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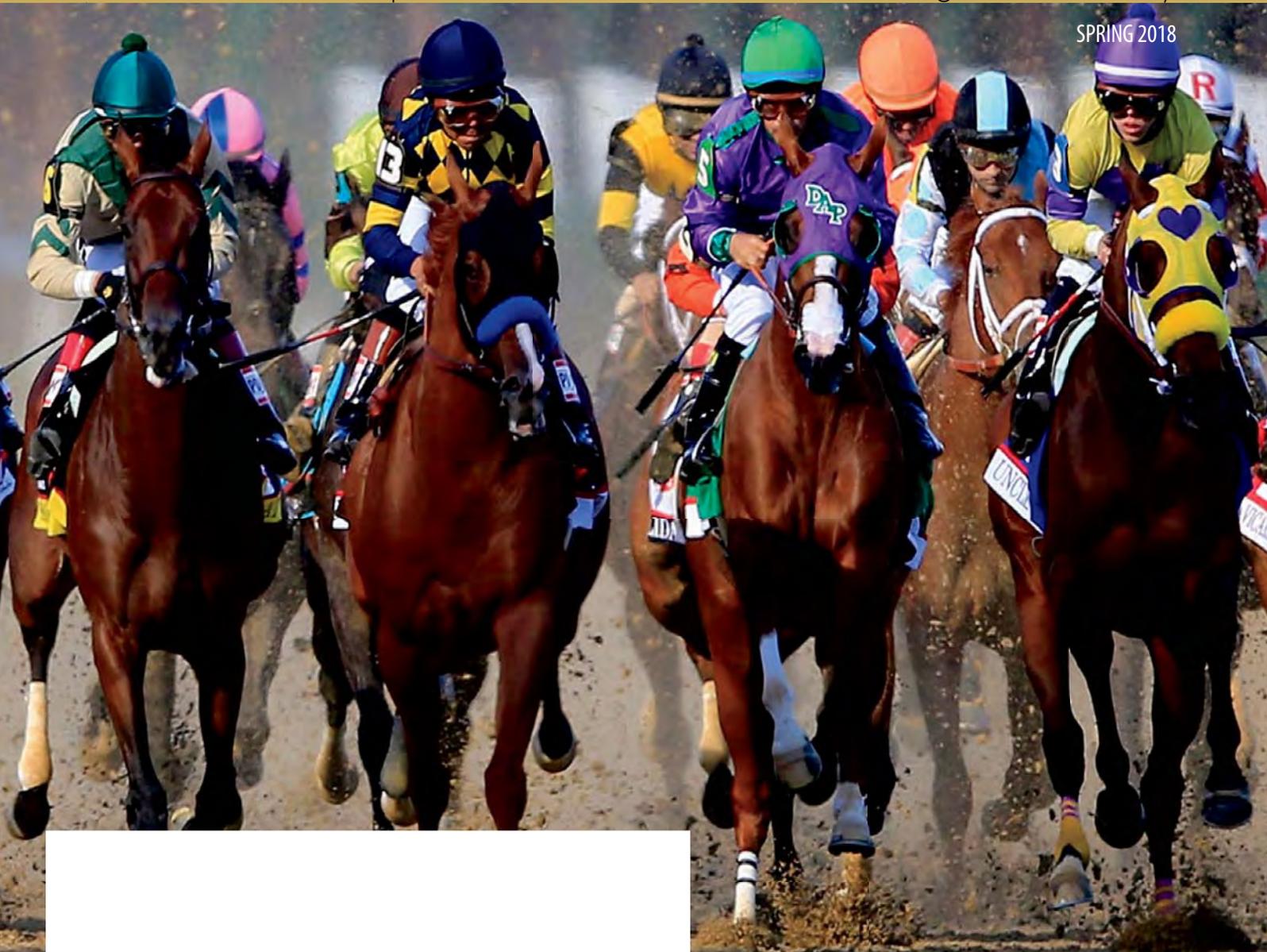
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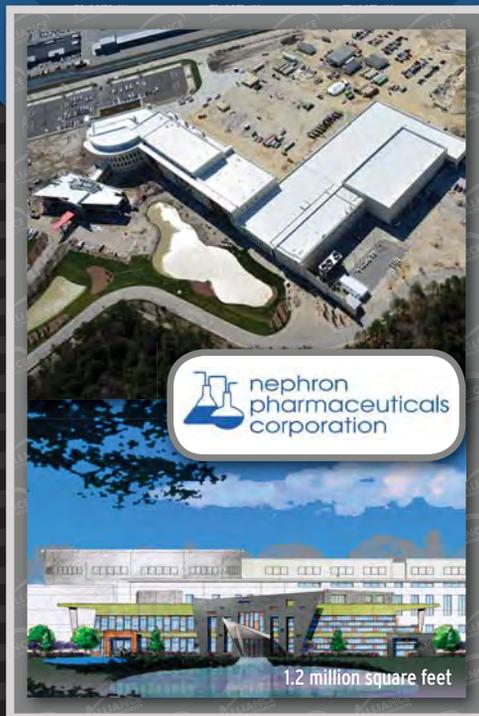
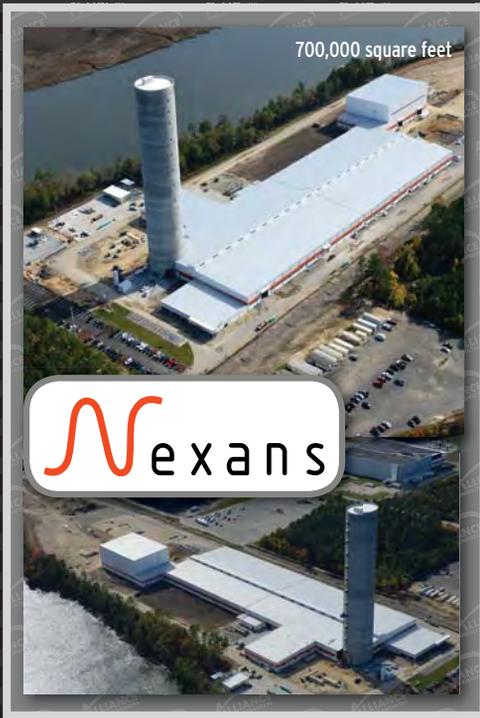
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TABLE OF CONTENTS



FEATURES

- ▶ **38 The 2018 SB&D 100**
Kentucky, long known for its horses, bourbon and blue grass, can add big deals to the list. See how the other Southern states and cities finished in the 2018 SB&D 100.
- 56 SB&D Job 100**
The top 100 job-producing projects announced in 2017
- 58 SB&D Investment 100**
The top 100 income-producing projects announced in 2017
- 60 Top Deals & Hot Markets**
Highlighting the most impressive projects and the states and markets that captured them in 2017
- 70 SB&D 100 State Report**
Brief comments on the performance of each Southern state in the 2018 SB&D 100
- 72 Best of Aerospace in the South**
The best locations in Louisiana, Mississippi, Missouri, North Carolina and Oklahoma for the fastest growing industry in the South
- 82 The Way-Too-Early Guide to Toyota-Mazda Parts Supplier Locations**
The 25 best counties in the South for suppliers to the Toyota-Mazda plant that is being built in Huntsville, Ala.

DEPARTMENTS

- 6 Southbound**
The editor's column
- 8 Around the South**
Top stories from the last quarter relative to business and economic development
- 24 Snapshots from the Road**
Photos of the people and places SB&D visited in the last quarter
- 26 Relocations & Expansions**
All of the significant new starts, expansions and relocations announced in the South in the last quarter
- 34 SouthernAutoCorridor.com**
News from the South's auto industry courtesy of SouthernAutoCorridor.com
- 88 Top Deals**
The ten largest employment deals announced in the last quarter





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SOUTHBOUND

By Michael Randle, EDITOR

Why mess with a good thing?

THE SOUTH'S ECONOMY, the third largest economy in the world, has been humming along nicely since 2010 when 594 projects were announced meeting or exceeding SB&D 100 thresholds (the 2018 SB&D 100 can be found on page 38). It was an awesome comeback year after the recession of 2009 cratered the "100" with just 367 projects, the lowest on record. In fact, the last four years are the best years in SB&D 100 history, averaging 693 projects announced every year in the South with at least 200 jobs and/or \$30 million in investment.

Yes, we are in the second longest economic expansion in this nation's history, and the longest consecutive monthly job gain period ever. But, as of the spring 2018 quarter, those economic streaks are now in jeopardy. Without Congressional approval, our president slapped tariffs on allies in Europe, Mexico and Canada. According to reports, he did it for "national security" reasons. What does that mean?

So why is this administration dismantling the global economic order that we — Republicans and Democrats — crafted over the last 75 years? Your guess is as good as mine because the president is really messing with a good thing. We are at full employment and there is nothing wrong with a trade deficit. We might not feel the initial effects of tariffs in the current economic expansion, but we will surely feel them when this expansion slows to a stop, aided by what are essentially taxes on goods made by our allies and others.

What we need are more free trade deals, not less. For instance, over the last decade, the Southern Automotive Corridor has lost out on about 10 auto assembly plants to Mexico. The main reason being that Mexico has free trade agreements (FTAs) with 46 countries. We had FTAs with 20, but that is now down to about 12, maybe less. And those who we slap tariffs on will retaliate, and then less is sold, and what is sold becomes more expensive.

The last time we set protectionist policies was with the passing of the Tariff Act of 1930, better known as Smoot-Hawley. Even then, 1,028 economists signed a petition asking President Herbert Hoover not to sign the bill. He signed it anyway. What happened? The value of global trade dropped from \$4.9 billion in



1930 to \$1.8 billion in 1933, and the U.S. fell into an extended depression.

But, the current protectionist policies could cause even more harm than in 1930. The reason is that our economy is so much more global than it was in 1930. Here is an example: The 787 Dreamliner is built in North Charleston, S.C. Its forward fuselage is made in Kansas and in Japan. Its center fuselage and stabilizers are made in Italy. Its wings are made in Japan. Its wingtips are made in South Korea. Its rear fuselage is made at its main plants in Washington and at the North Charleston site. Its engines are made in the U.K., and in the U.S. Its fairings are made in Canada. Its landing gears are made in France, as are its passenger doors. And its cargo doors are made in Sweden. If there is a better example of globalization than how the 787 is made, show it to me.

Now that the tariff threat is a reality, no country will be a winner, and neither will you. Buckle up because your trip on the 787 Dreamliner assembled in North Charleston, S.C., is going to cost more as a result of these tariffs.

After setting the tariffs on June 1, President Trump said, "Time to get smart!" There is nothing smart about protectionist policies, Mr. President. In fact, it is dangerous foreign policy. Over the years, tariffs have led to recessions, depressions, even wars. Hopefully, this is one of Trump's on, off, on-hold decisions on trade. If not, this is the worst economic decision a president has made since Herbert Hoover made his. ☹️

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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.

Forget the skills gap; it's the unskilled gap that's scary

By Michael Randle

Efforts to curb immigration, screening immigrants by certain educational standards and increased deportations will be the biggest threat to the nation's economy over the next five years. Note this; half of all the new jobs the government expects to be created over the next eight years will require only a high school diploma. Just about every economist you talk to says that unskilled immigrants are vital to the economy.

The new positions opening over the next eight years include low-paying jobs that most Americans simply will not take. They include an estimated 778,000 personal care aides, 580,000 food service workers, 431,000 home-health aides and millions of maids, construction laborers and farm workers. I can assure you, there is no farmer in America today who claims, "We don't need any more Mexicans working on our farms." They are all saying, "We need more Mexicans and now!"

Last year saw fertility at the lowest rate on record in the U.S. We are in a baby bust (have been since 2002); all the while the Baby Boomers are aging out of the workforce. For decades we could count on 175,000 to 225,000 people a month turning age 16 in this country (becoming work eligible). The last three years we have averaged 71,000 people a month turning 16. The

unemployment rate is the lowest it's been in 17 years. There are over 6 million jobs available in this country, and about 1.5 million people who are unemployed that are suited for full-time work regardless of their skill levels.

As for farm workers, we agree with U.S. Secretary of Agriculture Sonny Perdue, who said in February he would like to see a separate immigration program for agriculture workers. Perdue spoke at the annual USDA Agricultural Outlook Forum in February, saying that immigration farm labor is in the crossfire of the immigration debate. "The people who come to America to work on farms and ranches are not taking jobs from Americans," Perdue said. "They are not the ones putting a burden on the criminal justice system or welfare system."

In 2017, the Pew Research Center reported that the U.S. workforce will grow only if new immigrants are eligible to replace retiring Baby Boomers. Otherwise, the workforce will decline. Pew estimated that the U.S. working-age (25 to 64) population will rise by 10 million people by 2035 with legal immigration levels of at least 1 million per year, which has been the average for several years. Without immigration, Pew claims the workforce would shrink from 173 million today to 166 million. It would be reduced even further with mass deportations. The biggest source of increased labor supply is immigration, legal and illegal. You can make it political, but really, the issue is demography. It's simple math.

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AROUND THE SOUTH



London-based Liberty House is reviving a steel mill in Georgetown, S.C., that ArcelorMittal shuttered in 2015. Georgetown steelworks was a pivotal part of South Carolina's industrial infrastructure for nearly 70 years.

SB&D's pick for location of Amazon HQ2

After reviewing over 50 locations in the U.S. and Canada, SB&D has settled on its site for Amazon's second headquarters, dubbed "HQ2," a \$5 billion, 40,000-plus employee project. We believe HQ2 will be built on a 26-acre undeveloped site near Dulles International Airport on the border of Fairfax and Loudoun counties in Northern Virginia. The site is near the new East Coast headquarters for its cloud service, Amazon Web Services. Amazon is also building its latest data center campus nearby, and the site is adjacent to a new Metro station. It's also in the middle of Data Center Alley, where 70 percent of the world's internet

traffic flows on a daily basis. Amazon has about 30 data centers within a 15-minute car ride of the site.

Steelmakers restarting closed mills in the South

Steelmakers are reviving shuttered steel mills and even looking to build a new one as 25 percent across-the-board tariffs strengthen the domestic steel industry. Republic Steel and U.S. Steel both announced they would restart mills and bring steelworkers back to work. London-based Liberty House is reviving a steel mill that ArcelorMittal closed in South Carolina. And Nucor, the largest steelmaker headquartered in the United States, announced plans to buy a micro mill in Florida. CONTINUED

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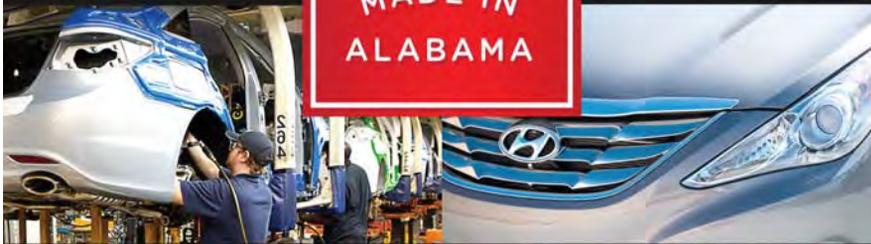
If you've ever driven along I-65 in north Alabama, you've probably seen the signs for Ave Maria Grotto in Cullman. It's a 4-acre park in an old quarry on the grounds of St. Bernard Abbey with 125 miniature reproductions of some of the most famous religious structures of the world.



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Cullman, Ala., ranked No. 1 in economic development projects

In the spring quarter, the Alabama Department of Commerce released its annual report on project activity in the state, and Cullman ranked No. 1 for projects with a total of 31. Cullman also ranked No. 1 in expansion projects for calendar year 2017.

South dominates *Forbes'* best cities for jobs ranking

Forbes came out with its best cities for jobs ranking in the spring quarter and Dallas-Fort Worth ranked No. 1. Following DFW were Austin, Nashville, Charlotte, Orlando and Raleigh in the South. San Jose, San Francisco, Seattle and Riverside-San Bernardino all made the top 10 from outside the South.

Economists agree current expansion will break U.S. record

At 107 months, the current economic expansion is the second longest on record. To beat the record expansion of 1991 to 2001, this one would have to go uninterrupted until August 2019. As of June, a consensus of over 50 top economic forecasters anticipate growth of 2.8 percent this year, followed by 2.6 percent in 2019. However, they also noted that a trade war between the U.S. and China could reduce that growth, but not to the point of recession. The economists also noted that if President Trump is impeached in 2018, the U.S. economy will continue to grow through 2019. The International Monetary Fund also paints a bright future for the U.S. economy this year, predicting growth of 2.9 percent. However, it reported in the spring quarter that a trade war "threatens to undermine confidence and derail global growth prematurely."

Nashville and Austin at top of nation's job growth

Nashville and Austin were two of the nation's top three job growth markets in the U.S. last year. In terms of overall job growth, Nashville ranked third among all markets of 1 million or more residents, and Austin ranked second. Riverside-San Bernardino ranked No. 1.

CONTINUED

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AROUND THE SOUTH



After a few contractions in 2015 and 2016 as a result of the oil bust, Texas' economy grew the fastest among all states in the fourth quarter of 2017.

Texas' economy grew the fastest, but it's still not like 2014

After a few contractions in 2015 and 2016 as a result of the oil bust, Texas' economy grew the fastest among all states in the fourth quarter of 2017. According to the U.S. Department of Commerce, the Lone Star State's economy grew at a 5.2 percent seasonally adjusted annual rate in the fourth quarter, mainly because of output gains from oil and gas mining. Yet, that rate, while it led all states, is about half the growth Texas saw in the third quarter of 2014 when the state grew at a 10 percent rate.

Chief Executive ranks Texas best for business

In the spring quarter, Texas was named the No. 1 state for business by *Chief Executive* magazine. Following Texas were Florida, North

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Carolina, South Carolina and Indiana. From the South, Tennessee and Georgia made the top 10. The worst states for business were California, New York, Illinois, New Jersey and Connecticut.

Office leasing market is slowing

Dallas-Fort Worth is the hottest deal-making market in the country, as evidenced by the Big D's 300 points earned in this year's SB&D 100. That's the most points earned by any market in the 25-year history of the SB&D 100. But office leasing in Dallas-Fort Worth is slowing. While pre-leasing activity appears healthy with 69 percent of the space under construction already leased in the first quarter, single-tenant, build-to-suit projects are only 35 percent pre-leased. According to JLL, nationwide office net leasing in the first quarter was at its slowest annual rate since 2010.

Chattanooga leads a slew of Southern cities with the lowest startup costs

SmartAsset.com came out with its annual list of the cities in the U.S. with the lowest startup costs. The site looked at cost of labor, office space and energy costs among other cost factors. Topping the list with the lowest startup costs was Chattanooga, followed by Knoxville; Greensboro, N.C.; Wichita; Little Rock; Columbia, S.C.; Memphis; Lexington, Ky.; New Orleans and Louisville.

Exxon planning multibillion-dollar Gulf Coast expansion

ExxonMobil is considering a multibillion-dollar expansion plan that would double U.S. oil refining capacity along the Gulf Coast, a move that could boost refining capacity at its Baton Rouge refinery. The plan would make the oil giant's Beaumont, Texas refinery the nation's largest by capacity when the work is complete in the next decade. The plan comes amid increasing domestic shale oil production, particularly in Texas.

CONTINUED

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AROUND THE SOUTH

The National Association of Homebuilders says Trump's tariffs on Canadian lumber have resulted in a 60 percent increase in lumber cost in two years.



Southern Company selling Florida assets

Atlanta-based Southern Company, parent of Georgia Power, Alabama Power and Mississippi Power among other utility assets, is selling Gulf Power, Florida City Gas and its share of two natural gas power plants. The buyer, NextEra Energy, will pay \$6.48 billion for the assets.

National Association of Homebuilders says steep tariffs on Canadian lumber are killing construction industry

The National Association of Homebuilders (NAHB) is unhappy with President Donald Trump's tariffs on Canadian lumber. NAHB CEO Jerry Howard says the tariffs are "ludicrous" in a story from *Fox Business*. "It's ludicrous that a neighboring country like Canada is not being able to import into our country," Howard said. "We are importing lumber from Russia to build our American homes — it doesn't make sense." The Trump administration announced tariffs on Canadian lumber last year, which has raised the price of lumber by 60 percent in two years.

Tariffs causing bottlenecks at U.S. manufacturing plants

Surging demand and the Trump administration's tariffs on imported metals are causing system-wide bottlenecks, according to the Institute for Supply Management's April survey. Despite increased orders, production slowed down as supplier's delivery times lengthened. According to the report, U.S. factories wait on average 67 days for materials, the longest period in decades.

Metal manufacturers' coalition protests steel and aluminum tariffs

In the spring quarter, the Coalition of American Metal Manufacturers protested President Donald Trump's steel and aluminum tariffs imposed in March. Under the banner "Tariffs are Taxes," co-

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AROUND THE SOUTH



This map shows the cumulative oil slick footprint from the BP/Deepwater Horizon oil spill, based on satellite images taken between April 25 and July 16, 2010.

aliation spokesperson Paul Nathanson said, "These tariffs will do nothing to uphold their stated purpose of protecting U.S. national security. They will instead hurt U.S. manufacturers in the near term by raising the price of essential inputs they need to make finished products, and do long-term harm to domestic steel producers by eroding their own customer base."

Triumph Gulf Coast awards grants in Northwest Florida

Triumph Gulf Coast, a seven-member, unpaid board established by the Florida Legislature to make awards that will promote the economy of the eight Gulf Coast counties affected by the BP oil spill, has awarded its first grants out of a pool of an expected \$1.5 billion. The first grant will provide \$10 million to the Port of Panama City for a major expansion at the port.

These states in the South saw record low unemployment

Kentucky (4.0), Mississippi (4.5), Alabama (3.7) and Arkansas (3.6) saw record low unemployment rates in the past year. There are an unprecedented 6.6 million jobs available as of May in this country.

Austin named best place to live

For the second straight year, *U.S. News*

& *World Report* named Austin as the best place to live in the U.S. Other cities in the South making the ranking's top 10 were Fayetteville, Ark.; Huntsville, Ala.; and Washington, D.C. Colorado Springs, Denver, Des Moines, Portland, Minneapolis and Seattle made up the rest of the top 10.

Tennessee adding jobs at 1.5 times the U.S. rate

Tennessee employers added 69,700 jobs from March of 2017 to March of this year. That figure is 1.5 times the rate of the rest of the country.

