

Business and Industry Greenville, South Carolina

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I. Executive Overview

Many companies in Greenville and the Upstate of South Carolina are widely recognized as strong competitors in the global marketplace. As a medium-sized market, the ten-county Upstate region comprises one of the strongest manufacturing centers in the country. The region is known for its ability to attract international and domestic firms by providing a pro-business environment and all the amenities necessary for business growth. And as Harvard Business School professor and author Rosabeth Moss Kanter writes in *World Class: Thriving Locally in the Global Economy*, “The history of the region’s economic development is a lesson for business and community leaders seeking to understand what is required to achieve world-class status and bring local residents into the world economy.”

Greenville County is the centerpiece of the region considered to be the “economic engine of South Carolina” and is the most populous county in the state. Since its beginning as a small farming community in 1786, Greenville County has grown into a large and diverse metropolitan area and one of the southeast region’s premiere areas for business. Over the past thirty years, Greenville has transformed itself from the textile capital of the world into a destination for corporate office, manufacturing and warehousing/distribution operations. Greenville is now home to world-class companies such as 3M, Lockheed, General Electric, Samsung and Michelin.

Companies are drawn here by our favorable tax rates, market accessibility and the quality and availability of our workforce. In fact, South Carolina’s workforce was ranked in #5 in the nation; 8th best for access to transportation in all its modes; and 6th best for “cost of doing business” by CNBC’s 2010 Top States for Business. And in fDi Magazine’s 2009/2010 “*North American Cities of the Future*”, the City of Greenville ranked # 1 among “micro cities”.

Greenville County has announced over \$1.1 Billion in new capital investment and over 7,000 new jobs in last five years. The SC Department of Commerce indicates that Greenville is home to more corporate headquarters than any other region in South Carolina. Additionally, as of 2010, Greenville County was home to more than 50 Fortune 500 companies.

Investment in Greenville County (announced)

Year	New Jobs	New Investment
2006	1,926	\$298.5 Million
2007	681	\$183.2 Million
2008	1,556	\$181.3 Million
2009	909	\$185.4 Million
2010	2,083	\$251.9 Million
Five Year Total	7,155	\$1.1 Billion

Source: Greenville Area Development Corporation

Fortune 500 Companies in the Upstate, 2010

*Companies in Greenville County, Source: Fortune Magazine, and SC ACOG

Company	Rank
3M*	95
Air Products & Chem.*	273
Ameriprise Financial	288
Apache	271
Aramark	189
AT&T Inc.*	7
Automatic Data Proc.*	265
Auto-Owners Insurance	418
Avery Dennison	362
Avnet	142
Avon Products*	228
Bank of America Corp.*	5
BB&T Corp.*	265
Black & Decker	356
Caterpillar*	55
C H Robinson Worldwide*	349
CH2M Hill	381
Charles Schwab*	465
Charter Communications*	413
Cigna*	129
Cisco Systems*	58
Coca-Cola *	72
Conoco Phillips	6
Continental Airlines	183
CSX*	259
Cummins	218
Davita	355
Delta Air Lines	84
Dollar General	195
Duke Energy*	181
Eastman Chemical	415
Eaton Corp*	194
FedEx*	60
Fluor Corporation*	111
Gannett Publications*	370
General Electric*	4
Goodrich*	334
Goodyear Tire & Rubber	141
Graybar Electric*	470
Honeywell	74
Humana	73
Ingram Micro*	80
IBM*	20
International Paper	104
Jacobs Engineering Group*	203

Johnson Controls	83
Kelly Services*	479
Level 3 Communications	148
Liberty Mutual Ins. Group*	71
Lockheed Martin*	44
Manpower*	143
Marathon Oil	41
Marriott International*	213
Marsh & McLennan*	221
McGraw-Hill*	363
McKesson	14
MetLife*	51
Mohawk Industries	392
Morgan Stanley*	70
Mosaic*	231
Newell Rubbermaid*	373
Norfolk Southern*	287
Northrop Grumman	61
Northwestern Mutual*	115
Owens Corning	432
Parker Hannifin	231
Pepsi Bottling*	174
Pfizer, Inc. (Capsugel)	262
PPG Industries*	190
Prudential Financial*	65
Quest Diagnostics*	303
R.R. Donnelley & Sons	240
Rockwell Automation*	476
SCANA	489
Sealed Air*	487
Smurfit-Stone Container	374
Southwest Airlines	229
Textron*	220
Thrivent Financial for Lutherans*	342
Timken	452
Unisys	452
United Parcel Service*	43
US Airways Group	222
Verizon Communications*	13
W.W. Grainger*	349
Walgreen	32
Wal-Mart Stores	1
Waste Management	196
Wells Fargo*	19
Xerox*	145
Yum Yum Brands	262

