

# Utah Aerospace Industry

INDUSTRY PROFILE

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# Utah Aerospace Industry

## UTAH AEROSPACE INDUSTRY OVERVIEW

Utah is one of the top ten states in the nation in the concentration of aerospace employment. The industry is well supported by colleges and universities across the state. Flight schools and aviation programs provide Utah with a highly educated and experienced workforce.

Utah is rich with business opportunities in the aerospace industry. The state is home to several centers for technological development in computer and propulsion technology, and major aerospace companies such as ATK/Thiokol and L3 Communications. Hill Air Force Base, one of the largest military bases in the country, is located north of Salt Lake City in Davis and Weber counties. Hill Aerospace Museum, founded in Ogden in 1981 as part of the United States Air Force Heritage Program, exhibits more than 80 military aircraft, missiles, aerospace vehicles and thousands of historical military artifacts, making it the largest collection of military aircraft in the western U.S.

One of Utah's greatest strengths in the aerospace industry is the development of the advanced composites industry in the state. Utah has a long history in advanced composites, which greatly supports and provides products to the aerospace industry.

## INDUSTRY STRENGTHS

### Strong Historical Base

- Utah has a 70+ year history in development and manufacturing in the aerospace industry.
- Hexcel, located in West Valley City, is one of the three largest carbon fiber manufacturers in the nation.
- ATK, one of the largest aerospace and defense companies in the nation, maintains three large facilities across the state.
- Hill Air Force Base has grown to become the second largest employer in the state.

### Young, Highly Educated and Experienced Workforce<sup>1</sup>

- 7 colleges and universities across the state offer specialized programs in the aerospace field.
- Utah ranked 1<sup>st</sup> in the nation for its population growth rate of 2.5%.
- Utah is the youngest state in the nation with a median age of 29.0.

### Key Rankings & Headlines

- Utah ranks 1<sup>st</sup> in the nation as a lead investor in technology.<sup>2</sup>
- Utah ranks 1<sup>st</sup> as the most tech-savvy state in the nation for its progress in digital government.<sup>3</sup>
- Utah ranks 8<sup>th</sup> nationwide for its state technology and science overall index. The state ranks 1<sup>st</sup> in technology concentration and dynamism.<sup>4</sup>

## UTAH AEROSPACE INDUSTRY HISTORY

Hill Air Force Base (AFB) traces its historical roots back to the late 1930's when it began as an air depot with seven permanent stations to supply the Rocky Mountain region. From its humble beginning, the depot's strength grew to a World War II peak of roughly 22,000 employees, 15,780 of which were civilians and about 6,000 military personnel.

<sup>1</sup> Source: U.S. Census Bureau

<sup>2</sup> Source: CDW-G, State & Local Technology Investment Curve, 2008 data

<sup>3</sup> Source: Center for Digital Government, Digital States Survey, 2008 rankings

<sup>4</sup> Source: Milken Institute, State Science & Technology Index, 2008 rankings

Since it began construction in 1939, Hill AFB has grown to encompass 6,698 acres in Davis and Weber Counties with management of an additional 962,076 acres throughout Northern Utah. Today, Hill AFB employs nearly 23,000 military and civilian personnel.<sup>5</sup>

ATK, launched as an independent company in 1990 from a spin off of Honeywell, expanded into the aerospace market with the acquisitions of Hercules Aerospace Company in 1995 and Thiokol Propulsion in 2001. These acquisitions allowed ATK to become the world’s largest supplier of solid propellant rocket motors and a leader in the advanced composites industry.<sup>6</sup>

Other key players have since moved to Utah, recognizing the great potential of the state’s aerospace industry. With increased interest and a strong focus from state economic development officials, this industry continues to thrive.

