



 **Taking off in the Piedmont Triad**

HondaJet Manufacturing

From Startup to Aircraft Manufacturing



- After the world debut in 2005 of the HondaJet, the Honda Aircraft Company established its Global HQ and manufacturing campus at Piedmont Triad Int'l Airport (PTI)
- The campus is now 680k sf and employs 1,000
- The company announced an expansion, investing \$55.7M and creating 280 jobs to build the new Echelon jet



Boom Supersonic

Breaking Barriers

- Boom Supersonic has completed construction of the Overture Superfactory at PTI where it will assemble the new supersonic jet
- The company aims to employ 1,760 people to manufacture, test and manage the customer delivery center



JetZero

Innovating Aerospace

- JetZero announced the decision to build its blended-wing Z4 aircraft in the Triad
- The \$4.7 billion, 14,560-employee project is estimated to be operational by 2036.
- The new plane design improves lift, saving fuel cost and emissions by 50%



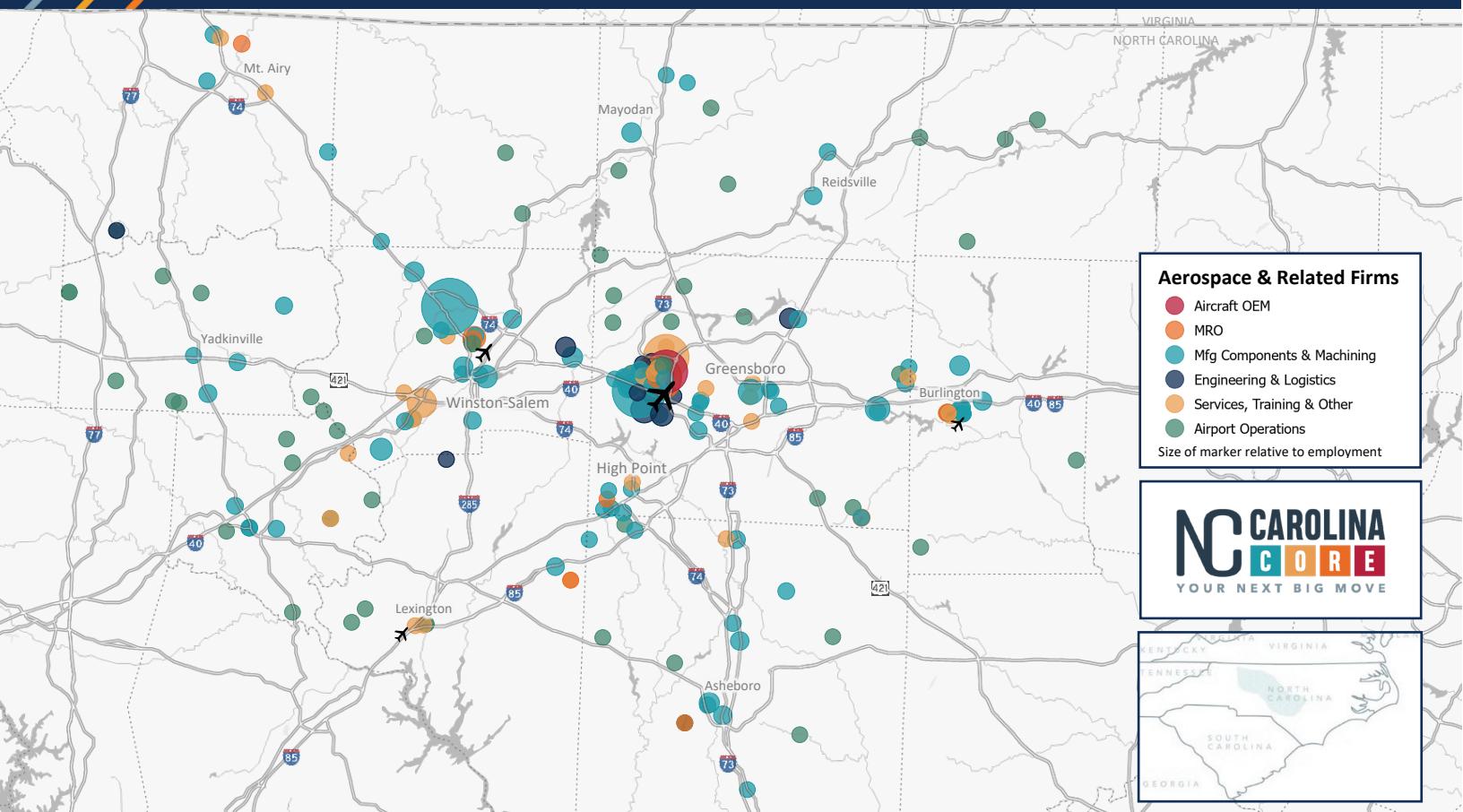
 **Regional Suppliers**

| | |
|-----------|--|
| 79 | Manufacturing Components & Machining Firms |
| 45 | Service & Training Firms |
| 28 | MRO, Engineering & Logistics Firms |

 **Major Aerospace Employers**

| |
|--------------------------------------|
| Collins Aerospace Interiors |
| FedEx MidAtlantic Air Hub |
| HAECO Americas |
| Honda Aircraft Company |
| American Airlines |
| Northstate Aviation |
| Zim Aircraft Cabin Solutions |
| Marshall USA |
| Triumph Group |
| TAT Piedmont Aviation |
| Bridgestone Aircraft Tire |
| Parker Hannifin-Aerospace Filtration |
| Honda Aero |
| Textron Aviation |

200+ Aerospace & Supplier Operations



