID-19 testing swabs, will establish



Google expands in South Carolina with a \$500 million investment

Google is investing \$7 billion nationwide and \$500 million will go toward further expanding its Berkeley County, S.C., operations. The company anticipates creating 10,000 full-time jobs this year, though there are no specifics yet on how many of those positions could be in South Carolina.

RELOCATIONS & EXPANSIONS

BP's new offshore platform arrives in Texas

After a two-month, 16,000-mile trip, BP's new Argos offshore platform arrived recently near Corpus Christi, bringing hundreds of jobs to the Gulf Coast offshore industry. The floating platform (which is as tall as a 27-story building and with a deck the size of a football field) is one of BP's largest oil production platforms. It is the centerpiece of the British oil company's \$9 billion project to extract oil from the Mad Dog 2 field in 4,500 feet of water almost 200 miles south of New Orleans.



new manufacturing and distribution operations in Orinda, just south of Nashville. The project represents an investment of \$220 million and the creation of 625 jobs over the next five years.

Amazon has begun hiring 1,000 jobs for new facility in Mt. Juliet

Amazon has started hiring for more than 1,000 full-time jobs at its new robotics fulfillment center in Mt. Juliet, Tenn. The facility will use robotics technology to pick, pack and ship smaller items to customers across the region. Amazon has projected up to 3,000 jobs for the Mt. Juliet facility.

French pet food company to expand Tennessee facility

Royal Canin, a pet food company headquartered in France, will expand its Lebanon facility, adding more than 90 jobs and investing more than \$200 million. The Wilson County facility expansion began in

2019, and is scheduled for completion in 2022.

NTT Data chooses Nashville for its digital innovation center

NTT Data Services, a global technology firm, says it will make Nashville, Tenn., the home of its new digital innovation center. The company, which has several offices across the U.S., will invest \$9.9 million and create 350 jobs with a focus on health-care and manufacturing technology.

Gap distribution center expands in Gallatin, Tenn., creating 600 jobs

Gallatin's Gap distribution center will expand operations with an \$83 million investment and 600 new, full-time jobs.

Amazon adding hundreds of jobs in Memphis

Amazon announced a new facility in Memphis that will ship large items such as mattresses, grills and kayaks.

TEXAS

Four Lubbock companies announce combined 500 new jobs

Four Lubbock-based companies are planning to expand, creating over 500 jobs and investing a combined \$11.4 million in capital: SIMFLO, a leader in the vertical and submersible turbine markets, is expanding its current facility and constructing a new testing facility in Lubbock, which will be one of the largest test pits in North America. SIMFLO will invest \$5 million and create 12 jobs. VXI Global Solutions, which designs customer engagement platforms, is creating over 350 new jobs. Tech company Starnik Systems, headquartered in Lubbock, is expanding with a capital investment of \$5 million, and will bring 75 new jobs to the area. CEV Multimedia, which produces instructional materials for students and teachers, is creating 89 new Lubbock-based jobs, with a \$229,555 investment.

ExxonMobil pitches \$100 billion Houston carbon capture hub

ExxonMobil is seeking federal support to develop a facility that could capture all of the CO2 emissions from refineries and industrial facilities along the Houston Ship Channel. The price tag? An estimated \$100 billion or more.

Tube manufacturer to bring jobs to large Texas steel plant

Bull Moose Tube will build a pipe mill on the Steel Dynamics campus in Sinton, Texas, near Corpus Christi. The new plant will produce 350,000 tons of hollow structural steel tube and sprinkler pipe each year. The project will generate 50 jobs.

New space media platform chooses Brownsville, Texas

Space Channel, a news and entertainment channel dedicated to all things space, will locate its new studio operations in Brownsville, mov-

Frozen treat maker expanding in West Virginia

The Ziegenfelder Company is immediately creating 40 jobs at its manufacturing plant in Wheeling, W.Va. The hiring need is fueled by the company's expansion and the addition of a new frozen dessert line.

ing from Los Angeles, Calif. The new studio will support Space Channel's international network by focusing on Brownsville's space-related infrastructure and its growing role in the space industry.

Fidelity Investments to hire hundreds at Westlake campus

Fidelity Investments will hire 475 new employees at its Westlake campus as part of a push to build out digital tools for investors and bolster client-facing positions

Nacero plans \$7 billion gas plant in Texas

The Odessa (Texas) Development Corporation and Nacero, a Houston-based company, have announced plans to build a \$7 billion lower carbon gasoline manufacturing facility at a site in Penwell, Texas (near Odessa), in two phases. Construction of the Penwell facility will employ a peak of 3,500 workers during the four years of phase one construction. When fully operational, the plant will employ 350 op-

erators and maintenance personnel with annual salaries of approximately \$85,000 per person. Construction is slated to begin in Penwell before the end of this year.

Texas medical marijuana facility to create hundreds of jobs

Atlanta-based cannabis operator Parallel announced the creation of a \$25 million cannabis cultivation, production and retail facility in the city of San Marcos. The new facility will create "hundreds of jobs" according to the local newspaper there.

Covestro plans \$4.7 billion expansion near Houston

German chemical manufacturer Covestro AG wants to expand its plant in Baytown, Texas, with a \$1.69 billion investment. The company will build new manufacturing units for polyurethane and polycarbonates at its existing manufacturing site near Houston.

VIRGINIA

Consulting company HQ lands in Tysons, Va., will create 900 jobs

Guidehouse, a management consulting company, will invest \$12.7 million to establish a global headquarters and create 900 jobs in Tysons. The new campus will house more than 1,550 employees when at full capacity,

Air purification company bringing 100 new jobs to Radford, Va.

Oransi, a North Carolina-based company that specializes in air purification products, is planning to invest \$5.6 million to open a manufacturing facility in Radford. The company's first manufacturing facility will create 101 new jobs.

Amazon to build robotics fulfillment center in Richmond

Amazon announced in April it will build a robotics fulfillment center in Henrico County. The facility will house 1,000 workers.

Biotech firm expanding in Richmond

Grenova, a Virginia-based sustainable biotech firm, is expanding its operations in Richmond. The company



will make devices to wash and sterilize contaminated pipette tips for reuse in COVID-19 testing. The \$10 million project will create 250 new jobs.

WEST VIRGINIA

Atlanta-based firm growing in West Virginia
The Atlanta-based business-to-business firm N3, which uses artificial intelligence and machine learning to improve clients' sales portfolios, is expanding in Charleston, W.Va. N3, a subsidiary of Accenture, will add 100 jobs in the deal.

Sheetz to build distribution depot in Jefferson County, W.Va.
The convenience store chain Sheetz plans to build a \$2 million distribution truck transfer station in Kearneysville. When completed, the station will employ 34 workers. 📍

Big hydroponic greenhouse to create over 100 jobs in Virginia

Sunny Farms will invest \$59.6 million to establish a "state-of-the-art" facility at Taylor Farms in Virginia Beach. The deal will create 155 new jobs.



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For all economic development projects announced in the South, go to SB-D.com. For more information on the
automotive industry in the South, go to SouthernAutoCorridor.com.

Hyundai to invest billions in electric vehicles in the Southern Automotive Corridor

South Korean sister automakers Hyundai and Kia will invest \$7.4 billion in their electric vehicle transition in the U.S., the companies announced in the spring. Hyundai operates its only U.S. plant in Montgomery, Ala., and Kia operates its only U.S. plant 80 miles away in West Point, Ga.



GM will support UAW at its two new battery plants

In May, General Motors announced it will support union efforts to organize at the two U.S. electric vehicle battery factories that it's building in Ohio and Tennessee with its joint-venture partner. The union is working to create a wage of about \$31 per hour at the two plants.

ALABAMA

Mazda Toyota set to begin production in Alabama

To date, Mazda Toyota has hired 1,600 workers for its plant in Huntsville that will soon begin mass production. In June, the joint venture announced the first vehicle to be made at the plant — the Toyota Corolla Cross small SUV.

Mazda Toyota still has to hire 2,400 more workers, which they have found particularly tough during a pandemic. Danielle Winningham, executive director of the Tuscaloosa County EDA (home of Mercedes-Benz) said that her county alone will see about 3,200 new jobs created in the next two to three years.

Mercedes suppliers foresee 3,200 new jobs for the Tuscaloosa area

Regarding potential job growth at Mercedes-Benz U.S. International, the automaker predicts its suppliers are looking to bring 3,200 jobs to the Tuscaloosa County area within the next two to three years as it expands into the electric vehicle market.

GEORGIA

EV charging giant opening HQ in Atlanta

A Netherlands-based supplier of charging stations for electric vehicles, Heliox, will set up a North American headquarters in Atlanta, hiring 70. North America is expected to become the largest market for e-mobility in the next five years.

Korean automotive manufacturer opening first U.S. facility in Jackson County

Duckyang, a supplier of automotive battery modules and energy storage systems to SK Battery America, will invest \$10 million in opening its first U.S. manufacturing plant in Braselton, Ga. The

new facility will create 285 jobs in Jackson County.

Auto battery deal saves 2,600 Georgia jobs

Electric vehicle parts competitors SK Innovation (SKI) and LG Energy Solution (LGES) have reached an agreement in an ongoing dispute on trade secrets that will preserve 2,600 jobs in Northeast Georgia. The U.S. International Trade Commission (ITC) ruled in favor of LGES in February, after the company accused SKI of stealing 22 of its trade secrets. The ruling banned SKI from importing battery parts and components for 10 years, with some exceptions. SKI has agreed to pay LGES \$1.8 billion in lump-sum payments and royalties. Both companies agreed to withdraw pending litigation and not seek enforcement of patent or intellectual rights for 10 years.

