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Subject: 5th Annual SC Automotive Summit
Location: Hyatt Regency Greenville, 1st Floor Ballroom, 220 N. Main Street, Greenville, S.C.
When: 2/25/2016 11:30:00 AM - 12:15:00 PM

Advance: Brandon Landrum
(803)260-0783
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(864)982-3937

APPROVED BY: NH on 9/21

EVENT: South Carolina Automotive Summit

DATE: February 25, 2016

TIME: 11:15 AM

LOCATION: Hyatt Regency Greenville, 220 N. Main Street, Greenville, SC 29601

PARKING: Park in circular drive in front of Hyatt Regency, where there will be a reserved parking spot. Hank Bennett, with Robert Bosch LLC and SC Automotive Council Chairman, will greet the Governor when she arrives.

LOCATION SET-UP: Indoors in the Main Ball Room. On stage, there will be a podium and microphone.

ON-SITE LOCATION CONTACT: Jessica Watts, SCMA, (803) 238-1731

SEATED ON STAGE: Only the Governor will be on stage.

KEY COMPANY PERSONS: Registration list attached.

GIFT: N/A

PRESS: Yes
WHNS-TV FOX Carolina
WYFF-TV
WLOS-TV
Greenville Business Magazine, John McCurry, Editor
Upstate Business Journal, Ashley Boncimino

PUBLIC: Yes, but this event is open only to registered participants.

ACCESS TO EMPLOYEES: N/A

INTRODUCED BY: Dr. Robert H. Jones, Clemson University Provost

LENGTH OF SPEAKING: 10-15 minutes of remarks, then 10 minutes of Q & A with audience.

LINE-BY-LINE:

- 11:15 AM Arrive in circular drive at the Hyatt (enter left from Beattie Place before Main St)
- 11:15 AM Hank Bennett, Robert Bosch LLC and SC Automotive Council Chairman, Greets Governor at car and escorts her inside.
- 11:16 AM Hank Bennett and Governor/staff go to Crepe Myrtle room (main level) where she will wait until her presentation time.
- 11:29 AM Governor moves from Crepe Myrtle room to doors leading to Regency Ballroom to await her introduction (20-25 steps away).
- 11:30 AM Dr. Robert H. Jones, Clemson University Provost, introduces the Governor from inside the Main Ballroom.
- 11:31 AM Doors to Regency Ballroom open; Governor enters and walks length of Ballroom to podium at main stage (steps at stage left).
- 11:32 AM Governor Remarks
- 11:47 AM Governor takes questions from audience via microphones in the Ballroom
- 11:57 AM Governor concludes speech and exits stage the same way she entered. She returns to Crepe Myrtle to conduct press interviews.
- 11:59 AM Five press interviews in the following order:
1. WHNS-TV FOX Carolina
 2. WYFF-TV
 3. SC BIZ News, Matt Clark, Editor/GSA Business & Columbia Business Monthly
 4. WLOS-TV
 5. Greenville Business Magazine, John McCurry, Editor
- 12:10 pm Press interviews conclude
- 12:11 pm Governor escorted by Hank Bennett to hotel entrance at circular drive for departure (same location where she arrived).

HISTORY OF COMMUNICATION: The Governor has met Dr. Robert Jones.

AUTOMOTIVE OVERVIEW:

- Six automotive OEMs in the state – BMW, Mercedes-Benz Vans, Volvo Cars, Freightliner, Honda, Proterra
- SC is home to nearly 400 automotive manufacturing plants, suppliers, and other auto-related companies directly employing nearly 60,000 South Carolinians. (SCDOC records)
- 27.1 billion Automotive Economic impact (*USC Automotive Economic Impact Study*)
- Automotive and ground transportation industry represents at least 85,000 full-time equivalent jobs, more than 5% of the state's employment base. (*USC Automotive Economic Impact Study*)
- 4X - how much South Carolina's automotive industry has grown in the past two decades.
- Ranked 1st in automobile exports. (*Global Trade Information Services-World Trade Atlas*)
- Ranked a top 5 state in employment concentration – for a number of occupations applicable to the automotive industry (*U.S. Bureau of Labor Statistics, S.C.*)
- Over \$6 billion in announced automotive capital investment since 2011, and over 14,000 announced jobs in the automotive industry. (SCDOC records)
- \$46.1 billion in passenger vehicles exported 2010-15. (*Global Trade Information Services-World Trade Atlas*)
- \$9.8 billion in passenger vehicles exported 2015. (*Global Trade Information Services-World Trade Atlas*)
- \$733 million in parts and accessories of bodies of motor vehicles exported 2010-2015. (*Global Trade Information Services-World Trade Atlas*)