Energy industry in Louisiana pays out \$4.3 billion in wages

Despite the oil bust in recent years, Louisiana's energy industry remains a formidable economic force. Last year, oil and gas production in Louisiana — including mining, refining and pipeline operations — employed nearly 45,000 people with a payroll of \$4.3 billion.

U.S. natural gas saw record production in 2017

U.S. natural gas production topped all previous years in 2017, according to the U.S. Department of Energy. Gross mined withdrawals totaled 90.9 billion cubic feet per day. The record year substantially boosted exports of LNG.

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AROUND THE SOUTH

Coal dead? Not here.

In the spring quarter, Warrior Met Coal opened a new \$19 million portal facility at its No. 7 coal mine in Brookwood, Ala. The portal is now being worked by 350 hourly miners and 150 salaried employees. Warrior Met has hired more than 1,000 workers in the area in 18 months.

One in 11 Georgia jobs tied to ports

A recent study by the University of Georgia's Terry College of Business showed that Georgia's deepwater ports are one of the state's "strongest economic engines." According to the study, the ports in



In the spring quarter, Warrior Met Coal opened a new \$19 million portal facility at its No. 7 coal mine in Brookwood, Ala.

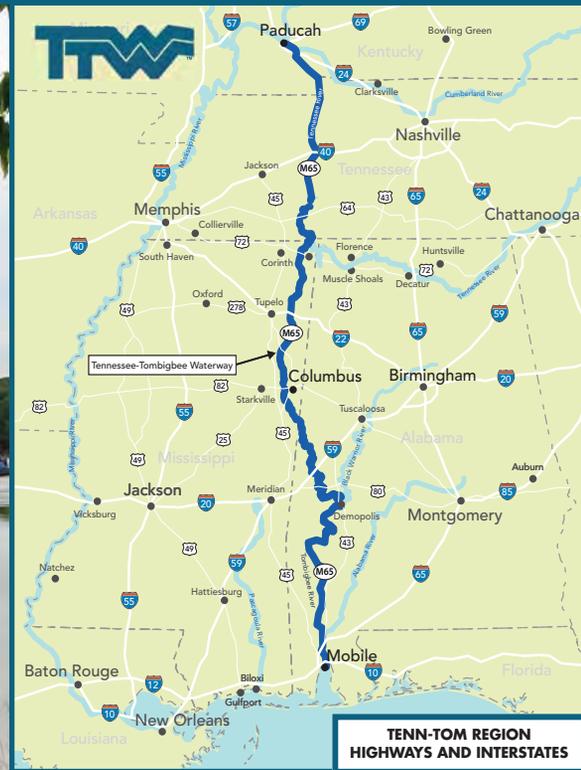
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AROUND THE SOUTH



Fayetteville, N.C., has been named the nation's most innovative city by *Governing* in collaboration with the nonprofit *Living Cities*.

Brunswick and Savannah in 2017 supported over 439,000 jobs, or one out of 11 jobs in the state.

Fayetteville, N.C., named "most innovative city"

Fayetteville, home to Fort Bragg, the largest military base in the world based on population, has been named the nation's most innovative city by *Governing* in collaboration with the nonprofit *Living Cities*. The second annual Equipt to Innovate report, released in the spring quarter, assesses municipal governments based on several metrics, including citizen engagement, racial equity, data use and strategic planning. Other Southern cities in the report include Louisville and San Antonio.

Alabama industrial site earns certification

A 735-acre site in Lowndes and Montgomery counties has earned AdvantageSite designation by the Economic Development Partnership of Alabama. The site, located just south of Montgomery in Hope Hull, includes proper zoning, accessibility and is served by all utilities.

Chemical industry in Louisiana is huge

According to economist Loren Scott, Louisiana's chemical industry accounted for \$79.7 billion in annual sales in 2017 and \$15.7 billion in wages. Two out of every seven jobs created in Louisiana were supported by the chemical industry. 🌟

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SNAPSHOTS

FROM THE ROAD

In the spring quarter, SB&D visited Alabama, North Carolina and Texas.



- 1:** SB&D traveled to Winston-Salem, N.C., for the annual Swing & Swine golf tournament. Host Bob Leak Jr. of Winston-Salem Business Inc.'s Swing & Swine tournament greets guests.
- 2:** SB&D Matthew Randle with professional golfer John Daly.
- 3:** Leak and Randle.
- 4, 5 and 6:** Swing and Swine in Winston-Salem.
- 7:** Chuck Whipple and Matt Randle at SEDC's Meet the Consultants in Dallas.
- 8:** Randle with some of SEDC's attendees.
- 9:** George Swift and Randle.
- 10:** Raul Peralta and James Chavez.
- 11:** J.D. Lowery, Gene Stinson and Matt Randle.
- 12:** Jubal Smith.
- 13:** Sam Powers.
- 14:** Josh Bays, Alison Benton and Craig Hughes.
- 15:** Linda Burns, Dean Barber and Chris Schwinden.
- 16:** Heidi Smith, Josh Bays and John Bradley.





10



11

SB&D attended the Hyundai expansion announcement in the spring quarter.
17: CEO of Hyundai Motor Manufacturing Alabama Dong Ryeol Choi, Gov. Kay Ivey, Director of Production for Hyundai Motor Manufacturing Alabama Craig Stapley
18: Dong Ryeol Choi.
19: Artist Brooks Barrow, Montgomery Mayor Todd Strange, Gov. Kay Ivey, Chairman of the Montgomery County Commission Elton Dean, and President of the Montgomery Area Chamber of Commerce Randy George. 🇺🇸



12



13



14



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16



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19

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.

ALABAMA

Google begins construction on \$600 million data center

Google has begun construction on its \$600 million data center in Bridgeport, Ala. The project is expected to create as many as 100 full-time jobs in Jackson County.

Aviation company expanding in Birmingham
Stewart Industries International has leased the former Kaiser Aircraft facility next to Birmingham-Shuttlesworth International Airport. The company said recently they expect to hire 200 to provide maintenance support to the East Coast-based aviation industry.

Westervelt Lumber will build mill in Alabama, create 100 jobs

The 130-year-old Tuscaloosa company, Westervelt, will build a new mill in South Alabama, creating 100 jobs.

The new mill will complement Westervelt's existing lumber mill in Moundville, Ala., which the company says is the second-largest production facility of Southern Yellow Pine in the U.S. The specific location and design should receive final approval from its board of directors soon.

Over \$100 million being invested in South Alabama plant

Kimberly-Clark is investing \$100 million to expand and improve its plant in Mobile. The company makes bath tissue for Scott and Cottonelle brands.

Manufacturer adding jobs in Lanett

WestRock, which is a manufacturer of paper and packaging, is expanding its operations in Lanett. The company, which has about 300 employees, is adding a 375,000-square-foot distribution center and 50 jobs.

Hyundai Power Transformers expanding in Montgomery

Hyundai Power Transformers USA will invest \$33 million in its Montgomery plant to expand capacity by 60 percent to build its transformers. The project will result in 86 new jobs.

ARKANSAS

Nucor plans another expansion of its East Arkansas plant

Charlotte-based Nucor just recently celebrated an expansion of its steel mill in Mississippi County, Ark. Now the company has announced another expansion of the plant. Nucor will add a galvanizing line to produce sheet metal at the plant at a cost of \$240 million.

Swedish manufacturer expands in rural Arkansas

Granges of Sweden announced in May it will invest \$26 million to expand its facilities in Newport, Ark. The company makes light gauge aluminum foil for food-grade packaging. The deal will add 100 jobs.

Manufacturer expanding in Arkansas

Bekaert is expanding its heavy steel wire plant in Van Buren, Ark. The company has been part of the Van Buren community since 1976. The \$16 million expansion will include 100,000 square feet of new space and 40 new jobs.

Food service company to add jobs at new Arkansas distribution center

Fort Worth-based Ben E. Keith Co. is opening a new distribution center with warehouse and office space in Arkansas. The facility in North Little Rock will employ 350.

FLORIDA

Pratt & Whitney investing \$100 million in South Florida facilities

Jet engine maker Pratt & Whitney announced in May it will invest \$100 million in its massive manufacturing and design campus in northwestern Palm Beach County. The project will include new equipment for manufacturing, engineering and the de-



Medical marijuana companies bringing 100 jobs to Jefferson County, Ark.

More than 100 jobs are coming to the Pine Bluff area as part of the medical marijuana industry. Five cultivation facilities will open across the state, with two belonging to Natural State Wellness Enterprises in Jefferson County. Arkansas was the first state in the Bible Belt to legalize the drug for certain patients.



GE opens \$200 million Alabama plant

GE Aviation opened its \$200 million components complex in Huntsville in the spring quarter. One plant will produce silicon carbide and the other ceramic fiber to be used to make ceramic matrix components for jet engines and gas turbines. The Huntsville location marks the first time these two processes will be in the same location.

velopment of new technologies. The project will create 215 new jobs.

Company opens Center for Intelligent Buildings

In the spring quarter, United Technologies cut the ribbon on its Center for Intelligent Buildings in Palm Beach County. The smart building is part headquarters, part product showcase. United Technologies builds smart buildings, and its headquarters is where it can show that technology to customers. The \$115 million project will create 480 jobs.

Walmart to hire hundreds for new Cocoa facility

Walmart is holding job information sessions for its soon-to-open Cocoa Grocery Distribution Center in

Cocoa, Fla. The company plans to hire 375 full-time workers to distribute perishable food to Walmart stores across the state.

Raytheon to hire 500 in Palm Bay, Fla.

Massachusetts-based Raytheon may employ up to 500 for its cybersecurity division at the former Oakridge Global Energy Solutions facility in Palm Bay. The defense contractor employs more than 64,000 workers worldwide in its defense, civil government and cybersecurity divisions.

Lockheed Martin adding 100 jobs in Florida

Lockheed Martin is adding 100 jobs at its plant in Pinellas Park that makes parts for the F-35 fighter jet that is assembled in Fort Worth,

Texas. Lockheed already employs 270 at the plant.

Nucor bringing \$240 million steel plant to Florida

Charlotte-based Nucor recently announced it will invest \$240 million to build a rebar micro mill in Frostproof, Fla. The Polk County facility will be the second rebar micro mill Nucor is constructing. (In November 2017, the company announced a rebar micro mill project in Sedalia, Mo.) The Florida mill could create up to 250 jobs that pay an average annual salary of \$66,000.

Florida Blue hiring 500

Florida Blue (Florida's Blue Cross/Blue Shield) is on another hiring spree, and this time it's for 500 workers statewide. More than half of the open positions are for member care specialists and will offer year-round benefits while working for nine months, then three months

off with pay. Some of the other year-round roles include registered nurses and people with Medicare and sales experience.

Details emerge on Jabil's HQ project in St. Pete

Jabil Inc. expects to spend \$67.3 million on its new world headquarters in St. Petersburg, Fla. The improvements will be used to accommodate 300 new full-time jobs, and the introduction of an innovation center.

GEORGIA

Gulfstream expands in Savannah

Gulfstream Aerospace Corp., the world's corporate jet manufacturer, is investing \$55 million in its service center operations in Savannah. The company will add 200 workers to the workforce there, which currently stands at more than 10,000.

CONTINUED

Telemundo opens new \$250 million Miami HQ

Telemundo has opened the largest TV production studio in South Florida, a \$250 million complex designed for 1,200 employees, with room to grow to 1,500. The Spanish language media giant is a subsidiary of NBCUniversal and Comcast Corp. The facility will be the hub of TV series production, news, digital content and sports for Telemundo.



RELOCATIONS & EXPANSIONS

Pandora expands its Atlanta operations

Pandora, the largest music streaming service in the U.S., will expand its operations in Atlanta. The California-based company is adding 250 jobs.

Facebook to build \$750 million data center in Georgia

Facebook is investing \$750 million in a new data center in Newton County, Ga., located just outside of Atlanta. It is the social media giant's ninth data center in the U.S.

New Taurus USA facility to bring 300 jobs to Bainbridge

Taurus USA, a firearms manufacturer, will create 300 jobs and invest more than \$22.5 million to establish a manufacturing plant in Decatur County.

Elavon to expand Atlanta HQ, create 180 jobs

Payments company Elavon is expanding its Atlanta headquarters and will create nearly 200 jobs at its campus

located in Sandy Springs. The U.S. Bancorp subsidiary provides payment processing and services to merchants and financial institutions.

Rug maker to build 650,000-square-foot distribution center in Georgia

Rug maker Loloï will build a distribution center in Cartersville, Ga. The Dallas-based company will hire 200 in the deal.

Georgia Ports breaks ground in Chatham County, Ga.

Officials were on hand recently for the ground-breaking of the Mason Mega Rail project at the Georgia Ports. The \$127 million project will double capacity at the port.

KENTUCKY

Aluminum processor breaks ground in Kentucky

Novelis broke ground in the spring on a \$305 million automotive-grade aluminum sheet plant in Todd County.

The plant in Western Kentucky will house 125 full-time jobs.

Barrel manufacturer to add 220 jobs in Morehead, Ky.

Missouri-based barrel manufacturer Independent Stave says it will create 220 jobs in Morehead as it plans to build a new \$66.5 million cooperage. The company already has a stave mill in Morehead, and the governor's office says the cooperage announcement is a result of strong demand in the bourbon and whiskey industry.

Conveyor manufacturer adding 300 jobs in Kentucky

Material Handling Systems (MHS) is investing \$20 million in its facilities in Mount Washington, Ky. The company builds and installs conveyor systems for companies such as Amazon, Fed-Ex and UPS. The project will double the company's footprint and add 300 jobs.

Indoor farming company bringing new jobs to Breathitt County

Hydroponic Farms USA, a startup indoor farming company, will invest more than \$44.5 million in East-

ern Kentucky's Breathitt County and create 121 jobs with the construction of a new facility on a reclaimed mine in Jackson.

LINAK expansion brings new jobs to Louisville

More than 400 new jobs are coming to Louisville with the opening of a 75,000-square-foot expansion at LINAK Incorporated. The company, which is headquartered in Jefferson County, Ky., makes parts used in healthcare equipment, desks and other furniture.

LOUISIANA

Formosa to locate \$9.4 billion facility in Louisiana

Taiwan-based Formosa Petrochemical Corp. will locate a \$9.4 billion chemical manufacturing complex on 2,400 acres on the west bank of the Mississippi River in St. James Parish. The project will create 1,200 jobs.

New Orleans votes "yes" for DXC Technology

The New Orleans City Council recently passed an incentive package worth as much as \$6.5 million that is part of a larger \$120 million deal to bring the technology firm DXC to New Orleans. In exchange for the incentives,

Instacart adding 400 jobs in metro Atlanta

Instacart, a grocery delivery service, announced in the spring it will add 400 jobs in the Atlanta area. The company is also investing \$40 million in metro Atlanta. The Instacart service is available in more than 240 markets nationwide and handles deliveries for seven of the eight largest grocers in North America.





Century Aluminum announces \$115 million upgrade to smelter in Hawesville, Ky.

Century Aluminum, a producer of primary aluminum, will invest approximately \$116.5 million for improvements at its operation in Hawesville that will create over 250 full-time jobs. The facility produces high purity metal required for the defense, aerospace and electrical industries.

DXC has pledged to hire at least 2,000 people. The company's pledge has been hailed as an economic game-changer for the city according to Greater New Orleans Inc.'s Michael Hecht.

Software developer doubling workforce in Louisiana

CGI, a software developer, is adding 400 jobs to its facility in Lafayette. By the year 2023, 800 people will work at the company's center with an estimated cumulative payroll of \$480 million.

Big aerospace deal in Lake Charles

Citadel Completions is investing over \$17 million to establish a center for interior jet modifications at Chenault International Airport in Lake Charles. The facility will also perform aircraft maintenance. The project is expected to start in the third quarter of this year and will generate 256 jobs.

New \$70 million plant to bring 39 jobs to Jefferson Parish

Georgia-based Fuji Vegetable Oil plans to launch a \$70 million processing facility with 39 jobs next to the former Avondale Shipyard

in Jefferson Parish. Louisiana Economic Development (LED) said the facility will primarily import and refine palm oil from sources in the Pacific, and LED said access to international waters will be vital to the operation.

MISSISSIPPI

Peco Foods bringing 300 jobs to West Point

Alabama-based Peco Foods will take over the former AmeriCold facility in West Point, Miss., and invest \$40 million in it. The company is a poultry provider. The project will create 300 jobs.

Metal building company plans Northeast Mississippi factory

A Georgia company that makes steel building components wants to open a factory in Aberdeen, Miss. Bradbury Logistics & Services will invest \$1 million and hire 150 people by 2020.

General Atomic's \$20 million expansion will add 60 jobs in Mississippi

General Atomic's Electro-magnetic Systems will invest \$20 million to expand for the tenth time in 13 years in Shannon, Miss. The project is expected to create 48 jobs to manufacture laser systems.

India-based data firm to locate first center in New Orleans

India-based digital data services firm iMerit, whose founder and CEO Radha Basu is shown here, will locate its first U.S. delivery center in downtown New Orleans. The company, which uses data to teach artificial intelligence, will hire 100.

General Atomic, a defense contractor headquartered in San Diego, Calif., specializes in nuclear physics. The company's acoustic surveillance sensor doesn't see you coming, it hears you.

Mississippi wood manufacturer expanding in Vicksburg

Industrial Wood Products is locating several lines of its wood products in a plant in Vicksburg, Miss. The company will invest \$2 million in the deal and create 50 jobs.

Woodgrain Distribution plans Jackson distribution hub

Building products company Woodgrain Distribution will invest \$5 million to open a distribution hub in Jackson.

MISSOURI

Amazon creating 1,500 jobs in Missouri

Amazon.com will locate its first Missouri fulfillment center in St. Peters, Mo., creating more than 1,500 full-

time jobs. Workers there will also have "opportunities to engage with Amazon Robotics in a highly technological workplace."

Thermo Fisher investing \$50 million in St. Louis

Thermo Fisher Scientific will invest \$50 million at its St. Louis facility to expand production of the company's biologic drug substance capabilities. The project will create 80 jobs.

Magnitude 7 Metals reopens Missouri aluminum smelter

Magnitude 7 Metals will reopen an aluminum smelter closed in 2016 in Marston, Mo. The company plans to create more than 450 jobs to produce aluminum cans.

Grove Collaborative plans Missouri distribution hub

Grove Collaborative, a natural home care products company that ships natural cleaning brands like Method and Mrs. Meyer's, plans



RELOCATIONS & EXPANSIONS



Nestlé to hire 135 workers in Missouri

Nestlé announced in the spring it will add 135 workers at a Conagra Brands plant in Trenton, Mo. The plant makes Chef-mate products.

to open a new \$3.7 million fulfillment center in St. Peters, Mo. The new facility is expected to create 210 jobs in the region.

Mortgage firm Cenlar opens first Missouri office, adding 500 jobs

Cenlar FSB, a mortgage servicing operation headquartered in New Jersey, plans on adding 500 jobs in O'Fallon, Mo., as it takes over the mortgage servicing operations of Citigroup. The CitiMortgage unit based in O'Fallon last year began to focus more on making mortgage loans rather than servicing them.

NORTH CAROLINA

Life sciences company locating new plant in North Carolina

AveXis, a clinical-stage gene therapy company that develops treatments for neurological diseases, will locate a new manufacturing plant in

Durham County. The company will invest \$55 million and create 200 jobs.

LabCorp locates operations in Durham

LabCorp, known for its clinical laboratory and drug development services, will locate a new operations center in Durham County. The company plans to create 422 jobs and will invest \$30 million in facility.

Israel-based Albaad USA expands North Carolina manufacturing plant

Albaad USA, an Israel-based manufacturer of wet wipes and other hygiene products, will expand its U.S. operations in Reidsville, N.C. The company plans to add 302 jobs and invest \$45 million in Rockingham County.

EGGER Wood Products breaks ground on \$700 million Triad Project

EGGER Wood Products, an Austria-based wood materi-

als supplier for the furniture, construction and flooring industries, has begun construction on its North American corporate offices, part of a \$700 million project that will add 770 manufacturing jobs in Davidson County.

Grifols breaks ground on \$120 million facility

Spain-based healthcare giant Grifols has broken ground on a new \$120 million facility at its Johnston County site, part of a \$320 million investment in Clayton. The company's latest addition will be used for making hemotherapy products. An additional \$210 million is being invested in its other facilities there. Grifols expects to hire about 250 new employees in Clayton over the next dozen years.

Financial payments firm investing in Winston-Salem

The Clearing House Payments Co., a financial pay-

ments firm, is investing almost \$25 million in its operations center in Winston-Salem. The company, which will hire 50 in the deal, has been operating there for a decade.

Fibertex breaks ground in Randolph County

Officials gathered at the site of a proposed Fibertex manufacturing facility to mark the company's expansion into Randolph County with a groundbreaking. Based in Denmark, Fibertex Personal Care announced last year that it would locate its first U.S. manufacturing operation in Asheboro on what once was the Goodyear wire plant campus. The project means a \$114 million investment and 145 new jobs.

GE Aviation will invest \$105 million in North Carolina

Ohio-based aircraft engine supplier GE Aviation plans to invest \$105 million into its

Corning to construct Valor Glass facility in Durham, N.C.

Corning has announced an investment in Corning Valor Glass to build a high-volume manufacturing facility that will create over 300 new jobs in Durham County. Adding capacity for Valor Glass — a break-resistant glass for packaging injectable drugs — is part of Corning's plan announced in July 2017 to invest \$500 million and create 1,000 new jobs in the U.S.



operations in Asheville and West Jefferson, N.C., creating 146 jobs to support its new technology.

Corvid Technologies expands HQ in Mooresville

Engineering firm Corvid Technologies, which provides physics-based engineering solutions for the defense, automotive, aircraft and biomedical industries, will invest \$28.9 million to locate its headquarters and create 367 new jobs in Iredell County. Salaries will average \$100,000.

Hickory-area fiber-optic expansions to total \$54 million, 100 jobs

A Hickory-area fiber-optic cable plant is adding 100 jobs and will spend almost \$75 million on its huge facility in Catawba County. Italian energy and telecom cable company Prysmian Group already has about 500 working at its Claremont facility.

OKLAHOMA

Italian paper manufacturer announces \$360 million plant in Oklahoma

An Italian tissue paper manufacturer is investing \$360 million to build a new plant in northeastern Oklahoma that will support 300 area jobs. Sofidel Group announced the plan as it broke ground on the project in Inola, located about 30 miles east of Tulsa.

