

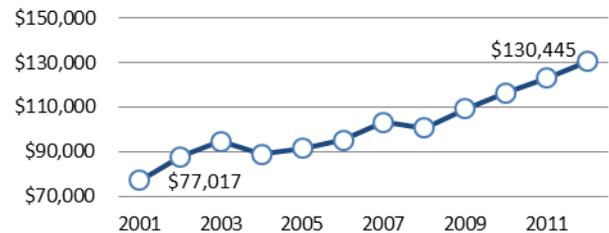


Industry Trends: Advancements in Engineering, Technology and Process

South Carolina's manufacturing industry experienced 48.7 percent growth in output per employee from 2002 through 2012, evolving into a growing technology-centric, capital-intensive sector requiring a smaller, yet higher-skilled labor force.

(Source: US Bureau of Economic Analysis, US Bureau of Labor Statistics)

Manufacturing Output per Employee 2001-2012



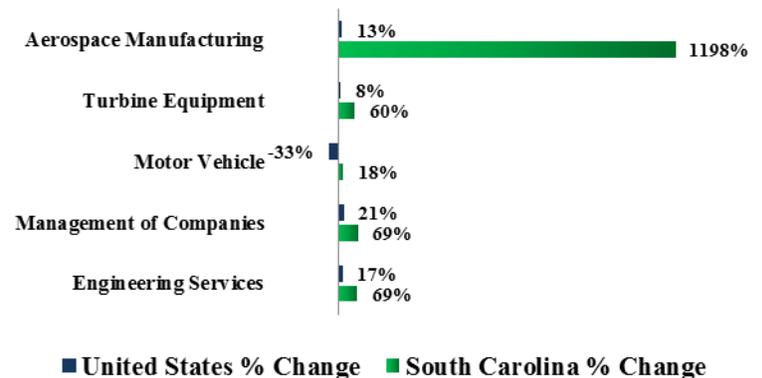
Employment: Gains in Advanced Manufacturing and Engineering

South Carolina has experienced dramatic growth in a number of subsectors classified as Advanced Manufacturing, including the chemical, electrical, automotive and pharmaceutical industries. When comparing the state to the United States average, South Carolina's growth exceeded the nation for each of the subsectors in shown in the accompanying chart.

Between the end of the recession, July 2009, and June 2013, South Carolina added 14,048 manufacturing jobs. Over the past three years, South Carolina had one of the highest growth rates in manufacturing employment in Southeast.

(Source: US Bureau of Labor Statistics)

Employment Growth, Specific Industries 2003-2012



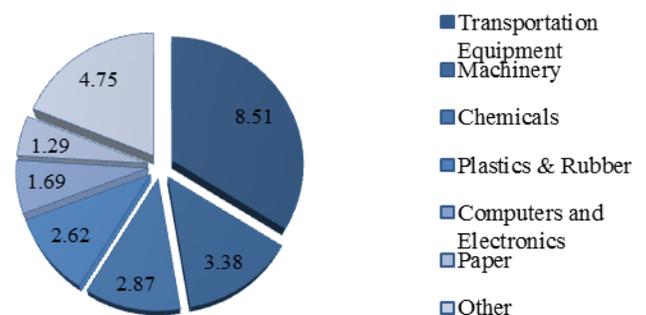
Exports: Adding Real Value to the State Economy

The value of South Carolina exports has increased faster than the national average. From 2002 to 2012, total exports from South Carolina grew by 160 percent to more than \$25.1 billion in goods. South Carolina manufacturing exports exceeded the national export growth rate by 37 percent.

Between 2002 and 2012, exports from South Carolina to Germany increased 122 percent, to Mexico by 152 percent and to the United Kingdom by 143 percent. Export growth to India has grown 900% and exports to China have grown over 1,200%.