II. Major Headquarters

Selected Greenville County Headquarters Listing: International, North American, National, and Regional

Company Name	Product/Service	Type	Website
Agfa Corporation	Photographic Films – Technology	Regional	www.agfa.com
Bi-Lo Corporation	Grocery Sales	Regional	www.bi-lo.com
Charter Communications	Broadband Communications	Regional	www.charter.com
Fluor Corporation	Engineering, Procurement, Construction, and Maintenance Services	Regional	www.fluor.com
Hubbell Lighting	Lighting	International	www.hubbellighting.com
General Electric	Engineering	COE	www.ge.com/innovation/greenville/index.html
Guardian Building Products	Building Materials	Corporate	www.guardianbp.com
CertusBank	Financial Services	National	www.certusbank.com
Kemet Corporation	Capacitors	International	www.kemet.com
Lockheed Martin Aircraft	Aircraft Maintenance	International	www.lockheedmartin.com
Michelin North America	Radial Tires	North American	www.michelin.com
Nutra Manufacturing	Pharmaceuticals	National	www.nutramfg.com
ScanSource Incorporated	Internet Systems	International	www.scansource.com
Span-America Medical Systems	Medical Products	National	www.spanamerica.com
SYNNEX	Information Technology	Regional	www.synnex.com
Verizon Wireless	Communications	Regional	www.verizonwireless.com

