

AEROSPACE

INDUSTRY SPOTLIGHT



WASHINGTON: THE GLOBAL INDUSTRY LEADER

Washington State leads the global aerospace industry. Our companies drive innovation in avionics, composites and advanced materials, aero-structures, aviation biofuels, design and engineering, tooling and interiors.

Established global trade networks, an experienced and knowledgeable workforce and a rich history of innovation are the cornerstone of Washington's aerospace cluster. These competitive advantages drive aerospace companies to choose Washington.

Washington boasts more than 82,000 skilled workers directly employed in aerospace and a cluster

of 650 companies, making our industry one of the most robust and dynamic in the world.

EDUCATED & SPECIALIZED WORKFORCE

The strength, innovation and success of Washington's aerospace cluster lies in its skilled, educated workforce. The state employs:

- 17% of all U.S. aerospace workers
- 6,460 aerospace engineers
- 30,000 aerospace manufacturing workers
- 44 aerospace workers per 1,000 jobs, the highest per capita in the country



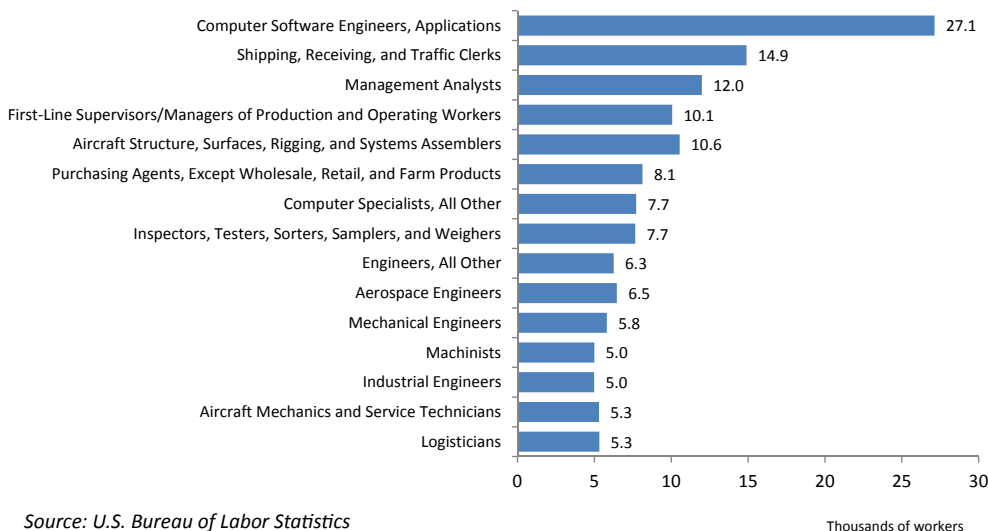
ESTABLISHED TRADE NETWORKS & GLOBAL CONNECTIONS

Washington's developed infrastructure and established trade networks make it a gateway to global markets and provide aerospace companies with business expansion opportunities:

- Washington is the largest U.S. exporter of aerospace products, accounting for nearly 29.4% of the national total in 2010.
- Aerospace exports were valued at \$23.2 billion in 2010.
- Washington aerospace suppliers work with companies including Airbus, Boeing, Bombardier, Dassault and Northrop Grumman.
- 75 ports connect companies to markets around the world.
- The state is equidistant from Europe and Asia.

WASHINGTON AEROSPACE VALUE CHAIN

Washington's skilled workforce positions companies competitively:



Source: U.S. Bureau of Labor Statistics

Thousands of workers

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INDUSTRY INNOVATION & WORKFORCE RESOURCES

Washington companies benefit from a network of industry associations dedicated to advancing aerospace growth through research, workforce training and networking opportunities:

- Aerospace Futures Alliance
- Inland Northwest Aerospace Consortium
- Pacific Northwest Aerospace Alliance
- Aerospace Joint Apprenticeship Committee
- Air Transportation Center of Excellence for Advanced Materials
- Center of Excellence for Aerospace & Advanced Materials Manufacturing
- University of Washington's Department of Aeronautics and Astronautics
- Shoreline Community College Center for Manufacturing Excellence

- South Seattle Community College: Aviation Maintenance Technology
- Washington Aerospace Training and Research Center
- Spokane Aerospace Technology Center
- Pacific Northwest Defense Coalition (PNDC)

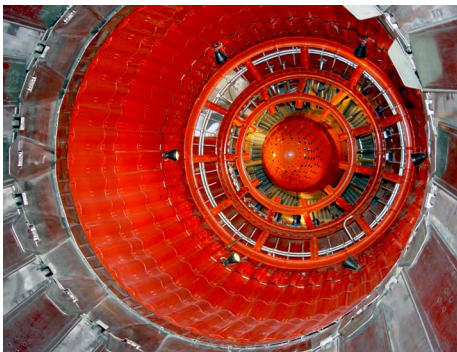
ECONOMIC INCENTIVES

- Reduced business and occupation tax for commercial aerospace suppliers
- Business and occupation tax credits for preproduction development expenditures and taxes paid on manufacturing facilities
- Sales and use tax exemption for computer hardware and software
- Reduced business and occupation tax rate for FAR Part 145 repair stations



COMPANIES IN WASHINGTON

Aerojet
Aviation Partners Inc.
B/E Aerospace, Inc.
BAE Systems
The Boeing Company
C&D Zodiac Inc.
Crane Aerospace & Electronics
Esterline Technologies Corporation
Exotic Metals Forming Company
Fatigue Technology, Inc.
General Plastics Manufacturing Company
Goodrich Corporation
Heath Techna
Honeywell International Inc.
Insitu
Janicki Industries
Machinists Inc.



"Washington State's government is committed to promoting the aerospace industry. The infrastructure is in place to support the industry. The workforce is highly trained, knowledgeable and dedicated to the industry. All this is why airplane, defense and space companies come to Washington to do business."

Floyd Henry, President
General Plastics Manufacturing Co.

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Department of Commerce
Innovation is in our nature.