

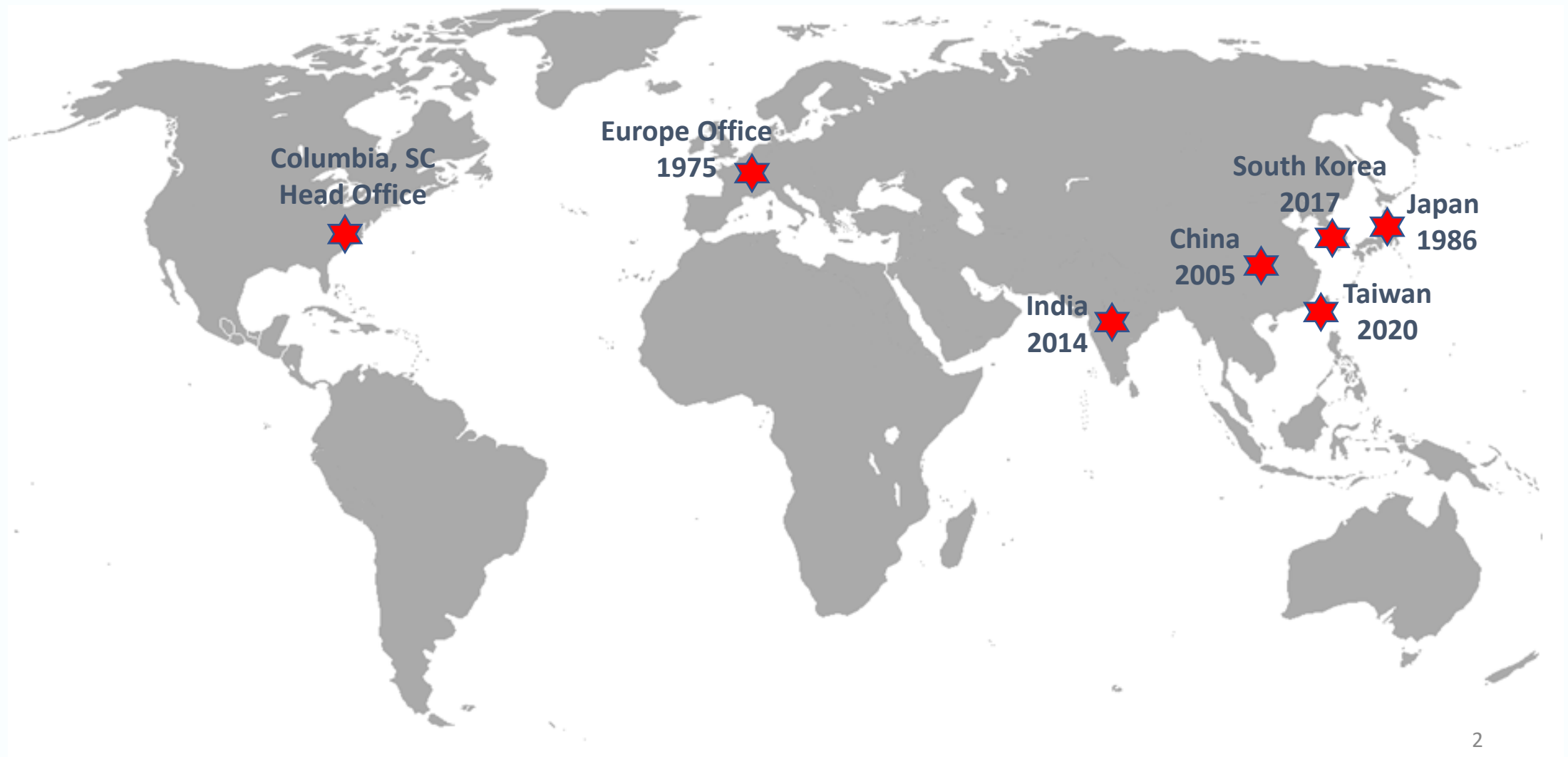
Introducing South Carolina



South Carolina
Department of Commerce

Just right for business.