Hyundai TRANSYS adds another \$9 million and 150 jobs to major expansion

With a \$9 million investment, Hyundai TRANSYS Georgia Seating System will expand its manufacturing operations in West Point, Ga., which is expected to add more than 150 jobs in Troup County. The Hyundai subsidiary makes seats and seat foam pads for several Hyundai vehicle lines and electric vehicle makers.

KENTUCKY

Metalsa expanding again

Mexican automotive parts supplier Metalsa is expanding its existing facility in Hopkinsville, adding new equipment and 97 jobs. The company currently employs more than 600 people at its Christian County plant. Metalsa makes chassis structures for vehicles. It also has facilities in Elizabethtown and Owensboro.

Morgantown manufacturer expanding with 135 new jobs

Stratus Plastics, a plastics manufacturing company located in Morgantown, Ky., has announced its latest expansion project. The facility will hire approximately 135 people to make essential plastic parts that will be used in automotive manufacturing and assembling processes.

Auto supplier creating 200 jobs in Louisville with new facility

Michigan-based Eberspaecher North America, a system developer and supplier of exhaust technology, thermal management systems and automotive electronics, is expected to create 214 jobs with a new facility in Louisville.

NORTH CAROLINA

Cummins adding jobs in North Carolina

Cummins, which makes mid-range diesel engines at its plant in Whitakers, N.C., is expanding its facility that houses 1,800 workers. The company is investing \$42 million at its Rocky Mount Engine Plant.

Wayne County gaining 96 new jobs from auto supplier

An automotive exhaust manufacturer will create 96 new jobs in Wayne County, N.C. AP Emissions Technologies will invest \$400,000 to expand its e-commerce operations in Goldsboro.

SOUTH CAROLINA

Magna Mirrors bringing 300 new jobs with \$31 million factory build in Duncan

Magna Mirrors is constructing a \$31 million manufacturing facility in Duncan. The facility is expected to employ 300 people to produce high-tech vehicle mirrors with cameras and sensor technology.

King Machine expanding in Sumter

King Machine, a tire mold manufacturer, has announced plans to expand operations in Sumter County. The \$2.6 mil-

lion investment will create 30 new jobs. Located in the Black River Industrial Park in Sumter, King Machine's expansion will include a 50,000-square-foot facility.

TENNESSEE

Nissan begins assembling new Pathfinder in Tennessee

Japanese automaker Nissan began the assembly of its new 2022 Pathfinder model at its plant in Smyrna. The first model rolled off the line in May with its powertrain being built nearby in Decherd, Tenn. More than 7,000 workers are housed at the plant in Smyrna, east of Nashville.

Volkswagen plant in Tennessee tops 4,000 workers

The German automaker Volkswagen has steadily invested in its plant in Chattanooga since it announced in July of 2008. There are now multiple lines, including an electric line and a battery facility. In the spring, contractor Aerotek announced it will hire 150 production workers at the plant to help assemble the Passat sedan model. The new hires bring employment at the plant to over 4,000 for the first time.

EV manufacturer bringing 400 jobs to Memphis with \$336 million investment

Electric vehicle manufacturer Mullen Technologies is looking to expand into Memphis, creating more than 400 jobs in the process. The California-based startup plans to spend more than \$336 million setting up shop at the site, which was formerly in-

habited by Nike, but has been vacant for the past five years.

TEXAS

Elon Musk recruits employees at new Austin Tesla plant via Twitter

Entrepreneur Elon Musk of SpaceX and Tesla took to Twitter in April to recruit employees at the new Gigafactory that will build Tesla's first cybertruck near the airport in Austin. Musk wants to recruit 10,000 employees to the new facility, double the number originally announced.

VIRGINIA

STS Group opening first U.S. location in Wythe County

STS Group AG, a supplier of interior and exterior parts for commercial vehicles, will invest \$39 million to establish its first U.S. manufacturing operation in Wythe County's Progress Park, creating 120 new jobs. The new facility will supply Volvo Trucks in Pulaski County and other truck and automotive facilities throughout the Midwest and Southeastern U.S. markets.

WEST VIRGINIA

Toyota West Virginia expanding Buffalo facility

Toyota Motor Manufacturing West Virginia (TMMWV) will invest \$210 million to upgrade existing engine production and add 100 new jobs to increase capacity of its four-cylinder engine line. Once complete, TMMWV's total investment will be more than \$1.8 billion and employment will exceed 2,000 at the Buffalo facility. ⚡



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German automaker Volkswagen has steadily invested in its plant in Chattanooga since it announced in July of 2008. There are now multiple lines, including an electric vehicle line and a battery facility.

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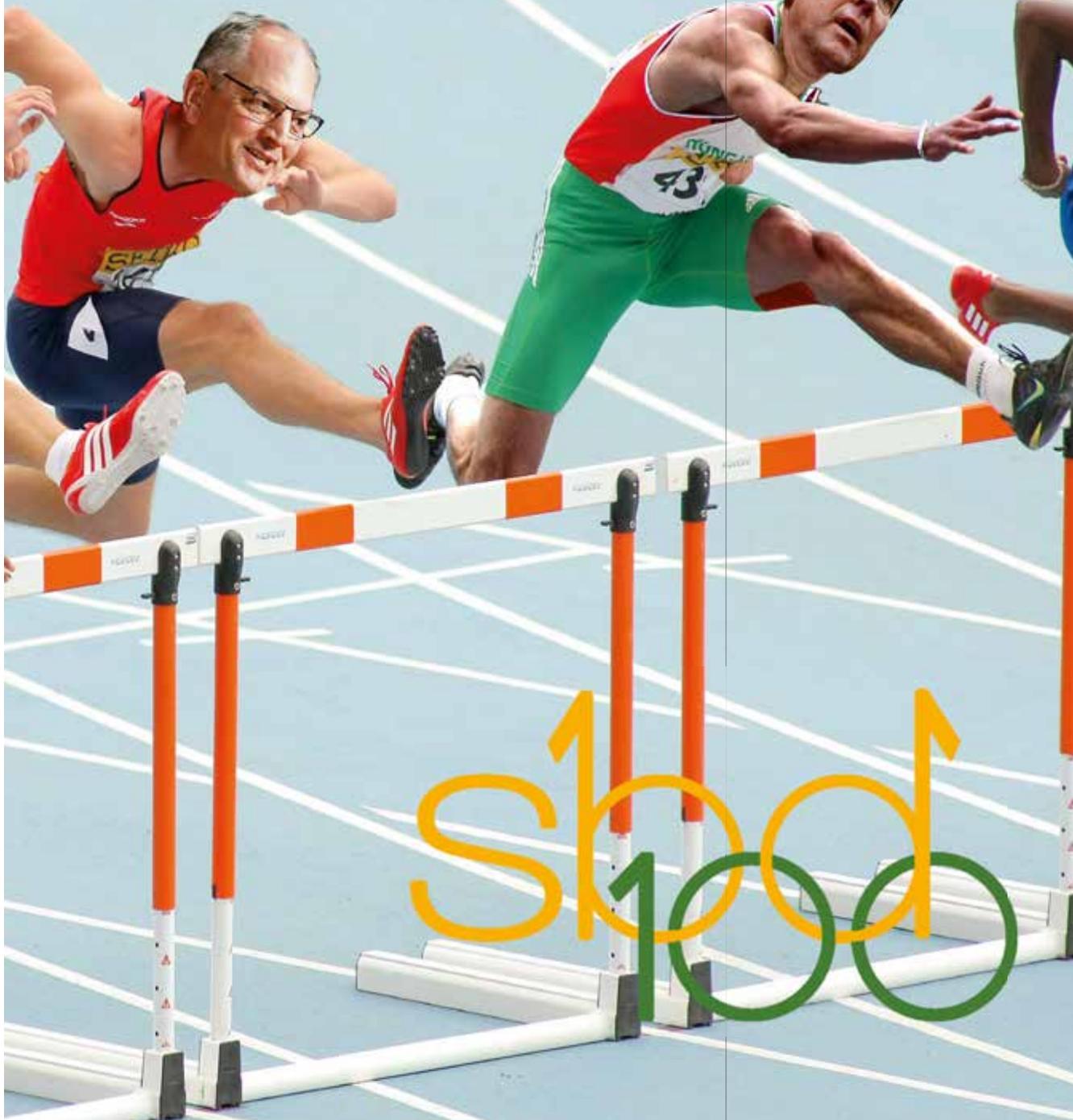
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Jumping Hurdles

IN 2020

BY MICHAEL RANDLE



Stop100



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Another year of monitoring economic development project activity in the South — the world’s third largest economy — clearly shows that this last 10-year recovery that ended in the spring of 2020 thanks to the pandemic (the longest recovery on record), peaked in 2015 or 2016. SB&D doesn’t judge an economy as an economist does, using real time data such as job creation, GDP, worker productivity and unemployment rates, even though unemployment rates are incredibly important in economic development. We look at the economy in just one way — economic development project activity broken down by how many manufacturing and service projects were announced in the region each calendar year.

To judge where the economy is and how it is performing, we count the number of projects meeting or exceeding 200 jobs and/or \$30 million in investment announced in the South each year. We use projects submitted by each of the 15 states’ economic development agencies and back that up with announcements published on our fantastic news aggregator site, RandleReport.com.

