Kentucky Will Help You Succeed

Support for growing businesses

Kentucky strives to be a strategic partner with every Kentucky company to facilitate growth. Not only does that include providing assistance during location or expansion plans, but also along every step of the journey that follows. Kentucky offers the resources to help companies strengthen their businesses, whether they need workforce development assistance, export help or access to capital and new markets.

As part of our partnership, we also work with companies to help them build connections with other related companies or organizations in the Commonwealth that will strengthen the entire industry. Our knowledgeable staff is here to help bring together manufacturers, suppliers, vendors and other partners to create the Kentucky Automotive Industry Association (KAIA).

Formed in 2014, KAIA unites these groups to share best practices, encourage meaningful partnerships and discuss challenges and opportunities facing the industry. KAIA also plays a key role in other areas, including workforce development, leadership, business advocacy and branding. As a united, industry-led organization, the association is able to collectively highlight Kentucky’s automotive successes and elevate the state’s contributions to the global auto market.

Our Kentucky Home

Here in the Commonwealth, we offer all of the resources a business needs to get started and/or flourish for years to come. Any company looking to locate or expand in Kentucky is sure to find the facilities, suppliers and partnerships needed to ensure long-term success. As the auto industry continues to evolve, so too will Kentucky. That evolution will ensure Kentucky remains a national leader in the auto industry well into the future.
**The Kentucky Effect**

Kentucky—land of the thoroughbred—is widely known as the horse capital of the world. But Kentucky is also home to another type of horsepower. Kentucky is a driving force in today's auto industry. Companies have been building vehicles in the Bluegrass State for generations, and those companies continue to succeed and grow.

How large is the automotive industry in Kentucky? Its size and impact is dramatic. A recent statewide study by the Kentucky Automotive Industry Association shows its effect on Kentucky's overall economy, wages and workforce.

From assembling the most innovative cars and trucks on the planet to designing the next generation engines and parts, it's clear Kentucky horses aren't alone in being ahead of the competition.

- **$5.3 Billion**
  - Kentucky automotive-related exports were $5.3 Billion in 2015.

- **$6.1 Billion Annual Payroll**
  - Kentucky automotive manufacturers & suppliers paid $6.1 Billion in annual payroll.

- **89,515 Workers**
  - Automotive-related businesses directly employ 89,515 workers.

- **$488 Million**
  - State income & sales taxes from industry-supported jobs were $488 Million in 2015.

- **1 out of every 13 Dollars**
  - in Kentucky's economy is tied to the automotive industry.

- **1 out of every 18 Kentucky Jobs**
  - is supported by automotive-related businesses.

- **$41,641**
  - average KY salary for a mfg employee in the automotive sector.

- **$58,609**
  - average KY salary in the automotive sector.

- **$14.3 Billion**
  - The auto industry contributes $14.3 Billion to Kentucky's gross state product.

- **$6 Billion**
  - Over the last 5 years Kentucky's automotive industry has announced $6 Billion in investments & 20,000 new jobs.

- **Almost One-Fifth**
  - of the state's exports last year were tied to the auto industry.

Source: Kentucky Automotive Industry Association, 2015

Kentucky Business & Industry Information System (KBIIS), 2015
Kentucky has been making cars for more than a century, when Ford first rolled off its Model T down a Louisville assembly line back in 1913. Henry Ford discovered what countless others would soon learn—Kentucky is a great place to build the world's best vehicles.

Today, Kentucky is at the center of advanced automotive manufacturing. Its four major assembly plants—Ford (two plants), General Motors and Toyota—have invested billions of dollars into their Kentucky operations and are designing, engineering and assembling the next generation of vehicles. In fact, the Commonwealth produced more than 1.3 million cars and trucks last year, making Kentucky the largest automotive-producing state per capita.

Kentucky doesn't just assemble top performing vehicles, though. It also builds quality parts and is heavily engaged in the research and development of cutting-edge technology and innovation. For example, several of the state's universities are performing research on such advances as lightweighting, additive manufacturing, reducing emissions and increasing battery performance.

The industry provides major benefits to Kentucky's economy: Approximately one-third of all new investment and new jobs announced in the state in the past five years have resulted from automotive-related projects. Nearly 90,000 Kentuckians are directly employed in the industry, and another 50,000 jobs are supported indirectly. Two-thirds of Kentucky's counties have at least one automotive-related facility.