## UTAH AEROSPACE INDUSTRY DENSITY



Source: InfoUSA, EDCUtah

<sup>5</sup> Source: Hill Air Force Base

<sup>6</sup> Source: ATK

## RECENT NEWS & ANNOUNCEMENTS

- Duncan Aviation announced its expansion plans in late 2008. The company will construct a new 320,000-square-foot aircraft maintenance facility at the Provo Municipal Airport. The expansion will create a \$58 million capital investment and will provide 657 new full-time positions with salaries paying 150% of Utah County's median wage.<sup>7</sup>
- Jet Aviation, one of the world's leading business aviation services companies, is expanding into the Kemp Ogden Airport Gateway Center. The 70,000-square-foot expansion will allow the company to provide aircraft maintenance and refurbishment, charter services and operate its aircraft sales division. The project will generate an expected \$28.9 million in capital investment and will employ 902 people in the area.<sup>8</sup>
- As part of West Valley City's creation of the Southwest EDA, a 400+-acre parcel industrial park, Hexcel Corporation plans to expand into the new park and will create an expected 7,600 new jobs and \$1.1 billion in capital investment over the next 15 years. The new manufacturing facility will allow Hexcel to remain the largest manufacturer of high performance carbon fiber in the U.S. and will serve as a catalyst for continued growth in the advanced composites and aerospace industries in the state.<sup>9</sup>
- The Salt Lake City International Airport has expanded its services to include a non-stop, direct flight to Paris, France. The inaugural flight was held in June 2008. Passenger numbers have exceeded initial projections. The airport is also preparing for another expansion of its services with a non-stop, direct flight to Tokyo, Japan with the inaugural flight planned for the summer of 2009.<sup>10</sup>
- The St. George Replacement Airport, currently under construction, is located on a 1,306-acre site approximately five miles southeast of the city of St. George. The new relocation site allows for development of a new single runway with a length of up to 9,300 feet. The current airport location site cannot allow the runway to be extended beyond its current length of 6,606 feet. Due to this limitation, the current airport will not service the increase in present and forecasted growth in commercial service. An airport traffic control tower will also be constructed and there will be two roads providing access to the relocated airport. Start of operations is scheduled for January 1, 2011. A section of land located to the west of the future site has been reserved for a business park.<sup>11</sup>
- The Logan-Cache Airport, currently under construction to expand, plans to offer commercial air service to Las Vegas and Denver in the near future. This would be the first passenger service from the airport in nearly two decades. Upon receiving the large grant award of \$530,000 from the Department of Transportation, the Logan-Cache Airport has been working to provide regularly scheduled air service to passengers.<sup>12</sup>
- During the last round of military base closures, the Base Realignment and Closure (BRAC) Commission considered the serious economic impact of closing Hill AFB and decided against it. Other than being the state's second largest employer, Hill AFB operations result in a national economic impact of \$2.02 billion with \$1.2 billion of that total benefiting Utah's own economy.<sup>13</sup>

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<sup>7</sup> Source: EDCUtah

<sup>8</sup> Source: EDCUtah

<sup>9</sup> Source: EDCUtah

<sup>10</sup> Source: Salt Lake City International Airport

<sup>11</sup> Source: St. George Replacement Airport EIS

<sup>12</sup> Source: Logan-Cache Airport

<sup>13</sup> Source: Hill AFB

## LABOR

Approximately 77% of Utah's total labor pool resides in the Salt Lake, Ogden-Clearfield and Provo-Orem metropolitan statistical areas, known as the Wasatch Front. As of September 2008, Utah's overall employment in the aerospace industry totaled an estimated 10,010 employees.<sup>14</sup>

### Wage Data

The following table lists typical aerospace positions and the corresponding mean wage for each location listed.

| Title / Position (SOC Code)  | State of Utah | National | Utah as % of National |
|--|---------------|----------|-----------------------|
| Aerospace Engineers (17-2011)  | \$80,370      | \$92,700 | 86.7%                 |
| Aerospace Engineering & Operations Technicians (17-3021)             | \$49,690      | \$56,780 | 87.5%                 |
| Atmospheric & Space Scientists (19-2021)                             | \$83,420      | \$78,960 | 105.6%                |
| Aircraft Mechanics & Service Technicians (49-3011)                   | \$49,610      | \$49,670 | 99.9%                 |
| Aircraft Structure, Surfaces, Rigging & Systems Assemblers (51-2011) | \$37,400      | \$44,180 | 84.7%                 |