(Source: US Department of Commerce, Int'l Trade Administration)

State Exports by Commodity, 2012 (Billions of Dollars)



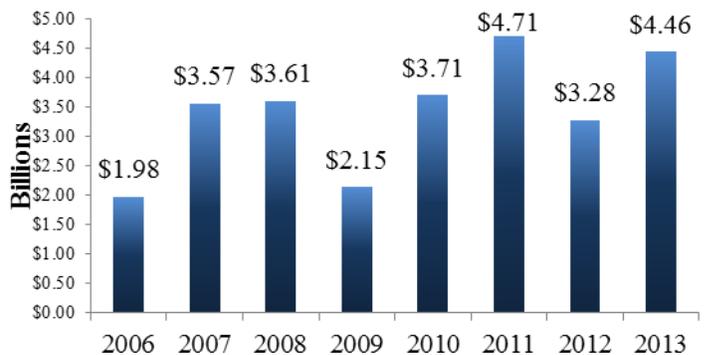


Manufacturing Capital Investment: Confidence in Our State

Manufacturing firms are attracted to South Carolina thanks to its favorable business climate, proximity to major markets and a low cost of doing business. Despite the worldwide recession, South Carolina's job recruitment and capital investment from manufacturers saw steady growth from 2006 to 2013. In 2013, the state attracted more than \$4.4 billion in capital investment from manufacturing companies. Between 2006 and 2013, new and expanding manufacturing firms committed to creating more than 87,000 jobs in the state.

(Source: South Carolina Department of Commerce, Division of Research Capital Investment Reports)

Manufacturing Capital Investment in South Carolina, 2006 - 2013



Workforce: Providing the Labor and Training Manufacturers Need

Compared to all other states, South Carolina has one of the highest proportions of its workforce employed in many of the engineering, technical and production occupations critical to success in manufacturing.

(Source: U.S. Bureau of Labor Statistics)

South Carolina's workforce training program, ReadySC™, has trained over 275,000 workers since 1961. The program trained nearly 5,000 during FY 2012-13 alone. In 2012, ReadySC™ won the CiCi Award for outstanding achievement in economic development.

(Source: ReadySC.org, January 2014)

SC Rank of Employment Concentration for Key Occupations, 2012

Occupation	SC Rank	Occupation	SC Rank
Tire Builders	1	Extruding and Drawing Machine Operators	2
Nuclear Technician	1	Heat Treatment Equipment Operators	3
Fiberglass Production	3	Chemical Plant and System Operators	2
Extruding & Forming Operator	1	Industrial Engineering Technicians	3
Industrial Engineers	3	Nuclear Engineers	3
Team Assemblers	1	Engine and Machine Assemblers	4
Paper Machine Operators	2	Inspectors, Testers, and Weighers	4
Chemical Engineers	4	Textile Knitting and Weaving Operators	1
Mechanical Engineers	2	Textile Winding & Twisting Machine Setters	3

Recent Rankings: South Carolina is Recognized Nationally

- As the top recipient for FDI job creation in the U.S., South Carolina was named the "It State" for FDI by Site Selection magazine. South Carolina was also within the top ten states for overall business climate. *(Source: Site Selection, 2012)*
- South Carolina did exceptionally well on the latest 2013 State Rankings Report from Business Facilities magazine, placing in five categories. South Carolina ranked 8th for Business Climate, 7th for Lowest Cost of Labor, 3rd as Nuclear Power Leaders, 7th in Automotive Manufacturing Strength and 10th as Automotive Parts Supplier Leaders. *(Source: Business Facilities, 2013)*
- South Carolina came in as one of the ten best states for business on Chief Executive Magazine's annual poll of CEOs, ranking 8th. About 650 business leaders rated states on taxation and regulation, workforce quality and quality of life. *(Source: Chief Executive, May 2013)*
- Forbes ranks South Carolina's regulatory environment 5th best in the nation for business. The 2012 ranking is based on the state's labor regulations, health insurance coverage mandates, the tort system, tax incentives and other measures. *(Forbes, 2012)*