Kentucky's auto industry also has a strong international presence. The state is home to more than 170 international motor vehicle-related facilities, employing over 52,000 people. In addition, motor vehicles and parts are Kentucky's second-largest export at $5.3 billion annually. Kentucky-made cars and trucks can be found on the streets throughout North America, Europe, Asia, the Middle East and the rest of the world. Automotive parts and components are shipped to more than 100 countries. In the global automotive industry, Kentucky has become synonymous with quality.

While the world has changed in the past 100 years, Kentucky's passion for making quality automotive products has not. That passion will continue to be coupled with technology and innovation and will make Kentucky a global automotive force for years to come.

### Kentucky's Automotive Strength

<table>
<thead>
<tr>
<th>State</th>
<th>Units</th>
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<tbody>
<tr>
<td>Michigan</td>
<td>2,327,314</td>
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<tr>
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</tr>
<tr>
<td>Alabama</td>
<td>1,063,985</td>
</tr>
</tbody>
</table>

Note: Units are in cars & trucks.
Ford Escape  
Made in Kentucky Since 2011

Lincoln Navigator  
Made in Kentucky Since 2009

Lexus ES 350  
Made in Kentucky Since 2015

Toyota Camry Hybrid  
Made in Kentucky Since 2006

Toyota Camry  
Made in Kentucky Since 1988

Chevrolet Corvette  
Made in Kentucky Since 1981

Ford Expedition  
Made in Kentucky Since 2009

Lincoln MKC  
Made in Kentucky Since 2014

Ford F-series  
Made in Kentucky Since 2006

Toyota Avalon Hybrid  
Made in Kentucky Since 2012

Toyota Avalon  
Made in Kentucky Since 1994

5,500,000+ vehicles were produced in Kentucky over the past five years
Kentucky’s Automotive Manufacturers

Ford Motor Company

Ford has come a long way since its Model T days. Today, Ford operates two plants in Kentucky. The Louisville Assembly Plant (LAP) produces the Ford Escape and the Lincoln MKC. LAP is one of Ford's largest plants in terms of employees and is among the company's most flexible plants in the world.

The Kentucky Truck Plant (KTP) produces the Expedition, Lincoln Navigator and F-Series Super Duty Trucks. The F-Series is in such high demand that Ford is expanding production capacity and modernizing its tooling process. The Ford F-Series has been America's best-selling truck for nearly four decades.

Toyota Motor Corporation

Toyota Motor Manufacturing Kentucky (TMMK) rolled its first Camry off its Georgetown assembly line more than 25 years ago. Since then, Toyota has produced more than 10 million Camry vehicles, which have been America's best-selling car since 2000. On average, the Georgetown plant has produced more than 400,000 Camrys per year.

Toyota's Kentucky plant was the company's first stand-alone plant in America and is the first U.S. facility to manufacture the popular Lexus ES 350. Today, TMMK produces five different vehicles on site and houses its North American production engineering team.

General Motors

The iconic Corvette has been made exclusively in Kentucky for 35 years. General Motors began production of the esteemed sports car at the Bowling Green Assembly Plant in 1981, and the facility has remained Corvette's exclusive home. The Corvette has been named the North American Car of the Year in 2015, and won the Kelley Blue Book Best Buys award in the Performance Car category.

GM also houses its Performance Build Center, which specializes in hand-built, high-performance engines for the Corvette and Camaro, at Bowling Green. Nearby, the National Corvette Museum has become a prime tourism destination, attracting hundreds of thousands each year.

“Ford has been manufacturing in Kentucky for more than 100 years and our success here is a direct result of the great partnership we have with the Commonwealth.”

JOE HINRICHS
President of The Americas, Ford Motor Company

“Toyota is Toyota’s home. It also has some of the most experienced Toyota team members in the world.”

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North America Manufacturing Manager, General Motors

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Supply Chain Central

Not only does Kentucky know how to manufacture vehicles, it can supply virtually every component that goes into building them. As the nation’s OEMs continue to grow, more parts suppliers are locating and expanding in the state.

Kentucky’s supply chain is one of the reasons the state’s auto industry is so successful. Nearly 500 auto suppliers call Kentucky home. They make everything from bumpers to engine components to windshields to frames. These parts are shipped throughout the country and around the world.

Automotive Fact

Two-thirds of Kentucky’s counties are home to an employer in the automotive industry.

There are 17 manufacturers of electrical & electronic equipment for motor vehicles.

61 Kentucky plastics facilities supply parts or services to the motor vehicle industry.

20 Kentucky companies make seating and interior trim.

Kentucky is home to 32 motor vehicle-related stamping facilities.