Globally-Connected



Customized U.S. Expansion Support



Market Research

- Workforce availability
- Cost of doing business comparison
- Local supplier options
- Business intelligence resources



Site Selection

- Building search support based on company requirements
- One-on-one tours of locations and communities



Workforce Programs

- Training development
- Apprenticeship support
- University and Technical college partnerships
- Workforce recruitment assistance



Connections

- Introductions to local officials
- Introductions to local service providers
- Permit assistance

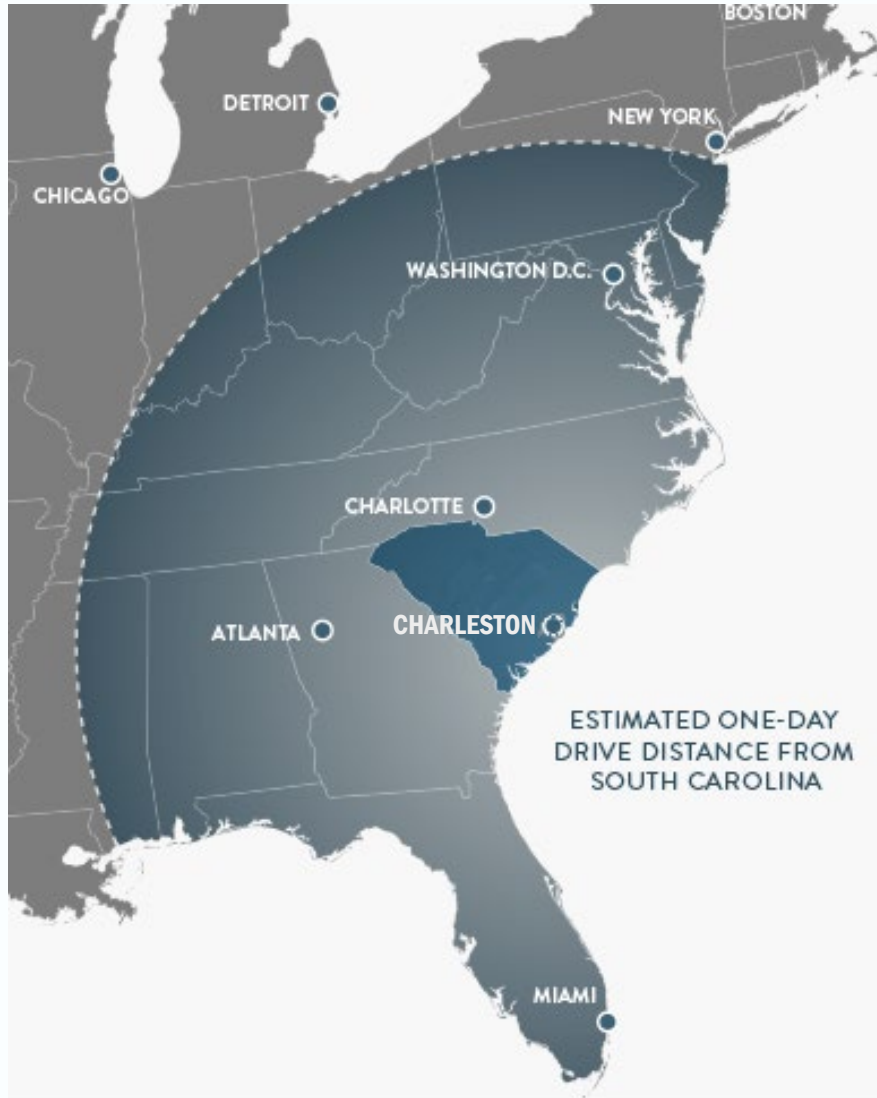


Incentives

- Overview of project-based incentives



Location



- Within **1,000 mi/1,609 km** of **35 states** and **nearly 70%** of the total U.S. population.
- Located in the **Southeast**, midway between **New York** and **Miami**
- **Area: 32,020 square miles (82,931 square kilometers)**
- **Population: 5.14 million**





Source: US Census Bureau

Infrastructure

Port of Charleston is the most efficient open water port on the Eastern Seaboard.