- \$160 million in parts and accessories of bodies of motor vehicles exported 2015. (*Global Trade Information Services-World Trade Atlas*)

Automotive Manufacturing Wages

Employees in the motor vehicle manufacturing industry in South Carolina, on average, earned \$1,434 per week in 2014. These employees earn 35 percent more than the average South Carolina manufacturing employee, who took home \$1,063 weekly in 2014. The average South Carolina resident employed in private industry earned \$772 per week, so the motor vehicle manufacturing wage premium is 86 percent. (*U.S. Bureau of Labor Statistics*)

BMW

- BMW Manufacturing in Spartanburg was the company's first full manufacturing facility outside of Germany. Around 70% of all BMW X models made in South Carolina are exported.
- The Spartanburg facility produced more than 400,904 vehicles for 140 global markets in 2015.
- About 40 suppliers are located in the Palmetto State, and BMW's North American supplier network has grown from 22 in 1992 to about 270 companies today.
- BMW imports approximately 25,000 containers of parts and components through the Port of Charleston annually.
- The plant has produced more than 3 million vehicles, including six different vehicle models plus their variants, in 20 years of production.
- Employment has grown significantly from 500 in 1994 to approximately 8,000 today.
- Original investment in 1992, \$600 million, to date over \$7 billion in SC operations

Mercedes-Benz/Daimler in South Carolina Fast Facts:

- The 2015 announcement marked Mercedes-Benz/Daimler's third expansion in its 10 year history in South Carolina.
- The Sprinter is the world's leading large van, and the U.S. represents its second-largest sales market.
- The Sprinter is available as both a Mercedes-Benz and a Freightliner branded vehicle in the U.S.
- The company has operated its current van assembly operation in Charleston County, S.C. since 2006.
- More than 100,000 Sprinters have been assembled in North Charleston since 2006.

Volvo Cars

- Volvo Cars Corporation is establishing its first manufacturing facility in the Western hemisphere in Berkeley County, S.C.
- The new facility will have an initial estimated annual production capacity of around 100,000 cars.
- Once completed, Volvo Cars will be able to manufacture vehicles on three continents.

Tires

- Ranked 1st in exports of tires, holding more than 28% of the market share in U.S.-made, exported tires, for the fifth year in a row.
- More than 89,000 tires produced daily in South Carolina; two tire recycling plants located in South Carolina. (*Automotive Tire News*)
- S.C. is home to 11 active tire plants – more than any other U.S. state (*SCDOC records*)
- Bridgestone Tire is the largest tire producer in the world and has two facilities in Aiken County, while Bridgestone Americas has two additional facilities in Kingstree and Wellford.

Other

- Honda in S.C. is the world's largest ATV manufacturer
- CU-ICAR is the only graduate degree program for Automotive Engineering in the United States.
- Proterra, the manufacturer battery powered transit buses in Greenville, SC. Greenville facility employs 165 employees and as of October 2015 began operating a second assembly line. The headquarters was moved to Burlingame, CA from Greenville to be part of the technology cluster in Silicon Valley (according to CEO).

SUGGESTED TALKING POINTS:

- It is another great day in South Carolina, as we have the opportunity to come together and discuss

- one of the true backbones of our state's economy.
- In South Carolina, the automotive industry has an annual economic impact of more than \$27 billion, employing nearly 60,000 workers.
- Our state hasn't always been known as an automotive powerhouse, however.
- The origins of our current success in the auto sector can most certainly be traced to BMW's decision to locate here more than two decades ago.
- The German automaker's decision to establish its first North American manufacturing facility in South Carolina forever transformed our state and its economy.
- On September 8, 1994, the first North American-made BMW, a 318i, rolled off the assembly line at the company's Upstate facility.
- At that time, many around the world were wondering if South Carolina's workforce could produce such a complex, top-quality product.
- More than three million BMWs later, I think we've proved all doubters wrong.
- To put it simply, South Carolina and its people are great at making things.
- From textiles to cars to planes, we make things with pride and with a remarkable level of skill.
- The leadership at BMW recognized this and so have many BMW suppliers.
- Originally, BMW committed to investing \$600 million in its South Carolina operations. To date, the company's investment in our state has grown to more than \$7 billion.
- The company's South Carolina workforce has also grown significantly – from 500 workers in 1994 to approximately 8,000 today.
- And now, BMW's plant in Greer is the company's largest in the world.
- In 2015, it produced more than 400,000 vehicles, approximately 70 percent of which were exported to international markets.
- Because of BMW's success here, approximately 40 automotive suppliers have established operations within our borders.
- Since 2011, we've announced more than \$6 billion in automotive capital investment and more than 14,000 new jobs.
- Including tire manufacturing, there are approximately 400 auto-related firms that operate here.
- Today, cars and tires made with pride right here in South Carolina are exported and sold to customers all over the globe.
- In 2015, we continued to lead the U.S. in the export of both completed passenger motor vehicles and tires.
- South Carolina accounted for nearly 18 percent of the nation's automotive export market and more than 28 percent of its tire export market.
- South Carolina's reputation for manufacturing first-class automobiles and automotive products continues to make its way around the globe.