OKC could get 550 new jobs

Oklahoma City took a first step toward approving a \$1.25 million economic incentive to bring a federal



New steel mill opens in Oklahoma

Commercial Metals dedicated its new micro mill in Durant, Okla., in the spring quarter. The mill is the company's second advanced micro mill that uses a manufacturing process that melts, casts and rolls steel from a single strand, resulting in higher yields and lower energy use than the traditional mini mill plant.

contractor and 550 quality jobs to town. CACI provides information solutions and services in support of national security missions and government transformation for Intelligence, Defense and Federal Civilian customers.

Alltran expanding Tulsa office with 150 new call center jobs

Alltran is bringing 150 new "high-paying" call center jobs to Tulsa. The company specializes in revenue cycle, accounts receivable and contact center solutions within health care, financial services, higher education and government.

SOUTH CAROLINA

Mortgage company relocating to South Carolina, 1,100 jobs

More than 1,000 jobs will be created in York County, S.C., as RoundPoint Mortgage will relocate its headquarters from Charlotte. The company is investing \$34 million in the deal.

Keurig to build new facility in South Carolina

Keurig Green Mountain plans to build a new roasting and packaging facility in Spartanburg County. The coffee operations will see \$350 million in capital in-

vestments and 500 new jobs.

Steelworkers return to mill in Georgetown

Forty steelworkers have returned to work at a Georgetown mill, the plant's new owners announced recently. British-based Liberty House acquired the mill from ArcelorMittal, which ceased operations at the plant in August 2015.

S.C. State Port opens inland port

The State Ports Authority opened its \$50.5 million inland port in Dillon, S.C., in the spring quarter. The new inland port is located on a CSX main rail line that will operate six days a week. The cargo transfer hub will enable trucks and trains to exchange thousands of containers to be distributed north on Interstate 95.

Manufacturer to open new plant in rural South Carolina

ACS Manufacturing, a maker of acoustical equipment enclosures, is opening a new plant in Abbeville, S.C. The \$6 million investment will create 150 jobs.

Chinese firm to open recycling facility in South Carolina

Eclomedia is expected to

bring 200 new jobs to Orangeburg County with a \$52 million investment in its first North American operations. As a U.S. subsidiary of Zhangzhou Sanlida Environmental Technology Corporation, the plant imports and recycles waste paper and plastic to be used in foam and cast plastic parts.

Big sawmill deal in Camden

Canfor Southern Pine will upgrade its sawmill in Camden, S.C. The company, which manufactures high-quality Southern yellow pine lumber at 14 locations in the South — including Conway, Darlington and Marion in South Carolina — is headquartered in Myrtle Beach, S.C. The expansion will see an impressive \$40 million invested into the Camden facility.

TENNESSEE

Big relocation from New York to Nashville

Global investment firm AllianceBernstein announced in the spring it will relocate its global headquarters from New York to Nashville. The headquarters relocation is expected to create 1,050 jobs in Nashville. The company is investing \$70 million in the move. It chose Nashville over

RELOCATIONS & EXPANSIONS



Samsung launches second line at South Carolina appliance plant

South Korean-based appliance manufacturer Samsung announced the expansion of its production footprint in South Carolina, making progress on a plan to create nearly 1,000 jobs in the state by 2020. The company officially launched a new line of top-loading washing machines at its facility in Newberry, which is in addition to a line of front-loading washing machines that the electronics company began making at the plant earlier this year. The expansion comes less than a year after Samsung's June announcement that it would invest \$380 million in South Carolina to manufacture home appliances, creating an estimated 950 jobs by 2020.

Charlotte for the relocation.

FedEx plans major investment in Memphis hub

FedEx Corp is making a capital investment of more than \$1 billion to modernize its hub in Memphis. Construction is expected to begin in 2019 and be completed by 2025. In the meantime, FedEx Express immediately hopes to fill 1,700 part-time positions.

Green Applications locates in Mountain City

Green Applications, an LED lighting manufacturer, distributor and wholesaler doing business as Star LED, plans to establish operations in Mountain City. The company will invest \$1 million and cre-

ate 50 jobs in Johnson County over the next five years.

Nearly 100 new jobs, \$40 million for Knox County

More than 85 new Knox County jobs and roughly \$40 million in investments will bolster global adhesive-products company Scapa Tapes North America's Knoxville operations.

SpecialtyCare to consolidate and expand HQ in Tennessee, add 100 jobs

SpecialtyCare, a clinical services provider for hospitals and health systems, is moving its headquarters to a new, expanded location in Brentwood. The 40,000-square-foot space will allow the

company to invest in more training facilities and lead to the creation of 124 new jobs.

Defense contractor expanding in Tennessee

Kilgore Flares, a defense contractor, is investing \$40 million to expand its facilities in Toone, Tenn. The project will create 100 jobs.

New Zealand tech company chooses Nashville

New Zealand-based tech firm, Mobile Mentor, has chosen Nashville as the place for its first U.S. office. The deal will create 110 jobs.

TEXAS

A \$10 billion deal near Corpus Christi

ExxonMobil Chemical and Saudi Basic Industries (SABIC), have formed a new joint venture for their Gulf Coast Growth Ventures project. The \$10 billion project, which will be located near Corpus Christi in Portland, Texas, is expected to include a 1.8 million-ton ethane cracker, a monoethylene glycol unit and two polyethylene units. The deal will create 600 per-

manent jobs and 6,000 construction jobs.

Indeed.com to hire 3,000 in Austin

The job website Indeed plans to hire 3,000 employees at its Austin facilities. The company currently employs 1,600 in Austin and is developing two new offices in downtown Austin and The Domain.

Texas port signs lease with Big River Steel

The prospect of a \$1.5 billion, LEED-certified steel manufacturing plant locating at the Port of Brownsville has moved closer to reality. Port commissioners voted unanimously to lease about 800 acres on the Brownsville Ship Channel to Arkansas-based Big River Steel. Big River in turn will build a high-tech steel mill that will house 500 workers. About 1,500 construction jobs will also be created.

Oracle opens gleaming new Austin facility

Oracle has opened its new 560,000-square-foot facility in Austin. Execs of the California-based company call

Doss Enterprises continues West Virginia expansion

Doss Enterprises, an excavation and site development company, is adding 70 long-term positions to help serve across North Central West Virginia.





the two new buildings the “workforce of the future.” The campus, just outside downtown Austin, could eventually house 10,000 tech workers.

TaskUs could bring 1,000 jobs to New Braunfels

TaskUs, a Los Angeles company that specializes in providing business services to digital brands such as Tinder and Hootsuite, is expanding its presence with as many as 1,000 new call center positions in New Braunfels. The company reported it may have upwards of 2,000 workers in the region.

Indian tech company unveils Plano tech hub, could hire 450

An India-based information technology company recently unveiled a new hub in Plano, with plans to hire 150 workers to staff it. Wipro Limited plans to open its 45,000-square-foot Texas Technology Center, which will be home to the company's U.S. cybersecurity center and advanced analytics operations. It will initially employ 150, but plans to increase to as many as 450 workers.

Peloton to open regional campus in North Texas

Indoor cycling company Peloton will open a regional campus in Plano, Texas. The new office will replace its New York headquarters. The project will create 400 jobs.

Gerber relocating HQ to Virginia

Gerber Products is relocating its U.S. headquarters from New Jersey to Arlington County, Va. The company wanted to be near the headquarters of its sister company, Nestlé USA, which also is in Arlington County. The \$5 million relocation will create 150 new jobs.

Investment firm chooses Austin over Dallas and Denver

Pacific Management Investment Co. has chosen Austin for a new innovation office that will house 200 workers. The financial firm will use artificial intelligence to manage portfolios, client relations and economic forecasting.

JSW Steel to invest \$500 million in Baytown

Texas Gov. Greg Abbott recently announced a \$500 million investment from India-based JSW Group to expand its steel operations in Baytown. The expansion will create 500 new jobs at the plant.

Denver firm to build \$1 billion data campus in Richardson, Texas

EdgeCore Internet Real Estate plans to build a \$1 billion data center in Richardson. EdgeCore wants to build a facility on 33 acres to include two office and data center buildings, each spanning 358,000 square feet.

VIRGINIA

Customs and border protection agency moving 3,700 jobs to Loudoun County

The U.S. Customs and Border Protection Agency's Office of Information Technology headquarters will consolidate its operations and bring 3,700 jobs to Loudoun County. The county's Board of Supervisors aided the relocation through an agreement with Quantum Park owner American Real

Estate Partners, which will make \$179 million in improvements to the facility.

Appian sets up new HQ in Virginia, adds 600 jobs

Appian, a low-code and business process platform provider, is moving its headquarters to a larger space in McLean, Va. The company will invest over \$28 million in the move, which will relocate 600 workers, and add 600 more.

Big government contractor to place IT jobs in rural Virginia

Science Applications International Corp. (SAIC) plans to establish an IT service center in Dickenson County, Va., one of the state's poorest counties. SAIC is a major government contractor. The deal will create 40 jobs.

DowDuPont's \$50 million investment in Kevlar production to include plant in Chesterfield, Va.

DowDuPont is investing \$50 million in its global operations that make Kevlar, a high-strength material manufactured at the company's Spruance plant in Chesterfield County. The investment will not mean additional hiring there, although the Spruance plant, which employs about 1,800 people, has hired 150 people over the last year.

FinTech Paymerang plans hiring 100 in Virginia

Backed by a new \$26 million investment, Chesterfield County-based financial services tech company Paymerang is planning an expan-

sion that will create 100 jobs over the next five years. The company offers a platform that enables its clients to pay all vendors electronically.

MicroStrategy adding 300 jobs, investing \$6 million at Virginia headquarters

MicroStrategy Incorporated has renewed its headquarters lease in Tysons, Va., and plans to invest \$6 million in capital improvements. The analytics and mobility software company also considered Washington, DC for the project, which will retain more than 800 existing jobs in Fairfax County and add 300.

WEST VIRGINIA

VA Coding Unit moves to Huntington, W.Va.

The revitalization of downtown Huntington took another step forward as the Veterans Affairs' MidSouth Healthcare Network announced it would relocate its 85-employee medical coding unit from Ceredo, W.Va. The move will create an additional 40 jobs in a long-vacant former department store.

Ground-breaking for a new plant in Jefferson County

TeMa North America, based in Italy, is breaking ground on a 42,000-square-foot manufacturing plant in Jefferson County. The \$10 million plant, announced last summer, is the company's first manufacturing facility in the United States, and will produce insulation and drainage systems. 🌟

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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.



Nissan's new CEO Hiroto Saikawa wants the company to slow down, worried its rush to expand sales was pushing it off track.

Nissan cutting vehicle production by 20 percent in the U.S.

Nissan Motor Co. is cutting production by as much as 20 percent in North America to help it deal with declining profitability in the United States. Nissan, Japan's second largest automaker, with its North American headquarters in a Nashville suburb, has seen sales fall 6.5 percent this year. Discounts for the slow selling Altima and Rogue models have factored in the drop in profit in the U.S. In the Southern Auto Corridor, Nissan operates assembly plants in Canton, Miss., and Smyrna, Tenn. It also operates an engine and crankshaft plant in Decherd, Tenn. Although production is slowing down, the Nikkei said, employees will not be let go. The plants will not be completely shut down and, at some point later this year, production is expected to return to normal levels.

ALABAMA

Hyundai plant in Montgomery to undergo \$388 million expansion

Hyundai announced in the spring quarter it will invest \$388 million in its Montgomery assembly plant to build a 260,000-square-foot engine head manufacturing facility to produce its next-generation engine. The engine will use new technology and components. The South Korean automaker will also update and improve its existing engine plant at the Montgomery campus. The new engines will be placed in vehicles built at the Alabama facility as well as Kia's plant in West Point, Ga. Also, Hyundai rolled out the new Santa Fe model in June. Fifty jobs will be created with the expansion. About 3,000 workers are currently housed at the Montgomery facility.

Alabama sees record 15,000 new manufacturing jobs in 2017

In calendar year 2017, 15,465 manufacturing jobs were created in Alabama with a record investment total of \$4.41 billion. The automotive and aerospace sectors led the way followed by forest products and food production.



Hyundai announced in the spring quarter it will invest \$388 million in its Montgomery assembly plant. Pictured at the site are Dong Ryeol Choi, President and Chief Executive Officer of Hyundai Motor Manufacturing Alabama; Kay Ivey, Governor, State of Alabama; and Craig Stapley, Director of Production, Hyundai Motor Manufacturing Alabama.



The new Mercedes-Benz North American headquarters is located in Sandy Springs, Ga.

Construction begins on Mazda-Toyota plant on October 1

Construction on Huntsville's \$1.6 billion Mazda-Toyota plant is scheduled to start on October 1, according to Gov. Kay Ivey. The plant is expected to house 4,000 workers.

Port of Mobile signs agreement to ship vehicles

The Alabama State Port Authority is partnering with a joint venture from South America to build and operate a facility that enables vehicles to be driven on and off of ships at the Port of Mobile. The joint venture is called AutoMobile International Terminal. An automobile handling center at the Port

of Mobile would clearly be an advantage to Alabama's three operating auto assembly plants — Mercedes-Benz, Hyundai and Honda — as well as the Mazda-Toyota joint venture assembly plant in Huntsville that begins construction in October. The new terminal could create 600 or more jobs.

Autocar opens \$120 million plant in Birmingham

Autocar, a manufacturer of concrete trucks and garbage trucks, has opened its \$120 million plant in Birmingham at a 1.3 million-square-foot facility, a former Meadowcraft Complex. The company currently employs 746 workers.

Big automotive parts supplier opens Alabama plant

Samvardhana Motherson Peguform (SMP) has officially opened its new 700,000-square-foot plant in Tuscaloosa, Ala. The company has invested \$150 million in the facility and the plant already houses 320 workers. Plans are to hire up to 1,000.

Auto supplier Yorozu opens Jasper plant

Auto parts maker Yorozu marked the grand opening of its \$110 million manufacturing plant in Walker County, where hiring has been ramping up and will continue to grow. The Tier 1 automotive supplier produces metal stamped suspension components for automakers including Honda, Toyota and Nissan.

German auto supplier opens \$46.3 million plant in Alabama

MöllerTech, a German auto supplier, has opened a \$46.3 million plant in Bibb Coun-

ty. Company officials say 222 employees will be hired at the new supply plant by the end of 2019.

Truck & Wheel Group opens \$30 million Alabama wheel assembly plant

The Spain-based auto supplier Truck & Wheel Group has opened a new 127,000-square-foot manufacturing facility that will supply wheel assemblies for automakers in the Southeast. The \$30 million project will create more than 70 jobs.

ARKANSAS

Nucor completes latest Arkansas expansion

In the spring quarter, Nucor Steel Arkansas completed its \$230 million cold mill expansion. The company makes steel for the automotive industry near Blytheville, Ark., and is one of the largest employers in Mississippi County. About 100 jobs will be added at the mill.

CONTINUED



Toyota announced in the spring quarter it is investing \$170 million at its Blue Springs, Miss., assembly plant to add capacity. The deal will create 400 jobs.

Volvo Cars has begun producing prototypes of its new S60 sedan to prepare for full production by the end of the year in Berkeley County, S.C.



FLORIDA

Mexican auto supplier

chooses Panama City for HQ

Yucatan-based Air Temp, a global auto parts supplier, will locate its first U.S. headquarters in Panama City, Fla. The project is expected to create 50 jobs.

GEORGIA

Mercedes-Benz to add innovation lab in Atlanta

Mercedes-Benz will open an innovation lab, named Lab1886, in metro Atlanta, a surprise announcement that came as the German automaker opened its new North American headquarters in Sandy Springs. Lab1886, a reference to the year the founders of Mercedes' parent company, Daimler Group, built the first automobile powered by an internal combustion engine, will help fast-track projects and services from design to market.

Tire maker joint venture picks Atlanta for HQ

A new joint venture between two global tire makers is locating its headquarters in Atlanta. Goodyear and Bridgestone have created TireHub, a tire distribution joint venture. The new company will attempt to meet the growing demand for larger rim diameter premium tires. The new headquarters in Atlanta will house 150 workers.

Smyrna's Topre America announces 50 new jobs

Topre America Corp. has announced plans to expand its existing facility in Smyrna, Ga., representing a \$37.8 million capital investment and the creation of 50 jobs. Topre America provides automotive stamping and body structure assemblies for Nissan, Honda and Toyota.

KENTUCKY

Fitzgerald Industries opens Kentucky plant

A manufacturer of dump-truck beds, Fitzgerald Industries II, will locate in the former Belden plant in Monticello, Ky. The company plans to invest \$6 million and create 250 full-time jobs.

Commercial truck facility adding jobs in Kentucky

E-Z Pack Refuse Hauling Solutions, a maker of commercial trucks, is investing \$6.85 million in its plant in Harrison County. The deal will create about 100 jobs.

LOUISIANA

Plant coming to Vidalia

Syrah Resources announced in the spring it will build a \$25 million graphite processing facility in Vidalia, La. The plant will produce graphite anode materials for batteries in electric vehicles and other products. The Australian company will hire 55 workers in the deal.

MISSISSIPPI

Toyota creating hundreds of jobs at Mississippi plant

Toyota announced in the spring quarter it is investing \$170 million at its assembly plant in Blue Springs, Miss., to add capacity. The Japanese automaker builds the Corolla model there. The deal will create 400 jobs.

Nissan's milestone in Mississippi

Nissan's plant in Canton, Miss., produced its 4 millionth vehicle, a 2018 NV Cargo van, marking a major milestone for the facility that opened in 2003. To meet demand for the NV, the Japanese automaker added a second shift in April. About 250 jobs will be created or retained to staff the second shift.

NORTH CAROLINA

Chinese tire plant gets bigger

Last year, China-based Triangle Tire announced a \$582 million, 800-employee tire plant at the Kingsboro CSX Select Megasite in Edgecombe County, N.C. In the spring quarter, company officials raised those numbers to just over \$1 billion and between 1,100 and 1,200 jobs at the unbuilt plant.

Manufacturer Dhollandia building \$30 million North Carolina facility

Belgium-based manufacturer Dhollandia broke ground

in Gaston County on what will become the company's first manufacturing facility in the United States. The new 160,000-square-foot facility, which will manufacture hydraulic lift gates for trucks, is expected to create up to 200 new jobs.

Two foreign companies adding 100-plus jobs in Charlotte region

Tokyo-based Yokohama Tire will open a research and development facility in Cornelius, adding 56 jobs and nearly \$5.9 million in investment, while Kurz, a hot stamping and coating technology company based in Furth, Germany, will build a new \$18 million North American headquarters in Huntersville and hire 90 new positions by 2022.

SOUTH CAROLINA

Volvo Cars gears up for mass hiring in South Carolina

Volvo Cars has begun producing prototypes of its new S60 sedan to prepare for full production by the end of the year in Berkeley County. The test cars (not to be sold) help new hires learn how to make the vehicles before producing them in real time.

Magna South Carolina plant to supply BMW

Headquartered in Ontario, Canada, Magna will supply seats to BMW Group for the first time with the open-

ing of its seat-manufacturing facility in Spartanburg County, S.C. At the recent grand opening, Magna also announced an \$8 million expansion of the plant, which will add 25,000 square feet and an additional 130 jobs, bringing the total workforce to 610 jobs at the facility, which will supply seats for the BMW X5, X6 and X7 models.

Auto parts supplier expanding in South Carolina
 JTEKT North America is investing \$19.4 million in its Koyo Bearings plant in West Union, S.C. The company, which makes bearings, steering systems and drive-line components, will add 56 jobs in the project.

Auto parts supplier plans South Carolina plant
 Germany-based Paul Bippus GmbH, a manufacturer of precision parts, is opening a plant in Summerville, S.C. The \$16 million facility will supply parts to the nearby Robert Bosch plant. The deal will create 45 jobs.

TENNESSEE

Volkswagen announces \$340 million Chattanooga investment
 Volkswagen has announced plans to build a third model

el at its Chattanooga plant, representing a \$340 million investment in addition to the \$900 million already invested to expand the plant for Atlas production. Beginning in the last quarter of 2019, the plant will make a five-seat SUV based on its Atlas, a seven-seat vehicle that's already built in Chattanooga. Volkswagen currently employs 3,500 people at the plant, and that number could grow based on sales of the new SUV.

General Motors returns to three shifts at Tennessee plant
 GM will add a third shift that it took down in November at its plant in Spring Hill, Tenn. The third shift will add about 1,000 jobs. GM added the shift because of high demand for its GMC Acadia and Cadillac XT5 models.

Big deal in Northeast Tennessee
 Belgian-based Van Hool NV, a manufacturer of buses, coaches and industrial vehicles, will establish its first U.S. manufacturing facility in Morristown, Tenn. The family-owned company plans to invest \$47 million to build a 500,000-square-foot facility in Morristown's East Tennessee Progress Center.

About 640 jobs will be created in the deal.

Truck parts maker opening a plant in Northeast Tennessee
 Canada-based RMC Advanced Technologies is opening a new plant in Hawkins County, Tenn. The company makes large body parts for big truck rigs. The company will hire 54 workers to start.

Adient to invest \$10.8 million in Tennessee
 Adient will invest \$10.8 million in its Lexington facility and create 200 new jobs. The automotive seating and interior systems manufacturer plans to upgrade its facility by installing equipment and expanding production in Henderson County, Tenn.

ATLASBX locating first U.S. manufacturing facility in Tennessee
 ATLASBX will locate its first U.S. manufacturing facility in Clarksville, Tenn. The automotive battery manufacturer will invest \$75 million and create approximately 200 jobs in Montgomery County.

Denso invests millions, adds 320 jobs in Tennessee
 Automotive supplier Denso announced a \$190 million investment in its Athens, Tenn., facility that will add

four new production lines and 320 jobs focused on electrification and safety systems.

South Korean manufacturer to build new plant in West Tennessee
 Dong-A USA, an automotive and appliance supplier, will invest \$13 million in a new plant in Martin, Tenn. The South Korean company makes rubber and plastic components. The deal will create 200 new jobs.

Over 170 new jobs in Loudon
 Morgan Olsen is immediately hiring over 170 positions. The company produces walk-in vans and is looking to quickly fill these positions after being awarded a "record-breaking" contract for over 6,000 vans.

Dorman Products plans hub in Portland, Tenn.
 Dorman Products will invest more than \$55 million to expand its operations in Robertson County, Tenn. The Pennsylvania-based automotive parts manufacturer plans to establish a new production and distribution facility and create approximately 215 jobs. ⚡



Volkswagen announced plans to build a third model at its Chattanooga plant, representing a \$340 million investment in addition to the \$900 million already invested to expand the plant for Atlas production.

