

GEORGIA AEROSPACE Industry Overview



WHERE AEROSPACE TAKES OFF

INDUSTRY LEADING COMPANIES & PRODUCTS

Boeing, Gulfstream, Lockheed Martin, Northrop Grumman, Pratt & Whitney, Thrusch and Triumph are just a few of the OEMs with extensive manufacturing operations in Georgia. TIMCO Aviation Services, StandardAero, Bombardier, and the U.S. Air Force have major MRO operations in the state. Combined, these industry leaders exported more than \$4.3 billion in 2010, affirming Georgia as a forerunner in global aerospace.

AIR TRANSPORTATION LEADER

Georgia is the home of the world's busiest passenger airport, Hartsfield-Jackson Atlanta International Airport, winner of the 2009 and 2010 *Air Cargo Week* World Air Cargo Award. The Atlanta area is home to the headquarters of Delta Air Lines, a major international airline; Atlantic Southeast Airlines, a leading U.S. regional carrier; World Airways, a major international passenger and cargo charter airline; and the main hub and maintenance base for AirTran Airways, a leading U.S. airline and now a wholly-owned subsidiary of Southwest Airlines.

DIVERSE AVIATION COMMUNITY

More than 500 companies in Georgia perform all facets of aerospace vehicle & systems design, testing, manufacturing, operations, maintenance & overhaul, and support for customers throughout the world. Georgia's total aerospace exports topped \$4.3 billion in 2010, ranking as the fourth highest U.S. state in this sector, exceeding the exports of major aerospace countries such as Brazil, Spain, Japan, Russia, and China.

LEADER IN AEROSPACE EDUCATION

Georgia is home to the Guggenheim School of Aerospace Engineering at the Georgia Institute of Technology, the #2 ranked aerospace engineering program in the nation. Middle Georgia College Aviation School offers programs in Flight, Airport Management, Air Traffic Control, Avionics, Aircraft Structural Technology, and Aviation Maintenance Technology. Georgia's Technical College System has FAA certified programs throughout the state including sites at Atlanta, Central Georgia, Georgia Northwestern, Middle Georgia, Savannah, and South Georgia. Other top ranked programs include aviation curriculum offered in Georgia high schools, and Quick Start—Georgia's nationally ranked workforce training program that provides customized training for aerospace employers.

EXPERIENCED & PRODUCTIVE WORKFORCE

More than 80,000 Georgians are employed in the aerospace industry, which ranks fifth in the U.S. Georgia boasts one of the highest value-added output per employee in the U.S. aerospace industry, contributing to an over 100 percent growth in aerospace exports over the last five years.

LEADING AEROSPACE RESEARCH CENTER

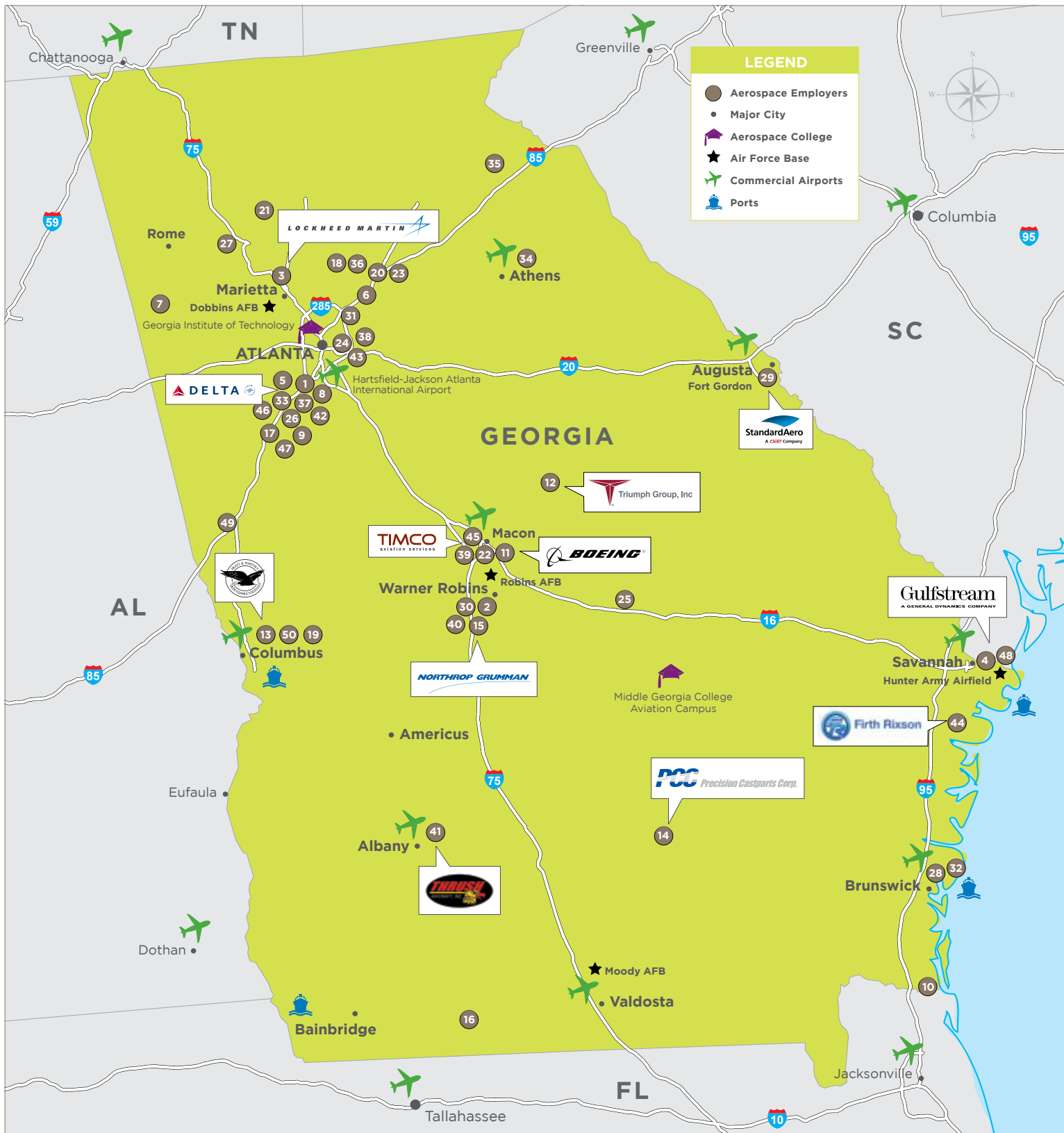
The aerospace industry in Georgia leverages the latest R&D in science and engineering fields. Georgia's universities and colleges annually spend over \$419 million in overall engineering R&D with over \$56 million in aerospace engineering R&D. Georgia Tech ranks in the top five institutions nationally in terms of the volume of aerospace R&D.