We call it the SB&D 100 because we publish the top 100 job and investment projects announced the previous calendar year. Ranking the top 100 announced projects creates a threshold for both rankings, and that threshold is the 100th largest project. So, any project of 200 jobs or more and/or \$30 million or more in investment up to the 100th largest project earns a state or community five points. If a project lands on either SB&D 100 ranking — jobs or investment — it earns 10 points. In other words, we give larger projects more points, so the ranking is weighted.

We count the points in each market category: rural (less than 50,000 in population), small market (50,000 to 249,999), mid-market (250,000 to 749,999), major market (750,000 to 2.49 million) and mega-market (over 2.5 million in population). Based on points earned, we also rank states. However, while markets are ranked among their peer groups by points exclusively, on the state level, those recognized are the highest point earners based on points per million persons, or points per capita. If we did not rank states on points earned per capita,



The largest job-generating project announced in 2020 was Tesla’s Gigafactory. Del Valle, Texas, outside Austin, will be the location of the 5,000-job manufacturing site for the Tesla Semi, among other models by the automaker.

Texas would win every year based on points alone, and that’s no fun.

This method of judging the economy makes sense if you think about it. Companies looking to expand production capacity — services or manufacturing — employ experts that can see around corners. These experts — economists or not — usually have an accurate opinion on what the economy will be doing in six months, a year, or three years, depending on how long the project will take to complete. Every year is different and this, the 2021 SB&D 100, happened to occur during a pandemic for the first time ever.

CONTINUED



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If there was ever any doubt, the pandemic proved that Americans love their pets. People flocked to animal shelters to adopt, and the pet industry hurried to keep up with demand: Chewy in Richardson, Texas; Fresh Pet in Ennis, Texas; Nestlé Purina in Hartwell, Ga., and Rockingham County, N.C.; all made the SB&D 100.



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So, how bad was it? How did the economy fare in the South during the worst pandemic in 100 years? After the 2001 recession during George W. Bush's first year as president, Southern Business & Development ran a cover story titled, "So, how bad was it?" SB&D's answer to the question was something like, "Man, the 2001 recession could have been so much worse." Thankfully, it wasn't nearly as bad as the next recession, the Great Recession of 2007-2009, which I have described multiple times as a "financial disaster."

Yes, we saw economic development projects drop dramatically 20 years ago, or the year of 9/11 and one year removed from the Y2K scare (remember that?). In the fall quarter of 2001, in the few months after 9/11, there were fewer deals recorded in the South than any quarter in SB&D 100 history, or since 1993. In the years of 2001 to 2003, after several years of the go-go 1990s with no year falling to project totals below the 500 level, economic development projects in the South meeting or exceeding our thresholds of 200 jobs and/or \$30 million in investment fell into the 400s.

This year, too, for the first time since 2008, project totals in the 2021 SB&D 100 dropped below the 500 mark (but just slightly) at 497. Again, not nearly as bad as we were thinking or projecting. It could have been and should have been so much worse. The 10-year recovery of the economy from the Great Recession clearly peaked in 2015 when the 15-state American South announced 730 projects of 200 jobs or more and/or an investment of \$30 million. That year holds the record for number of deals announced meeting our thresholds in the South after almost 30 years.

This is what we faced in the beginning of the pandemic — a shutdown of most businesses — During the last two weeks of March 2020, the U.S. economy saw nearly 10 million new unemployment claims, a total never seen ever. Yep, in just two

weeks. As the pandemic raged on in April, business closures and layoffs spiked to the highest level in U.S. history. Higher than in World War II, worse than World War I and any other catastrophe this nation's economy has suffered, including the Great Depression.

Incredibly, total non-farm payroll employment fell by 20.5 million in the U.S. in April of 2020. Peak weekly unemployment claims occurred the week of March 28, when 6.9 million filed for first-time unemployment assistance.

To give you an idea of what a massive crater that 6.9 million was in unemployment claims, the peak week prior to March 28, 2020, was 650,000 claims in 2008 during a week in the Great Recession. That was in one week. So, ten times the previous peak in unemployment claims in the U.S. occurred in March of 2020. Pretty bad, huh? Yes, but it got worse.

By the start of the second quarter of last year, the economy was in a deep dive. In less than 60 days, the U.S. found itself in a wide-ranging recession. The long 10-year recovery from the Great Recession was history. Nada. Gone forever all because of the virus, or the U.S. government's response to it at the start.

The coronavirus pandemic, as it was defined by the WHO at the end of the first quarter, triggered the deepest reduction in gross domestic product in the nation's modern-day history. Again, the longest economic expansion in the U.S. — 113 consecutive months of job growth that began in June 2009 — was over by the end of the first quarter of last year, and it got worse by the second quarter of 2020.

Gross domestic product — easily the best method of judging an economy — fell by an enormous annual rate of 32.9 percent in the second quarter of 2020. That is more than three times the previous annual record of GDP

“By the start of the second quarter of last year, the economy was in a deep dive. In less than 60 days, the U.S. found itself in a wide-ranging recession.”

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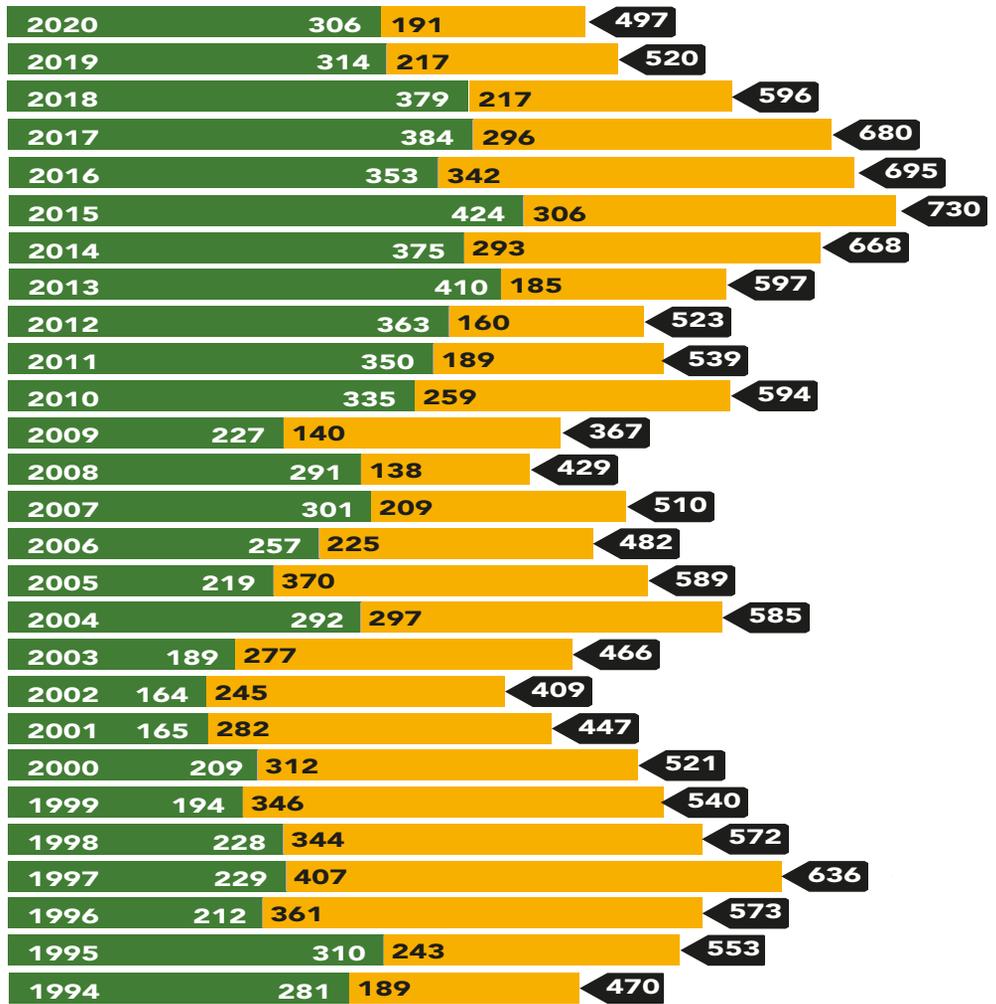
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The South's Manufacturing vs. Non-Manufacturing Projects 1994-2020



MANUFACTURING
NON-MANUFACTURING
TOTAL PROJECTS

Totals are derived from all projects announced in the American South 1994-2020 calendar years meeting or exceeding 200 jobs and/or \$30 million in investment. Source: SB&D

decline, which was a 10 percent drop in 1958. On a quarterly basis, the 9.1 percent drop in GDP in the second quarter of 2020 was more than triple the previous high of 3 percent since records first began.

In the second quarter, the consumer economy ground to a halt as retailers and almost everything in the service economy shut down in an effort to slow the spread of the virus. In an NPR article published in July, chief economist at IHS Markit, Nariman Behraves, called the enormous downturn in GDP in the second quarter “horrific.”

Things brighten in the second half of 2020, but how?

There were some economic bright spots as early as April 2020. It should be noted that U.S. retail sales increased by 17.7 percent from April to May, the largest monthly increase in U.S. history. But that increase was simply because some inroads were made in retail openings after a total collapse of closures in March. Ghost towns were everywhere.

But, keep in mind that personal stimulus checks were being received in April and May as well as small business Paycheck Protection Program checks.

Called the CARES ACT, the first round of federal aid totaled over \$2 trillion, more than doubling the stimulus of the Great Recession.

By the start of the fall 2020 quarter, the pandemic had claimed more lives than those lost in the Vietnam War (Source: Ducharme 2020; authors’ calculations). By then, however, the deaths were slowing despite the fact that some states lifted social distancing restrictions in the summer. By September 7, 2020, there were only 23,500 new cases of COVID. By the end of October, those cases had quadrupled. Probably as a result of more people being allowed into businesses.