Source: Utah Department of Workforce Services, Bureau of Labor Statistics

## EDUCATION

### Specialized Programs

- Utah State University (USU) owns and operates the Space Dynamics Laboratory (SDL), a nonprofit research corporation charged with applying basic research to technology challenges in the military and science fields. NASA is funding several important projects being conducted at the SDL.
- Westminster College (WC), Utah Valley State College (UVSC) and USU offer undergraduate program degrees in flight operations and aviation management.
- Salt Lake Community College (SLCC) offers three program degrees in the field of aviation.
- The University of Utah (U of U), Weber State University (WSU) and Brigham Young University (BYU) offer aerospace study degrees and training in aerospace through their Air Force Reserve Officer Training Corps (ROTC) programs.
- The Utah College of Applied Technology offers degree programs and training in the aerospace industry at its college campuses throughout the state. The Ogden-Weber Applied Technology Center offers a specialized program for the aerospace field.
- The Utah Aerospace Education Foundation (AEF), an affiliate of the Utah Air Force Association, promotes aerospace through public awareness programs, education and financial assistance.
- Project ASTRO UTAH, a project encouraging collaboration among Utah universities, aerospace businesses, astronomy clubs, planetariums and Utah schools, is focusing on the core science curriculum of Utah sixth-grade students. Teams of astronomers and teachers are working together in Utah school districts to enhance the learning experience for science and astronomy.

<sup>14</sup> Source: Utah Department of Workforce Services, September 2008 data

## Graduates in Aerospace & Aviation

| Institution Name              | Location       | Enrollment    | Aerospace Graduates |
|-------------------------------|----------------|---------------|---------------------|
| Salt Lake Community College   | Salt Lake City | 29,886        | 5                   |
| Utah State University         | Logan          | 23,925        | 15                  |
| Westminster College (private) | Salt Lake City | 2,887         | 19                  |
| <b>TOTAL</b>                  | <b>Utah</b>    | <b>56,698</b> | <b>39</b>           |

Source: Utah State Board of Regents, 2007-08 data

## BUSINESS COSTS

### Cost Comparison Model

EDC Utah can run a cost comparison model that enables a company to compare a Utah location with other select locations when considering a relocation or expansion. Other wage data, unemployment insurance and workers compensation rates may be applicable. Please contact EDC Utah for more information. (See contact information at the end of this document.)

## BUSINESS INCENTIVES & BUSINESS FINANCING

Please contact EDC Utah for business incentive and/or business financing information. (See contact information at the end of this document.)

## UTAH AIRPORTS

Map of Utah Airports



## Utah Airport Information

| Rank | Airport Name and Location   | Runway Length (Feet) | Control Tower |
|------|---|----------------------|---------------|
| 1    | Beaver Municipal Airport<br>City Building<br>Beaver, Utah 84713                               | 5,100'               | No            |
| 2    | Blanding Municipal Airport<br>50 West 100 South<br>Blanding, Utah 84511                       | 6,000'               | No            |
| 3    | Bluff Airport<br>P.O. Box 9<br>Monticello, Utah 84535   | 3,000'               | No            |
| 4    | Brigham City Airport<br>20 North Main Street<br>Brigham City, Utah 84302                      | 7,501'               | No            |
| 5    | Bryce Canyon Airport<br>Garfield County<br>Panguitch, Utah 84759                              | 7,395'               | No            |
| 6    | Cal Black Memorial Airport<br>P.O. Box 338<br>Monticello, Utah 84535                          | 5,700'               | No            |
| 7    | Canyonlands Field Airport<br>125 East Center Street<br>Moab, Utah 84532                       | 7,100'               | No            |
| 8    | Carbon County Airport<br>120 East Main Street<br>Price, Utah 84501                            | 8,300'               | No            |
| 9    | Cedar City Regional Airport<br>10 North Main Street<br>Cedar City, Utah 84720                 | 4,822'               | No            |
| 10   | Delta Municipal Airport<br>76 North 200 West<br>Delta, Utah 84624                             | 5,500'               | No            |
| 11   | Duchesne Municipal Airport<br>City of Duchesne<br>Duchesne, Utah 84021                        | 5,800'               | No            |
| 12   | Fillmore Municipal Airport<br>75 West Center<br>Fillmore, Utah 84631                          | 5,050'               | No            |
| 13   | Green River Municipal Airport<br>P.O. Box 620<br>Green River, Utah 84525                      | 5,600'               | No            |
| 14   | Hanksville Airport<br>135 North 2400 West<br>Salt Lake City, Utah 84116                       | 5,675'               | No            |
| 15   | Heber City Municipal/Russ McDonald Field Airport<br>75 North Main Street<br>Heber, Utah 84032 | 6,898'               | No            |
| 16   | Huntington Municipal Airport<br>75 East Main Street<br>Castle Dale, Utah 84513                | 4,048'               | No            |
| 17   | Junction Airport<br>P.O. Box 26<br>Junction, Utah 84740                                       | 4,505'               | No            |
| 18   | Kanab Municipal Airport<br>70 North Main Street<br>Kanab, Utah 84741                          | 6,193'               | No            |
| 19   | Logan-Cache Airport<br>120 North 100 West<br>Logan, Utah 84321                                | 9,095'               | No            |