SB&D 100



How did they finish?

The South continues to beat the odds with four years of unprecedented economic development success. See which states and cities win, place and show. . .

BY MICHAEL RANDLE





The South continued its decades-long run as the economic engine of the world's largest economy. In 2017, almost 1 million of the 2.2 million jobs created in the U.S. were captured by states in the South. The West came in second place with a net plus of 669,000 jobs, followed by the Northeast (320,000) and Midwest (281,000) last year.

At 92 months (as of May), the U.S. is in the longest stretch of consecutive monthly job gains in history. Yet, jobs are not the issue anymore; people are. Workers are hard to find, which is slowing the economy down a little. It's not much yet, but the consecutive monthly streak of job gains has to end at some point, and if workers don't magically emerge from somewhere, we are closer to that happening than at any time in eight years.

Fortunately for the South, it is the No. 1 region for in-migration from other U.S. regions and has been for decades. Over 1.2 million people migrated to the South from July 2016 to July 2017 from other

Job fairs are happening everywhere as recent research shows that 77 percent of CEOs are concerned that their companies' growth will be adversely impacted by the ongoing shortage of key skills such as leadership, adaptability and problem solving. In addition, U.S. employers are reporting difficulty hiring skilled trades people, technicians, engineers and medical talent, among others.

regions, mostly from the Northeast. The South is by far the largest in-migration region of the country.

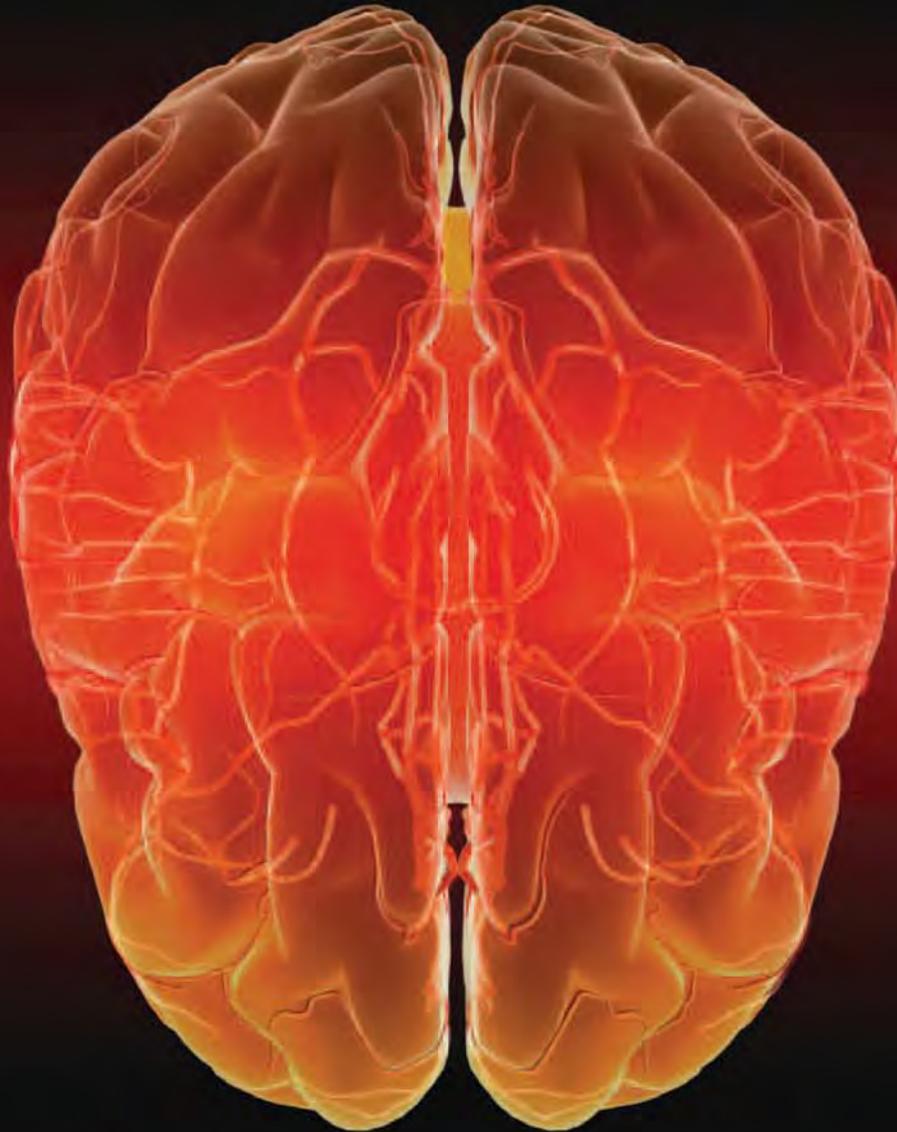
To give you a comparison, while over 1.2 million people migrated to the 15-state American South, only 111,221 migrated to the Northeast during the same period. So, if your market is a destination for those looking for better jobs and a lower cost of living, you are somewhat insulated from the lack of labor.

Regardless, labor constraints have become the No. 1 issue in this economy. The situation in the South and elsewhere is no longer about a skills gap. All the folks with skills are working. What we have today is a "body gap." Currently, there are a record 6.6 million jobs available in the U.S., with an employable

pool of an estimated 1.4 million workers by most economists' accounts. I know, crazy! It wasn't too long ago that over 15 million able workers were unemployed in the U.S. and that was deemed the "new normal."

Since the 2014 recovery peak of 250,000 jobs created per month on average, the average monthly job gains have fallen every year. The theory that there are plenty of folks outside the labor force and employable is completely flawed. The U.S. set a new record low in April for weekly unemployment insurance claims. In fact, the record low is unprecedented. The last time we saw a low of 200,000 unemployment insurance (UI) payments filed was during a week in December 1969. Why is it unprecedented? In

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At 92 months (as of May), the U.S. is in the longest stretch of consecutive **monthly job gains** in history.

Source: Bureau of Labor Statistics

1969, the U.S. had a labor force of 82 million people. Today, it's double that at 162 million. In other words, new UI claims just reached a 49-year low with a labor force almost twice as large as it was 49 years ago. What does that mean? It means there's hardly anyone left that is employable.

And while there are few workers available, some of our lawmakers are trying hard to cut legal immigration in addition to illegal immigration. Let's emphasize that: some lawmakers want to cut legal immigration. That seems



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Employment Status among every 500 Americans

247 Employed Full Time

54 Employed Part Time

177 Unemployed, Don't Want Job

12 Unemployed, Want Job

10 Unemployed, Not Looking

500 Total

Source: Bureau of Labor Statistics

to me to be the opposite of what this nation needs right now as it relates to economic realities. Sure, we've all heard about the aforementioned "skills gap," but that is not the most pressing issue. Unskilled workers are the center of the real labor shortage, as farmers, seafood processors and construction companies are in need of tens of thousands of workers that are simply not there for hire.

Another way to look at U.S. labor availability, or lack thereof, is this nifty chart (shown at left) that FiveThirtyEight put together from numbers provided by the Bureau of Labor Statistics. As of April 2018, this is the employment status among every 500 Americans.

Remember, labor participation or total workforce is defined as anyone age 16 to 64. Not counted are those in the military, in prison, in long-term care or are otherwise institutionalized.

So, as you can see, only 12 out of 500 people in this country are unemployed and seeking a job. That's about 2.3 percent of the eligible workers in the country who are unemployed, want a job and are actively looking. That's a tiny pool of workers left who want a job.

The second largest pool in the chart are those who are unemployed who don't want a job. That could be any number of types of individuals aged 16 to 64, including the retired, disabled, drug addicted, mentally ill, student and family caretaker. Remember, there are an estimated 2 million people in this country who are addicted to opioids and cannot pass a drug test.

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The baby bust: So many less people entering the workforce

As mentioned in previous cover stories, we are facing a double whammy to the labor market — today's tight immigration policies and birth rates that have been declining for more than 15 years. It isn't too surprising that job growth is beginning to slow considering the unemployment rate, 3.9 percent, is beyond full employment.

As a result of the lower birth rates seen since 2002, the U.S. population today provides anywhere from 60,000 to 75,000 people entering the job market per month (turning age 16). For decades, the U.S. could count on about 175,000 to 225,000 people entering the job market per month. But with a declining labor force, population and immigration, combined with full employment and a record number of people

aging out of the workforce, job growth will most certainly keep falling. Yet, declining job growth is not such a bad thing when you have achieved full employment. Full employment is the goal of any economy.

It should be noted that just about every developed country in the world is in the same tight labor and low fertility rate boat as the U.S. The problem is that the U.S. is not doing anything about it. In fact, the U.S. is doing the exact opposite of what it should do in a tight labor market. Japan is suffering not from a skills gap, but a body gap as well. What Japan is experiencing is the same as in the U.S. — a severe shortage of people.

In May, officials in Japan announced a new program to recruit foreign workers to solve its labor situation. Like the U.S. today, Japan has long resisted immigrant labor. This summer, a new pro-



Just about every developed country in the world is experiencing the same **tight labor and low birth rates** as the U.S.



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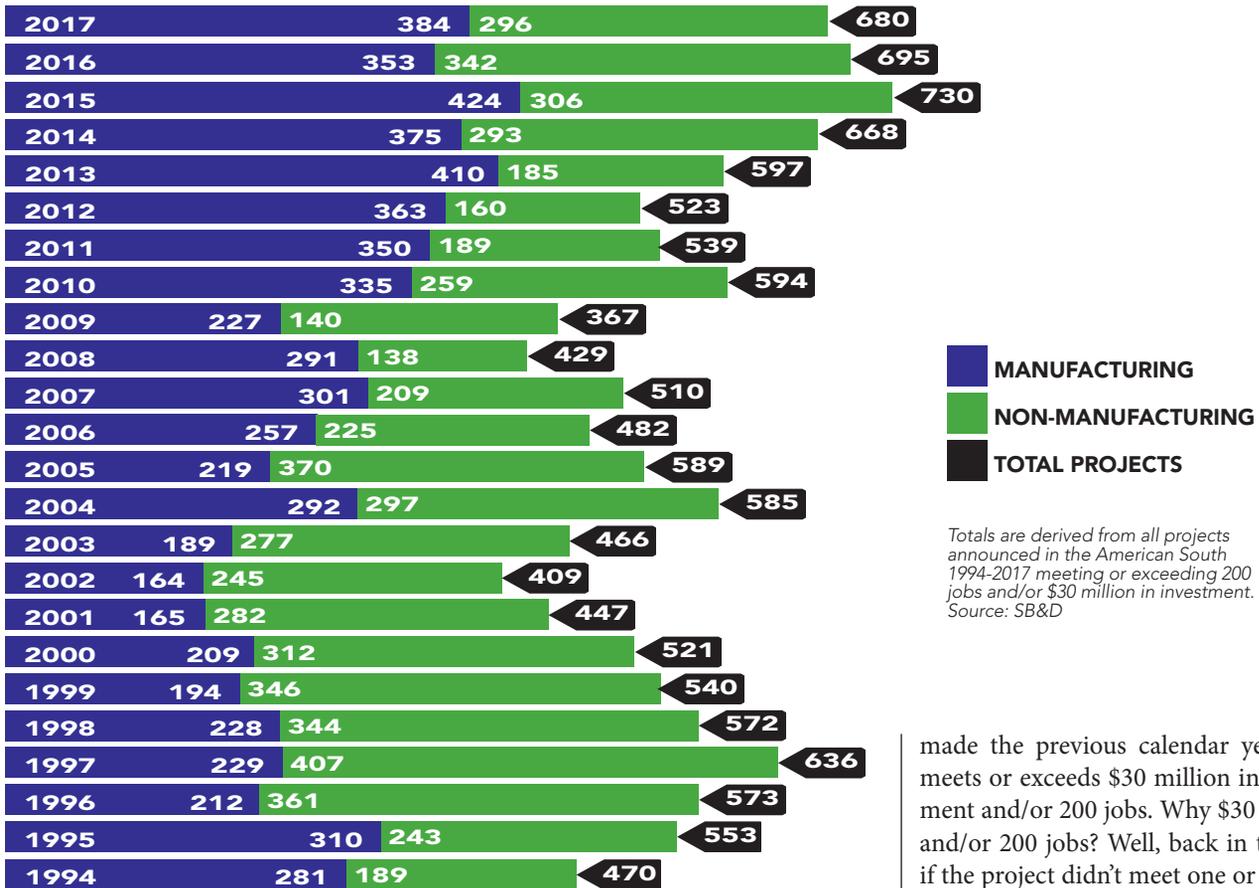
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SB&D 100



Totals are derived from all projects announced in the American South 1994-2017 meeting or exceeding 200 jobs and/or \$30 million in investment. Source: SB&D

The South's Manufacturing vs. Non-Manufacturing Projects 1994-2017

gram will be launched in Japan that will accept foreigners with certain skill sets. The accepted individuals will work in Japan for as long as five years as “trainees.” They will work in fields such as agriculture, construction and home care.

Void of a recession, the U.S. will be forced to take up a similar foreign worker program as Japan's within 18 months, maybe sooner. With this baby bust, site consultants are unable to prove to employers that locations in the South and elsewhere in the U.S. can backfill labor 20 years out. It's not politics, it's demographics.

The 2018 SB&D 100: So, how did project activity in the South fare in President Trump's first year in office?

Given the labor constraints, how did President Trump's first year in office fare in economic development project activity in the South, the world's third largest economy? The methodology of the Southern Business & Development 100 can be found on page 60 in the 2018 Top Deals and Hot Markets report. The short version of the methodology of this ranking is this: we document every publicly announced project in the South

made the previous calendar year that meets or exceeds \$30 million in investment and/or 200 jobs. Why \$30 million and/or 200 jobs? Well, back in the day, if the project didn't meet one or both of those thresholds, many states wouldn't let the local economic developer use the state plane for site visits.

We rank and publish on page 56 the top 100 job announcements from calendar year 2017, and on page 58 are the top 100 investment announcements from last year. But those are simply the top 100 projects for each sector. This, the 24th annual SB&D 100, saw 680 projects meet or exceed 200 jobs and/or \$30 million in investment, the third best total in the ranking's history. Only the 2016 SB&D 100 with a record 730 projects (projects from calendar year 2015) and the 2017 SB&D 100 (projects from calendar year 2016) topped this year's total.

The last four years have been the most successful in SB&D 100 history (see chart above). In the first 20 years of this ranking, the yearly average of big deals announced in the 15-state American South was 520 projects. Reaching 500 projects meeting our thresholds represented the benchmark for an out-

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SB&D 100



Distribution leader Amazon currently has more facilities in Kentucky than any other state in the South. It was widely thought that the company had even gotten in to the horse-racing biz, sponsoring Audible, a favorite in this year's Kentucky Derby. Such was not the case, but Amazon did take advantage of the publicity.

standing year for the first 20 years of the SB&D 100. Not anymore. In the last three years, we've seen 730 projects (2015), 695 projects (2016) and 680 big deals in calendar year 2017. That's a three-year average of 702 projects, obliterating the annual average of the first 20 years of the "100."

So, while Trump's first year couldn't quite beat President Obama's last two years in large project activity, it is close enough to not make a real difference. So, yes, if you base the health of an economy on corporate and industrial project activity, this four-year period in the South is indeed as good as it gets. We have been in rare air and the last four

TOP INDUSTRIES	NUMBER OF PROJECTS					
	2017	2016	2015	2014	2013	2012
1. Distribution	74	66	54	51	26	39
2. Food & Beverage	73	51	63	45	50	36
3. Automotive	72	85	111	81	83	81
4. Financial Services	38	47	69	42	31	19
5. Aviation/Aerospace	35	55	26	28	30	18
6. Petrochemicals	27	41	70	47	37	51
7. Headquarters	33	32	36	42	14	15
8. Oil & Gas	33	25	37	51	53	73
9. Call Centers	29	26	26	33	26	15
10. Healthcare	28	27	19	43	37	23
11. Paper & Packaging	24	10	12	5	4	6
12. IT	21	24	20	25	16	7
13. Communications	17	18	8	20	12	16
14. Metals	16	18	14	15	22	12
15. Building Materials	13	26	21	35	29	15
16. Electronics	12	13	6	6	18	15
17. Data Centers	12	12	14	16	15	7
18. Software	12	6	11	8	4	3
19. Textiles	11	8	11	7	13	4
20. Wood Products	8	11	7	12	10	13
21. Renewable Energy	7	19	19	12	15	8
22. Life Sciences	6	11	5	2	4	8
23. Pharmaceuticals	5	22	7	6	6	2
24. Apparel	5	8	5	8	6	9
25. Fossil Energy	6	7	7	19	8	5

Totals are derived from all projects announced in the American South 2012-2017 meeting or exceeding 200 jobs and/or \$30 million in investment. Source: SB&D

years may represent the best we've got for years to come.

The only year that can even remotely compare to the last four years was in 1997 when 636 big deals made the big board. But even the go-go 1990s can't compare with the average of 701 big deals seen the last three years. From 1995 to 2000 — formerly the best stretch in total projects until this four-year string — the yearly average of SB&D 100 projects was 566. Of course, the low point in the last 24 years was the recession year of 2009 when only 367 deals met or exceeded our thresholds, meaning project activity found in each year's SB&D 100 directly correlates with

an expanding or contracting economy. So, again, we are in the sweet spot historically when it comes to project activity in the American South. There has never been a better period of economic development success than the last four years in the South.

Breaking down the 2018 SB&D 100

For the fourth consecutive year, both manufacturing and services had outstanding years. If you study the chart on page 46, you will notice that is rarely the case. With 384 projects meeting or exceeding 200 jobs and/or \$30 million in investment, manufacturing had its second best year ever.

CONTINUED



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One of 2017's big food and beverage projects had Tennessee crowing. Tyson Foods will build a new chicken production complex in Humboldt, Tenn., 75 miles northeast of Memphis, that will employ 1,500 people. The \$300 million project is to begin operations in late 2019 to meet what Tyson described in a release as "strong consumer demand for its chicken."

The manufacturing sector in the South has now been on a 10-year hot streak (not including the recession year of 2009). The region has simply become one of the most competitive on a cost basis as any region or country in the world. The proliferation of low-cost natural gas has helped manufacturing stop the loss of jobs and now the sector is a job generator. About 1.2 million manufacturing jobs have been added in the U.S. since the collapse of the industry in 2009. Almost half of those 1.2 million manufacturing jobs have been created in the 15-state American South.

When manufacturing was cratering from the early 1990s to 2006, many years saw the service sector totals were double the number of manufacturing deals meeting our thresholds. For the last 10 years, however, manufacturing has beaten services each year in large job generating projects. Yes, the age

of reshoring, onshoring, nearshoring, make it where you sell it — whatever you want to call this manufacturing renaissance — has been driving the South's economy for more than a decade now.

Of all aspects of the South's economy, the success of the manufacturing sector is without a doubt the greatest comeback story. The industry was so down from 1994 to 2006 that the South only averaged 214 large manufacturing announcements each year. From 2007 to 2017, that annual average has risen to 358 large projects, a very significant and healthy comeback.

On the services side, the region saw 296 projects announced of 200 jobs or more. That is 46 deals less than last year, but still an outstanding number. So, this was the fourth consecutive year where manufacturing and services performed well in the same year.

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Industry sector performances

For only the second time in 24 years, the automotive industry was not the No. 1 sector in projects meeting or exceeding 200 jobs and/or \$30 million in investment. Reigning supreme this year is the distribution sector with 74 big deals.

It's amazing how distribution in the South is evolving. Home to FedEx, UPS and DHL's main U.S. hubs, the distribution sector, in what is probably the best consumer economy in years, is lighting up the big deal board. For example, in 2013, there were only 26 projects of 200 jobs or more from the distribution sector. That total has now almost tripled in four years.

There were all kinds of distribution centers announced in 2017 from Walmart to Dollar Tree to Chewy.com. But, leading the way with 14 massive distribution/fulfillment centers in this year's SB&D 100 is Amazon. The proliferation of Amazon distribution centers clearly indicates the nation's changing buying habits.

Notable Distribution Projects

	Jobs	\$Inv	Location
Amazon	2,700	\$1,400	Hebron, Ky.
Amazon	2,500	N/A	Jacksonville, Fla.
Amazon	1,500	N/A	Jacksonville, Fla.
Amazon	1,500	\$198	Orange Co., Fla.

(Investment in millions)

Another sign that consumerism has been unleashed is the fact that the food and beverage industry, with 73 big projects, came in second for the most projects meeting our thresholds. Food and beverage projects increased from 51 to 73 this year.

Notable Food and Beverage Projects

	Jobs	\$Inv	Location
Tyson	1,500	\$320	Humboldt, Tenn.
Simmons	1,500	\$300	Benton Co., Ark.
Mission	1,000	N/A	Dallas, Texas
Ruiz	704	\$79	Florence, S.C.

(Investment in millions)

While the automotive sector, for only the second time in 24 years, was not the No. 1 industry, it placed third with 72 big deals. Automotive has averaged 88 projects a year for 24 years, and to see it drop to 72 is a little concerning.

CONTINUED

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SB&D 100



Volvo announced in 2015 it would build its then-bread-and-butter model, the S60 sedan, in South Carolina. In 2017, the automaker decided to add the revamped, hybrid XC90 to its Low Country lineup. That addition will result in 1,900 more jobs and push the total investment to more than \$1 billion.



Allstate racked up major points with its announced expansion that will create 2,250 jobs in a Charlotte project spanning three years. The insurer is expected to invest more than \$22 million on its operations center. The move will add to the roughly 1,400 employees the company already has in the North Carolina city.

Notable Automotive Projects

	Jobs	\$Inv	Location
Volvo	1,910	\$620	Ridgeville, S.C.
Toyota	1,209	\$1,330	Georgetown, Ky.
Denso	1,000	\$1,000	Maryville, Tenn.
BMW	1,000	\$600	Greer, S.C.

(Investment in millions)

Also concerning is the fact that just two years ago, financial services racked up 69 projects, its second best year ever. This year it could only muster 38. We've seen over the years that when financial services deals begin to wane in the South, that indicates the economy is slowing. But 38 projects is a great total compared to financial services' performance in the recession. It was the financial services industry that totally collapsed during the recession, dropping the service sector to record lows for several years. As late as 2011, when financials only put up nine big deals, the sector was still reeling. It really didn't gain traction until 2013 when it posted 31 projects.