- It's that reputation – built by our exceptional workforce – that allowed us to recruit two more major automotive original equipment manufacturers last year.
- Announced last spring, Mercedes-Benz Vans and Volvo Cars now give our state six total automotive OEMs. (BMW, Freightliner, Honda, Mercedes-Benz Vans, Proterra and Volvo Cars)
- No other state in the nation boasts an automotive constellation of that quality.
- Illustrating our success in attracting investment from automotive firms – since 2009, there have been 10 new vehicle assembly plants announced in North America. Eight have been in Mexico. The other two are in South Carolina.
- Looking ahead, it's clear that the automotive industry will continue to drive our state and its economy forward.
- As is the case with any growing state, there will be challenges we'll need to overcome.
- For example, within the next decade, Team South Carolina will need to produce more than 3,500 new automotive workers in the Lowcountry to accommodate the ramp up of Mercedes-Benz Vans and Volvo Cars.
- However, as we do in South Carolina, I know we won't just meet the expectations of our newest automotive firms – we'll exceed them.
- From our port facilities to our workforce training programs, South Carolina offers unparalleled resources, not just to automotive firms, but to companies in all industries.
- readySC is a globally-recognized program, having trained 280,000 workers for more than 2,000 companies since its inception in 1961.
- Moreover, our Apprenticeship Carolina program has served approximately 14,000 apprentices since its establishment in 2007.
- In that time, we've seen a more than 700 percent increase in the number of registered apprentices in our state.
- As you can see, it's truly an exciting time for South Carolina and for our automotive industry.
- I thank each and every one of you in this room for what you do to help advance both that industry and this state.
- Looking ahead, I'm excited to continue working with all members of Team South Carolina, as we position our state for even greater economic success in the years to come.

ATTENDEES:

Badge First Name	Badge Last Name	Company
Stephanie	Volpe	2AM Group
Ben	Linville	A1 Fastener & Components, Inc.
David	Cerrillos	ABB Robotics
Beau	Gailey	ACS
Ryan	Raabe	Acuren
Ron	Davis	Alabama Automotive Manufacturers Association
Mark	Hamelin	ATCO Industries, Inc

Julie	Wren	ATCO Industries, Inc.
Donald	Goggans	Austin Industrial
Jennifer	Mann	Automation Engineering
Rob	Watson	Bank of America
Roberto	Patino	BLG Logistics
Mike	Richau	BLG Logistics
Maike	Sievers	BLG Logistics
Beth	Snelson	BLG Logistics
Sebastian	Kahle	BLG Logistiscs
James	Joy	Bondtex, Inc
Kevin	Ball	Braasch Building Group
Russ	Braasch	Braasch Building Group
Ryan	Braasch	Braasch Building Group
Dennis	Braasch	Braasch Building Group
Krystal	Stewart	Bridgestone
Monica	Key	Bridgestone Americas
Chris	Gullott	Bridgestone Americas, Inc.
Todd	Burgess	BRPH
Lauren	Minors	BRPH
Brad	Eagy	Camcraft Inc.
Paul	Lindsay	Camcraft Inc.
Trey	Pennington	CBRE
Merle	Johnson	Charleston County Economic Development
Anne	Barr	Clemson University
Amy	Bulger	Clemson University International Center for Automotive Research
Frederick	Cartwright	Clemson University International Center for Automotive Research
Suzanne	Dickerson	Clemson University International Center for Automotive Research
Robert	Krulac	Clemson University International Center for Automotive Research
Brad	Milner	Coastal Corrugated
Scott	Quinn	Coastal Corrugated
Lauren	Goodson	Cornerstone Recruitment Group
Natalie	Cobb	Crandall Corporation
Doug	Tyler	Custom Plastic Forming
David	Eyes	Data Interchange
Bethany	Fovargue	Data Interchange
Robin	Fox	DataSoft Technologies
Jayadev	Manyapu	DataSoft Technologies
Blair	Biggerstaff	DataWorks Plus
Melanie	Hill	DataWorks Plus