Source: SC Department of Commerce, The Upstate Alliance, Reference USA, and GADC

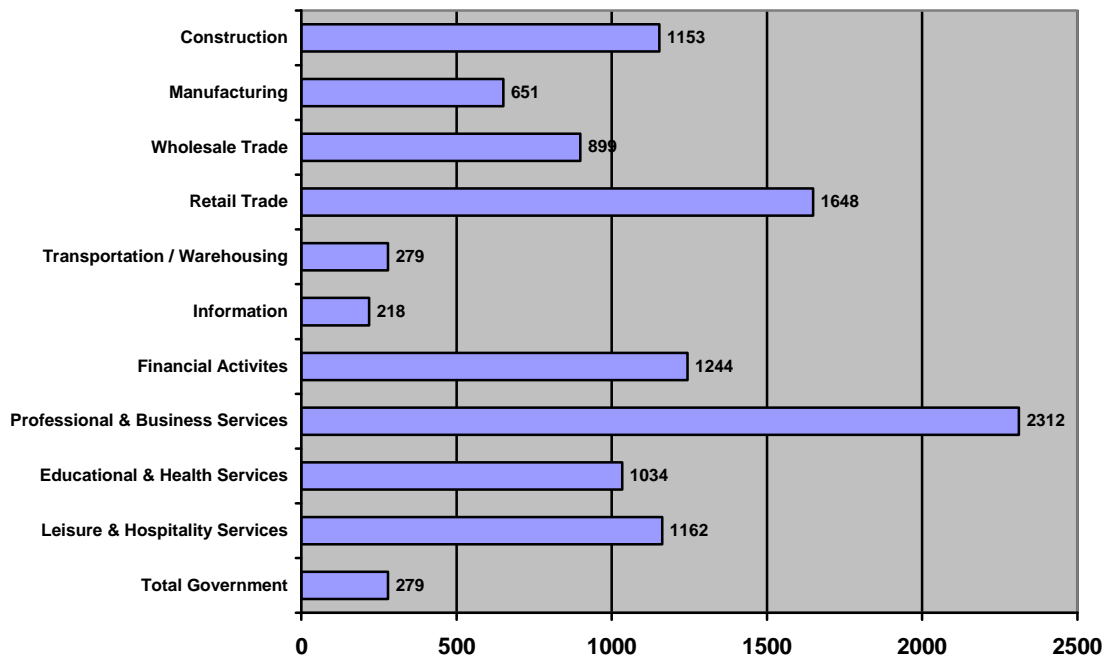
III: Business and Industry Overview

Industry Sector by Facility Count, Greenville County and Upstate Region

Sector	NAICS	Greenville	Upstate Region
Total Private and Government	10	12,041	28,666
Total, Private	10	11,762	27,638
Goods Producing	101	1,830	4,823
Natural Resources & Mining	1011	26	168
Construction	23	1,153	2,881
Manufacturing	31-33	651	1,774
Durable Goods		379	1,070
Non Durable Goods		272	704
Service Providing	102	9,932	22,815
Trade, Transportation & Utilities	1021	2,836	7,054
Wholesale Trade	42	899	1,788
Retail Trade	44-45	1,648	4,556
Transportation / Warehousing	48-49	279	640
Utilities	221	13	57
Information	51	218	397
Financial Activities	1023	1,244	2,711
Professional & Business Services	1024	2,312	4,408
Education & Health Services	1025	1,034	2,485
Leisure & Hospitality Services	1026	1,162	2,864
Other Services (except Public Administration)	81	1,126	2,896
Total Government	10	279	1,028