Notable Financial Services Projects

	Jobs	\$Inv	Location
Allstate	2,250	\$22	Charlotte, N.C.
USAA	1,500	\$70	San Antonio, Texas
Navy Federal	1,400	\$100	Frederick Co., Va.
Credit Suisse	1,200	\$65	Morrisville, N.C.

(Investment in millions)

After a record year in calendar year 2016 with 55 big deals, the aerospace industry had its second best year with 35 projects. This is the industry to watch. Last year for the first time, automotive and aerospace finished No. 1 and No. 2 in total deals on the manufacturing side. This year it was food and beverage and automotive.

CONTINUED

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SB&D 100



(Top left) The Air Force chose Florida's Tyndall Air Force Base as the site of a new MQ-9 Reaper Wing consisting of 1,600 new jobs and more than \$250 million of military construction.

(Bottom left) American Airlines is planning a new 1.8 million-square-foot headquarters campus in Fort Worth that will house more than 7,000 administrative employees. The construction is expected to cost at least \$350 million.

Notable Aerospace Projects

	Jobs	\$Inv	Location
Tyndall AFB	1,600	\$250	Panama City, Fla.
Aerojet	805	\$46	Huntsville, Ala.
Pratt & Whitney	510	\$386	Columbus, Ga.
Blue Origin	342	\$200	Huntsville, Ala.

(Investment in millions)

Another industry that is certainly slowing is the petrochemical sector. In 2015, petrochemical activity, mostly in Louisiana and Texas, set a record with 70 projects, several of which were multi-billion dollar deals. That activity has slowed to 27 projects this year.

Notable Petrochemicals Projects

	Jobs	\$Inv	Location
LC Methanol	200	\$3,900	Lake Charles, La.
Wanhua Chemical	N/A	\$1,123	St. James Parish, La.
Lotte Chemical	N/A	\$1,100	Calcasieu Parish, La.
Agrium	N/A	\$720	Borger, Texas

(Investment in millions)



(Top right) Global IT services giant NTT Data plans to relocate its North American headquarters into Plano's Legacy West as part of a major consolidation after the company acquired Plano-based Dell Services for \$3.1 billion. The move also means an additional 6,000 jobs.

(Bottom right) A \$3.8 billion methanol project — LC Methanol — will be built on about 70 acres along the Calcasieu Ship Channel.

With 33 deals, headquarter projects continued its strong run begun in 2014.

Notable Headquarters Projects

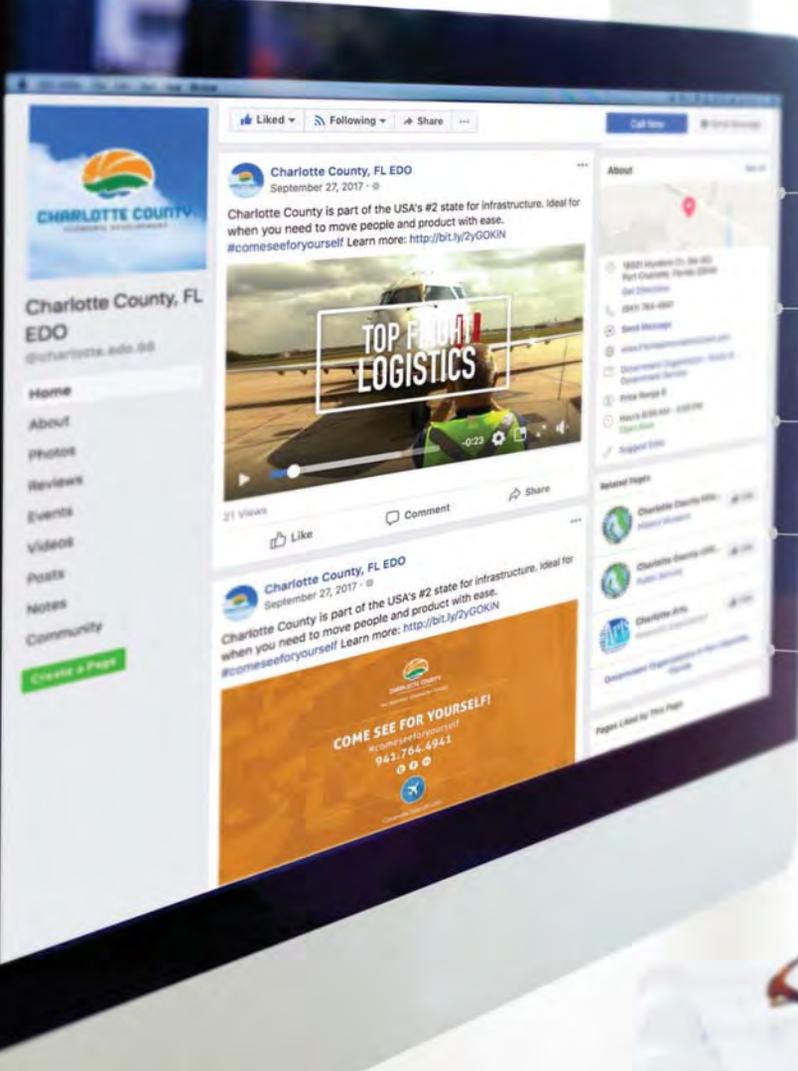
	Jobs	\$Inv	Location
American Airlines	N/A	\$350	Fort Worth, Texas
CPS Energy	N/A	\$145	San Antonio, Texas
Amazon Web	1,500	N/A	Fairfax Co., Va.
Nestlé	748	\$39	Arlington Co., Va.

(Investment in millions)

Other Notable Projects

	Jobs	\$Inv	Location
NTT Data	6,377	\$28	Plano, Texas
DXC Technology	2,000	N/A	New Orleans, La.
Nutri Biotech	1,600	\$100	Garland, Texas
Jackson Healthcare	1,400	\$100	Alpharetta, Ga.
UPS	1,400	\$22	Arlington, Texas
ExxonMobil SABIC	600	\$10,000	Portland, Texas
Braid Industries	550	\$1,300	South Shore, Ky.
Facebook	100	\$1,000	Henrico Co., Va.
Ford	500	\$900	Louisville, Ky.
Centene	1,000	\$770	Clayton, Mo.
Samsung	950	\$380	Newberry, S.C.
EnerBlu	875	\$372	Pikeville, Ky.
Shandong Ruyi	800	\$410	Forrest City, Ark.
Autocar	746	\$120	Birmingham, Ala.
Mercedes-Benz	502	\$281	Woodstock, Ala.

(Investment in millions) Ⓢ



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2018 SB&DJOB 100

RANK	COMPANY	JOBS	\$INV*	LOCATION	N/E/R	PRODUCT/SERVICE
1	NTT Data Corp.	6,377	\$29	Plano, Texas	E	IT
2	Amazon	2,700	\$1,494	Hebron, Ky.	N	Distribution
3	Amazon	2,500	N/A	Jacksonville, Fla.	N	Distribution
4	Allstate Insurance	2,250	\$23	Charlotte, N.C.	E	Headquarters
5	The World of Avatar	2,200	N/A	Orlando, Fla..	N	Theme Park
6	Infosys	2,000	\$9	TBD in N.C.	N	Headquarters
7	DXC Technology	2,000	N/A	Orleans, La.	N	IT
8	Volvo Car USA	1,910	\$620	Ridgeville, S.C.	E	Auto Assembly
9	Anthem	1,800	N/A	Atlanta, Ga.	E	Financial Services
10	ASOS	1,620	\$42	Union City, Ga.	R	Distribution
11	Tyndall Air Force Base	1,600	\$250	Panama City, Fla.	E	Aerospace
12	Nutri Biotech USA	1,600	\$100	Garland, Texas	E	Pharmaceuticals
13	Tyson Foods	1,500	\$320	Humboldt, Tenn.	N	Food & Beverage
14	Simmons Prepared Food	1,500	\$300	Benton County, Ark.	E	Food & Beverage
15	Amazon	1,500	\$198	Orange, Fla.	N	Distribution
16	USAA	1,500	\$70	San Antonio, Texas	E	Financial Services
17	Amazon	1,500	N/A	Jacksonville, Fla.	N	Distribution
18	Amazon Web Services	1,500	N/A	Fairfax County, Va.	N	IT
19	Navy Federal Credit Union	1,400	\$100	Frederick County, Va.	E	Financial Services
20	Jackson Healthcare	1,400	\$100	Alpharetta, Ga.	E	Healthcare
21	United Parcel Service	1,400	\$23	Arlington, Texas	N	Distribution
22	Favor TechConsulting	1,275	\$2	Fairfax County, Va.	E	Headquarters
23	Toyota	1,209	\$1,330	Georgetown, Ky.	E	Auto Assembly
24	Credit Suisse	1,200	\$65	Morrisville, N.C.	E	Office
25	C3	1,200	\$1	McGregor, Texas	E	Call Center
26	Global Technical Systems	1,110	\$55	Virginia Beach, Va.	E	Renewable Energy
27	Chewy.com	1,100	N/A	Hollywood, Fla.	N	Call Center
28	Amazon	1,100	N/A	Frederick County, Va.	N	Distribution
29	Cognizant	1,090	\$8	Irving, Texas	E	IT
30	Denso	1,000	\$1,000	Maryville, Tenn.	E	Auto Parts
31	Centene	1,000	\$770	Clayton, Mo.	E	Healthcare
32	BMW Manufacturing	1,000	\$600	Greer, S.C.	E	Auto Assembly
33	TJX Companies	1,000	\$150	San Antonio, Texas	N	Distribution
34	Amazon	1,000	\$92	Miami-Opa Locka, Fla.	N	Distribution
35	Luxottica Group	1,000	\$78	McDonough, Ga.	E	Eyewear
36	Arthrex	1,000	\$69	Sandy Springs, S.C.	N	Healthcare
37	LuLaRoe	1,000	\$35	Blythewood, S.C.	N	Distribution
38	Textile Corp. of America	1,000	\$27	Pikeville, Tenn.	N	Textiles
39	Spring Venture Group	1,000	\$12	Kansas City, Mo.	R	Headquarters
40	Diversified Consultants	1,000	\$7	Louisville, Ky.	N	Financial Services
41	USAA	1,000	N/A	Tampa, Fla.	E	Financial Services
42	Amazon	1,000	N/A	Katy, Texas	N	Distribution
43	Mission Foods	1,000	N/A	Dallas, Texas	E	Food & Beverage
44	Amazon	1,000	N/A	Braselton, Ga.	R	Distribution
45	Samsung	950	\$380	Newberry, S.C.	N	Electronics
46	EnerBlu	875	\$372	Pikeville, Ky.	N	Renewable Energy
47	Charles Schwab	823	N/A	Austin, Texas	N	Financial Services
48	Philips North America	815	\$17	Nashville, Tenn.	N	Headquarters
49	Aerojet Rocketdyne	805	\$47	Huntsville, Ala.	E	Aerospace
50	Triangle Tire Co.	800	\$580	Rocky Mount, N.C.	N	Auto Parts
51	Shandong Ruyi Tech Group	800	\$410	Forrest City, Ark.	N	Textiles
52	Gartner	800	\$12	Irving, Texas	E	IT
53	Modernizing Medicine	800	N/A	Boca Raton, Fla.	E	Healthcare
54	Brakebush Brothers	800	N/A	Greenville, Texas	N	Food & Beverage
55	Accenture	800	N/A	Atlanta, Ga.	E	IT
56	Brown & Brown	760	\$25	Volusia, Fla.	E	Financial Services
57	Amgen	750	\$20	Hillsborough, Fla.	N	Life Sciences
56	 SPRING 2018					

RANK	COMPANY	JOBS	\$INV*	LOCATION	N/E/R	PRODUCT/SERVICE
58	Empereon Marketing	750	\$2	Waco, Texas	E	Healthcare
59	Nestlé USA	748	\$40	Arlington County, Va.	N	Headquarters
60	Autocar	746	\$120	Birmingham, Ala.	N	Auto Assembly
61	Ruiz Food Products	705	\$79	Florence, S.C.	E	Food & Beverage
62	Trane	700	\$96	Columbia, S.C.	E	HVAC
63	Publix Super Markets	700	\$28	Polk, Fla.	E	Headquarters
64	Flex-N-Gate	700	\$25	Grand Prairie, Texas	N	Auto Parts
65	Movement Mortgage	700	\$18	Indian Land, S.C.	E	Financial Services
66	Pacific Union Financial	700	N/A	El Paso, Texas	E	Financial Services
67	Candor	675	\$39	Rome, Ga.	R	IT
68	Milwaukee Tool	660	\$33	Northern Miss.	E	Hand Tools
69	Charter Communications	655	\$7	Charlotte, N.C.	E	Headquarters
70	ExxonMobil - SABIC	600	\$10,000	Portland, Texas	N	Petrochemicals
71	LG Group	600	\$251	Clarksville, Tenn.	N	Appliances
72	General Motors	600	\$150	Arlington, Texas	E	Auto Assembly
73	Amazon	600	\$106	Macon, Ga.	R	Distribution
74	Chewy.com	600	\$50	Marion, Fla.	E	Distribution
75	Amazon	600	\$35	Kannapolis, N.C.	N	Distribution
76	Amazon	600	\$35	Memphis, Tenn.	N	Distribution
77	Merck	600	\$24	Austin, Texas	N	Pharmaceuticals
78	Gartner	600	\$22	Lee, Fla.	E	IT
79	Spectrum	600	\$18	McAllen, Texas	E	Call Center
80	Convergys	600	\$4	Lynchburg, Va.	N	Call Center
81	Comcast	600	N/A	Miramar, Fla.	E	Communications
82	Alorica	600	N/A	High Point, N.C.	E	Call Center
83	Alorica	595	N/A	Caddo, La.	N	Call Center
84	Availity	593	\$12	Duval, Fla.	E	IT
85	Iomaxis	555	\$2	Fairfax County, Va.	E	Cybersecurity
86	Braidy Industries	550	\$1,300	South Shore, Ky.	N	Metals
87	Walmart	550	\$135	Irvington, Ala.	N	Distribution
88	New Flyer	550	\$40	Shepherdsville, Ky.	N	Auto Assembly
89	AXA	550	\$18	Charlotte, N.C.	E	Headquarters
90	Pratt and Whitney	510	\$386	Columbus, Ga.	E	Aerospace
91	Gap	509	\$42	Gallatin, Tenn.	E	Apparel
92	Mercedes-Benz	502	\$282	Woodstock, Ala.	N	Auto Assembly
93	Ford Motor Co.	500	\$900	Louisville, Ky.	E	Auto Assembly
94	Finisar	500	\$390	Sherman, Texas	N	Communications
95	Lockheed Martin	500	\$200	Orange, Fla.	E	Aerospace
96	John Soules Food	500	\$110	Valley, Ala.	N	Food & Beverage
97	Metlife	500	\$63	Cary, N.C.	E	Headquarters
98	Toyota Motor Credit Corp.	500	\$36	Plano, Texas	E	Financial Services
99	Black and Decker	500	\$31	Fort Mill, S.C.	N	Hand Tools
100	TexPharma	500	\$21	Rosenberg, Texas	N	Pharmaceuticals
101	Louis Vuitton	500	\$20	Keene, Texas	N	Apparel
102	Onetrust	500	\$20	Atlanta, Ga.	R	IT
103	Crawford & Co.	500	\$15	Peachtree, Ga.	N	Financial Services
104	Senture	500	\$10	Williamsburg, Ky.	N	Call Center
105	PRA Group	500	\$4	Burlington, N.C.	N	Call Center
106	Hulu	500	\$3	San Antonio, Texas	E	Call Center
107	Sysnet Global Solutions	500	\$2	Atlanta, Ga.	R	Call Center
108	Northwell Health (Formativ)	500	\$1	Duval, Fla.	N	Life Sciences
109	Formativ Health	500	N/A	Jacksonville, Fla..	N	Healthcare
110	Harbor Freight Tools	500	N/A	Dillon, S.C.	E	Distribution
111	Geico	500	N/A	Virginia Beach, Va.	E	Financial Services
112	Athenahealth	500	N/A	Atlanta, Ga.	E	Healthcare
113	CGS	500	N/A	Peachtree, Ga.	R	IT
114	LHC Group	500	N/A	Lafayette, La.	E	Healthcare

\$INV*=INVESTMENT IN MILLIONS.

N=NEW PROJECT E=EXPANDED R=RELOCATED

2018 SB&D INVESTMENT 100

RANK	COMPANY	\$INV*	JOBS*	LOCATION	N/E/R	PRODUCT/SERVICE
1	China Energy	\$80,000	N/A	West Virginia	N	Oil & Gas
2	Lake Charles LNG Export	\$10,900	N/A	Calcasieu, La.	E	Petrochemical
3	ExxonMobil - SABIC	\$10,000	600	Portland, Texas	N	Petrochemical
4	Invenergy, GE, American Electric	\$4,500	N/A	Texas County, Okla.	E	Renewable Energy
5	Lake Charles Methanol	\$3,900	200	Calcasieu, La.	N	Petrochemical
6	Amazon	\$1,494	2,700	Hebron, Ky.	N	Distribution
7	Toyota	\$1,330	1,209	Georgetown, Ky.	E	Auto Assembly
8	Braidy Industries	\$1,300	550	South Shore, Ky.	N	Metals
9	Phillips 66	\$1,300	N/A	Calcasieu, La.	E	Oil & Gas
10	Wanhua Chemical	\$1,123	N/A	St James/Iberville, La.	N	Petrochemical
11	Lotte Chemical Louisiana	\$1,100	N/A	Calcasieu, La.	E	Petrochemical
12	Denso	\$1,000	1,000	Maryville, Tenn.	E	Auto Parts
13	Facebook	\$1,000	100	Henrico County, Va.	N	Data Centers
14	Switch	\$1,000	65	Lithia Springs, Ga.	R	Data Centers
15	Vantage Data Centers	\$1,000	50	Loudoun County, Va.	N	Data Centers
16	Ford	\$900	500	Louisville, Ky.	E	Auto Assembly
17	Valero and Magellan Midstream	\$820	N/A	Pasadena, Texas	N	Oil & Gas
18	Energy World Corp.	\$800	N/A	Lafourche, La.	N	Oil & Gas
19	Centene	\$770	1,000	Clayton, Mo.	E	Health Care
20	Agrium	\$720	N/A	Borger, Texas	E	Petrochemicals
21	Volvo	\$620	1,910	Ridgeville, S.C.	E	Auto Assembly
22	BMW	\$600	1,000	Greer, S.C.	E	Auto Assembly
23	Triangle Tire	\$580	800	Rocky Mount, N.C.	N	Auto Parts
24	International Paper	\$553	N/A	Selma, Ala.	E	Paper & Packaging
25	Airgas	\$470	35	Mebane, N.C.	E	Gases
26	WestRock	\$470	N/A	Florence, S.C.	E	Paper & Packaging
27	MMEX Resources	\$450	100	Fort Stockton, Texas	N	Oil & Gas
28	Enel Green Power	\$435	N/A	Billings, Okla.	E	Renewable Energy
29	KPMG	\$433	80	Orange, Fla.	N	Financial Services
30	Enel Green Power	\$420	N/A	Kingfisher/Logan Co, Okla.	E	Renewable Energy
31	Shandong Ruyi Tech Group	\$410	800	Forrest City, Ark.	N	Textiles
32	Irving Consumer Products	\$400	211	Macon, Ga.	R	Paper & Packaging
33	Georgia-Pacific	\$400	80	Palatka, Fla.	E	Paper & Packaging
34	Tall Oak Midstream	\$400	N/A	Hughes County, Okla.	E	Oil & Gas
35	Finisar	\$390	500	Sherman, Texas	N	Communications
36	Pratt and Whitney	\$386	510	Columbus, Ga.	E	Aerospace
37	Samsung	\$380	950	Newberry, S.C.	N	Electronics
38	EnerBlu	\$372	875	Pikeville, Ky.	N	Renewable Energy
39	Nokian Tyres	\$360	400	Dayton, Tenn.	N	Auto Parts
40	CONFIDENTIAL	\$360	375	Huntingdon, Tenn.	E	Metals
41	Novus International	\$360	65	Port Lavaca, Texas	N	Food & Beverage
42	Syngas Energy	\$360	N/A	St James, La.	N	Petrochemicals
43	American Airlines	\$350	N/A	Fort Worth, Texas	N	Airline
44	Clearwater Paper	\$330	180	Shelby, N.C.	E	Paper & Packaging
45	Valero Refining	\$325	N/A	St Charles, La.	E	Oil & Gas
46	Tyson Foods	\$320	1,500	Humboldt, Tenn.	N	Food & Beverage
47	Nestlé-Purina	\$320	240	Hartwell, Ga.	R	Food & Beverage
48	Simmons Prepared Foods	\$300	1,500	Benton County, Ark.	E	Food & Beverage
49	EGGER Wood Products	\$300	400	Linwood, N.C.	N	Wood Products
50	Apple	\$300	N/A	Maiden, N.C.	E	Data Centers

RANK	COMPANY	\$INV*	JOBS*	LOCATION	N/E/R	PRODUCT/SERVICE
51	Charles Schwab	\$300	N/A	Westlake, Texas	N	Financial Services
52	PCS Nitrogen Fertilizer	\$290	N/A	Ascension, La.	E	Petrochemicals
53	Mercedes-Benz	\$282	502	Woodstock, Ala.	N	Auto Parts
54	Grainger	\$273	431	Louisville, Ky.	N	Distribution
55	Facebook	\$267	N/A	Fort Worth, Texas	E	Data Centers
56	Phillips 66	\$255	N/A	Brazoria, Texas	E	Oil & Gas
57	Exxon Mobil	\$252	N/A	East Baton Rouge, La.	E	Petrochemicals
58	LG Group	\$251	600	Clarksville, Tenn.	N	Electronics
59	Qorvo	\$250	220	Richardson, Texas	E	Electronics
60	Tyndall Air Force Base	\$250	1,600	Panama City, Fla.	E	Aerospace
61	Nucor	\$250	255	Sedalia, Mo.	N	Metals
62	Google	\$250	50	Loudoun County, Va.	N	Data Centers
63	INEOS	\$250	N/A	Chocolate Bayou, Texas	E	Petrochemicals
64	Georgia-Pacific	\$229	100	Putnam, Fla.	E	Paper & Packaging
65	James Hardie	\$220	205	Prattville, Ala.	N	Building Materials
66	Entergy Louisiana	\$216	N/A	Washington, La.	N	Power Generation
67	Nucor Steel	\$213	75	Ghent, Ky.	E	Metals
68	Lockheed Martin	\$200	500	Orange, Fla.	E	Aerospace
69	Blue Origin	\$200	342	Huntsville, Ala.	N	Aerospace
70	Roseburg Forest Products	\$200	145	Chester, S.C.	N	Wood Products
71	Alon USA	\$200	19	Big Spring, Texas	E	Oil & Gas
72	Cyrus One	\$200	9	Douglasville, Ga.	R	Data Centers
73	Corning	\$200	N/A	Harrodsburg, Ky.	E	Glass
74	Phillips 66	\$200	N/A	Calcasieu, La.	E	Oil & Gas
75	Electrolux	\$200	N/A	Anderson, S.C.	E	Appliances
76	Hexcel	\$199	88	Decatur, Ala.	E	Petrochemicals
77	Amazon	\$198	1,500	Orange, Fla.	N	Distribution
78	Graphic Packaging	\$190	N/A	Ouachita, La.	E	Paper & Packaging
79	Corning	\$189	317	Durham, N.C.	E	Glass
80	Apotex	\$184	383	Broward, Fla.	E	Life Sciences
81	Shaw Industries	\$184	N/A	Andalusia, Ala.	E	Textiles
82	Bridgestone	\$180	16	Wilson, N.C.	E	Auto Parts
83	White Rock Pigments	\$179	124	Hawesville, Ky.	N	Chemicals
84	BASF	\$156	N/A	Ascension, La.	E	Petrochemicals
85	OneOK	\$155	N/A	Canadian Valley, Okla.	E	Oil & Gas
86	Robert Bosch	\$152	130	Anderson, S.C.	E	Auto Parts
87	TJX Companies	\$150	1,000	San Antonio, Texas	N	Distribution
88	General Motors	\$150	600	Arlington, Texas	E	Auto Assembly
89	Fresenius Kabi	\$150	445	Wilson , N.C.	E	Healthcare
90	Advanced Airfoil	\$150	350	Hillsborough, Fla.	N	Headquarters
91	Roxul	\$150	150	Ranson, W.Va.	N	Building Materials
92	Huntsman	\$150	N/A	Port Neches, Texas	E	Petrochemicals
93	WestRock	\$150	N/A	Jackson, La.	E	Paper & Packaging
94	Kentucky Owl	\$150	77	Bardstown, Ky.	N	Food & Beverage
95	Walmart	\$148	460	Brevard, Fla.	N	Distribution
96	Five Star Custom Foods	\$146	138	Nashville, Tenn.	E	Food & Beverage
97	CPS Energy	\$145	N/A	San Antonio, Texas	E	Headquarters
98	Air Products and Chemicals	\$145	N/A	Ascension, La.	E	Oil & Gas
99	Mohawk Industries	\$142	245	Dickson, Tenn.	E	Oil & Gas
100	Graphic Packaging Int'l	\$136	N/A	Macon, Ga.	E	Paper & Packaging

\$INV*=INVESTMENT IN MILLIONS.