8 Kentucky facilities supply steering and suspension components.

There are 17 manufacturers of electrical & electronic equipment for motor vehicles.

Top 10 Automotive Employers

Based on full-time, statewide employment

Toyota Motor Manufacturing Corp. 10,929
Ford Motor Company 9,300
Hitachi Ltd. 2,457
Akebono Brake Industry Co. Ltd. 2,311
Johnson Controls Inc. 2,185
Magna International Inc 1,779
Martinrea International Inc. 1,749
Dana Holding Corp. 1,714
Toyota Tsusho Corp. 1,590
Toyoda Gosei Co. Ltd. 1,519

Source: Kentucky Business & Industry Information System (KBIIS), 2016

“Within 10 to 11 years, we went from a very small company with only a handful of employees to an environment that now has around 700 employees. Our facility became the market to support our customer base.”

Steve Defazio | Vice President of Operations & Engineering
KYOSAN DENSO MANUFACTURING KENTUCKY
Mount Sterling, Ky.

“Automotive manufacturing in Kentucky is stronger than ever and it’s not going away.”

Patrick Conley | Production Leader
AKEBONO BRAKE
Glasgow, Ky.
One of Kentucky’s most undeniable assets is its location. Whether it’s to another state or another continent, Kentucky has the ability to move products quickly and efficiently.

Kentucky is within a day’s drive of more than two-thirds of the U.S. population. Those products can travel on 20 interstates and major highways, running through the heart of “Auto Alley.”

Kentucky has five commercial airports and dozens of regional airports. The two international airports that serve Kentucky are home to global hubs for UPS and DHL, making the state third in the country in total air cargo shipments. DHL’s global hub handles about 90 percent of DHL shipments entering the U.S., and the UPS Worldport is the largest fully-automated package handling facility on the planet.

A strong network of rail lines serve Kentucky, nearly 3,200 miles of track, including over 2,300 miles of Class 1 track that traverse the state and connect with other vital lines throughout the country.

Kentucky also provides an alternative for international shippers that have limited access to overly crowded ports on the east and west coasts. Bordered by three important commercially navigable rivers (the Ohio, Mississippi, and Big Sandy), and providing access to nine public riverport facilities, Kentucky offers an expedient two-way route between the inland markets of America’s heartland and major ports to the Gulf of Mexico.

The bottom line is this. A product made in Kentucky can get anywhere in the world in a matter of hours.

**Kentucky’s Top 10 Motor Vehicle Component Exports**

1. Steering Wheels, Columns & Boxes
2. Parts & Accessories*
3. Brakes
4. Road Wheels
5. Drive Axles
6. Suspension Shock Absorbers
7. Gear Boxes
8. Bumpers & Parts
9. Safety Airbags
10. Mufflers & Exhaust Pipes

*Not elsewhere specified or classified (2015)

Source: WISER Trade, U.S. Census Bureau
A highly skilled and available workforce is the engine that drives Kentucky’s economy. Our statewide system of colleges and universities is educating our young people to enter the workforce more prepared than ever.

An abundance of engineering degree programs are available at Kentucky’s colleges and universities, including specialized chemical, electrical, industrial, mechanical and materials engineering bachelor’s and master’s programs, as well as an engineering physics bachelor’s program. Nine colleges and universities in Kentucky offer undergraduate engineering degrees and three also provide graduate programs, including an individualized engineering program. The University of Kentucky and University of Louisville also offer doctorate programs.

In addition, the Kentucky Community and Technical College System (KCTCS) offers a variety of manufacturing-specific academic programs that combine classroom instruction with practical experience. These include:
- Advanced Manufacturing Technician
- Computerized Manufacturing Machining
- Welding Technology
- Industrial Maintenance Technology
- Manufacturing Industrial Technology
- Additive Manufacturing
- Manufacturing Electrical Technology

Kentucky Skills Network
Once students are educated, the Kentucky Skills Network allows employers to find and train the best and most qualified workers through a customized and streamlined approach.

The Kentucky Skills Network is an innovative statewide system of workforce professionals who help employers recruit, hire and train employees for the careers of today and tomorrow. Kentucky Skills Network services include:
- No-cost recruitment and job placement services
- Customized training at reduced or no cost
- Training incentives for internal training needs
- Workforce preparation initiatives such as job placement assistance, apprentice-style education and community readiness programs

Last year, the Kentucky Skills Network provided training to 84,000 Kentucky workers and assisted 5,600 companies.

