

# North Carolina Global TransPark Strategic Plan

March 15, 2018

This page left intentionally blank

# Executive Summary

This page left intentionally blank



# Executive Summary

## Context: Opportunity Amid Change

North Carolina's economic landscape continues to adjust to tectonic shifts brought on by global technological, social and political change. So too are success-minded businesses, which are striving to keep pace with emerging market opportunities, demographic changes, consumer patterns and new policy dynamics impacting the direction of regulation, taxes and trade. In such an uncertain environment, risk-averse companies embrace opportunities on a just-in-time basis. Community and state leaders must respond with economic development product – industrial sites, parks, buildings and infrastructure – that is well-documented, proven and ready.

Fortunately for the state, a fully functioning business destination already exists in the form of the North Carolina Global TransPark, which has demonstrated its ability to bring high-impact jobs, companies and capital investment. The North Carolina Global TransPark is now entering a new and critical phase in its history. With the proper strategic support, appropriate capital and operating resources, relevant expertise and focused execution, it can play a central role in North Carolina's economic strategy over the coming generation.

## Global TransPark: Rationale, Mission and Impact

The North Carolina Global TransPark (NCGTP) is a 2,500-acre multimodal industrial mega-park that is now home to more than 1,400 jobs. With workers commuting to the park from 21 counties, the NCGTP serves as an obvious regional economic engine for Eastern North Carolina. At the heart of the NCGTP's industrial appeal is an enviable network of transportation and land assets unmatched by most business destinations:

- An 11,500-foot by 150-foot runway that is the state's largest civilian runway;
- The NCGTP is 40 miles from I-95 and is served by industry-ready highways such as US70, which is set to become interstate-grade (I-42) under North Carolina's current state transportation improvement plan (STIP);
- 5,800 acres of environmentally-permitted land, including wetland mitigation credits valued at \$20 million.
- Gulf & Ohio Railway provides short-line rail service to the property, with mainline provider Norfolk-Southern also able to serve NCGTP tenants; and
- Easy access to deep-water port complexes in Morehead City (80 miles), Norfolk (155 miles) and Wilmington (99 miles).

The NCGTP mission is to enhance the economic well-being of North Carolinians by applying these multimodal capabilities to support global commerce. It accomplishes this through:

- The compilation of up-to-date site, workforce, environmental and other documentation to facilitate location decisions, speed development and minimize risk in the ramp-up of new operations;
- A dedicated focus on the sustained success of new and existing industrial residents;
- Business-savvy management that embraces opportunities to add measurable value for Eastern North Carolina and its economy;
- Priority consideration of current and future workforce needs through strategic and tactical collaboration with K-12, college and university partners to ensure an adequate and relevant talent pipeline;

- Ongoing efforts to equip the property with the assets, amenities and advantages of a globally-oriented 21<sup>st</sup>-century business destination.

While NCGTP has significant remaining developable land, the property now generates a measurable economic, community and national security impact:

- As of June 30, 2017, its private-sector tenants employ 847 workers who earn wages that are 34% higher than the Eastern North Carolina average and 29% higher than the Lenoir County average;
- GTP tenants provided \$1.14 million in local property-tax revenue to Lenoir County in 2016;
- Since 2008, the GTP has been anchored by Kansas-based Spirit AeroSystems, which supplies composite-based fuselage and wing components to France's Airbus Group. In late 2017, Spirit launched a \$55.7 million expansion plan at NCGTP;
- In 2013, military activities accounted for more than half the total runway operations; and
- As a base for the NC National Guard and the NC Division of Emergency Management, the NCGTP serves a vital role in life-saving relief efforts in the wake of hurricanes and natural disasters.

## Economic Development Action Plan

Operating with a small but aggressive management team, NCGTP seeks to fully achieve its regional economic potential through a detailed plan of action that builds on its enviable strengths, identifies and addresses current needs, creates a network of strategic partners and harnesses the momentum that has accompanied recent advancements in Eastern North Carolina. Strategies will include:

- **Investing in deferred maintenance** of existing NCGTP buildings and equipment to maintain the quality and consistency of the NCGTP and its inventory;
- **Modernizing the branding of the NCGTP** to align with the expansion strategies of industries requiring shovel-ready sites, ready-to-go facilities, multimodal transportation, industrial-grade utilities, digital telecommunications service, improved highways and a foreign trade zone (FTZ);
- **Building on current uses**, without being constrained by them, in order to coordinate the optimization of developable land within and adjacent to NCGTP;
- **Tightening the focus on targeted industries and industry clusters**, utilizing the latest cluster data, GIS tools and economic intelligence to hone in on recruitment candidates whose needs mirror NCGTP assets, amenities and aspirations;
- **Developing a network of K-12, college and university partnerships** to boost the credibility and readiness through internships, apprenticeships, technology transfer, sponsored R&D and other opportunities;
- **Engaging in ongoing internal outreach to marketing partners** (NC Ports, EDPNC, Duke Energy, NC Southeast, etc.) to promote the NCGTP as a leading statewide and regional business destination; and
- **Aiming for the future while keeping options open**; today's actions will enable the NCGTP to embrace the opportunities of tomorrow, whatever they may be.