|    |  |         |     |
|----|--|---------|-----|
| 20 | Manti-Ephraim Airport<br>50 South Main Street<br>Manti, Utah 84642                             | 4,868'  | No  |
| 21 | Milford Municipal / Ben and Judy Briscoe Field<br>P.O. Box 69<br>Milford, Utah 84751           | 5,000'  | No  |
| 22 | Monticello Airport<br>P.O. Box 457<br>Monticello, Utah 84535                                   | 4,817'  | No  |
| 23 | Morgan County Airport<br>48 West Young Street<br>Morgan, Utah 84050                            | 3,904'  | No  |
| 24 | Mount Pleasant Airport<br>115 West Main Street<br>Mount Pleasant, Utah 84647                   | 4,260'  | No  |
| 25 | Nephi Municipal Airport<br>21 East 100 North<br>Nephi, Utah 84648                              | 4,700'  | No  |
| 26 | Ogden-Hinckley Airport<br>2484 Washington Boulevard<br>Ogden, Utah 84401                       | 8,103'  | Yes |
| 27 | Panguitch Municipal Airport<br>55 South Main Street<br>Panguitch, Utah 84759                   | 5,700'  | No  |
| 28 | Parowan Airport<br>5 South Main Street<br>Parowan, Utah 84761                                  | 5,000'  | No  |
| 29 | Provo Municipal Airport<br>P.O. Box 1849<br>Provo, Utah 84603                                  | 8,599'  | Yes |
| 30 | Richfield Municipal Airport<br>City of Richfield<br>Richfield, Utah 84701                      | 6,600'  | No  |
| 31 | Roosevelt Municipal Airport<br>332 South 2 East<br>Roosevelt, Utah 84066                       | 6,500'  | No  |
| 32 | Salina-Gunnison Airport<br>Salina & Gunnison<br>Salina, Utah 84654                             | 3,815'  | No  |
| 33 | Salt Lake City International Airport<br>776 North Terminal Drive<br>Salt Lake City, Utah 84116 | 12,004' | Yes |
| 34 | Salt Lake City Municipal 2 Airport<br>AMF Box 22084<br>Salt Lake City, Utah 84122              | 5,860'  | No  |
| 35 | St. George Municipal Airport<br>620 South Airport Road<br>ST. GEORGE, UTAH 84770               | 6606'   | No  |
| 36 | Wayne Wonderland<br>Wayne County<br>Loa, Utah 84747  | 5,900'  | No  |