Source: Quarterly Census of Employment & Wages, 2010 Annual Averages, SC DEW

2010 Facility Count by Selected Industry Sector, Greenville County

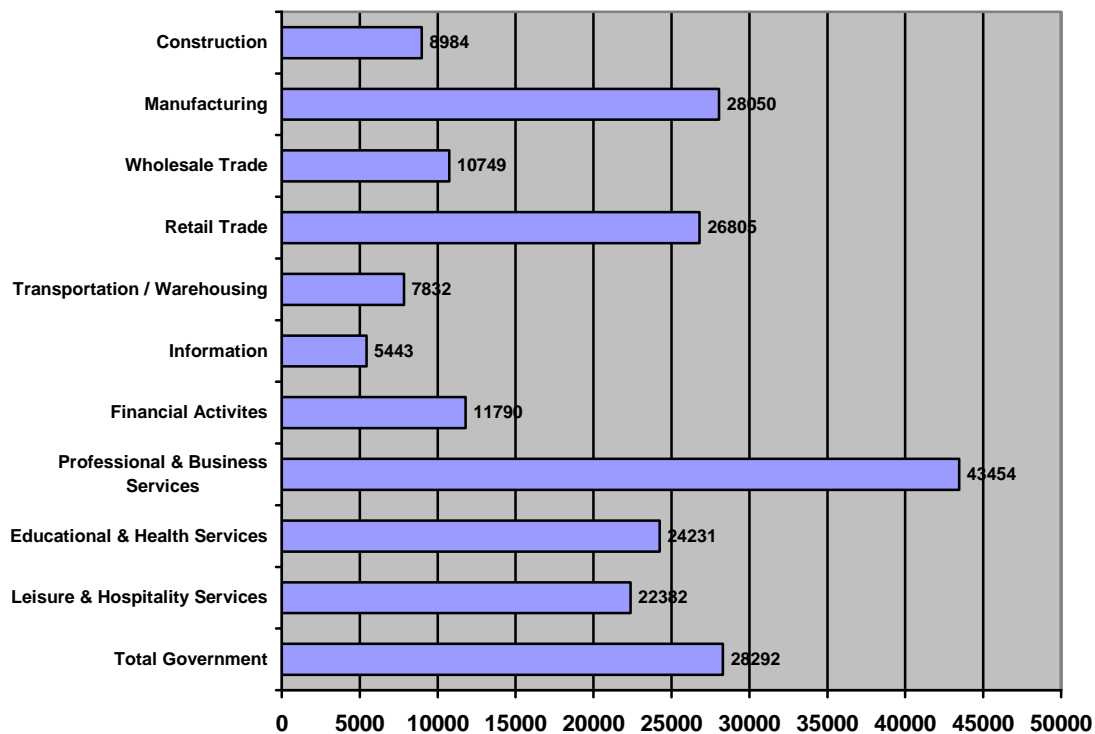


Average Monthly Employment by Industry Sector, Greenville County & Upstate SC

Sector	NAICS	Greenville	Upstate Region
Total Private and Government	10	225,017	517,704
Total, Private	10	196,725	429,216
Goods Producing	101	37,549	112,280
Natural Resources & Mining	1011	515	1,586
Construction	23	8,984	20,517
Manufacturing	31-33	28,050	90,198
Durable Goods		13,883	47,814
Non Durable Goods		14,168	42,385
Service Providing	102	159,176	316,937
Trade, Transportation & Utilities	1021	45,636	102,183
Wholesale Trade	42	10,749	20,916
Retail Trade	44-45	26,805	63,019
Transportation / Warehousing	48-49	7,832	15,305
Utilities	221	250	1,217
Information	51	5,443	7,890
Financial Activities	1023	11,790	21,377
Professional & Business Services	1024	43,454	65,965
Education & Health Services	1025	24,231	52,395
Leisure & Hospitality Services	1026	22,382	54,161
Other Services (except Public Administration)	81	6,239	12,966
Total Government	10	28,292	88,489

Source: Quarterly Census of Employment & Wages, 2010 Annual Averages, SC DEW

2010 Employment by Selected Industry Sector, Greenville County



IV. Manufacturing Overview

Largest Manufacturing Employers in Greenville County

Company	Employees	Product/Service
Michelin North America*	4,000	Radial tires, Headquarters, R & D