Glenn	Carver	DeltaWing Technology Group, Inc
Ralph	Schwarz	DRÄXLMAIER Group
Charles	Dick	Environmental Air Systems
Paul	Springett	Esys Automation
William M.	Edwards	Ferrostaal Automotive
Terry	Dolch	First Tennessee
Kaziah	Searles	Fisher & Phillips LLP
John	Mack	FORCAM Inc.
Ole	Busck-Nielsen	Formel D USA Inc.
Gottfried	Gschnitzer	Formel D USA Inc.
Dennis	Kunz	Formel D USA Inc.
Charles	Faivre	FSI Advanced Research Inc.
Scott	Tobey	FSI Advanced Research Inc.
John	Bono	Fuyao Group
Sheree	Chandrl	Fuyao Group
Jeff	Flaugher	Fuyao Group
Dan	Martin	Fuyao Group
Rick	Walker	GAMA
Jim	Posda	GEL Engineering, LLC
Anne Sophie	Suhr	German American Chamber of Commerce (of the Southern US, Inc.)
Iciar	Balza Echeita	Gonvauto SC
Kevin	Landmesser	Greenville Area Development Corporation
Frank	Davis	Haynsworth Sinkler Boyd, P.A.
Martin	Loose	Heiche US Surface Technology
Bill	May	High Value Manufacturing Consulting
John	Blundy	HRSflow
Jon	Jarvais	Human Technologies, Inc.
Larry	Dill	Hydradyne
Todd	Hoisington	IBI Group
Wendy	Pedersen	IBI Group
Mark	Doyle	IGear
Tony	Fink	IGear
BOB	Martel	IMDS Data
Derrik	Snider	IMDS DATA
Liz	Griffith	International Transportation Innovation Center (ITIC)
John	Hopkins	International Transportation Innovation Center (ITIC)
Joachim	Taiber	International Transportation Innovation Center (ITIC)

Roy	Ferrante	JIT Services, LLC
Joe	Roswech	JIT Services, LLC
David	Tatman	Kentucky Automotive Industry Association
Terry	Grayson-Caprio	KPMG LLP
Stan	Harvell	KPMG LLP
Paul	Kumler	KTM SOLUTIONS, INC.
Grant	Faulkner	LMC Automotive
Kim	Winkler	LMC Automotive
Albert	Gray	Lumbee Enterprises
Janice	Thomas	Magna International Inc.
Frank	Ervin	Magna International, Inc
Mark	Butterfield	Magnode Corporation
Mark	Lee	Management Solutions, LLC
Brian	Callahan	MAU Workforce Solutions
Alana	Davis	MAU Workforce Solutions
Jon	Nelson	MAU Workforce Solutions
Gary	Plyler	MAU Workforce Solutions
Jack	Brown	MB Kahn Construction
John	Evans	MECO Manufacturing
Mark	Proffitt	MECO Manufacturing
Tony	Radchishin	Millhouse Logistics Inc.
Daniel	Wells	Millhouse Logistics Inc.
Viktor	Goroshko	Millhouse Logistics Inc.
Matthias	Gruenwald	MINILEIT
Ben	Stoner	MINILEIT
Mary	Taylor	MTC Federal Credit Union
Rick	Farmer	Newberry County Economic Development
Rob	Moses	Nucor Steel Berkeley
Ellis	Fisher	Ogletree, Deakins, Nash, Smoak & Stewart, P.C.
Mark	Stubley	Ogletree, Deakins, Nash, Smoak & Stewart, P.C.
Katy	Alter	Ogletree, Deakins, Nash, Smoak & Stewart, P.C.
Shane	Bolding	O'Neal Inc.
Eldon	Gowens	O'Neal Inc.
Assaf	Vigdor	Ornit Inc - Fastening Solutions
Terry	Bolinger	Ornit Inc. Fastening Solutions
Eric	Nagle	Ornit Inc. Fastening Solutions
Dennis	Rainwater	Ornit Inc. Fastening Solutions
Michael	Jung	P3 group
Walter	Kaufmann	P3 group