LEVERAGING AEROSPACE INNOVATION

The Georgia Center of Innovation for Aerospace actively engages high-growth potential aerospace companies, using state-backed resources to provide access to academic intellectual capital, advanced university research and industry expertise. Georgia also actively develops and supports public/private partnerships and consortia to support emerging markets such as unmanned aerial vehicles and aerospace alternative fuels.



STATE OF GEORGIA MAJOR AEROSPACE LOCATIONS



TOP 50 AEROSPACE EMPLOYERS

COMPANY	CITY	EMPLOYEES
1 Delta Air Lines	College Park	27,100
2 Warner Robins Air Logistics Center*	Warner Robins	13,476
3 Lockheed Martin Aeronautics	Marietta	8,100
4 Gulfstream Aerospace Corp.	Savannah	6,500
5 Atlantic Southeast Airlines	College Park	2,900
6 EMS Technologies (Honeywell)	Norcross	1,160
7 Engineered Fabrics Corp.	Rockmart	1,121
8 AirTran Airways (Southwest Airlines)	College Park	1,000
9 World Airways	Peachtree City	650
10 Lockheed Martin	St. Marys	525
11 The Boeing Co.	Macon	500
12 Triumph Aerostructures	Milledgeville	500
13 Pratt & Whitney	Columbus	465
14 PCC Airfoils LLC	Douglas	450
15 Northrop Grumman Corp.	Warner Robins	400
16 TECT	Thomasville	385
17 Aircraft Service International Group, Inc.	Hapeville	360
18 L-3 Communications	Alpharetta	350
19 Precision Components International, Inc.	Columbus	345
20 GE Energy/Airfoils	Duluth	280
21 Universal Alloy Corp.	Canton	248
22 TIMCO Aviation Services, Inc.	Macon	244
23 Barco, Inc.	Duluth	235
24 TIGHTCO, Inc.	Atlanta	230
25 Parker Hannifin Corp.	Dublin	225
26 Chromalloy Georgia	Newnan	200
27 Phoenix Air Group	Cartersville	180
28 Gulfstream Aerospace Corporation	Brunswick	175
29 StandardAero	Augusta	170
30 BAE Systems, Inc.	Warner Robins	150
31 Epps Aviation, Inc.	Chamblee	150
32 Jered LLC	Brunswick	150
33 Zodiac Aerospace	College Park	150
34 McCann Aerospace Machining Corp.	Athens	143
35 Eaton Corp.	Eastanollee	131
36 American Panel Corp.	Alpharetta	130
37 FELLFAB Corp.	College Park	125
38 Ceradyne Thermo Materials	Clarkston	120
39 Bombardier	Macon	119
40 ARINC, Inc.	Warner Robins	105
41 Thrush Aircraft, Inc.	Albany	105
42 Rockwell Collins, Inc.	College Park	102
43 Hawker Beechcraft Services	Atlanta	92
44 Firth Rixson	Midway	85
45 LH Thomson Co.	Macon	85
46 Precision Electronics LLC	College Park	80
47 Global Aviation Holdings	Peachtree City	80
48 LMI Aerospace, Inc.	Savannah	71
49 Fokker Aerotron	LaGrange	70
50 McCauley Propeller Systems (Cessna)	Columbus	65

Sources: GDEcD

* civilian employees only

\$4.3B

total aviation exports
worldwide in 2010



500+

Georgia companies
perform all facets of
the aerospace industry



80,000+

Georgians work in the
aerospace industry



Robins Air Force Base

1 of 3

USAF Air
Logistics Centers in
the United States

THE GEORGIA AEROSPACE ADVANTAGE SERVICES AT NO COST FOR YOUR COMPANY

Companies seeking a competitive edge in a global marketplace will find world-class support and resources through the industry-focused teams of the Georgia Department of Economic Development. Representing decades of experience, expertise, and leadership within the aerospace sector, our staff provides:

- Extensive site and building services, including pre-selected sites
- Comprehensive location data, including community demographics, supplier industry reports, maps and regional wage data
- Coordination with community officials regarding project needs, existing utilities and specific site requirements
- Access to workforce training
- Information on business cost environment, taxes and available incentives
- A contingent of ten offices located throughout the world

The Georgia Center of Innovation for Aerospace accelerates the growth of aerospace companies by providing industry expertise along with access to academic intellectual capital, industry knowledge, and business connections to support high-growth potential companies.



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