N=NEW PROJECT E=EXPANDED R=RELOCATED



Kentucky Nailed It; Dallas-Fort Worth Sets Market Record for Points

Recognizing outstanding economic development performances in the South for calendar year 2017.

By Michael Randle

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 meeting or exceeding 200 jobs and/or \$30 million in investments and highlight market peer groups who captured the most of those game-changing deals.

All announcements found in the SB&D 100 were made public by a representative of the company. Job and investment totals are those that have been projected by a company spokesperson over a three- to five-year period. Only new, expanded and relocated manufacturing and selected service projects are eligible for the ranking. Government projects such as prisons and military bases are eligible; however, retail, lodging and some entertainment-based announcements are not. Real estate investments such as office buildings, 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 500 jobs — the number of jobs for the 100th largest project — so all announcements made of 500 jobs or more earned 10 points. Five points are given for announcements of 200 to 499 jobs. This year's Investment 100 threshold is \$127 million, meaning 10 points are awarded for announcements meeting or exceeding that total, and five points for deals \$30 million to \$126.99 million in investment.

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

**2018 SB&D 100
State Scores***

**2018 SB&D 100
State Scores PPM****

**SB&D State of the Year Winners
1994-2018**

State	Points	Projects	State	Points PPM	
Texas	97	685	Kentucky	96.5	2018 Kentucky
Florida	73	495	Louisiana	77.1	2017 South Carolina
North Carolina	65	425	South Carolina	63.0	2016 Tennessee
Kentucky	50	425	Alabama	61.2	2015 Kentucky
Georgia	64	415	Tennessee	55.2	2014 Louisiana and Texas
Tennessee	63	375	West Virginia	52.7	2013 Louisiana and Texas
Louisiana	51	355	North Carolina	40.8	2012 North Carolina
South Carolina	47	315	Georgia	39.5	2011 Louisiana
Alabama	47	300	Virginia	31.2	2010 Louisiana and Tennessee
Virginia	43	265	Oklahoma	29.5	2009 Louisiana and Tennessee
Missouri	29	165	Mississippi	29.3	2008 Alabama
Oklahoma	18	115	Missouri	27.0	2007 Louisiana
West Virginia	12	95	Arkansas	25.0	2006 Alabama and North Carolina
Mississippi	12	85	Texas	23.8	2005 Alabama and North Carolina
Arkansas	9	75	Florida	23.2	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

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

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

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



With several huge projects, many of which landed in the eastern part of the state, Kentucky saw its best year ever with 425 points and a ridiculously high 96.5 PPM score. Pictured is Gov. Matt Bevin.

State Division

With 425 points and 96.5 points per million residents, Kentucky is the runaway winner for 2018 State of the Year. Kentucky has been on a roll for several years now, winning its first State of the Year in 2015 and earning an honorable mention in each of the years since. With Amazon’s air hub, Toyota’s massive expansion and Braidy Industries’ new aluminum mill, Kentucky captured three of the top 10 investments announced in the South in calendar year 2017. Kentucky nicely addressed its most pressing need with several large projects in Eastern Kentucky, where thousands of former coal miners have lost their jobs.

By virtue of their points per million residents, Louisiana, South Carolina and Alabama earned honorable mentions in the 2018 SB&D 100. All three states had outstanding years.

CONTINUED



Dallas-Fort Worth set an all-time market high of 300 points in the 2018 SB&D 100. The total beat or tied seven state scores this year. Job generation from DFW suburb Plano has been off the charts the last several years.

Mega-Markets (2,500,000-plus population)

In the mega-markets division, we can write with certainty that no single market in the country is producing more deals than Dallas-Fort Worth. In fact, points earned by DFW were around the *state* average seen this year. Last year DFW earned 295 points, the most points earned by a single market in SB&D 100 history. The many markets that make up Dallas-Fort Worth topped the single market record set last year with 300 points this year.

Atlanta, which has placed second to DFW the last two years, came in second again this year with 235 points. Midtown Atlanta may be the South's most active tech scene. Northern Virginia, also a tech giant, placed third in this division for the third consecutive year. Charlotte, which entered the mega-market division last year, also had an outstanding year.

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

In the major market division, we have a tie. With 105 points, for the third straight year, Nashville is at the top of the major market peer group. But this year, Louisville tied Nashville with 105 points for top honors among major markets. Greenville, S.C.; Jacksonville, Fla.; and Baton Rouge earned honorable mentions.

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

We have a first-time Mid-Market of the Year in the 2018 SB&D 100. Macon, Ga., with 55 points, is your new Mid-Market of the Year. Macon was followed by Rocky Mount-Wilson-Roanoke Rapids, N.C., Brevard County, Fla., Tri-Cities, Tenn., Northern Kentucky, Huntsville, and Hickory-Le-noir-Morganton, N.C.

Small Markets (100,000-249,999 population)

For the eighth consecutive year, Lake Charles, La., is the South's 2018 Small Market of the Year. During those eight years, Lake Charles has never truly been challenged. Much



The Richardson Economic Development Partnership (REDP) was the second entity, nationally, to have achieved dual honors of AEDO accreditation and the 5-star US Chamber Conferred accreditation. Richardson, Texas is home to the Telecom Corridor, where the highest concentration of technology workers in the Dallas-Ft. Worth area are located. Pictured is the REDP staff.

of the South's new oil and gas and petrochemical activity has been built in and around Lake Charles over the last eight years, including the nation's first large-scale LNG export facility. Jackson, Tenn., Florence, S.C. and Decatur, Ala., earned honorable mentions in the Small Market division.

Rural Markets (fewer than 100,000 population)

As mentioned, leaders in the Commonwealth of Kentucky addressed a huge issue in 2017. Eastern Kentucky, long ruled by the coal industry, has more out-of-work residents than any rural market in the South. Two big deals, EnerBlu and Braidy Industries, will put about 1,400 of those to work in Eastern Kentucky. For the first time, Pikeville, Ky., earned Rural Market of the Year. Carroll County, Tenn., Obion County, Tenn., Nelson County, Ky., Forrest City, Ark., and South Shore, Ky., all earned honorable mention in the Rural Market category.

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**STATE OF THE YEAR
KENTUCKY**

425 Points, 96.5 PPM (1st)

Notable Kentucky Deals:

Company	Jobs	Investment*
Amazon	2,700	\$1,494
Toyota	1,209	\$1,330
Braidy Industries	550	\$1,300

HONORABLE MENTION

LOUISIANA

350 Points, 77.1 PPM (2nd)

Notable Louisiana Deals:

Company	Jobs	Investment*
Lake Charles LNG	N/A	\$10,900
DXC Technology	2,000	N/A
Lake Charles Methanol	N/A	\$3,900

HONORABLE MENTION

SOUTH CAROLINA

315 Points, 63.0 PPM (3rd)

Notable South Carolina Deals:

Company	Jobs	Investment*
Volvo	1,910	\$620
BMW	1,000	\$600
Arthrex	1,000	\$69

HONORABLE MENTION

ALABAMA

300 Points, 61.2 PPM (4th)

Notable Alabama Deals:

Company	Jobs	Investment*
Aerojet Rocketdyne	805	\$46
Autocar	746	\$120
Mercedes-Benz	502	\$281



Atlanta also set a 24-year point record with 235, coming in second to Dallas-Fort Worth in the mega-market category. Midtown Atlanta (pictured) is killing it and has become the cluster in the South for financial technology companies.

MEGA-MARKETS

(2,500,000-plus population)

MEGA-MARKET OF THE YEAR

DALLAS-FORT WORTH

300 Points

Notable Dallas-Fort Worth Deals:

Company	Jobs	Investment*
NTT Data	6,377	\$28
Nutri Biotech USA	1,600	\$100
ExxonMobil-SABIC	600	\$10,000

HONORABLE MENTION

ATLANTA

235 Points

Notable Atlanta Deals:

Company	Jobs	Investment*
Anthem	1,800	N/A
Jackson Healthcare	1,400	\$100
Luxtottica Group	1,000	\$78

HONORABLE MENTION

NORTHERN VIRGINIA

155 Points

Notable Northern Virginia Deals:

Company	Jobs	Investment*
Amazon Web Services	1,500	N/A
Favor Tech Consulting	1,275	\$2
Nestlé USA	748	\$39

HONORABLE MENTION

CHARLOTTE

135 Points

Notable Charlotte Deals:

Company	Jobs	Investment*
Movement Mortgage	700	\$18
Amazon	600	\$35
AXA	550	\$18

Other mega-market scores: South Florida 115; Orlando 90; Houston 80; San Antonio 75; St Louis 65; Tampa Bay 60.

* Investment in millions

MID-MARKETS

(250,000-749,999 population)

MID-MARKET OF THE YEAR

MACON, GA.

55 Points

Notable Macon Deals:

Company	Jobs	Investment*
Iving Consumer Products	211	\$400
Amazon	600	\$106
Pure Flavor	200	\$105

HONORABLE MENTION

ROCKY MOUNT-WILSON-ROANOKE RAPIDS, N.C.

45 Points

Notable Rocky Mount-Wilson-Roanoke Rapids Deals:

Company	Jobs	Investment*
Triangle Tire	800	\$580
Bridgestone	16	\$180
Fresenius Kabi	445	\$150

HONORABLE MENTION

BREVARD COUNTY, FLA.

45 Points

Notable Brevard County Deals:

Company	Jobs	Investment*
Walmart	460	\$148
Lockheed Martin	450	N/A
Enhanced Resources	400	N/A

HONORABLE MENTION

JOHNSON CITY-KINGSFORT-BRISTOL, TENN.

40 Points

Notable Johnson City-Kingsport-Bristol Deals:

Company	Jobs	Investment*
Rockline Industries	250	\$40
Landair Transport	210	N/A
CONFIDENTIAL	30	\$51



HONORABLE MENTION

NORTHERN KENTUCKY

40 Points

Notable Northern Kentucky Deals:

Company	Jobs	Investment*
Amazon Fulfillment	2,700	\$1,494
Mubea Tailor	118	\$73
Schwan's Global Supply	N/A	\$33

HONORABLE MENTION

HUNTSVILLE, ALA.

40 Points

Notable Huntsville Deals:

Company	Jobs	Investment*
Aerojet Rocketdyne	805	\$46
Blue Origin	342	\$200
Toyota	50	\$127

HONORABLE MENTION

HICKORY-LENOIR-MORGANTON, N.C.

40 Points

Notable Hickory-Lenoir-Morganton Deals:

Company	Jobs	Investment*
Apple	N/A	\$300
Continental Teves	160	\$40
Corning	210	\$67

Other mid-market scores: Corpus Christi, Texas 35; Marion County, Fla. 30; Volusia County, Fla. 30; Durham, N.C. 30; Lexington, Ky. 25; Montgomery, Ala. 25; Mobile, Ala. 25; Columbus, Ga. 25; Savannah, Ga. 25; Fayetteville-Springdale-Rogers, Ark. 20; Clarksville, Tenn. 20; Fayetteville, N.C. 15.



(TOP) It's always exciting to see a first-time winner! Macon, Ga., won its first mid-market of the year with 55 points from several large projects. Pictured are members of the Macon-Bibb County Industrial Authority. Standing left is Stephen Adams, acting director; Standing right is Tyler Garrison, project manager; Seated, left to right, are Amy Tarpley, operations & finance director, Eleyce Coleman, existing industry manager, and Lillie Battle, administrative assistant.

(LOWER) With 40 points, Johnson City-Kingsport-Bristol, Tenn., earned an honorable mention in the mid-market division. Pictured is Alan Bridwell, the executive director of the Northeast Tennessee Valley Regional Industrial Development Association (NETVRIDA).



Lindsey Janies Photograph

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SMALL MARKETS
(100,000-249,999 population)

SMALL MARKET OF THE YEAR

LAKE CHARLES, LA.

80 Points

Notable Lake Charles Deals:

Company	Jobs	Investment*
Lake Charles LNG	N/A	\$10,900
Lake Charles Methonal	200	\$3,900
Phillips 66	N/A	\$1,300

HONORABLE MENTION

JACKSON-HUMBOLDT, TENN.

40 Points

Notable Jackson-Humboldt Deals:

Company	Jobs	Investment*
Tyson Foods	1,500	\$320
Stanley Black and Decker	256	\$29
Toyota Boshoku	139	\$31

HONORABLE MENTION

FLORENCE, S.C.

25 Points

Notable Florence Deals:

Company	Jobs	Investment*
GE Healthcare	100	\$40
Ruiz Food Products	705	\$79
WestRock	N/A	\$470

HONORABLE MENTION

DECATUR, ALA.

25 Points

Notable Decatur Deals:

Company	Jobs	Investment*
Wolverine Industries	250	\$16
Hexcel Corporation	88	\$199
3M Company	16	\$39

Other small market scores: Tuscaloosa, Ala. 20; Monroe, La. 20; Alexandria, La. 20; Olive Branch, Miss. 20; Joplin, Mo. 20; Midland, Texas 15; Rome, Ga. 15.



(TOP LEFT) Lake Charles, La., earned its eighth straight small market of the year, an unprecedented accomplishment. If you are seeking a poster child for the fracking frenzy, Lake Charles and Southwest Louisiana are it. Pictured is George Swift, president and CEO of the Southwest Louisiana Economic Development Alliance (far right), with a helicopter pilot ready for an aerial view of one of the area's many projects.

(CENTER) In the rural market division, Nelson County, Ky., earned an honorable mention. Pictured is Kim Huston, president of the Nelson County Economic Development Agency.

(RIGHT) With 20 points, Obion County, Tenn., also earned an honorable mention in the rural market division. Pictured is Lindsay Frilling, CEO of the Obion County Chamber of Commerce.



RURAL MARKETS
(fewer than 100,000 population)

RURAL MARKET OF THE YEAR

PIKEVILLE, KY.

25 Points

Notable Pikeville Deals:

Company	Jobs	Investment*
EnerBlu	875	\$372
Appalachian Forest	140	\$50

HONORABLE MENTION

CARROLL COUNTY, TENN.

20 Points

Notable Carroll County Deals:

Company	Jobs	Investment*
CONFIDENTIAL	375	\$360
Granges Americas	107	\$110

HONORABLE MENTION

OBION COUNTY, TENN.

20 Points

Notable Obion County Deals:

Company	Jobs	Investment*
Tyson Foods	330	\$80
Williams Food Works	226	\$37

HONORABLE MENTION

NELSON COUNTY, KY.

20 Points

Notable Nelson County Deals:

Company	Jobs	Investment*
Kentucky Owl	77	\$149
Takigawa America	180	\$45
ORBIS Corporation	55	\$30

HONORABLE MENTION

FORREST CITY, ARK.

20 Points

Notable Forrest City Deals:

Company	Jobs	Investment*
Shandong Ruyi	800	\$410

HONORABLE MENTION

GREENUP COUNTY, KY.

20 Points

Notable Greenup County Deals:

Company	Jobs	Investment*
Braidy Industries	550	\$1,300

Other rural market scores: Chambers County, Ala. 15; Hartwell, Ga. 15; Hawesville, Ky. 15; Frankfort, Ky. 15.

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SB&D 100 STATE SUMMARY

	Total Deals	Total Points	*PPM
Alabama	47	300	61.2

Another solid year by Alabama, earning another honorable mention. Automotive and aerospace rule this state, as each year sees lots of deals from those sectors. Next year already has an excellent start with Mazda and Toyota's announcement in January 2018 of their \$1.6 billion joint venture assembly plant in Huntsville.

Arkansas	9	75	25.0
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Good year for Arkansas. This small state's economy is one of the best in the South and its unemployment rate, at 3.7 percent, is one of the lowest in the region. Two big deals captured by Arkansas included Shandong Ruyi and Simmons Prepared Foods, and will result in 2,300 jobs.

Florida	73	495	23.2
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Lots of projects coming from Florida and not surprising to us, many have come from the manufacturing sector. Manufacturers in the aerospace industry have really boosted the economies of Northwest Florida, South Florida, the Space Coast and Central Florida in general.

Georgia	64	415	39.5
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Nice year for Georgia, with its highest point total in several years. Atlanta remains smoking hot with a nice mix of headquarter, financial services and healthcare deals. Georgia is one of the few Southern states with some labor available. The flooring industry that dominates the economies of Northwest Georgia, slammed by the recession, has come back strong.

Kentucky	50	425	96.5
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A generational year for the Commonwealth of Kentucky. State of the Year easily, capturing its second in four years. Louisville tied Nashville for Major Market of the Year and somehow, leaders in East Kentucky are turning projects they have never turned before, and with good reason. Since the coal industry has given pink slips to over 10,000 miners in recent years, Eastern Kentucky is home to more skilled labor than just about any region in the South.

Louisiana	50	350	74.4
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Louisiana earned another honorable mention as the petrochemical and oil and gas sectors still have legs. But that sector of our economy is slowing. Lake Charles won its eighth-straight Small Market of the Year, and Baton Rouge earned an honorable mention in the major market division.

Mississippi	12	85	29.3
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Mississippi hit its lowest unemployment rate in history earlier this year. The Milwaukee Tool deal was big for rural Mississippi. Toyota's recently announced expansion is huge, and when Mazda and Toyota's plant begins construction in North Alabama, all kinds of opportunities will fall on Northeast Mississippi.

Missouri	29	165	29.3
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Another decent year for Missouri in large projects. About the same performance as last year. At 3.5 percent unemployment, Missouri's labor shed is stressed. The \$770 million Centene project in the St. Louis suburbs is one of the largest healthcare deals in a long time.

SB&D 100 STATE SUMMARY

	Total Deals	Total Points	*PPM
North Carolina	65	425	40.8

A promising comeback from last year's performance on the heels of the abolishment of the controversial "bathroom bill." Charlotte, now competing in the big boy mega-market category, earned an honorable mention in that division. The 65-project total was fourth-best in the South.

Oklahoma	18	115	29.5
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A slowdown in big deals last year for Oklahoma. But the economy there is in good shape as the oil and gas industry finally lifts itself out of recession. The wind energy industry here is growing, as is aviation and aerospace.

South Carolina	46	315	63.0
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A 20-project drop in projects meeting or exceeding our thresholds from last year's State of the Year performance isn't so bad. This year's performance by the Palmetto State is good enough for another honorable mention. With 17 honorable mentions in 24 years, South Carolina has more than any other state in the South.

Tennessee	63	375	55.2
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This performance by Tennessee is very encouraging considering its unemployment rate is 3.4 percent. The jobless rate fell in all 95 Tennessee counties in April, and the unemployment rate is now at or below 5 percent in all counties across the state.

Texas	97	685	23.8
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If it wasn't for Dallas-Fort Worth, Texas' year would have been a disaster. Of Texas' 685 points, Dallas-Fort Worth was responsible for 300. But this state's job generation total is one of the nation's best, and Dallas-Fort Worth is the nation's best. But with just 30 points, the Austin area's economy is slowing, as is Houston's.

Virginia	43	265	31.2
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A drop of 14 big projects in Virginia compared to last year's SB&D 100 performance is somewhat of a concern. But this year's total of 43 large deals is still a pretty good performance. Northern Virginia earned an honorable mention in the mega-market category.

West Virginia	12	95	52.7
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West Virginia saw the largest single project in SB&D history with China Energy announcing \$80 billion in shale gas plays in the state. Those developments sent West Virginia's PPM score soaring to sixth-best in the region.

Methodology

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



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We continue with our series of the “Best of Economic Development in the South” with the “Best of the Aerospace Industry in the American South.” The South’s aerospace industry had the two best back-to-back years in terms of project activity ever in 2016 and 2017. This ranking will assist you in finding a location in the South for your aerospace company.