Decades of Maintaining Growth

HAECO

30+ Years in the Triad



- The MRO began operations in 1990, serving as one of the largest independent operations in the US. The company joined the global MRO operator HAECO in 2014.
- The Piedmont Triad campus is their North American HQ.
- Services cover all standard aircraft, accommodating widebody and narrowbody planes in their 5-hangar operation.

Marshall USA

Expanding from the UK



- Marshall Aerospace is ramping up operations for servicing C-130 aircraft at the new 192,000 sf multi-bay hangar at Piedmont Triad International Airport.
- The UK-based company expects to employ 240 people by the end of 2025 at its first US facility.

Regional Talent Base

1.8M

Regional Population

825,000

Regional Labor Force

8%

10-Year Growth

95,500

Employed in Mfg.

Strong Regional Aerospace Talent

2,800

Active A&P Mechanics
Certified in Region

#8

Rank on East Coast for
A&P Certifications

3,676

Active Certified Pilots
in Region

NC #8

State Rank in US for
Aerospace Mfg. (pwc)

3x

National Level in Support
for Air Transport Jobs

1,100

Annual Aerospace
Credentials Awarded



Aerospace Ecosystem & Talent

Piedmont Triad Gross Regional Product (GRP)

\$2B

Aerospace GRP, 2023
Mfg., Support & Trans.

50%

10-Year Growth
Overall

\$1.4 B

Aerospace Mfg.
GRP, 2023

#1

Metro in NC for
Aerospace Mfg.

Aerospace Manufacturing Supply Chain

\$630M

Domestic Purchases by
Aerospace Mfg. Firms, 2024

74%

Of Purchases
From Regional Firms

\$315M

Top Category: Aerospace
Product & Parts Mfg., 2023

98%

Of Product & Parts
Purchases with Region

Top Regional Suppliers include:



Piedmont Triad Aerospace Occupations

Aircraft Mechanics & Service
Technicians

977

Aircraft Cargo Handling
Supervisors & Freight Agents

455

Reservation & Ticket Agents

411

Commercial & Airline Pilots,
Flight Engineers

392

Aircraft Service &
Flight Attendants

377

Aircraft Structure, Surfaces,
Rigging, and Systems Assemblers

159

Aerospace Engineering &
Technicians

147

Avionics Technicians

133

2024 Employment, Piedmont Triad Region

Aerospace Comparative Wages

Airline Pilots, Copilots, and
Flight Engineers

\$153K

Commercial Pilots

\$123K

Aerospace Engineers

\$116K

Aircraft Mechanics and Service
Technicians

\$65K

Avionics Technicians

\$60K

Aircraft Structure, Surfaces,
Rigging, Systems Assemblers

\$52K

Cargo and Freight Agents

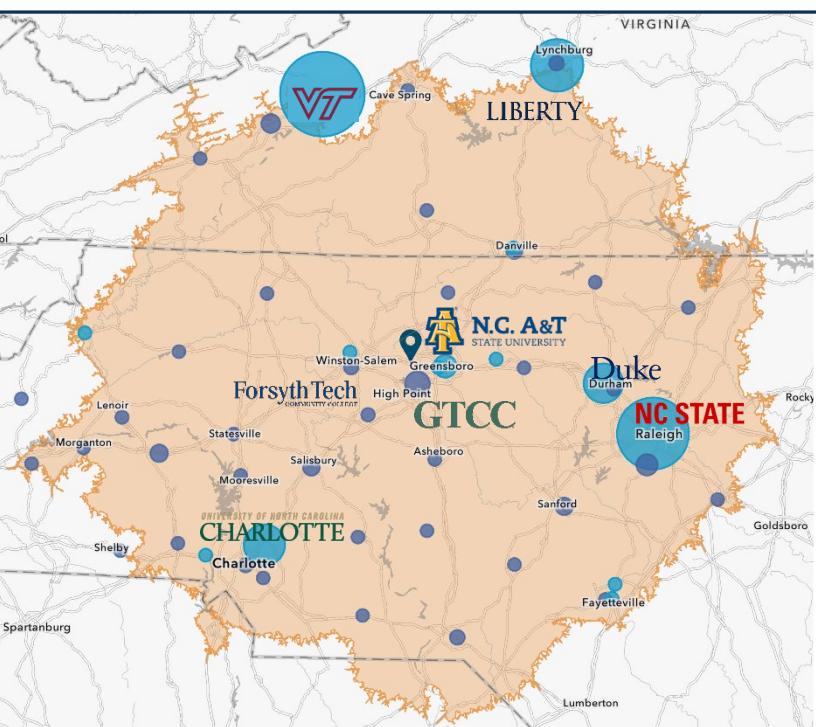
\$48K

US

Piedmont Triad

2024 Average Annual Wage for Sample Occupations

Aerospace Ecosystem & Talent



Aerospace-specific credentials awarded within a 2-hour drive

- Community College/2-Year Technical School
- College or University (4-Year or higher)

Size of mark relative to # aerospace credentials awarded in 2023



Regional Educational Assets

18

Colleges & Universities
Piedmont Triad

100,000+

Avg. Undergraduate
Students Enrolled

24,600

Degrees & Certificates
Awarded in Region, 2023

1,114

Aerospace Credentials
Awarded in Region 2023



Greater Recruitment Area (2 Hour Drive)

8,391

Aerospace Credentials
Awarded, 2023

23,300

Aerospace Credentials
Awarded Over 3 Years

1,179

Aerospace Engineering
Degrees Awarded, 3 Years

15,500

Aerospace Related
Engineering Degrees
Awarded, 3 Years

27,700

Overall Engineering
Program Enrollment, 2023

INNOVATION

North Carolina was first in flight and the Piedmont Triad continues aerospace innovation.

- The **HondaJet** was created here and is built here. Its Over-The-Wing Engine Mount is an example of their award-winning technical innovation.
- Boom is creating the next generation of **supersonic jets** and will be assembling the Overture model here.
- NC nonprofit AeroX is building an advanced air mobility (AAM) ecosystem, developing the nation's first urban **unmanned air traffic management** system (UTM) in Winston-Salem.
- NC A&T has **14 Engineering Centers** including the Transportation Center of Excellence and the Center for Advanced Materials
- Joint School of Nanoscience and Nanoengineering (JSNN) is home to the **composite material lab**
- **476** Employers in the region are training **2,644** apprentices on-the-job with **13** aerospace firms participating in local programs.



Guilford Technical Community College (GTCC)

3 Buildings on aviation campus with plans for a new 100,000 sf building expanding capacity

400 Enrolled in aerospace programs covering Aviation Systems Technology, avionics, pilot, aerospace machining and manufacturing

600 Certificates & Degrees awarded for A&P training over past 5 years

FAA Approved curriculum and a member of the National Aviation Consortium

E Partnership with Embry-Riddle University



Forsyth Technical Community College (GTCC)

52k Sq ft aviation facility with airframe lab for the Aviation Systems Technology program



Andrews Aviation Academy High School

100 Average enrollment in programs from pilot to maintenance & manufacturing including job shadowing and school-to-work programs