By the end of January of this year, over 300,000 cases a day were occurring, the highest since the pandemic began. At the same time, the first of the vaccines were administered. Not many at first, but by May 2021, new cases dropped below 10,000 as a result of the multiple vaccine programs. By the end of May, about 40 percent of the U.S. population had been fully vaccinated.

The second and third stimulus programs worked like an economic engine

While many believe that President Biden signed the second stimulus of another \$1 trillion or so to head off the economic crisis caused by the pandemic, it was actually President Trump. This round of loans (that most will not repay) really jump-started the economy at the beginning of January. Then Biden signed another round of stimulus spending — this worth \$1.9 trillion — in March.

The effectiveness of these stimulus programs (or you can call them bailouts) won't be seen until the money runs out, and that is going to be at least another year. If the recession was caused by the pandemic or something else (it is my opinion we were already headed for recession in 2018), then most agree that this large federal assistance plan was required for the economy to get on its feet. . .and it did.

So, today, you find states with the same unemployment rates that they had prior to the pandemic. But without nearly \$5 trillion in aid, there is no question in my mind the COVID recession would have lasted much longer.

Project activity in the South during the pandemic

With well-known economists like Nariman Behravesh using the word “horrific” to describe the economic environment in calendar year 2020, how

did project activity fare in the South? To be honest, not too bad, for deals announced in a “horrific” pandemic. Yet, the 2021 SB&D 100, with 497 projects meeting or exceeding our thresholds, does represent the fifth consecutive year of falling project totals as you can see by the chart on the opposite page.

Unlike the Great Recession more than a dozen years ago, where no industry sector went unscathed including the South's three largest industries — automotive, distribution and financial services — the COVID-19 recession was so unique that it actually created several opportunities for some regarding project activity. With almost everyone at home for much of the year — working at home, schooling at home — online spending just exploded.

To prove that, our data shows that Amazon announced 10 projects in calendar year 2020 in the South — not the

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Grön Fuels announced in November 2020 that its \$9.2 billion renewable fuel complex at the Port of Greater Baton Rouge would create 1,025 new direct jobs. The project earns the top spot on the SB&D 100 investment chart and the No. 18 spot on the jobs ranking.



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nation — with almost 18,000 jobs and a total investment of \$1.4 billion. That is an unheard-of total. No company has come close to earning 10 deals on any SB&D 100 in one year. Amazon announced 10 large projects in the middle of a pandemic.

2021 SB&D 100: Manufacturing vs. Services

Even with the pandemic in calendar year 2020, project totals making our thresholds stayed much the same from 2019 to 2020. There were 306 manufacturing projects making the “100” this year and 314 last year. Both years saw 191 big service deals, but with 10 coming from one company — Amazon — services actually had a terrible year. Of course, it was services that got slammed during the pandemic in 2020.

Manufacturing has pretty much dominated service projects for years now. In the 1990s that certainly wasn't the case. The 1990s saw the U.S. evolve into a services economy, much of it centered on the birth and maturation of the internet. The U.S. wasn't nearly as competitive in the manufacturing arena, as some years saw services doubling manufacturing in large deals. More than any other time over the last 30 years, the 1990s saw U.S. manufacturers making a beeline to China in a herd mentality. That has completely reversed for more than a dozen years now.

Look at the years 2007 to 2020. Manufacturing has dominated services in big economic development projects in the South. Why? That is easily answered. The South essentially became the most competitive region in the world to make something, particularly for U.S. consumption.

As manufacturing and labor costs soared in China and Mexico, the cost of doing business in the South actually dropped as the natural gas boom made the South incredibly competitive with other countries, even China. Around 2010, the term “reshoring” was invented. Economics after the Great Recession made it cost-effective to repatriate your plant back to the South, the least expen-



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TOP INDUSTRIES

NUMBER OF PROJECTS

	2020	2019	2018	2017	2016	2015	2014
1. Distribution	80	44	65	74	66	54	51
2. Food & Beverage	57	35	51	73	51	63	45
3. Automotive	40	65	51	72	85	111	81
4. Petrochemicals	33	33	40	27	41	70	47
5. Life Sciences	25	5	7	6	11	5	2
6. IT	21	24	21	21	24	20	25
7. Aviation/Aerospace	18	25	39	35	55	26	28
8. Pharmaceuticals	14	20	5	5	22	7	6
9. Healthcare	12	24	9	28	27	19	43
10. Metals	12	19	37	16	18	14	15
11. Financial Services	11	23	33	38	47	69	42
12. Renewable Energy	12	9	16	7	19	19	12
13. Data Centers	8	5	14	12	12	14	16
14. Headquarters	5	19	30	33	32	36	42
15. Call Centers	4	13	9	29	26	26	33

Totals are derived from all projects announced in the American South 2014-2020 calendar years meeting or exceeding 200 jobs and/or \$30 million in investment. Not every sector is included in the chart. Source: SB&D

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Top industries

There are some red flags flying with this SB&D 100 regarding some industry sectors. As mentioned with Amazon’s 10 projects, distribution for the second year in three years was your No. 1 industry with 80 large projects. That figure represents the best distribution has done in 28 years.

But automotive could only muster 40 deals, when in 2015 it produced 111 large projects. Financial services, always the canary in the coal mine, only put up 11 projects when that sector produced 69 in 2015.

In addition to distribution, the industries that did well in the 2021 SB&D 100 were food and beverage, life sciences, data centers and IT. Those that struggled include automotive, aerospace, healthcare and metals.

Some outstanding projects were announced in 2020 including a rare semiconductor deal in Richardson, Texas, and an Amazon air freight hub with 2,000 jobs in Northern Kentucky.

Conclusion

All-in-all, we here at SB&D feared the worst. We feared that because of the pandemic, total projects meeting or exceeding 200 jobs and/or \$30 million in investment could easily have set the low mark — below the 367 deals announced in 2009.

Yet, both presidents — Trump and Biden — as well as both political parties stepped up with huge monetary initiatives and incentives to keep employers paying employees, keep businesses open and keep folks paying their rent and mortgages with an unprecedented number of aid packages that the U.S. has never applied in its history.

These aid packages put so much mon-

ey “on the street” that for now, we have come back from the worst economic collapse in American history.

Others will say the debt created to emerge out of the virus recession cannot be sustained. That is debatable. Even before the pandemic, 50 cents of every dollar of U.S. expenditures went to interest servicing that debt alone. Yet, the dollar is the world’s currency and the U.S. controls its own currency.

So, what did we do? We printed so much new money — under both administrations — that we bought our way out of the pandemic recession. Bad thing? Good thing? We will see, but in the short term, it can only be described as a necessary thing.

So, how bad was it? In terms of large project activity in the South during a pandemic, we’d give it a “B.” That’s not so bad. 🌟

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RANK	COMPANY	JOBS	INV*	LOCATION	N/E/R	PRODUCT/SERVICE
1	Tesla	5,000	\$1,100	Del Valle, Texas	N	Automotive
2	Centene	3,237	\$1,035	Mecklenburg County, N.C.	N	Headquarters
3	Linear Labs	2,900	N/A	Fort Worth, Texas	E	Motors
4	Universal Music Group	2,500	\$1,200	Biloxi, Miss.	N	Casino Resort
5	SK Innovation	2,000	\$1,600	Jackson County, Ga.	E	EV Batteries
6	Costco	1,806	\$25	Oklahoma City, Okla.	E	Headquarters
7	U.S. Customs	1,700	\$2	Hendry County, Fla.	N	Customs
8	Peloton	1,600	\$11	Plano, Texas	E	Exercise Equipment
9	Microsoft	1,500	\$75	Atlanta, Ga.	N	IT
10	Microsoft	1,500	\$64	Fairfax County, Va.	N	IT
11	Amazon	1,500	N/A	Oak Cliff, Texas	N	Distribution
12	Aerotek	1,500	N/A	Fairfax County, Va.	E	Employment services
13	CWF GEM	1,400	\$265	Hampton County, S.C.	N	Aquaculture
14	Chewy	1,200	\$143	Belton, Mo.	N	Distribution
15	FedEx	1,200	\$8	Dallas, Texas	N	Distribution
16	HelloFresh	1,200	N/A	Irving, Texas	N	Food & Beverage
17	Bandwidth	1,165	\$103	Wake County, N.C.	E	Telecommunications
18	Grön Fuels	1,025	\$9,200	West Baton Rouge Parish, La.	N	Oil & Gas
19	Amazon	1,000	\$250	Mount Juliet, Tenn.	E	Distribution
20	Walmart	1,000	\$220	Dorchester County, S.C.	N	Distribution
21	Amazon	1,000	\$200	Memphis, Tenn.	E	Distribution
22	Amazon	1,000	\$200	Waco, Texas	N	Distribution
23	Amazon	1,000	\$35	Irving, Texas	N	Distribution
24	Paycom	1,000	\$25	Grapevine, Texas	N	IT
25	Amazon	1,000	N/A	Little Rock, Ark.	N	Distribution
26	Progressive	1,000	N/A	Tampa, Fla.	E	Financial services
27	Amazon	1,000	N/A	Dekalb County, Ga.	N	Distribution
28	Advance Aero Concepts	1,000	N/A	Caddo Parish, La.	N	Aviation/Aerospace
29	Amazon	1,000	N/A	Pflugerville, Texas	N	Distribution
30	Amazon	1,000	N/A	Richmond, Texas	N	Distribution
31	DST Innovations	1,000	N/A	Morgantown, W.Va.	N	Energy storage
32	TJX Companies	950	\$150	El Paso, Texas	N	Headquarters
33	BioAgilytix Labs	878	\$62	Durham County, N.C.	E	Biotechnology
34	Zinus	804	\$108	Henry County, Ga.	N	Mattresses
35	Pratt & Whitney	800	\$650	Buncombe County, N.C.	N	Aviation/Aerospace
36	Amazon	800	N/A	Columbia County, Ga.	N	Distribution
37	Norfolk Southern	800	N/A	Atlanta, Ga.	N	Headquarters
38	Amazon	750	N/A	Temple Terrace, Fla.	N	Distribution
39	Amazon	750	N/A	Lutz, Fla.	N	Distribution
40	HelloFresh	750	N/A	Coweta County, Ga.	N	Distribution
41	Amazon	700	\$192	El Paso, Texas	N	Distribution
42	BAE Systems	700	\$150	Austin, Texas	E	Aviation/Aerospace
43	Ross Stores	700	\$68	York County, S.C.	E	Distribution
44	ThredUp	700	\$28	Gwinnett County, Ga.	E	Distribution
45	Amazon	700	\$9	Round Rock, Texas	E	Distribution
46	Chewy	700	\$2	Richardson, Texas	N	Pet Food
47	Crawford & Company	700	\$2	Allen, Texas	N	Financial services
48	Aerion Supersonic	675	\$300	Melbourne, Fla.	N	Aviation/Aerospace
49	Macy's	660	\$14	Atlanta, Ga.	N	IT
50	Access Dental Lab TX	630	\$34	Columbia, Tenn.	E	Healthcare