Sal	Awada	PA Solutions, an ATS company
Matt	Branham	Panther Premium Logistics
Sam	Moses	Parker Poe Adams & Bernstein LLP
Regina	Williams	PickTheJob.com
Dani	Young	Pilot Freight Services
Betsy	Brannen	Polytron, Inc.
Kevin	Gallagher	Polytron, Inc.
Stewart	Bauknight	Premier Logistics Solutions
Hal	Burton	Premier Logistics Solutions
Bernd	Hess	ProfilGate
Cathleen	Fisher	Quistem, LLC
Roger	Heitzeg	Robert Bosch LLC
Doug	Young	Robert Bosch LLC
Christopher	Louis	Robert Bosch LLC Gasoline Systems
Hank	Bennett	Robert Bosch, LLC
Guenter	Knoll	Robert Bosch, LLC
Larry	Lautenschlager	Robert Bosch, LLC
David	Stamps	Robert Bosch, LLC
Peter	von Wartenberg	Robert Bosch, LLC
Adam	Brumfield	Roy Metal Finishing (RMF)
John	Pazdan	Roy Metal Finishing (RMF)
Rick	Lich	RSM US LLP
Steven	Menaker	RSM US LLP
Jason	Vaughn	S&ME Engineering
Jamie	Ferguson	SAE Foundation
Lori	Gatmaitan	SAE International
Matthew	Bowers	Sage Automotive Interiors
Mark	Brezenski	Sage Automotive Interiors
Chris	Heard	Sage Automotive Interiors
Bruce	Keel	Sage Automotive Interiors
Sidney	Locke	Sage Automotive Interiors
Paige	Reed	Sage Automotive Interiors
Patrick	Thomasson	Sage Automotive Interiors
Anthony	Allen	SC DEPARTMENT OF COMMERCE
Yates	Reynolds	SC Department of Commerce
Jason	Speake	SC Power Team
Angela	Long	SCRA
Bill	Mahoney	SCRA

Anthony	Comella	SCSI
Clint	Brown	SCSI LLC
Brian	Gardner	Sigmatex Carbon Solutions
Deborah	Cameron	South Carolina Council on Competitiveness
Ann Marie	Stieritz	South Carolina Council on Competitiveness
Byron	Miller	South Carolina Ports Authority
Jody	Bryson	South Carolina Technology & Aviation Center (SCTAC)
Chad	Raynes	Spartanburg Steel Products
John	Burke	Staubli
Paul	Deady	Staubli
Scott	Jaquith	Supplier Development Systems
Cindy	Gamby	Surgere
Dave	Zingery	Surgere
Duane	Ungethum	Sustained Quality / 2AM Group
Doug	Kopscik	TEALE MACHINE
Thomas	Brewer	Tennessee Tech University
Erik	Reynolds	The Post and Courier
Chris	Prokop	The Weitz Company
Woody	Smith	The Weitz Company
Brian	Ptashnik	Tower International
Bob	Derse	TRS Staffing
Rob	Eskew	TRS Staffing
Steve	Baughman	TW America / division of Tri-Wall Ltd
Jim	Moore	UCW Logistics
William	Coxe	University of South Carolina
Jack	Sisk	University of Tennessee IPS
Marc	Metcalf	Upstate SC Alliance
Bill	Vicary	USS Rhino
Joe	Cond	VTL Precision
Brian	Glasshof	VTL Precision
Rodger	Riddle	VTL Precision
Jeff	Teague	VTL Precision
John	Sesler	W. W. Williams
Kelly	Turley	W. W. Williams
Tim	Williams	W. W. Williams
Steve	Helms	Walbridge
Keith	McElveen	Wave Sciences, Corp.
William	Barefoot	WebsterRogers LLP
Tim	Sinclair	WebsterRogers LLP

Chuck	Talbert	WebsterRogers LLP
Jessica	King	Williams Mullen Law Firm
Nicole	Core	Wood Group Mustang
Mike	Wolski	Wood Group Mustang
Tony	Buchanan	Worthington Industries
Joji	Ishikawa	Worthington Industries
Thomas	Joos	ZF Transmissions Gray Court
Roland	Zimmer	Zimmer America Recycling Solutions (ZARS-USA, LLC)