Source: GlobalAir.com

## TOP AEROSPACE INDUSTRY COMPANIES

| Rank | Name and Address  | Phone Number and Contact                                    | # of Employees | Brief Description  |
|------|---|---|----------------|--|
| 1    | Hill Air Force Base<br>7981 Georgia Street<br>Hill AFB, Utah 84056                            | John Primbs<br>(801) 777-5201                               | Over 10,000    | An Air Force Material Command base providing logistics and engineering management, including composites.                         |
| 2    | ATK<br>P.O. Box 160433<br>Clearfield, Utah 84016  | Mike Blair<br>Manager<br>(801) 775-1722                     | 5,000 to 9,999 | Designs and manufactures advanced weapon and space system equipment.   |
| 3    | Sky West Airlines Inc.<br>444 SOUTH RIVER ROAD<br>St. George, Utah 84790                      | Jerry Atkin<br>CEO<br>(435) 634-3000                        | 1,000 to 4,999 | Largest regional airline company in the U.S.   |
| 4    | Boeing Company<br>1215 North 2200 West<br>Salt Lake City, Utah 84116                          | Dave Carbon<br>Manager<br>(801) 537-6400                    | 500 to 999     | Manufactures commercial aircraft, aircraft equipment and integrated defense systems.   |
| 5    | Moog Aircraft Group<br>2268 South 3270 West<br>Salt Lake City, Utah 84119                     | Steve Rusk<br>Manager<br>(801) 973-4300                     | 500 to 999     | Manufactures high-performance military and commercial aircraft control systems and space vehicles.                               |
| 6    | Parker-Hannifin Corporation<br>1425 West 2675 North<br>Ogden, Utah 84404                      | Guy Martin<br>Manager<br>(801) 786-3000                     | 500 to 999     | Manufactures aircraft motion control systems and related components.   |
| 7    | Salt Lake City Airport Authority<br>776 North Terminal Drive<br>Salt Lake City, Utah 84122    | Tim Campbell<br>Manager<br>(801) 575-2400                   | 500 to 999     | International airport services and city government transportation programs.  |
| 8    | FMC Jetway Systems<br>3100 PENNSYLVANIA AVENUE<br>Ogden, Utah 84401                           | Dale Sumpter<br>CEO<br>(801) 627-6600                       | 250 to 499     | Manufactures airport equipment and supplies.   |
| 9    | Hexcel Corporation<br>7200 West 5400 South<br>Salt Lake City, Utah 84118                      | Debbie Wilkerson<br>Marketing Manager<br>(801) 252-3400     | 250 to 499     | Manufactures the nation's largest amount of carbon fiber and fiberglass electronic materials and products.                       |
| 10   | Northrop Grumman<br>888 South 2000 East<br>Clearfield, Utah 84015                             | John Clay<br>President<br>(801) 525-3300                    | 250 to 499     | Designs and manufactures military aircraft, defense systems and military aero structures.  |
| 11   | Petersen, Inc.<br>1527 North 2000 West<br>Ogden, Utah 84404                                   | John Ballantye<br>Chief Executive Officer<br>(801) 732-2000 | 250 to 499     | Manufactures guided missile components and space vehicles.   |
| 12   | Barnes Aerospace<br>1483 West 2550 South<br>Ogden, Utah 84401                                 | Steve Moore<br>President<br>(801) 621-8960                  | 100 to 249     | Manufactures components for the compressor, combustor and turbine sections of jet engines.                                       |
| 13   | Dal Global Services<br>3823 West 1200 North<br>Salt Lake City, Utah 84122                     | Amy Child<br>Manager<br>(801) 579-3620                      | 100 to 249     | Aircraft servicing and maintenance.  |
| 14   | Kitco, Inc.<br>1625 Mountain Springs Parkway<br>Springville, Utah 84663                       | Brent Wood<br>Owner<br>(801) 489-3627                       | 100 to 249     | Manufactures and distributes military aircraft and ship parts.   |
| 15   | Klune Industries<br>1800 North 300 West<br>Spanish Fork, Utah 84660                           | Bob Ballantyne<br>Manager<br>(801) 798-7401                 | 100 to 249     | Manufactures assembled components for the military and commercial aerospace sectors.   |
| 16   | <i>Lockheed Martin Corporation</i><br>872 Heritage Park Boulevard, #210<br>Layton, Utah 84041 | Bob Ekstrom<br>Manager<br>(801) 773-0156                    | 100 to 249     | Creates software programs to provide solutions for technological problems for several business sectors, including space systems. |
| 17   | Metalcraft Technologies, Inc.<br>498 North 2774 West<br>Cedar City, Utah 84721                | David Grant<br>President<br>(435) 586-3871                  | 100 to 249     | Manufactures a broad range of precision machined components for the aerospace industry.  |
| 18   | <i>Million Air</i><br>303 NORTH 2370 WEST<br>Salt Lake City, Utah 84116                       | Bill Haberstock<br>CEO<br>(801) 359-2085                    | 100 to 249     | Aircraft charter rental and leasing, scheduled air transportation and aircraft service and maintenance.                          |