8 PUBLIC UNIVERSITIES
TOTAL ENROLLMENT 128,482

19 INDEPENDENT INSTITUTIONS
OF HIGHER EDUCATION
TOTAL ENROLLMENT 35,202

16 COMMUNITY & TECHNICAL COLLEGES
TOTAL ENROLLMENT 116,614

General and Operations
Managers 25,203
Kentucky avg/hr: $42.94
National avg/hr: $56.35

Supervisors of Production and Operating Workers 10,691
Kentucky avg/hr: $26.15
National avg/hr: $28.41

Welders, Cutters, etc. 6,132
Kentucky avg/hr: $17.88
National avg/hr: $19.23

Inspectors, Testers, etc. 8,246
Kentucky avg/hr: $17.64
National avg/hr: $18.46

Assemblers and Fabricators 5,077
Kentucky avg/hr: $12.60
National avg/hr: $13.80

Mechanical Engineers 3,863
Kentucky avg/hr: $47.74
National avg/hr: $41.48

Average pay here based on 40 hrs/week.

Source: Chmura Economics & Analytics / JobsEQ, 2015 (Q3)

Imagine being able to train your future workforce while they’re still in school. That’s the KY FAME model.

The Kentucky Federation for Advanced Manufacturing Education (KY FAME) is an industry-led partnership that includes manufacturers, educational and workforce institutions and the Cabinet for Economic Development to create a pipeline of skilled workers.

KY FAME offers a dual-track, apprenticeship-style training program. Students attend classes two days per week at their local community and technical college and work three days a week for a sponsoring employer. Students completing the program receive an associate degree in applied science and real-world work experience. Armed with this unique skillset, they have the option of choosing to pursue a four-year degree, enter the workforce or continue down both paths.

KY FAME is growing rapidly. In just over a year, the program has grown to include more than 150 students and 125 companies, and several other regions of Kentucky are joining the program as KY FAME goes statewide.

Kentucky has the most rigorous workforce certification program in the nation. Our Work Ready certification is an assurance to business and industry that the Kentucky community is committed to providing the highly skilled workforce required in today’s competitive global economy.

The certification measures high school graduation rates, National Career Readiness Certificate holders, community commitment, educational attainment, soft skills development and Internet availability.

More than half of Kentucky’s counties are either certified as Work Ready or Work Ready in Progress, with dozens more in the certification process.

---

“What has the KY FAME program done for me? It’s given me a future and a career.”

---

“The program for industry, by industry”
As manufacturers implement such innovations as lightweighting, digital manufacturing techniques and fuel efficiency breakthroughs, Kentucky offers the resources to implement these technologies and to create the innovative practices of the future. Here are just a few of the examples that make Kentucky the place to put innovation into practice.

**Aluminum**

Tighter fuel efficiency requirements are causing auto manufacturers to expand their use of lightweight aluminum. That's good news for Kentucky. There are 45 aluminum production facilities in the Commonwealth, with over 10,000 full-time employees. According to the U.S. Geological Survey, the state has the greatest capacity to produce aluminum in the nation. Aluminum accounts for $1.8 billion in the state's gross domestic product.

**Steel**

Steel has long been the staple of the automotive industry, and it will continue to be, thanks to new technologies.

Steel is becoming lighter and stronger, expanding its line to include a lighter, high-strength variety of steel. Since Kentucky has 43 steel and iron production companies employing more than 7,000 full-time workers, the lighter weight options will offer competitive choices for the automotive industry in Kentucky.

**Rubber and Plastics**

Rubber and plastics have been important to the automotive industry for years, and Kentucky's 224 rubber and plastics manufacturers are well suited to accommodate any manufacturer's needs. With more than 26,000 full-time employees working in the industry, Kentucky is able to produce a variety of parts for dozens of automotive models. In the past five years, rubber and plastics companies in Kentucky have experienced more than 100 expansions, so the industry not only has a solid foundation, but is continuously growing.

While Kentucky ranks number one per capita in the U.S. in motor vehicle production and third overall, the state continues to grow its automotive presence in the automotive world.

In September 2015, hundreds of auto industry leaders participated in the first-ever AutoVision conference, a sold-out event held by the Kentucky Automotive Industry Association and presented by the Cabinet for Economic Development.

Attendees heard from industry executives, experts and analysts. Manufacturers and suppliers represented at the conference included all three of Kentucky's car and truck manufacturers and dozens of Tier I, Tier II and Tier III suppliers, as well as numerous service providers.