RANK	COMPANY	JOBS	INV*	LOCATION	N/E/R	PRODUCT/SERVICE
51	SK Innovation	600	\$940	Jackson County, Ga.	E	EV Batteries
52	Bang Energy	600	\$145	Douglas County, Ga.	N	Food & Beverage
53	Amazon	600	\$30	Dallas, Texas	E	Distribution
54	Veterans United	600	\$14	Columbia, Mo.	E	Financial Services
55	Flex Health	600	\$3	Austin, Texas	E	Healthcare
56	Nift	600	\$2	College Station, Texas	N	IT
57	FPL Food	600	N/A	Thomas County, Ga.	E	Food & Beverage
58	Radial	600	N/A	Brunswick, Ga.	E	Call Center
59	Bell Textron	600	N/A	Fort Worth, Texas	N	Aviation/Aerospace
60	The Lampo Group	599	\$52	Franklin, Tenn.	E	Financial Services
61	DHL Exel	577	\$72	Stafford County, Va.	N	Distribution
62	SimpliSafe	572	\$5	Henrico County, Va.	N	Call Center
63	Arthrex	560	N/A	Collier County, Fla.	E	Healthcare
64	Techtronic Industries (TTI)	525	\$100	Anderson County, S.C.	E	Power Tools
65	Thermo Fisher Scientific	500	\$566	Pitt County, N.C.	E	Healthcare
66	Amazon	500	\$100	Lafayette Parish, La.	N	Distribution
67	Amazon	500	\$100	Oklahoma City, Okla.	E	Distribution
68	Amazon	500	\$80	Forney, Texas	N	Distribution
69	Amazon	500	\$54	Missouri City, Texas	N	Distribution
70	T-Mobile	500	\$30	Henrico County, Va.	E	Call Center
71	Navistar Defense	500	\$8	West Point, Miss.	E	Defense
72	International Capital Group	500	\$6	Mecklenburg County, N.C.	E	Financial Services
73	Channel Control Merchants	500	\$2	Marshall, Texas	N	Distribution
74	Thomas L. Cardella & Assoc.	500	\$1	El Paso, Texas	E	Call Center
75	Amazon	500	N/A	North Little Rock, Ark.	N	Distribution
76	Citibank	500	N/A	Brandon, Fla.	E	Financial services
77	Amazon	500	N/A	Auburndale, Fla.	N	Distribution
78	Amazon	500	N/A	Newnan, Ga.	N	Distribution
79	GEICO	500	N/A	Macon, Ga.	E	Financial Services
80	Amazon	500	N/A	Olive Branch, Miss.	N	Distribution
81	FedEx	480	N/A	Olive Branch, Miss.	E	Distribution
82	ID.me	478	\$3	Fairfax County, Va.	E	IT
83	Max Midstream	474	\$1,000	Point Comfort, Texas	N	Pipeline Transportation
84	Eli Lilly	462	\$474	Durham County, N.C.	N	Healthcare
85	UPS	451	\$262	Alamance County, N.C.	E	Distribution
86	DSV: Global Transport and Logistics	450	\$65	Lancaster, Texas	N	Distribution
87	Freshpet	427	\$265	Ennis, Texas	N	Pet Food
88	The Kerry Group	400	\$125	Rome, Ga.	E	Food & Beverage
89	Southwest Airlines	400	\$125	Houston, Texas	N	Aviation/Aerospace
90	Vigilant Labs	400	\$105	Charleston County, S.C.	N	Life Sciences
91	Ranger Scientific	400	\$7	Montgomery, W.Va.	N	Firearms
92	Tata Consultancy Services	400	\$4	Austin, Texas	N	IT
93	Paradigm Metals	400	\$1	Hutto, Texas	N	Metals
94	FedEx	400	N/A	Olive Branch, Miss.	E	Distribution
95	Atlassian	400	N/A	Austin, Texas	E	IT
96	Grail	398	\$103	Durham County, N.C.	N	Healthcare
97	Focus Services	380	N/A	Pitt County, N.C.	N	Call Center
98	Mercedes-Benz	373	\$54	Vance, Ala.	N	Automotive
99	Purple Innovation	360	\$21	Henry County, Ga.	N	Mattresses
100	Warrior Met Coal	359	\$528	Tuscaloosa County, Ala.	N	Coal



RANK	COMPANY	INV*	JOBS	LOCATION	N/E/R	PRODUCT/SERVICE
1	Grön Fuels	\$9,200	1,025	West Baton Rouge Parish, La.	N	Oil & Gas
2	General Motors	\$1,717	N/A	Spring Hill, Tenn.	E	Automotive
3	SK Innovation	\$1,600	2,000	Jackson County, Ga.	E	EV Batteries
4	Florida's Tyndall AFB	\$1,500	N/A	Panama City, Fla.	E	Defense
5	Mitsubishi Chemical	\$1,300	N/A	Ascension Parish, La.	N	Chemicals
6	Universal Music Group	\$1,200	2,500	Biloxi, Miss.	N	Casino Resort
7	Invenergy	\$1,200	32	Weatherford, Okla.	E	Renewable Energy
8	Convergent Technologies Group	\$1,200	N/A	Fauquier County, Va.	E	Data Center
9	REG Geismar	\$1,177	N/A	Ascension Parish, La.	E	Chemicals
10	Tesla	\$1,100	5,000	Del Valle, Texas	N	Automotive
11	Centene	\$1,035	3,237	Mecklenburg County, N.C.	N	Headquarters
12	Max Midstream	\$1,000	474	Point Comfort, Texas	N	Pipeline Transportation
13	SK Innovation	\$940	600	Jackson County, Ga.	E	EV Batteries
14	Qorvo	\$850	65	Richardson, Texas	E	Electronics
15	Mazda Toyota Manufacturing	\$830	N/A	Huntsville, Ala.	E	Automotive
16	Facebook	\$800	100	Gallatin, Tenn.	N	IT
17	AM/NS Calvert (Arcelor Mittal)	\$775	200	Mobile, Ala.	E	Metals
18	Braskem	\$675	50	La Porte, Texas	N	Chemicals
19	Pratt & Whitney	\$650	800	Buncombe County, N.C.	N	Aviation/Aerospace
20	Gulf Coast Ammonia	\$600	40	Texas City, Texas	N	Chemicals
21	Thermo Fisher Scientific	\$566	500	Pitt County, N.C.	E	Healthcare
22	Nestlé Purina PetCare	\$550	130	Hartwell, Ga.	E	Pet Food
23	Warrior Met Coal	\$528	359	Tuscaloosa County, Ala.	N	Coal
24	Eagle LNG	\$500	200	Jacksonville, Fla.	N	LNG
25	Air Products & Chemicals	\$500	N/A	Texas City, Texas	N	Chemicals
26	Eli Lilly	\$474	462	Durham County, N.C.	N	Healthcare
27	Nestlé Purina PetCare	\$450	300	Rockingham County, N.C.	N	Pet Food
28	Equilon Enterprises	\$441	N/A	St. James Parish, La.	E	Oil & Gas
29	QTS Data Centers	\$425	N/A	Henrico County, Va.	E	Data Center
30	Mark Anthony Brewing	\$400	300	Richland County, S.C.	N	Food & Beverage
31	Grifols Therapeutics	\$352	300	Johnston County, N.C.	E	Healthcare
32	W. Va. Methanol	\$350	N/A	Pleasants County, W.Va.	N	Petrochemicals
33	Atlantic Sapphire	\$340	237	Miami, Fla.	E	Food & Beverage
34	Charlotte Pipe and Foundry	\$325	N/A	Stanly County, N.C.	E	Building Materials
35	Domtar Paper Company	\$320	137	Kingsport, Tenn.	E	Paper & Packaging
36	Willis Pond PV1	\$300	N/A	East Feliciana Parish, La.	N	Renewable Energy
37	Aerion Supersonic	\$300	675	Melbourne, Fla.	N	Aviation/Aerospace
38	Georgia-Pacific	\$285	120	Sweetwater, Texas	N	Paper & Packaging
39	Verizon	\$285	N/A	Irving, Texas	E	Telecommunications
40	FFF Enterprises	\$270	N/A	Flower Mound, Texas	N	Pharmaceutical
41	CWF GEM	\$265	1,400	Hampton County, S.C.	N	Aquaculture
42	Freshpet	\$265	427	Ennis, Texas	N	Pet Food
43	UPS	\$262	451	Alamance County, N.C.	E	Distribution
44	RWDC Industries	\$260	200	Athens, Ga.	E	Biotechnology
45	Equilon Enterprises	\$254	N/A	St. Charles Parish, La.	E	Oil & Gas
46	Amazon	\$250	1,000	Mount Juliet, Tenn.	E	Distribution
47	Facebook	\$250	100	Newton County, Ga.	E	Data Center
48	Bueche PV1	\$240	N/A	West Baton Rouge Parish, La.	N	Renewable Energy
49	Exxon Mobil Refinery	\$240	N/A	East Baton Rouge Parish, La.	E	Oil & Gas
50	McKee Foods	\$225	125	Collegedale, Tenn.	E	Food & Beverage

