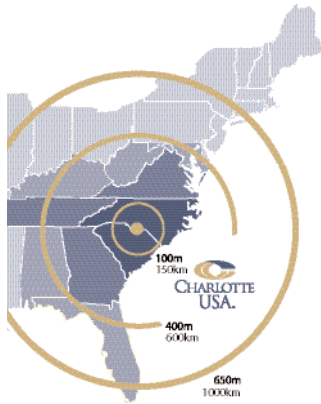


## What is Charlotte USA?

The Charlotte region continues to strengthen its position as one of the most dynamic and diversified locations in North America. This 16-county region – 12 in North Carolina and four in South Carolina – is home to more than 850 foreign-owned firms, nine FORTUNE 500 company headquarters and a growing population of over 2.6 million residents.



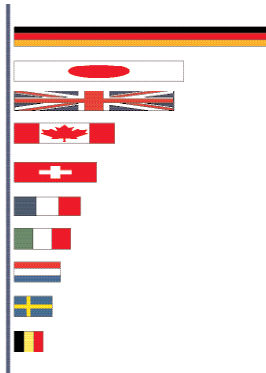
### Charlotte Region Automotive Highlights

- More than 50,000 workers are employed in the transportation equipment and related industries within the Charlotte region
- Nearly 500 transportation equipment related companies have facilities within the Charlotte region
- Charlotte/Douglas International Airport is located just 75 minutes north of BMW's only U.S. assembly facility
- Home of NASCAR, with over 90% of the NASCAR racing teams and the NASCAR Research and Development Center located within 50 miles of Charlotte USA
- The University of North Carolina at Charlotte offers a multidisciplinary program in Motorsports and Automotive Engineering

### Unparalleled Accessibility

- 62% of the U.S. industrial base and over 52% of the U.S. population is accessible within 650 miles/1,000 kilometers of Charlotte USA
- Served by four major interstate highways (I-40, I-77, I-485, I-85)
- 627 direct flights to 120+ destinations and daily international flights to Munich, Frankfurt, London, Paris, Toronto and Mexico City, among others
- 9<sup>th</sup> largest U.S. trucking center
- Within 200 miles of three major seaports, including the 2<sup>nd</sup> largest on the eastern coast of the U.S. – Charleston, SC
- Served by CSX, Norfolk Southern, Lancaster & Chester Railway, and short-line railroads within the Charlotte region

### 850+ Foreign-Owned Companies in Charlotte USA



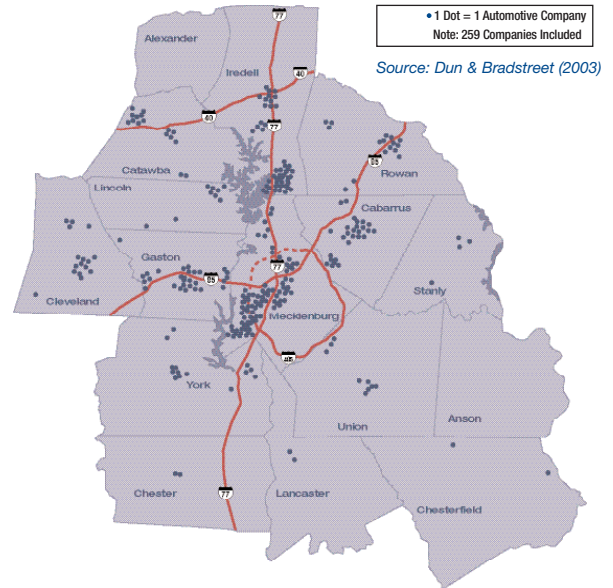
Source: Charlotte Regional Partnership and Charlotte Chamber of Commerce

### Recent Automotive Announcements

Company	County	Product	Investment	Date
BMB Steering Innovations	Lancaster	Steering Columns	\$70 million	2007
Cataler	Lincoln Co	Catalytic Converters	\$25 million	2006
(expansion)				
Alcoa Wheel & Forged Products	Rowan Co	Vehicle Parts	\$6 million	2005
Freightliner	Rowan Co.	Tractors and utility	1,000 jobs	2004
(expansion)	Gaston Co	Vehicle equipment	200 jobs	2004
Hella	York Co	Head Lamps	\$10 million	2004
(expansion)				
NGK Ceramics	Iredell Co, NC	Emission Control	\$32 million	2004
ZF Lemforder	Catawba Co	Suspension Components	\$45 million	2004
Getrag Axle Corp.	Catawba Co	Axles	\$81 million	2004

# AUTOMOTIVE

## Automotive/Transportation Equipment Map



## Automotive Manufacturing Employee Wages

	% of U.S. Avg.
North Carolina	73%
South Carolina	74%
Southeast Avg.	80%
Michigan	136%
Great Lakes Avg.	116%
U.S. Avg.	100%

Source: U.S. Bureau of Economic Analysis (2001)

## Competitive Business Costs

- State and local tax incentives for job creation and capital investment
- State and local infrastructure development incentives
- Utility cost economic development incentives available
- Average asking lease rate (\$/psf/yr) in the region is \$4.50 for industrial space (CBRE, 2009Q3)
- Among the most competitive utility rates in the U.S.

## Growing and Talented Workforce

- North Carolina (3.6%) and South Carolina (3.9%) have the lowest percentage of unionized workers in the U.S.
- Charlotte-Gastonia-Concord MSA ranked 7<sup>th</sup> fastest growing metro area in the nation (ACS, 2008)
- The Charlotte region is home to 11 community and technical colleges with customized workforce development programs
- Talent pool of graduates from University of North Carolina at Charlotte Motorsports and Automotive Engineering program

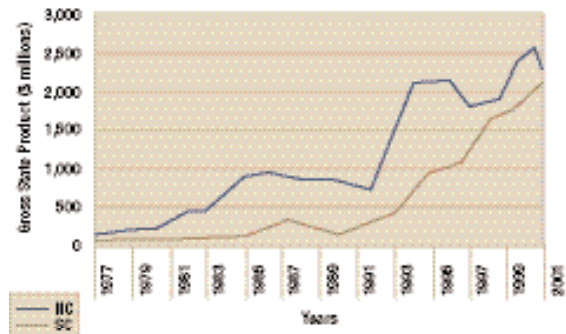
## Proximity to Major Auto/Truck Manufacturers



## Outstanding Business Climate

- North Carolina ranked 1<sup>st</sup>, South Carolina ranked 6<sup>th</sup> on *Site Selection's* Most Favorable Business Climate (2009)
- North Carolina ranked 3<sup>rd</sup>, South Carolina ranked 5<sup>th</sup> on *Pollina Corporate Real Estate's* Top 10 Pro-Business States (2009)
- South Carolina ranked 2<sup>nd</sup>, North Carolina ranked 4<sup>th</sup> in *Plants, Sites and Parks Magazine's* Readers Survey of Preferred States for Corporate Relocation
- North Carolina ranked 2<sup>nd</sup> according to a survey of CEO's in *Chief Executive* magazine of Best States for Business (2009)
- Charlotte-Gastonia-Concord MSA ranked 19<sup>th</sup> for Best Metro Area for Business and Careers by *Forbes* magazine (2009)
- North Carolina ranked 5<sup>th</sup> on *Forbes* magazine's Best States to Do Business (2009)

## Growth of the Automotive Industry in NC & SC



For more information call 800.554.4373 or 704.347.8942.  
www.charlotteusa.com