Well-connected, as 13 of the 15 top container lines call on the Port of Charleston

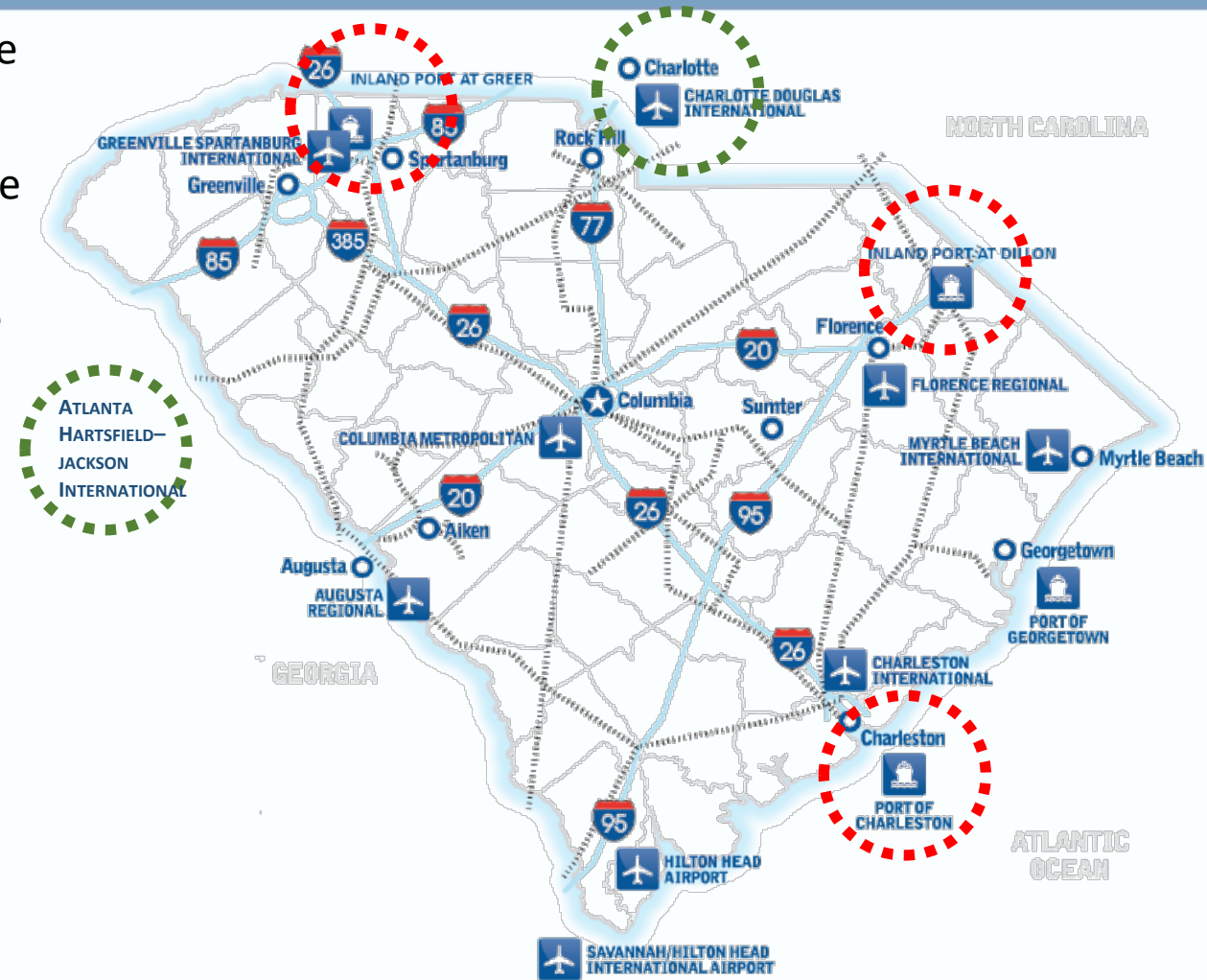
Two class-1 railroads and two inland port facilities within the state enhance speed to market

More than 172,000 rail lifts at Inland Ports Greer and Dillon

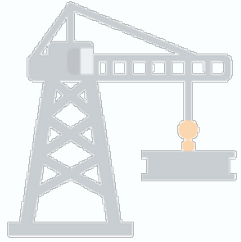
More than 199,000 vehicles handled annually at Port of Charleston

Access to **2 international airports with daily direct flights to Europe and Asia**

Price of **gasoline is 9% below** national average



Business Friendly Advantages



Construction Cost

10% below national average

Source: Marshall Valuation Service, July 2019



Industrial Power rates

12.3% below national average

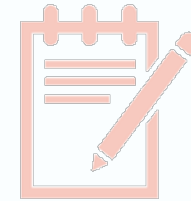
Source: U.S. Energy Information Administration, 2020 YTD Average.