The economic development action plan places the NCGTP on solid footing to determinatively embrace business recruitment and job creation opportunities aligned with the current and anticipated needs of forward-thinking businesses. Over a five-year planning horizon, NCGTP will sharpen its market viability, achieve organizational stability and strive toward consistent, realistic growth. Working in concert with allies and partners, the NCGTP will aggressively embrace long-term, transformational strategies that establish the NCGTP as a state-level resource that advances the cause of rural economic development in Eastern North Carolina.

## Cluster Targets and Segmentation Strategy

The NCGTP will base its value proposition on the unique array of geographical, physical and human resource assets that elevate its appeal over that of most competing destinations. It will concentrate its global market outreach on a manageable list of high-impact clusters and industry segments that will include:

- **Aerospace and Aviation**, including maintenance, repair and overhaul (MRO) operations; civilian aircraft assembly and testing; and civilian aircraft components manufacturing.
- **Automotive Components**, which shares common supply-chain characteristics with aerospace component manufacturers. This strategy leverages close proximity to Hyster-Yale a material handling company in Greenville, NC; Cummins Engines located in Rocky Mount, NC; and Triangle Tire's an emerging 800-worker operation and North Carolina's emerging leadership in next-generation vehicle research, testing and development.
- **Defense and Homeland Security Contracting**, including military-aviation component manufacturing, defense aircraft assembly and testing, and related services. The strategy includes private-sector providers of defense, homeland security, law enforcement and first-responder products, services, training and planning solutions.
- **Agribusiness and Food Science**, including food and beverage safety research and development, equipment manufacturing, advanced agribusiness inputs and services, and globally-oriented food and beverage processing and distribution which produces 30 percent of the state's agribusiness output from the 14 counties surrounding the industrial park.
- **Government Operations**. As a government asset, the NCGTP can increase its support of state and federal public safety interests by serving as a regional base for U.S. and North Carolina disaster preparation, training, and response and recovery functions. While not adding to the local business-property tax-base, such activities generate measurable economic and fiscal impact through facility construction and maintenance, residential and commercial development, and consumer spending.

A carefully targeted cluster approach concentrates NCGTP market outreach around the strategic physical, environmental, workforce and partnership development needs of growth-oriented segments of high-impact industries. NCGTP will leverage expertise and leadership from industry, education and government by establishing advisory councils to energize and guide the development of each targeted cluster.

## Commitment Forward

The NCGTP's vast multi-modal transportation network and inventory of nearly one million square feet of office, industrial, commercial and warehouse space are crucial to its appeal as a ready-to-go business destination. But those hard assets must be adequately maintained in order to be effectively leveraged. NCGTP buildings, for example, range in age from seven to 40 years old, and many now suffer from deferred maintenance due to lack of dedicated funding. The same is true for mission-critical NCGTP equipment, including airfield support systems that are now beyond their intended useful life. **Immediate needs for capital repairs and upgrades are needed to restore state assets to a state of good repair; these investments that are central to the NCGTP's continued viability as an economic development asset.** See *NCGTP Strategic Plan Table 2. Capital Investment Plan* on page 37.

Consistent and reliable operational funding is also critical to the GTP's ability to adequately harness its game-changing economic potential. The park and its management organization currently rely on a modest professional staff armed with meager resources for internal communication, partnership outreach, stakeholder networking, market intelligence and global promotion. **Additional annual investment in staffing and resources are needed to support stable NCGTP operations over the coming five years.** See *NCGTP Strategic Plan Table 3. NCGTP Additional Operating and Maintenance Resource Needs (5-Year Projection)* on page 39.

By renewing North Carolina's commitment to the Global TransPark, the state will demonstrate its determination to reverse the erosion of rural prosperity and highlight its readiness for 21<sup>st</sup> century job-creation in an era of rapid, relentless and unpredictable change in the global economic landscape.

# # #

# Business Plan 2018

This page left intentionally blank

# Contents

<b>Executive Summary .....</b>	<b>E-1</b>
<b>1 Opportunity Overview .....</b>	<b>1</b>
Global TransPark Mission .....	3
Current NCGTP Users.....	3
Business Plan Objectives .....	4
NCGTP Achievements.....	4
SWOT Analysis.....	5
Cluster Approach.....	6
The NCGTP Region: Quad-East .....	7
Planning Horizons.....	7
<b>2 Industry Targets &amp; Approach .....</b>	<b>9</b>
Workforce.....	9
Economic Trends .....	11
Industry Attraction: Best Practices for Multimodal Site Development .....	15
Top Industry Targets.....	17
Aerospace, Aviation and Automotive Cluster .....	18
Defense Cluster .....	21
Agribusiness & Food Science Cluster .....	23
Government Cluster.....	25
<b>3 Marketing .....</b>	<b>26</b>
Stakeholder Engagement: Our Process.....	26
State and Regional Economic Development (Recruitment) .....	27
Marketing and Economic Development Action Plan.....	27
<b>4 Capital Assets.....</b>	<b>29</b>
Land and Site Improvements .....	29
Utilities .....	32
Airfield and Supporting Facilities.....	33
Highway Access.....	34
Rail Access.....	35
Port Access.....	36
<b>5 Investment.....</b>	<b>37</b>
Capital Investment Needs.....	37
Consistent and Reliable Funding for NCGTP Operations.....	38
GTP Foundation.....	39
<b>Action Plan to Realize Strategic Plan Objectives.....</b>	<b>41</b>