investment

RANK	COMPANY	INV*	JOBS	LOCATION	N/E/R	PRODUCT/SERVICE
51	Walmart	\$220	1,000	Dorchester County, S.C.	N	Distribution
52	Amazon	\$200	1,000	Memphis, Tenn.	E	Distribution
53	Amazon	\$200	1,000	Waco, Texas	N	Distribution
54	Frito-Lay	\$200	120	Perry, Ga.	E	Food & Beverage
55	Pringles	\$200	80	Jackson, Tenn.	E	Food & Beverage
56	DC Blox	\$200	5	Greenville County, S.C.	N	Headquarters
57	Dominion Aquaculture	\$198	218	Tazewell County, Va.	E	Food & Beverage
58	Amazon	\$192	700	El Paso, Texas	N	Distribution
59	Clorox	\$190	100	Berkeley County, W.Va.	N	Chemicals
60	Calgon Carbon	\$185	38	Hancock County, Miss.	E	Chemicals
61	Gulf Access Terminals	\$177	N/A	Iberville Parish, La.	N	Oil & Gas
62	SiO2 Medical Products	\$163	220	Auburn, Ala.	E	Healthcare
63	Mission Forest Products	\$160	130	Corinth, Miss.	N	Building Materials
64	Air Liquide	\$160	N/A	Longview, Texas	E	Oil & Gas
65	TJX Companies	\$150	950	El Paso, Texas	N	Headquarters
66	BAE Systems	\$150	700	Austin, Texas	E	Aviation/Aerospace
67	KBI Biopharma	\$150	200	Wake County, N.C.	E	Pharmaceutical
68	PBF Energy	\$150	N/A	St Bernard Parish, La.	E	Oil & Gas
69	CROWN Cork & Seal	\$148	125	Warren County, Ky.	N	Food & Beverage
70	Bang Energy	\$145	600	Douglas County, Ga.	N	Food & Beverage
71	Chewy	\$143	1,200	Belton, Mo.	N	Distribution
72	Kimberly-Clark	\$140	N/A	Corinth, Miss.	E	Paper & Packaging
73	General Atomics	\$139	125	Lee County, Miss.	E	Defense
74	Nephron Pharmaceuticals	\$138	245	Lexington County, S.C.	E	Pharmaceutical
75	Hershey Chocolate	\$135	110	Augusta County, Va.	E	Food & Beverage
76	The Kerry Group	\$125	400	Rome, Ga.	E	Food & Beverage
77	Southwest Airlines	\$125	400	Houston, Texas	N	Aviation/Aerospace
78	CF Industries	\$122	N/A	Ascension Parish, La.	E	Petrochemicals
79	Florida Can	\$120	160	Winter Haven, Fla.	N	Aluminum Can Manufacturer
80	MDI (Merchants Distributors, Inc.)	\$120	111	Caldwell County, N.C.	E	Distribution
81	AppHarvest	\$112	285	Madison County, Ky.	N	Agriculture
82	DuPont	\$111	60	Chesterfield County, Va.	E	Kevlar
83	Y-tec Keflex Toyotetsu Alabama	\$110	N/A	Huntsville, Ala.	E	Automotive
84	Audentes Therapeutics	\$109	209	Lee County, N.C.	N	Biotechnology
85	Zinus	\$108	804	Henry County, Ga.	N	Mattresses
86	Dothan Solar	\$106	2	Unincorporated, Ala.	E	Renewable Energy
87	Vigilent Labs	\$105	400	Charleston County, S.C.	N	Life Sciences
88	Bandwidth	\$103	1,165	Wake County, N.C.	E	Telecommunications
89	Grail	\$103	398	Durham County, N.C.	N	Healthcare
90	Seaboard Foods	\$103	112	Guymon, Okla.	E	Food & Beverage
91	Ken's Foods	\$103	70	Henry County, Ga.	E	Food & Beverage
92	Danimer Scientific	\$102	55	Clark County, Ky.	E	Petrochemicals
93	Techtronic Industries (TTI)	\$100	525	Anderson County, S.C.	E	Power Tools
94	Amazon	\$100	500	Lafayette Parish, La.	N	Distribution
95	Amazon	\$100	500	Oklahoma City, Okla.	E	Distribution
96	Ochsner Health	\$100	300	Jefferson Parish, La.	N	Healthcare
97	Lidl	\$100	270	Covington, Ga.	N	Distribution
98	ALDI	\$100	200	Loxley, Ala.	N	Headquarters
99	Lowe's Home Improvement	\$100	130	Forsyth County, N.C.	E	Data Center
100	Envases Group	\$100	121	Waco, Texas	N	Aluminum Can Manufacturer

\$INV*=INVESTMENT IN MILLIONS.

N=NEW PROJECT E=EXPANDED R=RELOCATED

TOP DEALS AND HOT MARKETS

**GEORGIA
WINS ITS FIRST
STATE OF THE
YEAR**

If you look at previous state of the year winners in this section, you rarely see Texas, Florida, Georgia and other high population states win. Why? Because we judge states on a per capita or points per million residents basis. The small population states have a distinct advantage because we divide points earned into their populations.

Even with its large population, Georgia took the honors this year with a score of 60 points per million residents. With 455 points, Atlanta had its best year ever and by a long margin. But, Atlanta had help from Jackson County and Henry County, Ga.

ATLANTA BLOWS AWAY DALLAS-FORT WORTH

For the last decade, Dallas-Fort Worth has earned Mega-Market of the Year every year but two. Northern Virginia took one and so did Atlanta. Charlotte, because of its increase in population over the last five years, has entered the mega-market division and has done well every year. Orlando has also recently joined mega-market ranks because of its population increases the last three years. But this year was all about Atlanta. Midtown Atlanta is a deal-making machine. Note the “Special Individual Recognitions” in Henry County, Ga., and Irving, Texas.

CONTINUED

States*

State of the Year

Georgia 640 points 60 PPM*

Honorable Mention

Louisiana 250 points 54 PPM
Mississippi 155 points 53 PPM
South Carolina 250 points 49 PPM

*States in the South in each SB&D 100 are judged based on deals per million populations, or PPM (per capita).
Source: SB&D.

Mega-Markets

(2.5 million-plus-population)

Mega-Market of the Year

Atlanta 455 points

Honorable Mention

Dallas-Fort Worth 255 points
Charlotte 125 points
Houston 105 points

Others: Northern Virginia - 70 points;
Tampa Bay - 45 points; Orlando - 35 points;
South Florida - 20 points; St Louis - 15 points.

Special recognition in the mega-market category:
Henry County, Ga. - 45 points (Atlanta market);
Irving, Texas - 45 points (DFW market);
Fairfax, Va. - 40 points (Northern Virginia market).

**SB&D State of the Year Winners
1994-2021**

**2021 SB&D 100
State Scores PPM****

**2021 SB&D 100
State Scores***

2021	Georgia
2020	Alabama and Louisiana
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

State	Points (PPM)
Georgia	60
Louisiana	54
Mississippi	53
South Carolina	49
North Carolina	47
Kentucky	43
Tennessee	41
Alabama	40
West Virginia	36
Virginia	34
Texas	26
Arkansas	25
Florida	17
Oklahoma	17
Missouri	11

***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*

State	Points
Texas	775
Georgia	640
North Carolina	485
Florida	365
Virginia	295
Tennessee	285
Louisiana	250
South Carolina	250
Alabama	200
Kentucky	195
Mississippi	155
Oklahoma	85
Arkansas	75
West Virginia	65
Missouri	65

**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*

**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 359 jobs — the number of jobs for the 100th largest project — so all announcements made of 359 jobs or more earned 10 points. Five points are given for announcements of 200 to 358 jobs. This year's Investment 100 threshold is \$109 million, meaning 10 points are awarded for announcements meeting or exceeding that total, and five points for deals \$30 million to \$109 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 cities are based on points only.



After some sub-par years (most likely because its labor force has been depleted since 2015), Austin, one of the South's most dominant tech markets, earned "Major Market of the Year" for 2021. Baton Rouge, Nashville and New Orleans earning "Honorable Mentions" are pretty standard fare just about every year. Columbia, S.C., and El Paso also did well. Note the "Special Individual Recognitions" in Ascension Parish, La.

Durham's life sciences industry is on fire, driving that market to "Mid-Market of the Year" for the second consecutive year.

For the first time in 10 years, Lake Charles, La., with its incredible petrochemical and LNG industry, has not won "Small Market of the Year." The entire recognized market category, like Jackson County, Ga.; Henry County,



Ga.; and Pitt County, N.C.; did well this year.