Cost of Living

8.5% below national average

Source: United States Department of Commerce, Bureau of Economic Analysis., 2019



Lowest unionization rate in the United States

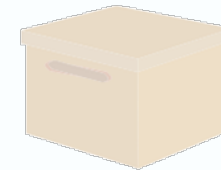
Sources: Union Membership and Coverage Database from the CPS (unionstats.com) 2019.



2nd lowest

average wage in the South East. U.S.

Source: BLS OES May 2018



No inventory tax and No state property tax



Growing Industries



Advanced Manufacturing Industry



Advanced Materials Industry



Aerospace Industry



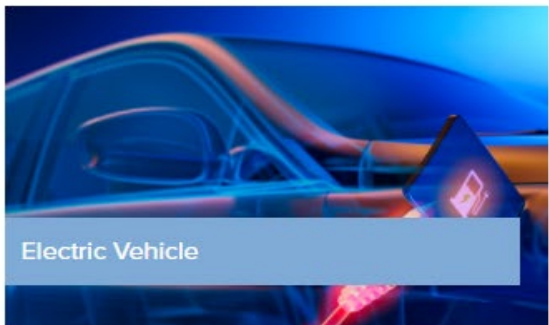
Agribusiness Industry



Automotive Industry



Distribution & Logistics Industry



Electric Vehicle



Headquarters & Corporate Offices



Life Sciences Industry



Global Presence in South Carolina



Ranked **1st** in workforce employed (by percent) **by foreign affiliates** in the US

Ranked **4th** in new jobs and investment from **foreign companies** in the US (2011- present)
(Area Development Magazine)

More than **1,200 foreign-owned affiliates** located in South Carolina

700+ European-owned operations



Global Brands in South Carolina



8 tire plants, NA HQs, R&D
ca. 8,800 employees



OEM, S60 and future XC90
vehicles, ca. 700 employees



Data Center,
ca. 110 employees



Final 787 Dreamliner assembly, Research
& Technology Center, ca. 7,000 employees



Optical Instrument & lens manufacturing,
ca. 1,000 employees



F-16 production line, Maintenance
& repair, ca. 500 employees



2 tire plants
ca. 1,800 employees



OEM, motor vehicle assembly for
the X series, ca. 11,180 employees



2 tire plants,
ca. 1,700 employees



4 distribution centers
ca. 3,200 employees



Liquid hand soap and deodorant
production, ca. 300 employees



ATV and MUV manufacturing,
ca. 500 employees



Innovation by Chemistry

high-performance carbon fiber
production, ca. 500 employees



Gas turbine + medical
manufacturing, ca. 4,000 employees



Home appliance manufacturing, Customer
service center, ca. 1,200 employees



Lawn & garden equipment
manufacturing, ca. 2,200 employees



OEM, Sprinter Van assembly,
ca. 975 employees



Sports apparel distribution & customer
service center, ca. 1,000 employees



Invented for life

Engine Parts & hydraulic pumps
manufacturing, ca. 4,000 employees



Coffee Roasting plant,
ca. 100 employees

Automotive Industry Snapshot

- **Over 500** automotive manufacturing plants, suppliers, and automotive-related companies
- S.C. is the **# 1 exporter** of completed passenger vehicles, with **21% of the U.S. market share**
- With 13 active sites, S.C. has more tire plants than any other state and is the **#1 exporter** of US-made tires, with **37% of the U.S. market share.**
- South Carolina's automotive workforce includes **more than 70,000 people**



Yellow dots indicate tier 1 suppliers only for the automotive industry.