General Electric	3,200	Gas turbines / Engineering
Sealed Air Corp – Cryovac Division	1,420	Plastic bags and plastic film
Honeywell*	875	Gas turbine component parts / R&O
Lockheed Martin Aircraft	800	Aircraft maint. and modification
ABB (Baldor)	668	Speed changers, Gear reducers
House of Raeford (Columbia Farms)	650	Processed poultry
Mitsubishi Polyester Film LLC	631	Polyester film
Milliken & Company*	570	Yarn & non woven fabrics
Nutra Mfg USA	550	Vitamins and supplements
Drive Automotive (Magna)	550	Automotive body panels

*includes multiple locations. Source: SC ACOG and GADC

Largest Manufacturing Employers in Upstate Region

Company	Employees	County	Product/Service
Michelin North America	8,358	Multiple	Radial tires, Headquarters, R & D
BMW Manufacturing Corp	5,500	Spartanburg	Automobiles
Milliken & Company	3,902	Multiple	Textile Mfg / R&D
General Electric	3,200	Greenville	Gas turbines / Engineering
Sealed Air Corp - Cryovac	2,520	Multiple	Plastic bags & film
The Timken Company	1,680	Multiple	Screw machine parts
Nestle USA	1,500	Cherokee	Frozen prepared foods
Duke Energy	1,500	Oconee	Power Generation
Robert Bosch Corp	1,380	Anderson	Automotive components
Fuji Film	1,200	Greenwood	Photographic products

Source: SC ACOG and GADC

Manufacturers Database

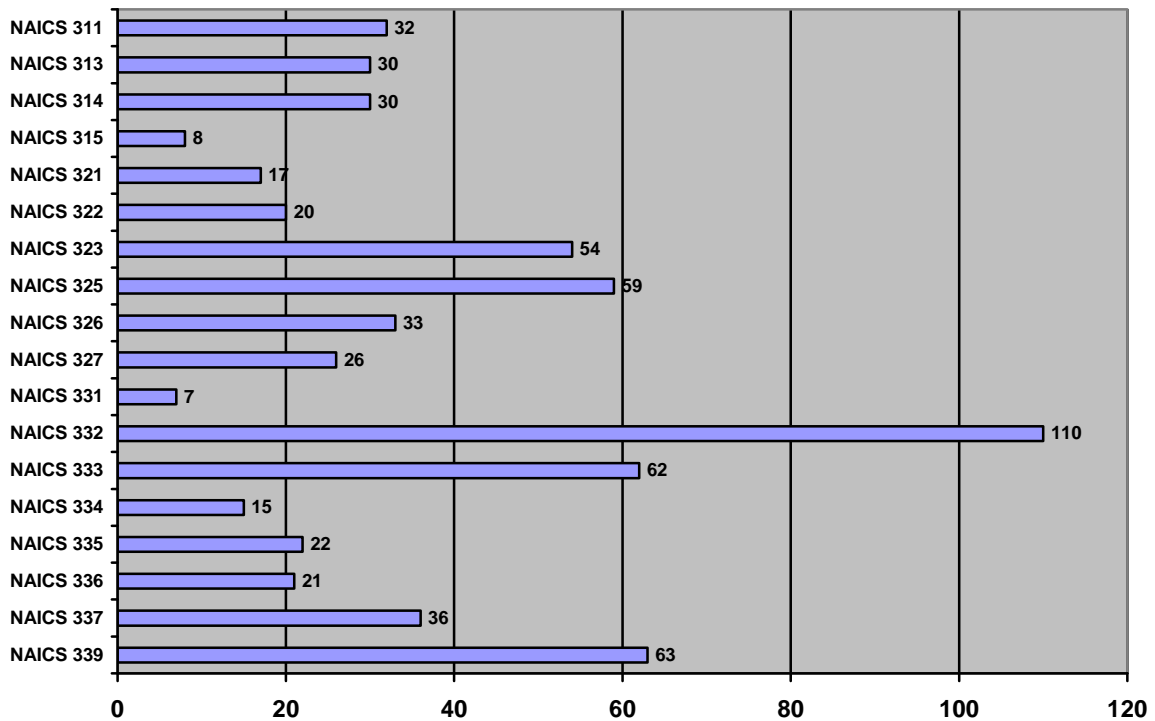
Go to the Greenville Area Development Corporation website (www.gogadc.com) to view and download the Greenville County Manufacturer's Directory.