## APPENDIX

Appendix A – NCGTP Strategic Plan Approach
Appendix B – Stakeholder Engagement
Appendix C – Industry Analysis
Appendix D – Site Attraction
Appendix E – Marketing and Economic Development Action Plan
Appendix F – NCGTP Organization, Staffing and Financial Resources
Appendix G – Asset Maintenance
Appendix H – Supportive Transportation Projects
Appendix I – Airfield Constraints
Appendix J – Utilities

## List of Figures

<b>Figure 1:</b> Aerospace Activities at NCGTP.....	1
<b>Figure 2:</b> NCGTP Site.....	2
<b>Figure 3:</b> Spirit AeroSystems Manufacturing Operation at NCGTP Employs People from 21 North Carolina Counties .....	3
<b>Figure 4:</b> NCGTP Cluster Approach.....	6
<b>Figure 5:</b> NCGTP Region: Quad-East.....	7
<b>Figure 6:</b> 2017 Working Age Population and Growth Trend in NCGTP Region (ages 25-64) .....	9
<b>Figure 7:</b> Aircraft Fuselage Manufacturing by Spirit AeroSystems at Their Existing NCGTP Facility .....	11
<b>Figure 8:</b> Industry Cluster Analysis .....	12
<b>Figure 9:</b> Factors Affecting Cluster Attraction to NCGTP.....	16
<b>Figure 10:</b> NCGTP Cluster Approach.....	17
<b>Figure 11:</b> Major Aviation and Automotive Assembly Plants near NCGTP.....	18
<b>Figure 12:</b> Locations of HondaJet Suppliers. ....	19
<b>Figure 13:</b> NCGTP Air Connectivity .....	20
<b>Figure 14:</b> Military Facilities in North Carolina .....	21
<b>Figure 15:</b> Sweet Potato Production in NCGTP Region .....	23
<b>Figure 16:</b> NCGTP Transportation Network.....	29
<b>Figure 17:</b> Main Entrance to Spirit AeroSystems Composite Center of Excellence / NCGTP Administration.....	30
<b>Figure 18:</b> Auditorium and dining space at Spirit AeroSystems Composite Center of Excellence / NCGTP Administration .....	30
<b>Figure 19:</b> Taxiway, air control tower, and terminal building at runway.....	33
<b>Figure 20:</b> Regional Highway Network, including STIP Projects .....	34

## List of Tables

<b>Table 1:</b> NCGTP Available Utility Service.....	32
<b>Table 2:</b> Capital Investment Plan .....	37
<b>Table 3:</b> NCGTP Additional Operational and Maintenance Resource Needs (5-Year Projection) .....	39



## List of Acronyms and Abbreviations

3PL	Third-Party Logistics
4PL	Fourth-Party Logistics
ALC	Aviation Logistics Center
ARFF	Aircraft Rescue and Fire Fighting
DHMRI	David M. Murdock Research Institute
DOD	US Department of Defense
ECU	Eastern Carolina University
EDPNC	Economic Development Partnership of North Carolina
EPA	Environmental Protection Agency
FAA	Federal Aviation Administration
FEMA	Federal Emergency Management Agency
FTZ	Foreign Trade Zone
G&O	Gulf & Ohio Railroad
IT	information technology
LCC	Lenoir Community College
NC	North Carolina
NCDEM	North Carolina Division of Emergency Management
NCDOT	North Carolina Department of Transportation
NCGTP	North Carolina Global TransPark
NC Ports	North Carolina State Ports Authority
NCRR	North Carolina Railroad
NS	Norfolk Southern Railway Corporation
MGD	million gallons per day
MRO	Maintenance, Repair, and Overhaul
mVA	mega Volt Amp
R&D	research and development
RGLP	Rickenbacker Global Logistics Park
RPO	Rural Planning Organization
SCSPA	South Carolina State Ports Authority
SOGR	state of good repair
STEM	science, technology, engineering, and math
STI	Strategic Transportation Investment
STIP	State Transportation Improvement Program
SWOT	strengths, weaknesses, opportunities, and threats
US Army Corps	United States Army Corps of Engineers

This page left intentionally blank

# 1 Opportunity Overview

The North Carolina Global TransPark Authority (NCGTP) was established by the General Assembly in 1991 as an independent government agency located within the North Carolina Department of Transportation (NCDOT), charged with the development of an industrial facility built around a multimodal transportation network that included an airport capable of handling international cargo flights. This plan is specific to NCGTP. In 1993, the General Assembly also created the Global TransPark Development Commission, which was charged with industrial product development and economic development marketing with a 12-county (later 13) region surrounding NCGTP; the Development Commission was later eliminated by the legislature. The GTP Foundation was also established to leverage private funding in support of the NCGTP mission, which effort continues today.