|    |   |  |            |  |
|----|---|--|------------|--|
| 19 | Triumph Gear Systems<br>6125 Silver Creek Drive<br>Park City, Utah 84060                          | Steve Rusk<br>President<br>(435) 649-1900                | 100 to 249 | Manufactures and engineers high-quality components and systems for aerospace and actuation applications.                             |
| 20 | <i>Wencor West Inc.</i><br>1625 MOUNTAIN SPRINGS<br>PARKWAY<br>Springville, Utah 84663            | Brent Wood<br>Owner<br>(801) 489-3614                    | 100 to 249 | Manufactures aircraft equipment, parts and supplies.   |
| 21 | Williams International<br>3450 Sam Williams Drive<br>Ogden, Utah 84401                            | (801) 395-6500   | 100 to 249 | Develops and manufactures small gas turbine engine technology.   |
| 22 | Advanced Composites, Inc.<br>2575 South 3270 West<br>Salt Lake City, Utah 84119                   | Randall Philpot<br>President<br>(801) 467-1204           | 50 to 99   | Produces composite structures emphasizing high-performance composite tubing through filament winding.                                |
| 23 | Aerospace Engineering & Support<br>1307 West 2550 South<br>Ogden, Utah 84401                      | Stan Florence<br>Owner<br>(801) 394-9565                 | 50 to 99   | Designs, develops, manufactures, tests and evaluates aircraft parts, systems and equipment.  |
| 24 | <i>Aerospace Support Technologies</i><br>Hill Air Force Base Building 515<br>Hill AFB, Utah 84056 | Samuel Dato<br>CEO<br>(801) 825-9451                     | 50 to 99   | Provides aircraft training devices, instruments, gas turbine engines, power equipment systems, and software development and support. |
| 25 | Ceramatec<br>2425 South 900 West<br>Salt Lake City, Utah 84119                                    | Ashok Joshi<br>President<br>(801) 972-2455               | 50 to 99   | Focuses on R&D in advanced materials and electrochemistry.   |
| 26 | Groen Brothers Aviation, Inc.<br>2640 California Avenue<br>Salt Lake City, Utah 84104             | David Groen<br>Chief Executive Officer<br>(801) 973-0177 | 50 to 99   | Develops high performance gyroplanes and gyrodynes using advanced composite materials.   |
| 27 | ITT / EDO Fiberscience<br>506 Billy Mitchell Road<br>Salt Lake City, Utah 84116                   | Michael Therson<br>Manager<br>(801) 537-1800             | 50 to 99   | Manufactures and designs lightweight advanced fiber-reinforced composite products.   |
| 28 | MacLean Quality Composites<br>3392 West 8800 South<br>West Jordan, Utah                           | Tom Sorensen<br>Vice President<br>(801) 565-8003         | 50 to 99   | Designs, engineers and fabricates advanced composite products.   |
| 29 | Zoltek Corporation<br>3653 South 500 West<br>Salt Lake City, Utah 84115                           | Rolf Johns<br>Vice President<br>(801) 261-3082           | 50 to 99   | Manufactures carbon fiber and advanced composite prepregs for individual / recreational applications.                                |

\*SIC Codes: 2875-02, 3721, 3724, 3728, 3761, 3764, 3769

Source: InfoUSA

## ADDITIONAL INFORMATION

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