Ideal Location: Southeast OEMs

- The Southeast is home to more than 20 OEMs and hundreds of automotive suppliers
- South Carolina is well positioned to access all the Southeast passenger and commercial OEMs in less than one trucking day



Aerospace Industry Snapshot



Centrally Located to:

- Boeing, Charleston, SC
- Lockheed Martin, Greenville, SC
- Airbus, Mobile, AL
- Gulfstream, Savannah, GA
- Embraer, Melbourne, FL
- Honda Jet, Greensboro, NC
- Spirit AeroSystems, Kinston, NC



Aerospace Industry Snapshot



- More than 400 civilian companies and four military aviation facilities
- South Carolina aerospace workforce includes more than 130,000 people
- South Carolina ranks #3 in the U.S. for exports of aircraft, space craft, and parts

Advanced Materials Companies



HQ, Specialty chemicals, floor covering, performance and protective textile materials, and healthcare, est. 1,000 employees



Carbon fiber textiles, est. 20 employees



Composite structures for aerospace and defense, est. 106 employees



High performance glass, astroquartz, carbon and specialty reinforcement woven fabrics, est. 300 employees



Carbon fibers, Torlon® PAI (polyamide-imide) and specialty chemicals, est. 250 employees. Research and Innovation Center.



Carbon fiber manufacturing facility, est. 220 employees



Technical ceramic components and hermetically sealed components, est. 210 employees



High-performance carbon fiber production, est. 200 employees



NA HQ, structured geomembranes, HDPE pipe fittings, needle punched nonwovens, est. 77 employees



HQ, glass fiber products for wind, automotive and aerospace industries, est. 731 employees



Technical nonwovens, est. 57 employees



Glass fiber reinforcements, est. 182 employees



Advanced Materials Partners

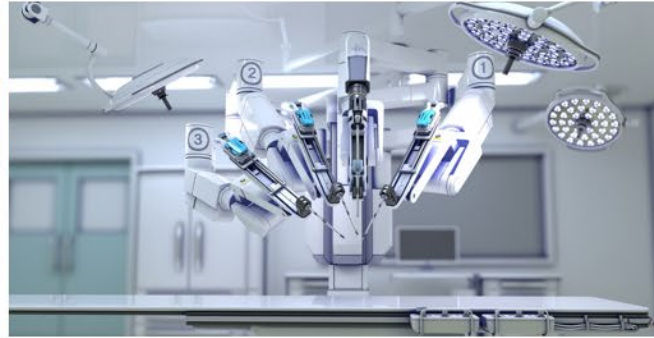


- **Clemson Composites Center** offers application engineering, full-scale prototyping and short-volume production runs for advance composites and polymer components
- The **Composites Manufacturing Technology Center (CMTC)** develops improved manufacturing processes for composites and advanced materials
- SC Fraunhofer USA Alliance provides opportunities for **applied research, matching manufacturers with participating Universities.**