Upon the completion of the initial transfer of property to NCGTP, its designation as a magnet site within the Foreign Trade Zone (FTZ), and acquisition of United States Army Corps of Engineers (US Army Corps) Section 404 permit for site development within 5,800 acres in 1998, NCGTP attracted its first tenants which valued its uncongested runway access. Today, NCGTP has expanded and enhanced its physical plant to include 2,500 acres of land, 11,500-foot long runway, nearly one million square feet of leasable space, an on-site advanced manufacturing training center, access to multilane highways, on-site rail spur and transload facility serviced by the Gulf & Ohio (G&O) Railroad and providing connection to Norfolk Southern Railway.

NCGTP provides a unique combination of attributes with its ready access to aviation, rail and highway infrastructure at a single facility. Its close proximity to military installations, two state ports, major interstate and rail thoroughfares and its central location in Eastern North Carolina make it a strategic asset at both the state and national level. As a government entity, NCGTP is exempt from property tax and has exclusive zoning jurisdiction over the industrial complex and additional zoning jurisdiction within six miles of the complex boundaries. North Carolina General Statutes Chapter 63-A defines the powers granted by the State Legislature to NCGTP to execute its mission.



**Figure 1:** Aerospace Activities at NCGTP

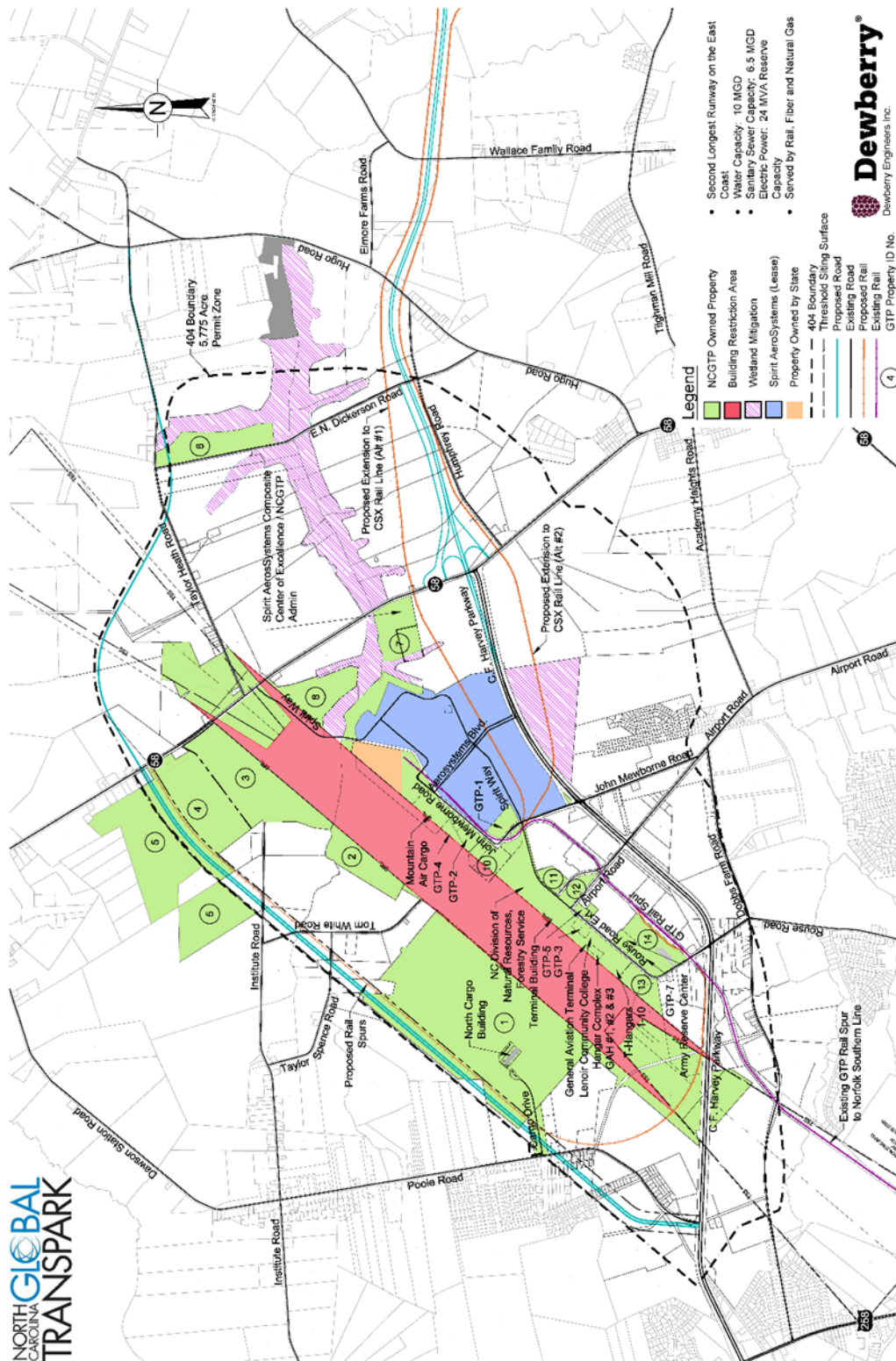


Figure 2: NCGTP Site

## Global TransPark Mission

The mission of the NCGTP is to enhance the economic well-being of North Carolinians by providing multimodal capabilities for global commerce. This mission is accomplished through:

- Dedicated focus on the requirements of its customers, both existing and new;
- Business-oriented management to realize opportunities of regional economic value for Eastern North Carolina;
- Workforce training and development that supports the retention and attraction of well-paying jobs; and
- Modern, well-maintained facilities and equipment capable of generating economic opportunity for generations to come.

NCGTP success will be measured against achievement of these goals.

## Current NCGTP Users

NCGTP benefits from the presence of established businesses that value its location and access to a multimodal transportation network. **The companies at North Carolina Global TransPark draw employees from 21 surrounding counties and represent active and growing industry clusters of aerospace and aviation, advanced manufacturing, logistics, and government services.**

### Aerospace and Aviation

*Spirit AeroSystems:* Manufacturing of aircraft fuselages and wings

*Henley Aviation:* Flight instruction

*Kinston Jet Center:* Fixed Based Operator (FBO)

*Mountain Air Cargo, Inc.:* Express cargo delivery and FedEx air fleet maintenance

*Fly Exclusive:* On-demand charter service, operating 31 aircraft

### Logistics

*CrateTech:* Full service packing and crating solutions

*DB Schenker:* Integrated transportation and logistics

### Advanced Manufacturing

*MJE Telestructure:* Electronic components

### Government Services

*NCDOT:* Regional highway construction & maintenance

*North Carolina Division of Emergency Management:*

Disaster response, recovery and mitigation assistance

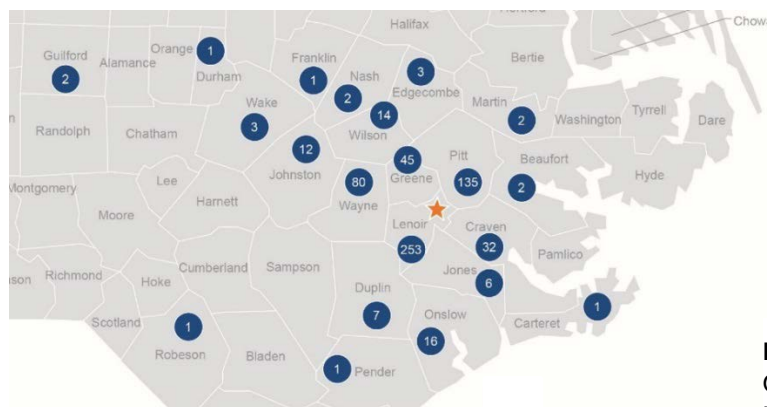
*North Carolina Forest Service:* Air operation for firefighting, training and education

*Lenoir County Sheriff's Office:* Detectives field office

### Workforce Training

*Lenoir Community College:* Education and Workforce Training, including the Advanced Manufacturing Academy and on-site composite training

*Spirit AeroSystems Composite Training Center*



**“NCGTP Employs People from 21 North Carolina Counties”**

Key  
★ NCGTP  
● Employee Address by County

**Figure 3:** Spirit AeroSystems Manufacturing Operation at NCGTP Employs People from 21 North Carolina Counties



## Business Plan Objectives

The NCGTP Business Plan seeks to maximize the effective use, economic benefits, and job-creating opportunities at the Global TransPark. This will be achieved through a multi-pronged approach to:

- **Enhance existing NCGTP assets**, including multimodal transportation, on-site utilities and roadway infrastructure, shovel-ready sites, and 22-county foreign trade zone (FTZ);
- **Build upon current uses, without being constrained by them**, so land uses within and adjacent to the NCGTP site can be optimized;
- **Draw from regional strengths** to focus staff and budget on target industries that value the resources available in proximity to NCGTP;
- **Identify and plan for the needs of targeted opportunities** so that strategic actions can be taken to improve NCGTP's physical, operational, and regulatory conditions, available workforce, and institutional relationships;
- **Implement a proactive marketing plan** to effectively attract targeted site users; and
- **Aim for the future**; today's actions will lay the groundwork for tomorrow's opportunities.