Speakers included U.S. Deputy Secretary of Transportation Victor Mendez, (top left) who focused not only on the economic impact of the automotive industry, but on the critical role the industry plays in protecting America’s travelers on the road. Sheryl Connelly, Ford Motor Co. (bottom left) manager of global consumer trends and futuring, pointed to identifying and following emerging trends such as the needs of aging consumers, changing attitudes and physiology of car buyers and the growing “information addiction” that is driving changes in technology offerings in vehicles.

KAIA board member Kurt Krug, a vice president at INOAC USA, a conference sponsor, described his experience at AutoVision as relevant, interactive, collaborative, energetic and engaging.

“The mix of panel discussions and breakout sessions offered everyone the opportunity to hear consistent messages about emerging trends and technologies while also providing time to hear from industry experts about specific subjects such as workforce development and supplier needs,” Krug said.
An Added Incentive

In business, there is no "one size fits all" approach, and we realize that. For that reason, we work personally with each company to help lower the cost of doing business. First, we listen to the challenges and needs of that company and then collaborate to find ways for them to grow and expand in the Commonwealth.

We have available a variety of customizable solutions:

- Sales and usage tax rebates
- Corporate income tax credits
- Wage assessments
- Fixed asset financing
- Industrial revenue bonds
- Low interest loans
- Environmental stewardship assistance
- Workforce training grants
- Recruitment and other job services at no cost

Business Costs

All companies want to operate with the lowest possible business costs. The Commonwealth has consistently offered one of the lowest overall costs of doing business in the eastern United States.

- Kentucky has among the lowest costs of living in the nation (CNBC, June 2015)
- Kentucky has the second lowest cost of doing business in the nation (CNBC, June 2015)
- Kentucky ranks among the most business competitive states in the U.S. (Site Selection, May 2015)
- Kentucky ranks third for top business climate (Site Selection, November 2015)

Utility Costs

The weight of power costs on a company’s bottom line is significant, so it has to be a prime driver in a business location or expansion decision. Kentucky offers significantly lower power costs than nearly every other competitor. In fact, Kentucky’s industrial electricity rates are the lowest in the eastern United States.

Electric Industrial Power Rates

Average Weekly Wages

<table>
<thead>
<tr>
<th>TOP AUTO PRODUCING STATES</th>
<th>ALL PRIVATE INDUSTRY</th>
<th>MANUFACTURING</th>
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<tbody>
<tr>
<td>United States</td>
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<tr>
<td>Alabama</td>
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<td>$994</td>
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Bureau of Labor Statistics, Preliminary data through September 2015

Stretching Dollars
Kentucky offers more for less
Finding the perfect location in Kentucky to start, relocate or grow a business is easy. From existing buildings to greenfield sites to megasites, we can accommodate companies of all shapes and sizes—and on any timetable. Need a pad, spec building or an existing facility? Kentucky has plenty of options all across the state from which to choose. Here are a few of Kentucky’s special features:

**Build-Ready**

When a site is certified Build-Ready, it guarantees construction can bypass the red tape and break-ground almost immediately. Communities that participate in the program already have a pad prepared and have taken care of such details as zoning, road surveys, geotechnical studies, permitting and cost and time estimates. Build-Ready drastically reduces the time it takes for a company to be operational and also allows communities to incorporate the specific needs of the company. For the latest list of Build-Ready sites, visit [BuildReadyKY.com](http://BuildReadyKY.com).

**Certified Megasites**

For those companies seeking very large tracts of land that are virtually ready for construction, Kentucky can offer two certified megasites.

» The 1,551-acre Glendale site is located near Elizabethtown, just off I-65, only 47 miles south of Louisville, its international airport and the UPS global air hub. Located on a CSX main rail line.

» The 2,100-acre I-24 site is near Hopkinsville, close to the skilled-labor supply of Fort Campbell and less than an hour’s drive from Nashville and its international airport.

**Select Kentucky**

Our unique online search tool, [SelectKentucky.com](http://SelectKentucky.com), can provide companies the flexibility to search for a site, building, community profile, workforce data or a variety of other criteria—all at one location and all online.
Motor Vehicle-Related Facilities
Kentucky is home to nearly 500 motor vehicle-related facilities that have established or announced a new location.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Location</th>
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<tr>
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</tr>
<tr>
<td>Atlas Copco Tools &amp; Assembly Systems</td>
<td>Lexington</td>
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