Manufacturing Sector by Facility Count, Greenville County and Upstate Region

Industry	NAICS	Greenville	Upstate Region
Food Manufacturing	311	32	42
Textile Mills	313	30	117
Textile Mill Products	314	30	45
Apparel Manufacturing	315	8	13
Wood Product Manufacturing	321	17	69
Paper Manufacturing	322	20	44
Printing and Related Support activities	323	54	109
Chemical Manufacturing	325	59	133
Plastics & Rubber Products Manufacturing	326	33	93
Nonmetallic Mineral Product Manufacturing	327	26	72
Primary Metal Manufacturing	331	7	30
Fabricated Metal Product Manufacturing	332	110	295
Machinery Manufacturing	333	62	156
Computer & Electronic Product Manufacturing	334	15	32
Electrical Equipment & Appliance Manufacturing	335	22	42
Transportation Equipment Manufacturing	336	21	72
Furniture and Related Product Manufacturing	337	36	80
Miscellaneous Manufacturing Industries	339	63	118

Source: Quarterly Census of Employment & Wages, 2010 Annual Averages, SC DEW

2010 Facility Count by Manufacturing Sector, Greenville County

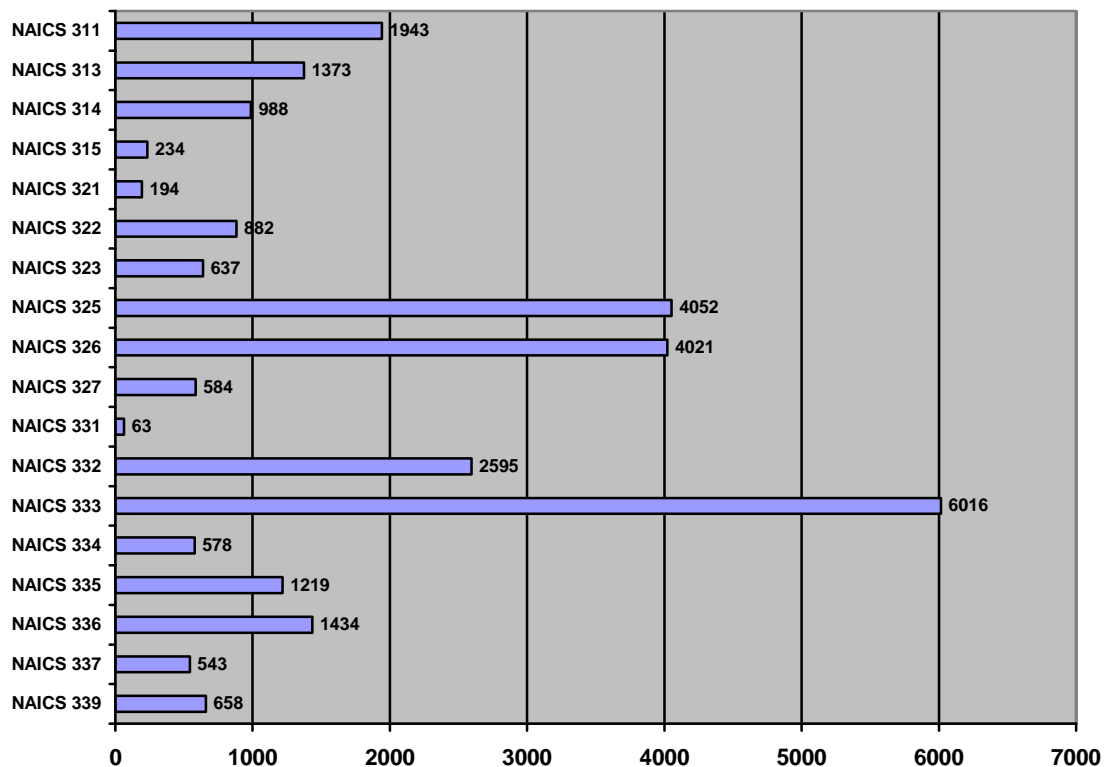


Average Monthly Employment by Mfg Sector, Greenville County & Upstate SC

Industry	NAICS	Greenville	Upstate Region
Food Manufacturing	311	1,943	2,459
Textile Mills	313	1,373	8,615
Textile Mill Products	314	988	1,636
Apparel Manufacturing	315	234	298
Wood Product Manufacturing	321	194	1,556
Paper Manufacturing	322	882	2,282
Printing and Related Support activities	323	637	1,745
Chemical Manufacturing	325	4,052	8,426
Plastics & Rubber Products Manufacturing	326	4,021	10,486
Nonmetallic Mineral Product Manufacturing	327	584	2,263
Primary Metal Manufacturing	331	63	319
Fabricated Metal Product Manufacturing	332	2,595	6,990
Machinery Manufacturing	333	6,016	9,943
Computer & Electronic Product Manufacturing	334	578	1,456
Electrical Equipment & Appliance Manufacturing	335	1,219	4,399
Transportation Equipment Manufacturing	336	1,434	11,083
Furniture and Related Product Manufacturing	337	543	862
Miscellaneous Manufacturing Industries	339	658	1,494

Source: Quarterly Census of Employment & Wages, 2010 Annual Averages, SC DEW

2010 Average Monthly Employment by Mfg. Sector, Greenville County



V. Select Call Centers

Company Name	Empl.	Type
Agilysys (Kyrus Corporation)	123	Inbound Customer Service
ABB (Baldor)	90	Inbound Customer Service
Benefitfocus	70	Inbound Customer Service
Charter Communications	375	Inbound Customer Service
Concentrix (formerly BSA Sales)	144	Outbound Technology Marketing Service
Duke Energy	100	Inbound Customer Service
Ford Motor Credit Company	550	Inbound Customer Service
Infor (DataStream Systems)	100	Inbound Customer Service
Level One	350	Inbound Marketing Service
Michelin Tire Corporation	300	Inbound Customer Service
Perceptis*	10-15	Inbound Customer Service
Resurgent Capital Services	460	Inbound Customer Service / Collections
Samsung Networks America, Inc	600	Inbound Customer Service
Sealed Air Corp	125	Inbound Customer Service
UPS	200	Inbound Customer Care / Outbound Sales
Ventus Capital	200	Inbound Customer Service / Outbound Collections
Verizon Wireless	1,200	Inbound Customer Service
Windstream Communications	207	Inbound Customer Service / Outbound Sales

*Perceptis announced 200 jobs on January 15, 2011

Source: GADC

VI. Select Technology and Software Development Companies

Company	Service
Infor (formerly DataStream)	Manufacturing Maintenance software
AHOLD	Data Management – Grocery
TetraData Corp	School District Analysis Software
Agilysys (formerly Kyrus Corp)	Point-of-Sale Software
PromoPipeline, LLC	Promotions Packaging Software
ScanSource	Internet Systems, POS, ADC
Solutienc	Custom Manufacturing Solutions
Asobous	Sports Software
Ebridge	Business Process Automation
IBM	Programming, Insurance Software
EDS	Data Management, Applications Maintenance