There were some excellent performances in the rural market division. Hampton County, S.C.; Corinth, Miss.; Hendry County, Fla.; and Guyman, Okla., all turned huge deals. . .maybe the largest in their histories. ✪

Henry County, Ga., located in the Atlanta MSA, has diversified its economy from long being a distribution powerhouse. Henry County earned a "Special Individual Recognition" for its success in calendar year 2020. Pictured is the groundbreaking of a \$103 million expansion of Ken's Foods.

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Major Markets
(750,000-2.499 million populations)

Major Market of the Year
Austin 125 points

Honorable Mention
Baton Rouge 120 points
Nashville 105 points
New Orleans 85 points

Others: Columbia, S.C. - 55 points;
El Paso - 55 points; Charleston-North
Charleston, S.C. - 50; Greenville, S.C. -
50 points; Richmond - 50 points; Raleigh-
Cary - 45 points; Oklahoma City - 40
points; Louisville - 35 points.

Special individual recognition in the
major market category: Ascension
Parish, La. - 50 points (Baton Rouge
market); Henrico County, Va. - 40 points
(Richmond market).

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

Mid-Market of the Year
Durham, N.C. 75 points

Honorable Mention
Henrico County, Va. 40 points
Richland County, S.C. 35 points
Waco, Texas 35 points

Others: Jefferson Parish, La. - 25 points;
Huntsville, Ala. - 25 points.

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

Small Market of the Year (tie)
Jackson County, Ga. 50 points
Ascension Parish, La. 50 points

Honorable Mention
Henry County, Ga. 45 points
Pitt County, N.C. 45 points
Tuscaloosa County, Ala. 40 points

Others: Lafayette Parish, La. - 30 points;
Olive Branch, Miss. - 30 points; Rocking-
ham County, N.C. - 25 points; Jonesboro,
Ark. - 25 points; Alamance County, N.C.
- 25 points; Auburn, Ala. - 20 points;
Madison County, Ky. - 20 points.

Rural Markets
(Less than 50,000 populations)

Rural Market of the Year
Hampton County, S.C. 30 points

Honorable Mention
Corinth, Miss. 20 points
Point Comfort, Texas 20 points
Hendry County, Fla. 20 points
Guymon, Okla. 20 points

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MAKE IT IN ALABAMA



ALABAMA'S MINING AND MANUFACTURING STRENGTH is historic and it all started in Birmingham, which sits in Jones Valley, the one and only place in the world where all three ingredients to make iron and steel — iron ore, limestone and coal — are found. Because of its mineral-rich location, Birmingham was the South's foremost industrial hub in the early 20th century. Immigrants, migrants, farmers, sharecroppers. . .you name it. . .were lured to work in the steel mills in and around Birmingham because of the high pay.

So many large steel mills opened in the early 1900s, such as long closed facilities like Sloss Furnace and the massive Ensley works, that Birmingham was called "The Pittsburgh of the South." During World War II, Birmingham steel mills played a key role in providing steel in the war effort. U.S. Steel is the best known steel factory left in the area and it is growing again after decades-long, up-and-down financial periods. However there were, and still are, plenty of other metals plants in the area, such as Charlotte-based Nucor.

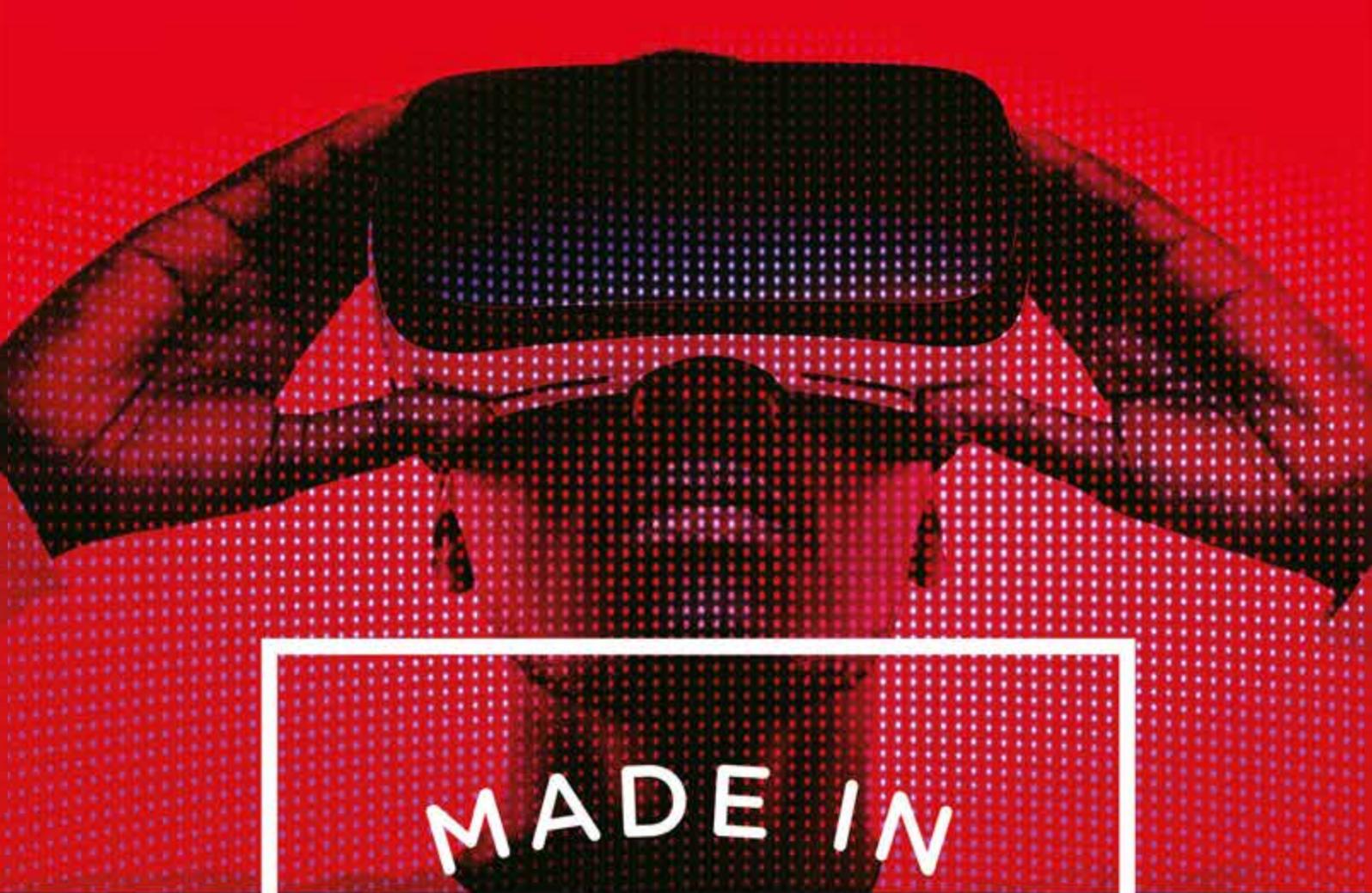


ALABAMA'S AUTOMOTIVE INDUSTRY

Fast forward to today and Alabama is again a manufacturing juggernaut, much like when it first burst on the scene in the early 1900s. With the completion of the Mazda Toyota plant in Huntsville this year, Alabama will become the second state in the Southern Automotive Corridor with four major automotive assembly plants. Toyota also operates a very large engine plant in Huntsville, and Honda and Hyundai have engine plants on site of their assembly plants in Lincoln, Ala., and in Montgomery.

The other three automakers in Alabama are Mercedes-Benz, Honda and Hyundai. There are over 40,000 people working in the automotive industry in the state, and over 165 parts suppliers. Those totals will see a significant increase once Mazda Toyota Manufacturing USA opens its joint venture plant in Huntsville. The \$2 billion plant will house as many as 4,000 workers, and





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multiple suppliers on site and near the plant are hiring now. The investment and the total announced workforce of 4,000 is the largest single greenfield automotive deal in Southern Auto Corridor history.

Before Mercedes-Benz announced its plant in Tuscaloosa County in 1993, there were few automotive-based outfits in the state supplying assembly plants out of state. Today, 28 years after Mercedes-Benz announced its only plant in the U.S. in Vance, Ala., the state is in the top five in automotive production in the U.S. every year.

The other state in the Southern Auto Corridor with four major assembly plants is Kentucky. Two Ford plants, a GM plant and a Toyota plant are located and operational in the Blue Grass State.

Alabama-made vehicles have become the state's No. 1 export to over 90 nations, with the state's largest export customers being China and Germany (home to the Mercedes-Benz headquarters). Automotive, in short, is an incredibly important part of the state's economy, and production has only been in play in the state for 25 years. The foreign-only-automaker plants in Alabama will most likely still be producing vehicles at the turn of the next century.

ALABAMA'S AEROSPACE INDUSTRY

While automotive is a huge segment of the manufacturing arena for the state of Alabama, its prowess as one of the South's most important manufacturing hubs stems from so much more than automotive. For example, there are only three final assembly plants for jetliners in the U.S., and the South has two of them — Boeing in North Charleston, S.C., and Airbus in Mobile, Ala.

Airbus, the European-based jetliner manufacturer, has recently finished up its expansion in Mobile, Ala., where it added another line to its A320 family of commercial aircraft. The new line has added the A220 commercial aircraft, an endeavor that has doubled the size of the Airbus facility located at the former Brookley Air Force Base on the shores of Mobile Bay.