## NCGTP Achievements

The NCGTP is not starting from scratch. Recent achievements provide momentum for the industrial park to achieve future objectives. Of particular note, NCGTP has realized the following goals in recent years:

- ✓ **Environmental Permit** NCGTP has recently renewed its US Army Corps EPA Section 404 clean water permit for another 10 years, encompassing a total of 5800 acres. This includes \$20 million in wetland mitigation credits for industry use and expansion.
- ✓ **Runway Resurfacing** NCGTP has undertaken a major, \$8 million rehabilitation of its runway, scheduled for completion July 2018.
- ✓ **Restructured Debt** During Fiscal Year 2014, NCGTP completed the restructuring of its debt, significantly reducing total liabilities and putting the NCGTP in a positive cash flow position over the last two fiscal years.
- ✓ **Jobs** NCGTP supports 1,420 jobs on site, with employees attracted from 21 surrounding counties, and beyond.
- ✓ **Spirit AeroSystems Expansion** In December 2017, Spirit AeroSystems, who established its original manufacturing operation at NCGTP in 2010, announced plans to expand its operation to include an additional investment of \$55.7 million over the next five years.
- ✓ **Rail and Transload Facility** With support from NCDOT, NCGTP has constructed a rail spur connection to the North Carolina Railroad (NCRR) corridor operated by Norfolk Southern Railway (NS) and transload ramp; the Gulf & Ohio Railroad provides on-site services to support transfer of goods between truck and rail.
- ✓ **CF Harvey Parkway Extension** NCDOT is advancing the project development for NC 148, which will improve regional connectivity between US 70, NC 58, NC 148 and NC 11 and increase access to NCGTP from commercial centers and business located along NC 11. Work is projected to be completed in 2020.
- ✓ **Emergency Management Headquarters** As home to North Carolina Forestry Service, Highway Division, and Division of Emergency Management (NCDem), NCGTP has served as the Eastern North Carolina coordinating center for response to recent hurricanes and major storm events.
- ✓ **Website** On March 1, 2018, NCGTP launched its new website, which provides greater information to site selectors and industries seeking to locate at NCGTP
- ✓ **"Super Park" Designation** Site selection consultant McCallum Sweeney has recommended that NCGTP pursue certification as a Super Park, a designation for facilities of more than 500 acres that have at least one site of 100 contiguous, developable acres

## SWOT Analysis

Through active engagement of stakeholders as well as critical analysis of NCGTP market position, the Business Plan development included evaluation of NCGTP strengths, weaknesses, opportunities and threats. Important findings of the SWOT analysis include:

### Strengths

- The NCGTP **airfield and 11,500-ft long runway are unique assets** that should be exploited to attract industries that treasure these resources;
- NCGTP's **location near six military bases** is an opportunity to support defense-related industries and also to attract exiting military workforce and their families;
- NCGTP sits in the center of one of North Carolina's **strongest agribusiness regions**, which produces 30 percent of the state's agribusiness output from the 14 counties surrounding the industrial park; and
- Recent ten-year renewal of the **US Army Corps 404 permit**, which covers the NCGTP multimodal complex and surrounding properties totaling 5800 acres is a valuable asset to attract users to the developable properties at NCGTP.

### Weaknesses

- The NCGTP image and ability to effectively realize its mission has been challenged by **lack of clarity of vision and purpose**, inconsistent funding, **lack of focused marketing resources**, and leadership and staff turnover;
- The NCGTP landside transportation network is evolving -- recently completed highway and rail projects and additional highway improvements underway have significantly improved connectivity between NCGTP and regional supply chains; however, NCGTP **rail access and port access** are weakened by unavailability of competitive Class I rail service to and from the site; and
- NCGTP site improvements and buildings have suffered from **deferred maintenance** due to lack of adequate funding.

### Opportunities

- The Composite Training Center and NCGTP partnership with Lenoir Community College offers a good model for **expanded partnerships with regional colleges and universities to support workforce development** in advanced manufacturing and composite training;
- NCGTP has not realized the potential value of its location within **Foreign Trade Zone (FTZ) 214**; and
- The region has not been successful in engaging the potential of **exiting military personnel** to meet its workforce needs – 2016 veteran unemployment in Eastern North Carolina was 8.7 percent.

### Threats to Success

- Increased **urbanization** is driving down the working age population in Eastern North Carolina, threatening the availability of a talented workforce required to attract businesses to NCGTP;
- NCGTP **ability to be nimble** – including quick response and commitment to private sector site location opportunities – is challenged by State legislative and administrative policies and procedures; and
- Lack of coordination in **lead generation process** for site attraction.