The results are based on SB&D’s knowledge of the aviation and aerospace industry in the region, data from RandleReport.com and SB-D.com, and a poll of members of the Southern Economic Development Roundtable.

There are 10 categories per state in the “Best of the Aerospace Industry in the American South” and the communities or sites chosen are listed based on what we believe are the top of their classes.

We think you will enjoy reading the results of the “Best of the Aerospace Industry in the American South.” The aerospace industry is growing faster than any industry in the region. This unique forum can help guide you and your business to a profitable place in the American South, the third largest economy in the world.

This is Part 2 of a three-part series that will profile five of the 15 states in the South. Profiled here is the “Best of the Aerospace Industry” in Louisiana, Mississippi, Missouri, North Carolina and Oklahoma.

aerospace

CONTINUED

best

OF THE AEROSPACE INDUSTRY
IN LOUISIANA

(TOP) There are several sites for large users at Chennault International Airport in Lake Charles, La.
(LOWER) England Airpark in Alexandria, La., features several sites along with two megasites.



1. Louisiana's Best Assets for the Aerospace Industry

- England Airpark
- Barksdale Air Force Base
- Michoud Assembly Facility
- Chennault International Airport
- Shreveport Regional Airport

Also receiving votes: Right to Work laws; Acadiana Regional Airport; Monroe Regional Airport; Baton Rouge Metro Airport; Available sites; Business climate; Naval Air Station Joint Reserve Base New Orleans; AIRSTA New Orleans; NAS JRB New Orleans; Low operating costs.

2. Louisiana's Most Important Employers in the Aerospace Industry

- Lockheed Martin
- NASA
- Boeing
- Northrop Grumman
- Bell Helicopter
- Rockwell Collins

Also receiving votes: Textron; Metro Aviation; Arrow Aviation; Haynes International; AvEx; K&B Industries; PHI; Sky Connect.

3. The Best in Aerospace R&D in Louisiana

- NASA Michoud
- Louisiana Center for Manufacturing Sciences
- Louisiana State University
- Louisiana Tech University
- University of Louisiana at Lafayette
- University of Louisiana at Monroe
- McNeese State University

4. Louisiana's Best Colleges for Aerospace Worker Training

- SOWELA Technical Community College
- South Louisiana Community College
- Baton Rouge Community College
- University of Louisiana at Monroe
- Louisiana Tech University
- Nunez Community College

Also receiving votes: University of Louisiana at Lafayette; McNeese State University.

5. Best Sites in Louisiana for Large Aerospace Assembly

- W1 Megasite England Airpark - Alexandria, La.
- W2 Megasite England Airpark - Alexandria, La.
- Franklin Farm Megasite - Richland Parish, La.
- Chennault International Airport - Lake Charles, La.
- Beauregard Airport Industrial Site - De Ridder, La.
- Shreveport Regional Airport - Shreveport, La.
- Monroe Regional Airport - Monroe, La.

6. Best Places in North Louisiana for Aerospace Companies

- Caddo Parish - Shreveport, La.
- Bossier Parish - Bossier City, La.
- Ouachita Parish - Monroe, La.
- Bienville Parish - Arcadia, La.

Also receiving votes: Lincoln Parish - Ruston, La.

7. Best Places in West Louisiana for Aerospace Companies

- Calcasieu Parish - Lake Charles, La.
- Caddo Parish - Shreveport, La.
- Bossier Parish - Bossier City, La.
- Beauregard Parish - De Ridder, La.

8. Best Places in Central Louisiana for Aerospace Companies

- Rapides Parish - Alexandria, La.
- East Baton Rouge Parish - Baton Rouge, La.
- Vernon Parish - Leesville, La.

9. Best Places in East Louisiana for Aerospace Companies

- Orleans Parish - New Orleans, La..
- St. Tammany Parish - Slidell, La.
- Ouachita Parish - Monroe, La.
- Plaquemines Parish - Belle Chasse, La.

10. Best Places in South Louisiana for Aerospace Companies

- Calcasieu Parish - Lake Charles, La.
- Lafayette Parish - Lafayette, La.
- Iberia Parish - New Iberia, La.



"Central Louisiana is a great place to live and work. Our family has chosen to do business in Central Louisiana for generations, and we intend on doing business in Central Louisiana for generations to come."

— Roy O. Martin, III, President - Roy O. Martin Companies

10 GREAT PARISHES, 1 GREAT REGION

The Central Louisiana Economic Development Alliance (CLEDA) is an organization which consists of the economic development entities from the parishes (counties) of Allen, Avoyelles, Catahoula, Concordia, Grant, LaSalle, Natchitoches, Rapides, Vernon and Winn. The mission of the Central Louisiana Economic Development Alliance is to help people prosper in vibrant, thriving communities.



CLEDA
Central Louisiana Economic Development Alliance

FOR MORE INFORMATION, CONTACT:
Central Louisiana Economic Development Alliance



Larkin Simpson
Vice President Major Employers
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Alexandria, LA 71301
318.441.3400

1. Mississippi's Best Assets for the Aerospace Industry

- Columbus Air Force Base
- Stennis Space Center
- Mississippi State's Raspet Flight Laboratory
- Keesler Air Force Base
- Low operating costs

Also receiving votes: Camp Shelby; Meridian Naval Air Station; Trent Lott International Airport; Available sites; Business climate; Incentives; Low cost utilities.

2. Mississippi's Most Important Employers in the Aerospace Industry

- Northrop Grumman
- GE Aviation
- Airbus Helicopters
- Rolls Royce
- Aerojet Rocketdyne
- Boeing
- Lockheed Martin
- NASA
- Columbus Air Force Base

Also receiving votes: Aurora Flight Sciences; L3; IAI North America; EATON; FINMECANICA; General Atomics; Ducommun; Orbital ATK; Raytheon; SpaceX; Stark Aerospace; Zodiac Aerospace; Keesler Air Force Base.

The Columbus Air Force Base in Columbus, Miss., is home to the 14th Flying Training Wing and has been since 1972.



3. The Best in Aerospace R&D in Mississippi

- Mississippi State University
- University of Southern Mississippi
- Center for Manufacturing Excellence
- Raspet Flight Research Laboratory

4. Mississippi's Best Colleges for Aerospace Worker Training

- Mississippi State University
- University of Southern Mississippi
- Hinds Community College
- Northwest Mississippi Community College

5. Best Sites in Mississippi for Large Aerospace Assembly

- Infinity Megasite - Columbus, Miss.
- Prairie Belt Powersite - West Point, Miss.
- The Hive - Lee County, Miss.
- Tri-County Commerce Park - Tishomingo County, Miss.
- Northeast Mississippi RailHub - Alcorn County, Miss.

6. Best Places in North Mississippi for Aerospace Companies

- DeSoto County - Hernando, Miss.
- Tishomingo County - Iuka, Miss.
- Lee County - Tupelo, Miss.
- Alcorn County - Corinth, Miss.
- Also receiving votes: Marshall County - Holly Springs, Miss.

The Stennis Space Center in Hancock County, Miss., has been a part of NASA's space exploration for years. Mainly a rocket engine test site, the Center has been involved in the International Space Station and Hubble Space Telescope. Several rocket engine manufacturers have facilities there. (LEFT) A test is being performed on one of the latest and most sophisticated Rolls-Royce civil aircraft engines.

(RIGHT) An RS-25 flight engine is lifted onto the A-1 Test Stand at Stennis in preparation for a scheduled test firing.



7. Best Places in West Mississippi for Aerospace Companies

- Hinds County - Jackson, Miss.
- Washington County - Greenville, Miss.
- Bolivar County - Cleveland, Miss.

8. Best Places in Central Mississippi for Aerospace Companies

- Hinds County - Jackson, Miss.
- Madison County - Canton, Miss.
- Scott County - Forest, Miss.
- Neshoba County - Philadelphia, Miss.

9. Best Places in East Mississippi for Aerospace Companies

- Lowndes County - Columbus, Miss.
- Tishomingo County - Iuka, Miss.
- Lee County - Tupelo, Miss.
- Lauderdale County - Meridian, Miss.

10. Best Places in South Mississippi for Aerospace Companies

- Hancock County - Bay St. Louis, Miss.
- Jackson County - Pascagoula, Miss.
- Harrison County - Gulfport, Miss.

Also receiving votes: Forrest County - Hattiesburg, Miss.



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best

OF THE AEROSPACE INDUSTRY IN MISSOURI

1. Missouri's Best Assets for the Aerospace Industry

- Robust aerospace manufacturing sector
- Quality Workforce
- Central U.S. location
- Scott Air Force Base
- Whiteman Air Force Base

Also receiving votes: Right to Work laws; Boeing.

2. Missouri's Most Important Employers in the Aerospace Industry

- Boeing
- GKN Aerospace
- LMI Aerospace
- PAS Technologies
- Triumph Group
- May Technology

Also receiving votes: Aviation Technical Services; Ducommun; Essex; Heizer Aerospace; Patriot Machine.

3. The Best in Aerospace R&D in Missouri

- Center for Aerospace Manufacturing Technologies - Missouri S&T
- Intelligent Systems Center - Missouri S&T
- The Emerson Center for Engineering Manufacturing - St. Louis Community College

Also receiving votes: The Aerospace Institute of St. Louis Community College; The Center for Intelligent Maintenance Systems.

4. Missouri's Best Colleges for Aerospace Worker Training

- Missouri University of Science and Technology
- St. Louis Community College
- Saint Louis University
- Missouri State University

Also receiving votes: University of Missouri.

5. Best Sites in Missouri for Large Aerospace Assembly

- Wildwood Ranch - Joplin, Mo.
- Neosho Industrial Park - Neosho, Mo.
- Lake City Site - Independence, Mo.
- Rolla National Airport Industrial and Technology Park

6. Best Places in North Missouri for Aerospace Companies

- Adair County - Kirksville, Mo.
- Platte County - Platte City

Boeing Defense, Space & Security is headquartered outside St. Louis at the Lambert-St. Louis International Airport in Berkeley, Mo. Boeing has produced many aircraft from this location, including the T-X trainer aircraft (pictured).

7. Best Places in West Missouri for Aerospace Companies

- Jackson County - Kansas City, Mo.
- Jackson County - Blue Springs
- Jasper County - Joplin, Mo.

8. Best Places in Central Missouri for Aerospace Companies

- Phelps County - Rolla, Mo.
- Greene County - Springfield, Mo.
- Polk County - Bolivar, Mo.

9. Best Places in East Missouri for Aerospace Companies

- St. Louis County - Hazelwood, Mo.
- St. Louis County - Chesterfield, Mo.
- St. Louis County - Clayton, Mo.
- St. Charles County - O'Fallon, Mo.
- St. Charles County - St. Charles, Mo.

10. Best Places in South Missouri for Aerospace Companies

- Jasper County - Joplin, Mo.
- Pemiscot County - Caruthersville, Mo.
- Cape Girardeau County - Cape Girardeau, Mo.



Honda Aircraft Company's HondaJet, a light business jet, is assembled in Greensboro, N.C.



1. North Carolina's Best Assets for the Aerospace Industry

- Large labor force
- Low corporate income tax
- Marine Corps Air Station at Cherry Point
- Seymour Johnson Air Force Base
- Charlotte Douglas International Airport

Also receiving votes: North Carolina Global Transpark; North Carolina ports; Business climate; Incentives; Low operating costs; Low unionization rate.

2. North Carolina's Most Important Employers in the Aerospace Industry

- GE Aviation
- HondaJet
- Lockheed Martin
- Spirit Aerosystems
- BAE Systems

Also receiving votes: American Airlines; Boeing; ATI; SAFRAN Turbomeca; HAECO; LORD; UTC Aerospace Systems; Curtiss-Wright; B/E Aerospace; Honeywell; Triumph; Raytheon; UTC Aerospace Systems; EATON.

3. The Best in Aerospace R&D in North Carolina

- Institute for Transportation Research and Education at North Carolina State
- Spirit Aerosystems Composite Center of Excellence
- North Carolina Advanced Manufacturing Alliance
- North Carolina State University

4. North Carolina's Best Colleges for Aerospace Worker Training

- North Carolina State University
- Appalachian State University
- University of North Carolina at Charlotte
- Central Carolina Community College
- Randolph Community College

Also receiving votes: Embry-Riddle.

5. Best Sites in North Carolina for Large Aerospace Assembly

- Greensboro-Randolph Megasite - Randolph County, N.C.
- Chatham-Siler City Manufacturing Site - Chatham County, N.C.
- North Carolina's Global TransPark
- The Moncure Megasite - Chatham County, N.C.

CONTINUED

6. Best Places in Northern North Carolina for Aerospace Companies

- Guilford County - Greensboro, N.C.
- Durham County - Durham, N.C.
- Forsyth County - Winston-Salem, N.C.

7. Best Places in Western North Carolina for Aerospace Companies

- Buncombe County - Asheville, N.C.
- Burke County - Morganton, N.C.
- Cleveland County - Shelby, N.C.

8. Best Places in Central North Carolina for Aerospace Companies

- Wake County - Raleigh, N.C.
- Durham County - Durham, N.C.
- Iredell County - Statesville, N.C.
- Randolph County - Asheboro, N.C.
- Chatham County - Pittsboro, N.C.

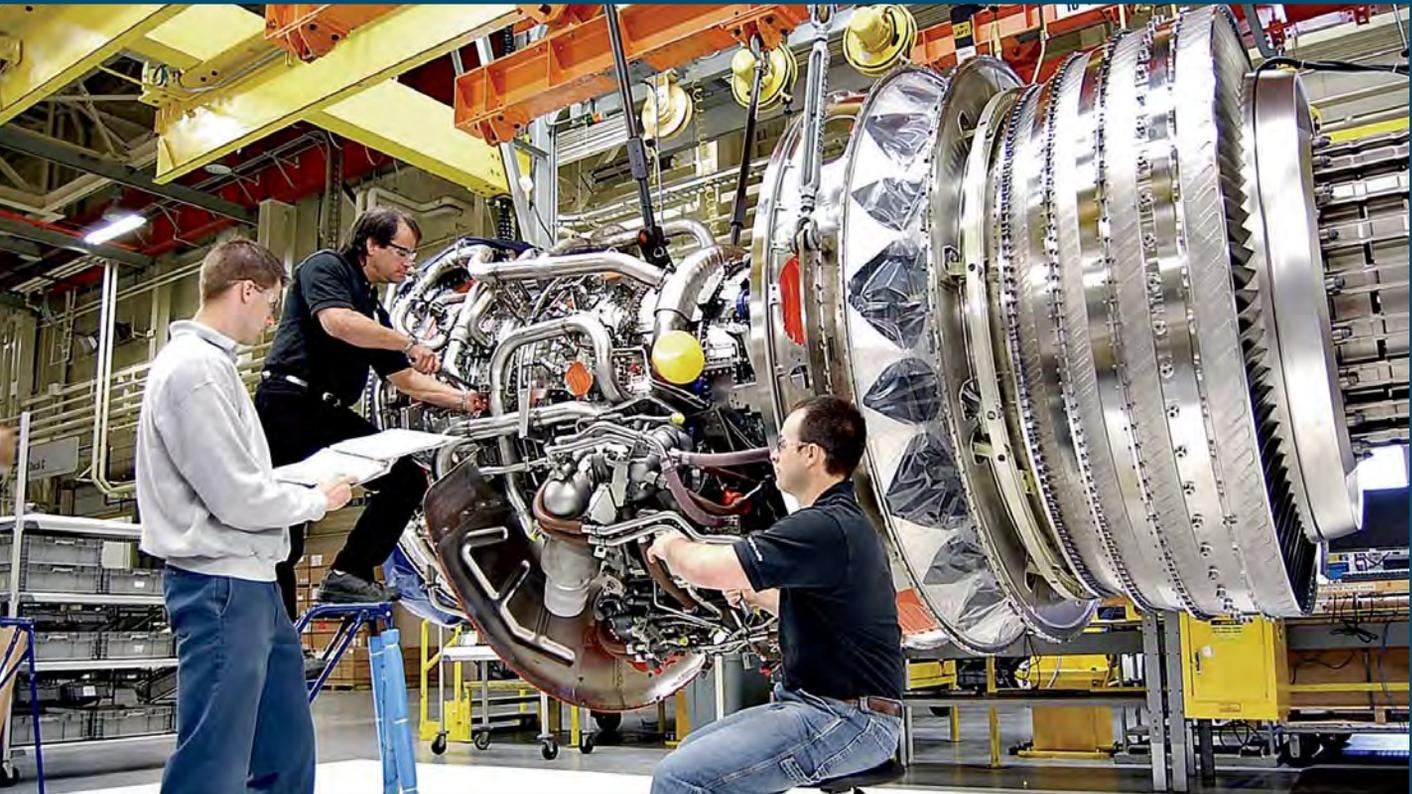
9. Best Places in Eastern North Carolina for Aerospace Companies

- Cumberland County - Fayetteville, N.C.
- New Hanover County - Wilmington, N.C.
- Onslow County - Jacksonville, N.C.
- Lenoir County - Kinston, N.C.
- Craven County - New Bern, N.C.

10. Best Places in Southern North Carolina for Aerospace Companies

- Union County - Monroe, N.C.
- Mecklenburg County - Charlotte, N.C.
- New Hanover County - Wilmington, N.C.

GE Aviation has several facilities in North Carolina. Pictured below is its Asheville facility, where it recently announced a \$105 million expansion.



1. Oklahoma's Best Assets for the Aerospace Industry

- Tinker Air Force Base
- American Airlines Maintenance and Engineering Ctr.
- Oklahoma City Air Logistics Complex
- FAA Mike Monroney Aeronautical Center
- The Oklahoma Air & Spaceport
- Vance Air Force Base

Also receiving votes: Altus Air Force Base; 21st Century Quality Jobs Program; Aerospace Engineer Workforce Tax Credit; Business climate; Central location; Incentives.

2. Oklahoma's Most Important Employers in the Aerospace Industry

- American Airlines
- Boeing
- GE Aviation
- Spirit Aerosystems
- Lockheed Martin

Also receiving votes: Pratt & Whitney; Northrop Grumman; Nordam; Lufthansa Technik; Asco Industries; ARINC; Flight Safety; BizJet .

3. The Best in Aerospace R&D in Oklahoma

- Tinker Air Force Base
- Boeing Defense
- University of Oklahoma
- Oklahoma State University

4. Oklahoma's Best Colleges for Aerospace Worker Training

- Oklahoma State University
- University of Oklahoma
- Oklahoma State University Tulsa

Also receiving votes: Southeastern Oklahoma State University.

5. Best Sites in Oklahoma for Large Aerospace Assembly

- Oklahoma Air & Space Port - Burns Flat, Okla.
- MidAmerica Industrial Park - Pryor, Okla.
- Ardmore Industrial Airpark - Ardmore, Okla.
- Lawton Airport Industrial Park - Lawton, Okla.

6. Best Places in North Oklahoma for Aerospace Companies

- Garfield County - Enid, Okla.
- Delaware County - Grove, Okla.
- Kay County - Newkirk, Okla.
- Kay County - Ponca City, Okla.

7. Best Places in West Oklahoma for Aerospace Companies

- Jackson County - Altus, Okla.
- Washita County - Burns Flatt, Okla.
- Woodward County - Woodward, Okla.

8. Best Places in Central Oklahoma for Aerospace Companies

- Oklahoma County - Oklahoma City, Okla.
- Oklahoma County - Midwest City, Okla.
- Canadian County - El Reno, Okla.
- Cleveland County - Norman, Okla.
- Oklahoma County - Edmond, Okla.
- Payne County - Stillwater, Okla.
- Pottawatomie County - Shawnee, Okla.

9. Best Places in East Oklahoma for Aerospace Companies

- Tulsa County - Tulsa, Okla.
- Mayes County - Pryor, Okla.
- Pittsburg County - McAlester, Okla.
- Tulsa County - Broken Arrow, Okla.

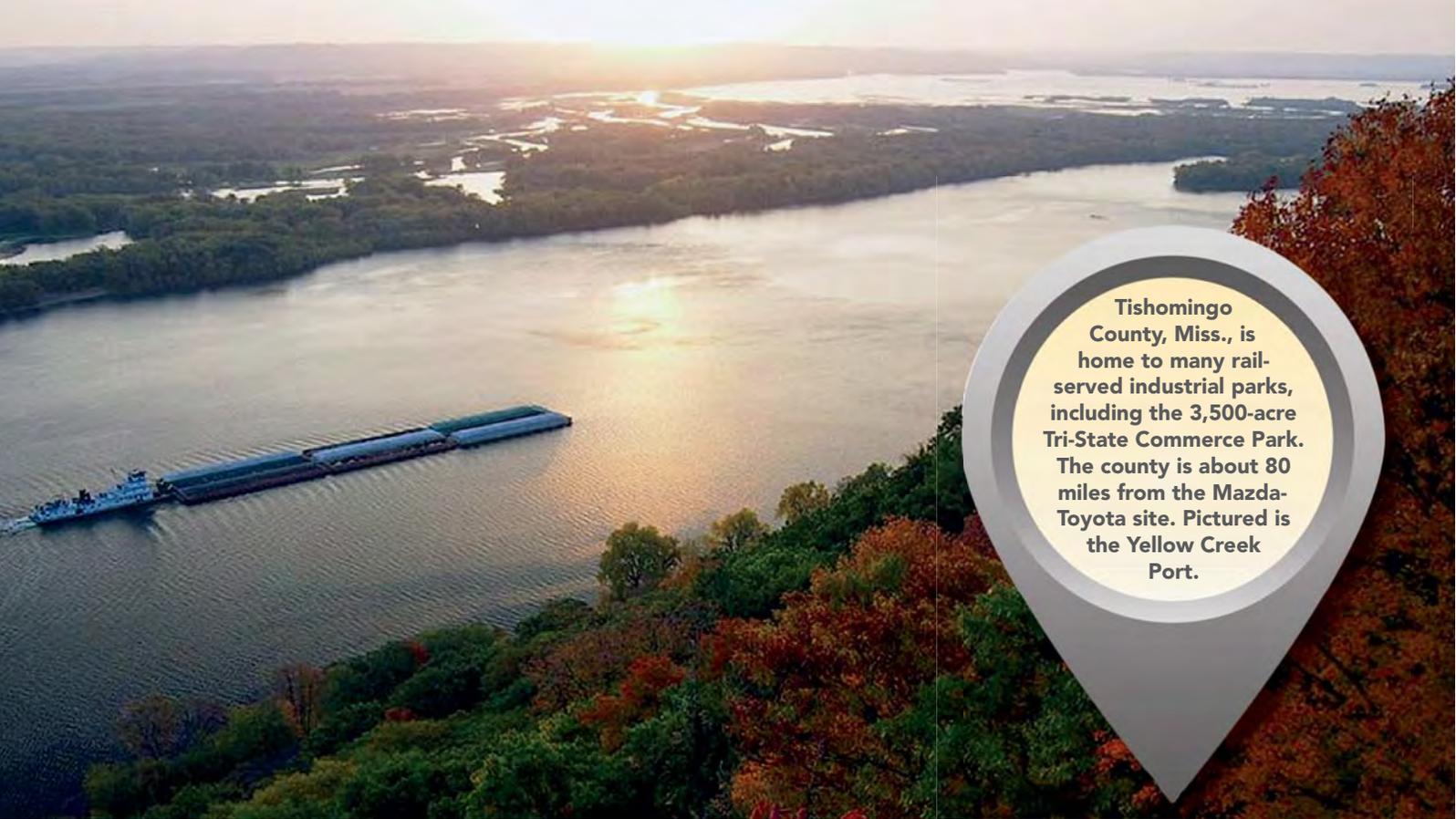
10. Best Places in South Oklahoma for Aerospace Companies

- Comanche County - Lawton, Okla.
- Carter County - Ardmore, Okla.
- Comanche County - Elgin, Okla. ★

(TOP LEFT) American Airlines' Tulsa Maintenance Base, known as Tech-Ops Tulsa, is the world's largest commercial airline maintenance facility at 3.3 million square feet in size.