Alabama's aerospace industry is a mile wide and a mile deep. In addition to Airbus, major aerospace companies operate, in some cases, multiple major facilities in Alabama — GE Aviation, Lockheed Martin, Boeing, Raytheon, GKN Aerospace and Collins Aerospace to name a few of the more than 300 aerospace companies that call Alabama home. All told, aerospace manufacturing employs about 14,000 in the state. Aerospace engineers total over 4,000 in Alabama, which ranks the state in the top in the U.S.



MILITARY AND DEFENSE IN ALABAMA

In January of 2021, the Air Force and the Pentagon chose Huntsville as the future site of the U.S. Space Command's headquarters. (That headquarters currently is at Peterson Air Force Base in Colorado Springs, Colo.) Huntsville's Redstone Arsenal was one of six finalists for the Space Command. The U.S. Space Command was established during the Trump administration as the 11th combatant command. The project is expected to initially create 1,400 jobs and add to the 62,000 aerospace and defense jobs in Alabama.

Immediately after the decision to establish the Command in Huntsville was made, there was opposition from several politicians in the other states that made the final six — Texas, California, Colorado, New Mexico and Nebraska.

Officials in those states that were in the running for the Space Command argued that the final decision to locate the facility was politically motivated. They claim that Alabama was chosen under the Trump administration because the former president lost Colorado in the presidential election and won Alabama.

Whatever happened regarding the Space Command site search, Huntsville is the perfect place for it. The Air Force claims the decision was based on a grading system in which

Huntsville's Redstone Arsenal beat Colorado in 11 of 21 comparisons, including qualified workforce, quality schools, infrastructure capacity and cost-of-living factors.

Huntsville's Redstone Arsenal is home to the Army Aviation and Missile Command, the Army's Space and Missile Defense Command and the Army Strategic Forces Command. Huntsville is also home to hundreds of defense contractors and space industry facilities, including the Marshall Space Flight Center, one of NASA's largest operations.

Redstone doubles as a large military base. Activity at the base includes military missile operations and space-related military and civilian operations. Redstone has been linked to space flight since Day One, when the first U.S. satellite was launched in the space race with the Soviet Union.

Alabama's comprehensive aerospace/aviation presence also includes an extensive roster of training programs and assets. AIDT's Robotics Technology Park near Decatur offers specialized training in robotics and automation programs, and AIDT operates an aviation training center in Mobile. In addition, the Alabama Community College System's Alabama Aviation Center, which has several locations across the state, offers FAA-certified training in airframe and engine maintenance. ✪



SiO2 Materials Science

Auburn, Ala.

SiO2 Materials Science increased its production capacity to meet the U.S. government's critical need for vials and syringes while maintaining the existing production needs of other customers, including pharmaceutical companies.

In June 2020, SiO2 announced a \$143 million contract with federal government agencies for a production scale-up of the company's state-of-the-art packaging platform for storing novel coronavirus (SARS-CoV-2) vaccines and therapeutics.

A key element of SiO2's product is enhanced safety for healthcare providers and for patients who are at a lower risk of adverse side effects. A combination of plastic and a microscopic layer of glass also means vials and syringes won't break, shatter or crack. SiO2 ships its products worldwide.



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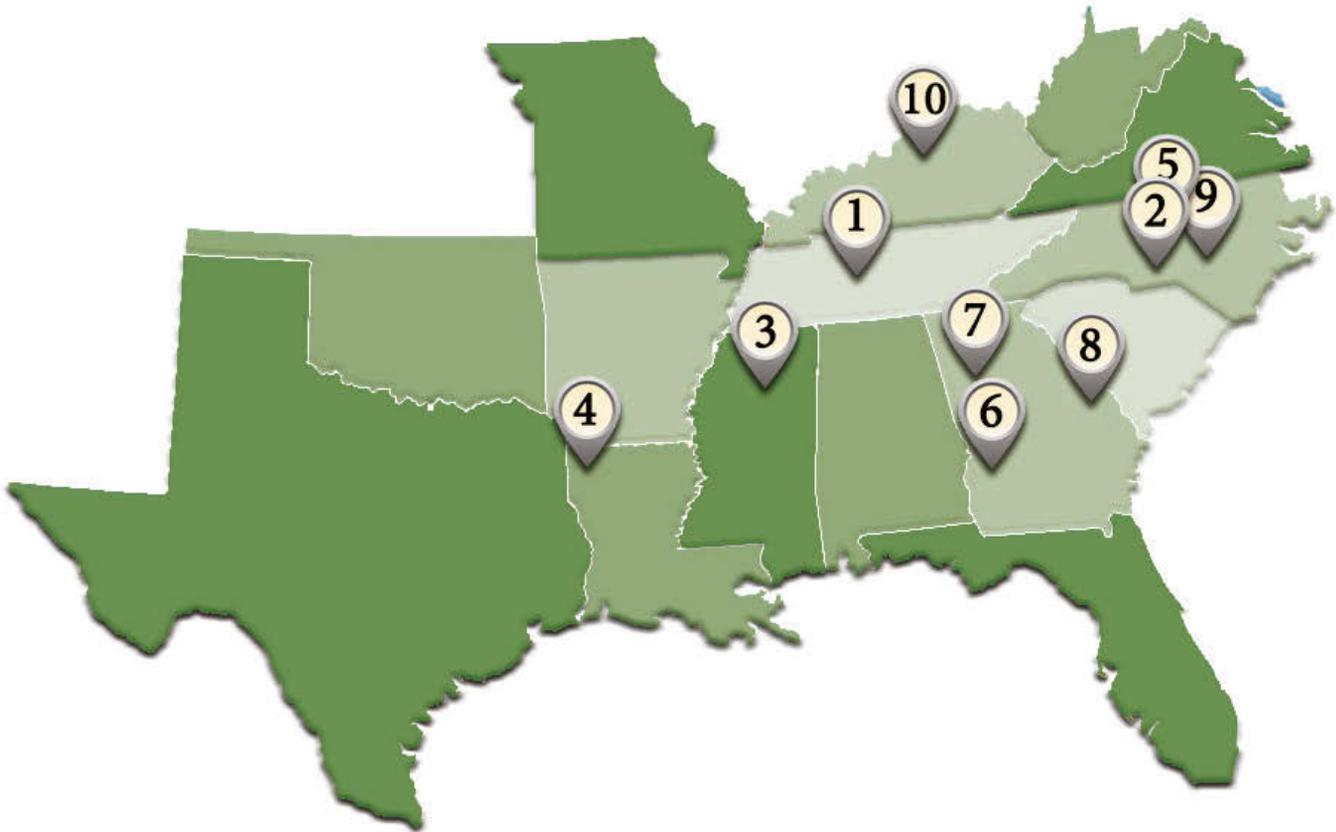
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TOP DEALS

The American South's 10 largest new or expanded manufacturing and selected non-manufacturing job announcements



ANNOUNCEMENTS MADE IN THE SPRING 2021 QUARTER

Development	Jobs	Investment*	N/E/R**	Location	Description
1. Oracle	8,500	\$1,200	N	Nashville, Tenn.	Technology campus
2. Apple	3,000	\$1,000	N	Research Triangle, N.C.	Technology campus
3. Milwaukee Tool	1,200	\$60	E	Grenada, Miss.	Tools
4. Amazon	1,000	\$200	N	Shreveport, La.	Fulfillment center
5. Google	1,000	N/A	N	Durham, N.C.	Cloud engineering
6. TLC Associates	1,000	N/A	N	Americus, Ga.	Call center
7. FanDuel	900	N/A	N	Atlanta, Ga.	Technology campus
8. Amazon	800	N/A	N	Columbia County, Ga.	Fulfillment center
9. Fujifilm Diosynth	725	\$2,000	N	Wake County, N.C.	Biopharmaceuticals
10. KCC Manufacturing	700	\$60	E	Simpsonville, Ky.	HVAC

*Investment in millions **N=New, E=Expansion, R=Relocation

Source: RandleReport.com

OTHERS GIVE YOU LEADS. WE GIVE YOU LEADERS.

Leaders so resourceful you work with names, never acronyms. Allies so connected their number's the only one you'll ever need. And guidance so clear, you'll wonder why you ever put up with red tape.

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Business Facilities, eleven years and counting

#2 FOR INFRASTRUCTURE INVESTMENT SUPPORTING ECONOMIC DEVELOPMENT
Site Selection

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AFTER 55 YEARS

**we've learned a thing
or two about optimizing
plants in the southeast.**

CONSTRUCTION

We self-perform a full range of services for both turnkey multi-discipline/multi-craft and single-service/single-craft projects.

INSTALLATION

Single machine? Entire production line? Complete industrial process system or plant? Put our expert installers to the test.

RELOCATION

Anywhere in the U.S., we relocate, consolidate, and reinstall manufacturing machinery/equipment and processes systems.

RIGGING

Hoisting, lifting, jacking, sliding, rolling, and erecting machinery/equipment/structures. Our trained, experienced riggers are ready.

MILLWRIGHT

We specialize in installing, setting, moving, aligning, and leveling machinery/equipment. Not to mention dismantling, refurbishing, and reassembling.

PRECISION ALIGNMENT

When millimeters matter, and equipment uptime is the objective, call us for close tolerance and precision alignment – optical and laser.

AUTOMATION

To boost efficiency and reduce cycle time, we integrate automation from automatic guided vehicles (AGVs) to self-driving vehicles (SDVs).

MAINTENANCE

Total plant maintenance? Contract? Supplemental? Mechanical? Electrical? Let us help maintain and extend the lifespan of your assets.



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