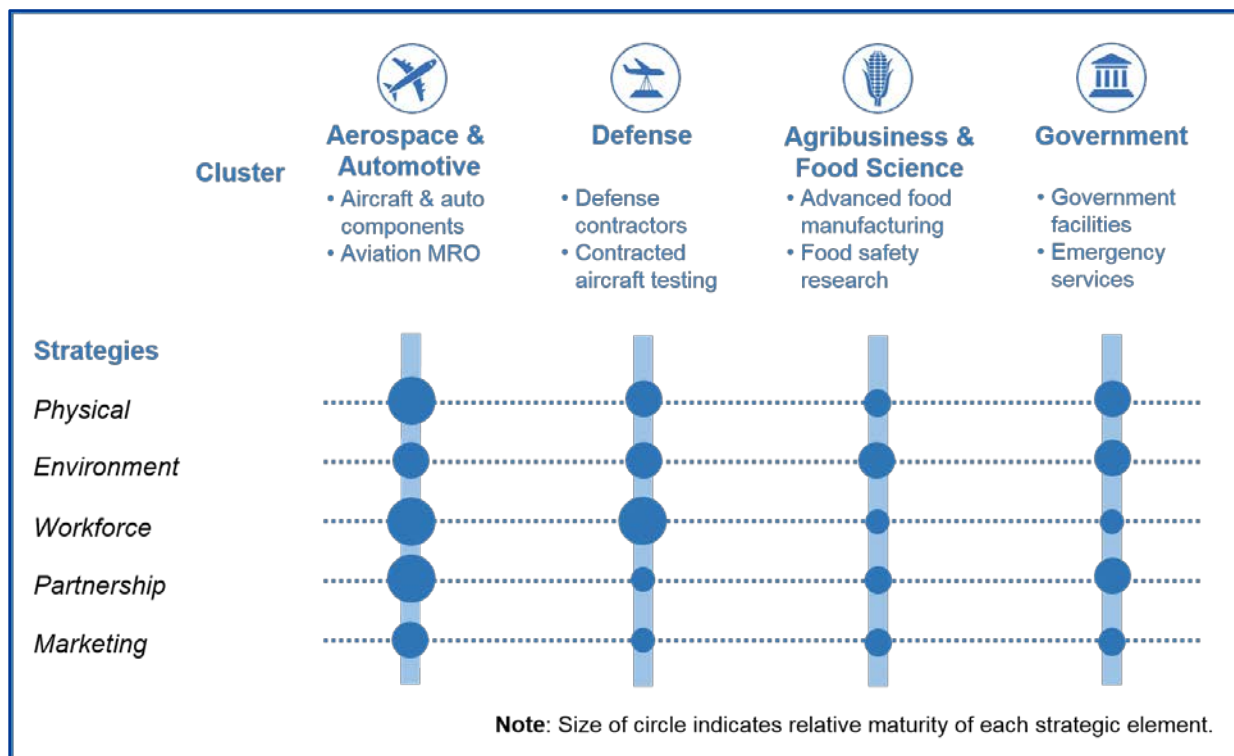
More information on SWOT findings are provided in Appendix B.

## Cluster Approach

Business Plan strategies and supporting tactics are built around a cluster strategy that focuses on targeted industry groups for which the unique NCGTP assets are attractive. These target clusters include: Aerospace & Aviation, Defense, Agribusiness & Food Science, and Government Services. Strategic actions are defined to enhance the NCGTP's ability to attract businesses in these clusters and expand job opportunities within each of those industry clusters. The action plan strategies are aimed to address the requirements of each targeted cluster.

The NCGTP cluster approach focuses Business Plan strategies on specific areas to attract, promote, and enhance each targeted cluster:

- **Physical:** strategies that provide or enhance the physical assets needed by businesses within each cluster, including on-site facilities and supportive regional infrastructure (transportation, utilities)
- **Environment:** strategies that connect target clusters to complementary businesses, services, environment, and non-physical features that support the objectives of cluster businesses and stimulate overall cluster growth (e.g. FTZ, logistics support, regulatory environment, surrounding industries)
- **Workforce:** strategies that attract, develop, and support the talent pool to support the cluster, stimulate opportunities and career pathways
- **Partnership:** strategies that bring together cluster businesses with supporting public and academic institutions to directly support the cluster needs, including incubation of new skills or services
- **Marketing:** strategies to deliver a message that directly addresses cluster interests, to attract new users to NCGTP, and to promote overall cluster growth

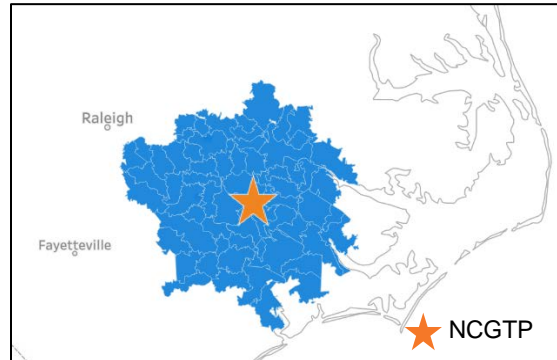


**Figure 4:** NCGTP Cluster Approach



## The NCGTP Region: Quad-East

The NCGTP is an employment growth center for the broader region. By providing higher wage job opportunities, NCGTP can attract workforce within a 60-minute drive time radius. This area of attraction comprises all or a portion of 14 counties: Beaufort, Craven, Duplin, Edgecombe, Greene, Johnston, Jones, Lenoir, Nash, Onslow, Pamlico, Pitt, Wayne, and Wilson. Notwithstanding this designation, NCGTP on-site employment data indicates that a share of today's workforce is attracted to NCGTP jobs from 21 counties in Eastern and Central Northern Carolina, and beyond.



**Figure 5:** NCGTP Region: Quad-East

NCGTP's targeted cluster approach builds upon the Quad-East concept, which seeks to propel economic growth in Eastern North Carolina by improving interconnectivity to allow the region to take better advantage of shared military, academic, medical, agribusiness, and manufacturing resources.