Source: GADC

VII. Select Distribution Centers

Selected Companies	Product/Service	Empl
Anderson Hardwood	Flooring	150
Atlas Cold Storage	Refrigerated products	35
C&S Wholesale (BiLo Distribution)	Food Products	950
Coca-Cola Bottling Company	Soft drinks	100
Diversified Distribution Systems	Retail products	50
Expert Med	Medical products	30
Gordon Food Service	Food products	50
Lanxess (formerly Bayer Corporation)	Industrial Products	25
Nissan North America Inc	Auto parts	45
Pet Dairy	Dairy products	75
ScanSource	Technology products	430
Super Duper Inc	Education materials, catalog sales	62
Confluence Watersports	Kayaks, canoes and accessories	40
WW Grainger	Industrial Products	20

Source: GADC

VIII. Transportation & Logistics

The Upstate of South Carolina has over 14,000 miles of state and county maintained highways. Among these are several major interstate systems including I-85, I-26, I-385 and I-185. Interstate I-85 is the backbone of the region. Passing thru the Upstate, I-85 stretches from Petersburg, VA to Atlanta, GA and southern Alabama and connects the southeast with the northeast. Greenville also connects with I-26 to the east, allowing access to the South Carolina ports.

Airports

South Carolina's largest airport, the **Greenville-Spartanburg International Airport (GSP)** is the major aviation facility in the Upstate. Located just 20 minutes from downtown Greenville on I-85, GSP provides both passenger and cargo service. The airport handles over 1.25 million passengers annually and is served by seven passenger and four cargo airlines. With a recent \$100 million expansion, the airport's runway now measures 11,001 feet and is capable of handling any aircraft flying today. GSP was voted 7th most user-friendly small airport in the nation in a survey by Conde' Naste Traveler.

www.gspairport.com

Located adjacent to the Palmetto Exhibition Center and only three miles from Greenville's Central Business District, the **Greenville Downtown Airport (GMU)** serves as the "Corporate Gateway" to Greenville. GMU is a modern and attractive facility with a wide variety of tenants that offer a full range of aviation services.

www.greenvilledowntownairport.com

The SC Technology and Aviation Center (SC TAC) features a public airport designed to meet a variety of aviation-related business needs. **Donaldson Field (GYH)** has an 8,000 foot primary runway that can handle virtually any landing gear configured aircraft and it has a Category 1 Instrument Landing System. SCTAC is well suited for air freight/cargo services as well as aviation MRO and other aviation-related business needs.

www.sc-tac.com

Rail

Greenville County is served by two major railroads, Norfolk-Southern and CSX Transportation, and a short-line railroad, Carolina Piedmont. Norfolk-Southern provides direct service to the Port of Charleston (second day delivery). All major metropolitan areas in the United States are accessible within three to six days by rail.

www.csx.com www.norfolksouthern.com <http://www.railamerica.com/RailServices/CPDR.aspx>

Port of Charleston

One of the busiest container ports along the Southeast and the Gulf coasts and a leader in productivity and efficiency, the Port of Charleston has been a major global center of commerce and trade for three centuries. The Port offers the deepest channels in the region - capable of accommodating 8,400-TEU vessels drafting up to 48 feet - and provides convenient access to global markets. To prepare for coming years, Charleston is heavily investing in its new and existing terminals with a 10-year, \$1.3-billion capital plan. A new terminal (Navy Base Terminal) that will boost container capacity in the port by 50% is set to open in 2018.

www.port-of-charleston.com

Logistics

Motor Freight

Greenville's location along I-85, the southeast's major freight corridor, provides the area with a large, consistent supply of trucks from numerous specialized trucking carriers serving the United States. There are over 70 freight lines in the Greenville-Spartanburg area, half of which have terminals.

- One-day trucking service reaches 44 percent of the country's population and 27 percent of the nation's manufacturing output.
- Overnight trucking service is available to most of the southeast.
- All major eastern markets are within two traveling days.

Air Freight

Two Federal Inspection Stations (FIS) consisting of Customs, Immigrations and Agriculture are located at the GSP airport. The first FIS facility located under the south concourse is designed to handle 250 international passengers per hour. The second FIS location on the north cargo ramp is designed to handle cargo and corporate aircraft that require international clearance.

The north end of the GSP airport is home to a 120,000 square foot FedEx facility. This facility, completed in 2001 provides FedEx with the capability to sort up to 3000 packages per hour.

Cargo Statistics at GSP Airport

Year	Cargo Tons
2010	24,668
2009	19,826
2008	26,735
2007	28,283
2006	26,853

Source: GSP Airport Commission