(BOTTOM LEFT) The Oklahoma City Air Logistics Complex at Tinker Air Force Base is one of the largest units in the Air Force Materiel Command, with a team of 10,000 military and civilian professionals. MRO is performed on a variety of aircraft, including the KC-135 and B-52s.





Tishomingo County, Miss., is home to many rail-served industrial parks, including the 3,500-acre Tri-State Commerce Park. The county is about 80 miles from the Mazda-Toyota site. Pictured is the Yellow Creek Port.

The Way-Too-Early Guide to Toyota-Mazda Parts Supplier Locations

Southern Business & Development is celebrating its 25th anniversary over the next year (four issues). The second feature attributed to that theme is this pictorial titled, "The Way Too Early Guide to Toyota-Mazda Parts Supplier Locations."

Based on our data, we have chosen the 25 best counties in the South for suppliers to the Toyota-Mazda plant that is being built in Huntsville, Ala. The MTMUS facility is expected to be fully operational in 2021 and will house 4,000 workers.

ALABAMA

Cullman County, Ala.

Cullman County is rich in automotive suppliers, most of which are foreign-owned. Located on Interstate 65, 48 miles south of the Toyota-Mazda site that is also located on I-65, Cullman has consistently been named among the top Micropolitans in the South by Southern Business & Development in project activity. Wallace State Community College in nearby Hanceville, Ala., is considered one of the best, if not *the* best, community college for workforce training in the state.

Cullman has a thriving downtown, local leaders supportive of growth, and

an exceptional school system. The high quality education system is matched by excellent healthcare options.

Jackson County, Ala.

If you don't want to compete with Toyota-Mazda's workforce, you might want to take a look at Jackson County, Ala. Located adjacent to Madison County in the far northeast corner of the state, Jackson County is about 55 miles from the Toyota-Mazda site. Its county seat, Scottsboro, is 73 miles from the site. In March, Google officially broke ground on a \$600 million data center in Jackson County.

Most of the industrial parks in Jackson County are rail-served and the popula-

Cullman, Ala., already has a significant automotive parts supplier employment base. Cullman is just 48 miles south of the Toyota-Mazda site that is also located on I-65.



tion within a 50-mile radius of Jackson (including parts of Huntsville) is nearly 250,000. School systems in Jackson County rank in the top 20 percent in the state of Alabama. The Earnest Pruet Center for Technology (EPCOT) is the No. 1 high school technical program in Alabama. EPCOT is located adjacent to Jackson County Industrial Park.

Lauderdale County, Ala.

Florence, the county seat of Lauderdale County, Ala., is 43 miles from the Toyota-Mazda site in Huntsville and 96 miles from the Toyota assembly plant in Blue Springs, Miss. So, logistically, a supplier building a plant in Lauderdale County or any counties in the Shoals region of Northwest Alabama can serve both facilities.

The Shoals Economic Development Authority (SEDA) works to capture projects in the Northwest Alabama region, including Lauderdale and Colbert Counties. SEDA currently owns and operates four industrial parks in Northwest Alabama with a combined acreage of 3,792 acres. Of that acreage, approximately 1,100 acres are available for prospective industry. Another 1,850 acres are available for industrial use at eight other parks and sites. Automotive supplier North American Lighting operates a large plant in the Shoals region, where it employs over 1,600 workers.

Limestone County, Ala.

Even though the Toyota-Mazda site is in the city of Huntsville (which is in Madison County), the site is technically in Limestone County, just off I-65. Limestone County is ground zero for the Toyota-Mazda plant. The county is growing rapidly, with a 10-year growth rate of 26 percent. With the arrival of Toyota-Mazda, that growth will expand exponentially.

There's been no news on whether Toyota-Mazda will build a supplier park near or at the site of the new plant. Regardless, Limestone County is home to an abundant number of industrial sites, ranging from 100 acres to a 2,000-acre megasite.

Madison County, Ala.

Huntsville, the county seat of Madison County, was recently ranked by *U.S. News & World Report* as the seventh best place to live in the U.S. That ranking topped Nashville and Raleigh-Durham, among other outstanding places to live. Madison County has a flourishing job market and it's where most of the 4,000 workers for the Toyota-Mazda plant will be drawn from.

Huntsville was almost picked by Volkswagen in 2008 for its plant that went to Chattanooga. With the addition of Toyota-Mazda to the city, the Huntsville region is without question one of

the most diversified economies in the South. Military, space, telecommunications and biotechnology all thrive in Madison County. Madison County has an estimated population of 365,000.

Marshall County, Ala.

Parts of Marshall County are only about 40 miles from the site of the Toyota-Mazda plant. Guntersville, the county seat, is roughly equidistant (60 to 90 minutes) from both the Honda assembly plant in Talladega County and the Toyota-Mazda site in Limestone County. Both are Japanese automakers, so if your company supplies Honda's plant and plans on supplying the Toyota-Mazda plant when built, Marshall County would be a good fit.

Residents of Marshall County enjoy a lower cost of living and have access to many recreational opportunities, including water activities on and around the Tennessee River and Lake Guntersville. The schools in Marshall County are consistently ranked above average in statewide tests.

Morgan County, Ala.

Located about 15 miles from the site of Toyota-Mazda is Decatur and Morgan County. Also on Interstate 65, Morgan County is supported by a diverse industry base, including automotive, aerospace, food processing, steel processing and chemicals.

CONTINUED



The Mazda-Toyota project was captured by Huntsville, Ala., one of the South's most innovative cities.

Morgan County is also home to the Robotics Technology Park. Workforce training in robotics is more active in this part of North Alabama than any other part of the state. It is also home to the Mallard-Fox Creek Port on the Tennessee River. The port is served by Norfolk Southern and there is industrial land available at the port.

Walker County, Ala.

With the completion of Interstate 22 from Birmingham to Memphis, Walker County has seen a significant increase in project activity. Jasper, the county seat, is located about 75 miles from the Toyota-Mazda site. Walker County is also about 72 miles from the Mercedes-Benz plant in Tuscaloosa County, 80 miles from the Honda assembly plant in Talladega County and 105 miles from Toyota's plant in Blue Springs, Miss.

Recently, Japanese parts supplier Yorozu opened a large facility in Walker County. Yorozu already supplies Toyota and Mazda, so it's highly probable the new plant in Walker County will supply the new Toyota-Mazda plant when it opens in three years.

KENTUCKY

Hardin County, Ky.

Elizabethtown and Hardin County, Ky., are about 200 miles from the Toyota-Mazda site in North Alabama. Both

are on Interstate 65. Hardin County has plenty of Toyota suppliers now because it is located just 90 miles from Toyota's largest North American assembly plant in Georgetown, Ky. Hardin County is also 40 miles from Ford's two assembly plants in Louisville and 75 miles from GM's Corvette plant in Bowling Green.

Hardin County has a thriving manufacturing sector, with many industries manufacturing components for the automotive sector. Hardin County is centrally located to assembly plants in Kentucky, Tennessee, Alabama and the Midwest. The county is poised for significant additional growth in advanced manufacturing with the 1,551-acre Glendale Megasite. The site is certified by CSX Railroad and is located on Interstate 65 and a CSX mainline.

Jefferson County, Ky.

From Louisville and Jefferson County, parts suppliers can serve both the Toyota assembly plant in Georgetown, Ky., and the Toyota-Mazda plant in Huntsville, Ala. Manufacturing is thriving in Louisville as *Forbes* has called the metro a manufacturing "boomtown" two years in a row. Louisville is also an outstanding place to live with a vibrant central business district.

The Louisville region's labor productivity is 50 percent higher than the national average and the metro's manufacturing

employment is 20 percent greater than the national average. There are 14 major automotive OEMs within 250 miles of Louisville, and when the Toyota-Mazda plant is built, that will make it 15.

Nelson County, Ky.

Bardstown is the county seat of Nelson County. Bardstown continues to be included in the list of the "Top 10 Best Small Towns in America." Bardstown was also named the "Most Beautiful Small Town in America" by Rand McNally and *USA Today*.

Nelson County is about 250 miles from the Toyota-Mazda site in North Alabama, but only 65 miles from Toyota's Kentucky plant. There are several Toyota parts suppliers located in Nelson County, including Toyota Boshoku. Population growth in Nelson County has been in double digits of late and the county continues to be one of the fastest growing areas of the Commonwealth.

Simpson County, Ky.

This small county of about 18,000 people is a straight shot down Interstate 65 to the Toyota-Mazda site in North Alabama, 140 miles away. Why pick Simp-

Downtown Columbus, Miss., is a dynamic market that has captured an impressive number of automotive and aerospace manufacturing projects. Columbus is 86 miles from the Toyota plant in Blue Springs, Miss., and 150 miles to the Mazda-Toyota site.



son County for one of the best sites for parts suppliers to Toyota-Mazda? Well, the folks running the Franklin-Simpson Industrial Authority really know the practice of economic development. There seems to always be at least one spec building available in the county and there are over 400 acres of available industrial land. The county features high speed internet service, a state-of-the-art technical college and CSX Railway access.

Warren County, Ky.

Here is another county in Kentucky that sees high volumes of deal activity. Located to the north of Simpson County, the interstate that fronts the Toyota-Mazda site (I-65) runs right through Warren County and Bowling Green, Ky.

Home to a GM plant, Warren County is approximately 155 miles north of the Toyota-Mazda site and 155 miles southwest of the Toyota plant in Georgetown, Ky. . .so equidistant to both plants.

Warren County is home to Western Kentucky University, and the South Central Kentucky region has grown by 22 percent in the past nine years. Interestingly, there are no local sales tax or production equipment taxes in Warren County. The Nashville International Airport is only one hour from Bowling Green.

MISSISSIPPI

Alcorn County, Miss.

I just visited Corinth, Miss., and Alcorn County. Great place with a dual rail —

true dual rail — site. The 145-acre site (with another 160 acres available) is controlled by the Corinth Alliance, the local economic development agency.

Alcorn County and Corinth, Miss., are located in Northeast Mississippi, just 50 miles north of Toyota's Corolla assembly plant in Blue Springs, Miss., and 100 miles from the new Toyota-Mazda site.

CONTINUED

Bardstown, Ky., is located in between the massive Toyota plant in Georgetown, Ky., and the site of the Mazda-Toyota plant in Huntsville.



Giles County, Tenn., is just across the state line from Limestone County, Ala., only 15 miles at its southern border from the Toyota-Mazda site.



Lawrence County, Tenn., has plenty of outdoor amenities and is located about 50 miles from Mazda-Toyota.



Alcorn County is within 250 miles of 10 assembly plants in the Southern Automotive Corridor. The public schools in Corinth are first-rate and the Northeast Mississippi Community College in neighboring Prentiss County, with a satellite campus in Corinth, provides valuable services to business and industry through its Division of Workforce Training and Economic Development.

Itawamba County, Miss.

Itawamba County, Miss., is the first county you hit when driving on Interstate 22 from Birmingham to Memphis. The county seat is Fulton, which is 110 miles from the Toyota-Mazda site in Huntsville, Ala., and only 35 miles to the Toyota Corolla plant in Blue

Springs, Miss. In fact, if there is lots of interaction between the two Toyota facilities, you must drive through Itawamba County to get to either plant.

Itawamba County's population is just shy of 25,000. It's a small county, but its location is perfect for Toyota-Mazda suppliers. The Itawamba County School District is the No. 10 school district in the state of Mississippi. Furthermore, Itawamba County is also home to Itawamba Community College, which has been rated as the No. 6 community college in the nation.

Lee County, Miss.

Tupelo and Lee County, Miss., have a rich history in the practice of economic development. Long the home

of the furniture industry, the county was immersed into the automotive industry when Toyota opened a plant in neighboring Union County in the fall of 2011. That Union County plant builds the Corolla model, which will also be assembled at the Toyota-Mazda plant in Huntsville.

The Community Development Foundation (CDF), one of the first economic development agencies formed in the United States in the late 1940s, has made major contributions to Lee County with the development of nine industrial parks. CDF has been characterized by many as an organization that is at the center of innovation, as well as the most significant force in rural American economic and community development.

Lowndes County, Miss.

Here is another famous place that is home to a well-known, highly successful economic development agency, the Golden Triangle Development Link. You may have seen its CEO Joe Max Higgins on *60 Minutes* recently.

The Golden Triangle references a region in North Mississippi encompassing Columbus, Starkville and West Point. The GTR LINK boasts a record of nearly \$6 billion in investments and nearly 6,000 jobs created in just over a decade. The organization has secured many industrial sites, including the Prairie Belt Powersite and the Infinity Megasite. Lowndes County is located 80 miles from the Toyota plant in Blue Springs, Miss., and 150 miles from the Toyota-Mazda plant site.

Monroe County, Miss.

Monroe County is located just north of Lowndes County, just 35 minutes from Toyota's Mississippi plant in Blue Springs. It is located about 125 miles from the Toyota-Mazda site in North Alabama.

Monroe County is also located on the Tennessee Tombigbee Waterway, which connects the Port of Mobile to the Tennessee River. The BNSF mainline runs through the county halfway between Birmingham and Memphis. Monroe County is halfway between Tupelo (Lee County) and Columbus, Miss., (Lowndes County).

Prentiss County, Miss.

Prentiss County is located in extreme Northeast Mississippi, 115 miles west of the Toyota-Mazda site and 30 miles from Toyota's plant in Blue Springs, Miss. This county is also on the Tennessee Tombigbee Waterway and it is served by KCS rail. Parker Hannifin, an automotive supplier, operates a large plant in Prentiss County.

The biggest draw to Prentiss County is that it is home to Northeast Mississippi Community College in Booneville. Industrial sites and buildings are readily available at several locations in the

county. County and municipal governments are very cooperative in accommodating the needs of new and expanding businesses.

Tishomingo County, Miss.

Tishomingo County has captured some outstanding projects over the years, particularly in the steel industry. Located just across the border from Lauderdale and Colbert counties in Alabama, Tishomingo County is 60 miles from the Toyota plant in Blue Springs, Miss., and just 84 miles from the Toyota-Mazda site.

There might not be a rural county in the South that has more and larger industrial parks than you will find in Tishomingo County. The Tri-State Commerce Park features 3,500 acres with a rail yard, barge dock and 24/7 security. It also has a crane with capacity of 400 tons, dual feed electric power and an onsite fire department. There are also several more industrial parks in the county.

Union County, Miss.

Union County is home to Toyota's Mississippi assembly plant. The county is located on Interstate 22, one hour from Memphis International Airport and 150 miles from the Toyota-Mazda site in Huntsville, Ala.

Northeast Mississippi Community College has a branch in New Albany and the two school systems are rated Level 5 or Level 4, the state's highest ratings. Historically, Union County has been a manufacturing location as it is considered the birthplace of Northeast Mississippi's furniture industry.

TENNESSEE

Giles County, Tenn.

Giles County has about 29,000 residents, and one of its largest employers is Magneti Marelli, a manufacturer of automotive lighting. In fact, several large automotive suppliers operate in Giles County.

Giles County is just across the state line from Limestone County, Ala., only 15 miles at its southern border from the Toyota-Mazda site. It is located 58 miles

south of Nashville and 40 miles north of Huntsville, two of the South's most progressive cities.

Lawrence County, Tenn.

Lawrence County and Lawrenceburg are located just across Tennessee's border with Alabama, approximately 40 miles from the Toyota-Mazda site in Huntsville, Ala. Lawrence County has been fertile ground for companies like Dura Automotive, Modine, Graphic Packaging, Hughes Parker Industries, Bertolini, InMotion Robotics and 3D Systems.

The Lawrence County School System works closely with local industry to make sure its programs help prepare students for success in today's job market. The county is also home to Columbia State Community College's Lawrence Campus.

Lincoln County, Tenn.

Fayetteville and Lincoln County are located in southernmost Tennessee, 31 miles from Huntsville and 82 miles from Nashville. Fayetteville, the county seat, is located 45 miles from the Toyota-Mazda site.

There is a wealth of workforce training facilities in Lincoln County, including the Don Sundquist Center for Advanced Technologies, Motlow State Community College and the Tennessee College of Applied Technologies. Industrial sites in Lincoln County are numerous at the Bullington and Fayetteville-Lincoln County Industrial Parks.

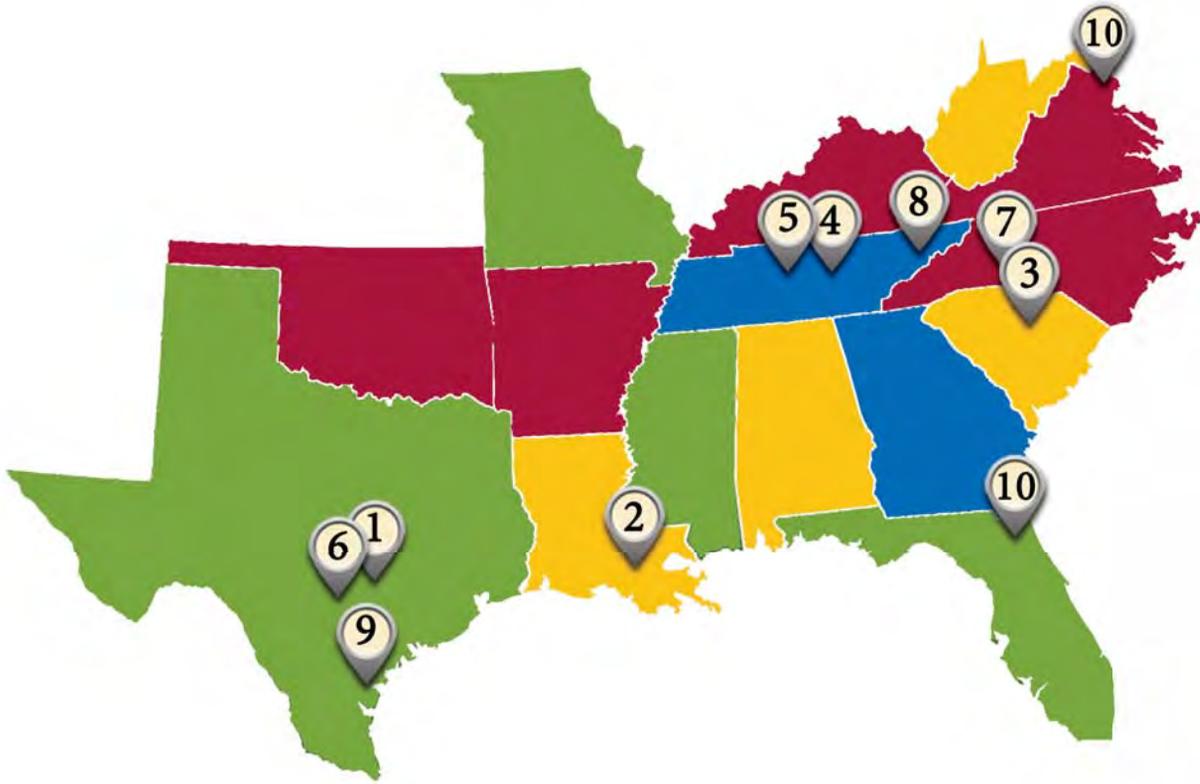
Maury County, Tenn.

Maury County is home to a large General Motors assembly plant and is a hotbed for automotive suppliers. The county is in the heart of automotive manufacturing in the U.S. In fact, 14 OEMs are within 250 miles of Maury County. The county also has a wide selection of available sites and buildings, many with direct highway access or Interstate 65 access.

The southernmost border of Maury County is only about 50 miles from the Toyota-Mazda site. Maury County is part of the Nashville MSA. 📍

TOP DEALS

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



ANNOUNCEMENTS MADE IN THE SPRING 2018 QUARTER

Development	Jobs	Investment*	N/E/R**	Location	Description
1. Indeed.com	3,000	N/A	E	Austin, Texas	Website
2. Formosa	1,200	\$9,400	N	St. James Parish, La.	Chemicals
3. RoundPoint Mortgage	1,100	\$34	R	York County, S.C.	Financial Services
4. AllianceBernstein	1,050	\$70	R	Nashville, Tenn.	Financial Services
5. General Motors	1,000	N/A	E	Spring Hill, Tenn.	Auto Assembly
6. TaskUs	1,000	N/A	N	New Braunfels, Texas	Call Center
7. EGGER Wood	770	\$700	N	Davidson County, N.C.	Wood Products
8. Van Hool NV	640	\$47	N	Morristown, Tenn.	Bus Assembly
9. ExxonMobile SABIC	600	\$10,000	N	Portland, Texas	Ethane
10. Appian	600	\$28	R	McLean, Va.	Headquarters

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

Source: RandleReport.com



union county

Located adjacent to Charlotte and I-485, Union County is home to a strong base in precision-focused manufacturing, most notably in aerospace. Monroe has the Carolina's highest geographic concentration of aerospace companies - 23 companies in a seven mile radius. Strategically located within easy access to the Southeast and Global markets, our companies supply virtually every aerospace company in the world.

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