Life Sciences Industry Snapshot



BIOTECH
DRUGS & PHARMACEUTICAL



MEDTECH
MEDICAL DEVICES & EQUIPMENT



DIGITAL HEALTH
AI & HEALTH IT



BIO-AG
AGRICULTURAL APPLICATIONS



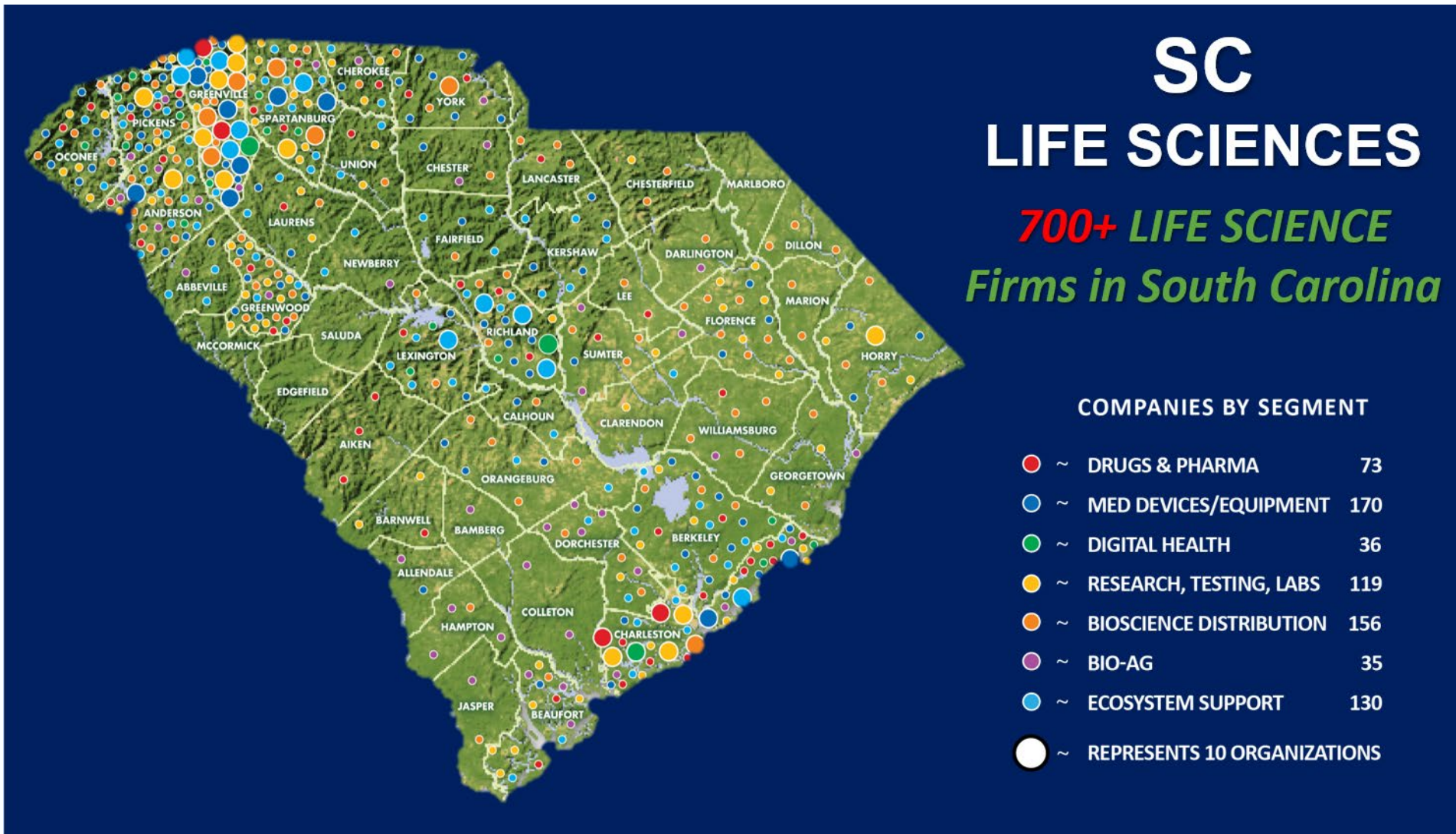
BIO-SCIENCE
DISTRIBUTION



RESEARCH,
TESTING & MEDICAL LABS



Life Sciences Industry Snapshot



Workforce Training Support



RECRUITMENT | TRAINING
TRAINING SITE | TRAIN THE TRAINER
| CURRICULUM DEVELOPMENT

- Created in 1961, one of the longest running and most experienced worker training programs in the nation
- Recognized as the premier economic development training program in the U.S. for more than 50 years
- More than 280,000 trained.



- Consultants are available, at no charge to employers, to guide companies through the registered apprenticeship development process.



Incentives for New & Expanding Companies



Two Types:

- Statutory
- Discretionary

Four Criteria for Incentives:

- Location
- Job Creation
- Wages
- Capital Investment



Diverse Real Estate Options throughout State



Shovel Ready Sites



Speculative Buildings



Existing Buildings & Industrial Parks



Landing Pad & Coworking Space



Landing Pad Program for International Companies

Make South Carolina Your Gateway to the United States



The Landing Pad Program
includes support in the following area:

- Identifying workspace or warehouse space
- Assistance finding reputable & reasonably priced services
- Guidance on business regulations
- Workforce assistance
- Applicable to projects creating less than 10 full-time jobs
- And more, depending on the needs of your company!



An aerial photograph of a city, likely Columbia, South Carolina, with a blue color overlay. The image shows various buildings, including a prominent one with a dome in the foreground, and a dense urban landscape.

Thank You

Joshua Seeberg

Senior FDI Advisor, International Strategy and Trade
South Carolina Department of Commerce – Europe Office

Email: jseeberg@sccommerce.com

www.sccommerce.com

Questions?