## Planning Horizons

Proposed action items within the Business Plan are targeted toward three planning horizons: near-term, medium-term, and long-term as described below.

### Near-term: "Ground Control"

In the near-term, NCGTP Business Plan strategies focus on activities required to reestablish solid footing that will better prepare NCGTP to capture the opportunities to come. Planning horizon for near-term activities is one to two years. **The vast majority of Business Plan actions fall within the near-term planning horizon.**

Specific strategies and tactics identified for this timeframe will:

- Firmly establish and communicate the NCGTP mission and vision;
- Protect the State's prior investments by returning NCGTP facilities to a state of good repair;
- Secure resources – both internal and external – that will allow NCGTP to ably respond to and capture opportunities;
- Develop, reaffirm, and formalize institutional relationships and cooperative agreements with partners who are critical to NCGTP success;
- Implement supporting management processes and systems; and
- Establish NCGTP marketplace position/visibility, with a focus that has been honed to match NCGTP assets.

**Near-term Outcome:** At the end of two years, NCGTP will have in place the resources, funding, and systems to realize its mission. Upon completion of near-term strategies, it is recommended that NCGTP perform an assessment of milestones achieved, conduct renewed stakeholder outreach, and refine its industry focus if necessary to match resources to opportunities.

## Medium-term: “Lift Off”

Medium-term strategies and tactics, focused on a planning horizon of two to five years, target the implementation of best practices for site attraction. During this planning horizon, NCGTP will seek to establish and maintain operational stability, with resources in place to realize medium- and long-term objectives. During this period, NCGTP will build from the strong base established by near-term activities to “work the plan” through:

- Fully-engaged pursuit and marketing to targeted clusters
- Continued expansion of marketing influence and impact
- Maintenance of assets and resources in ready state to capture opportunities, and
- Advancement of strategic investments, both on- and off-site to support specific targeted users

**Medium-term Outcome:** Over the five-year medium-term horizon, NCGTP will have achieved organizational stability and stable growth. At the end of five years, it is recommended that NCGTP conduct a comprehensive review and update of its Business Plan, to re-evaluate successes and challenges, and to confirm or revise long-term goals. Active engagement of NCGTP stakeholders will be an important element of this process.

## Long-term: “Aim for the Horizon”

Business Plan strategies also include “stretch” goals that look out ten or more years. Long-term action items seek to position NCGTP well into the future through:

- Investment in resources for tomorrow (infrastructure, workforce)
- Acting as a change maker in the economy of Eastern North Carolina by supporting economic growth, job creation, land use planning, and quality of life beyond the boundaries of the business park.

**Long-term Outcome:** Long-term strategies are transformational, aimed to use NCGTP as a state-level resource to reverse economic trends that are negatively affecting the rural population in Eastern North Carolina. They will be reviewed and refined as part of the Business Plan update in five years. Certain items are likely to move forward in the future in response to changed market conditions or NCGTP position.

### Key Activities:

#### Near-Term (1-2 years)

- ✓ Perform due diligence for site certifications
- ✓ Align NCGTP with site selection companies
- ✓ Work more closely with NC Ports, EDPNC, and regional economic development interests to generate leads
- ✓ Establish advisory councils to drive opportunities within targeted clusters
- ✓ Bring NCGTP assets to state of good repair
- ✓ Optimize rail accessibility
- ✓ Activate on-site Foreign Trade Zone operations
- ✓ Restructure GTP Foundation
- ✓ Establish and grow educational partnerships

#### Medium-Term (2-5 years)

- ✓ Option land around NCGTP
- ✓ Collaborate with regional partners on land use and zoning around NCGTP

#### Long-Term (10+ years)

- ✓ Provide road and rail access to north side parcels
- ✓ Provide secondary Class I railroad access to NCGTP users

*The Georgia Ports Authority* made transformational investments through collaboration with the Savannah Economic Development Authority, Georgia Department of Economic Development, Quick Start, Savannah Technical College, and other local and community officials, to develop a port-centric logistics cluster that now accounts for the one of largest in the United States for import retail distribution centers with more than 5 million square feet of distribution facilities. The cluster leverages the availability of land, short drayage distances to the international seaport, effective use of container assets, availability of intermodal rail service, and proximity to producers and consumers to attract major shippers, distribution centers, and logistics service providers. The establishment of the Georgia Center of Innovation for Logistics further fuels statewide logistics industry growth and global competitiveness.

Supported by this logistics cluster, the Port of Savannah has grown to be the second largest container port on the U.S. east coast.



## 2 Industry Targets & Approach

Industries attracted to NCGTP will value its unique assets over other sites and locations that are competing to attract those same businesses. For greatest success, NCGTP must identify those industries where a differentiated competitive advantage can be achieved. Factors affecting the competitive position of any location includes some combination of:

- State and regional business climate including costs and regulatory issues;
- Depth of workforce talent;
- Connective infrastructure (roads, air service, water & sewer, energy and broadband);
- Currently available buildings and shovel-ready sites; and
- Quality of life factors that appeal to current and potential workers.

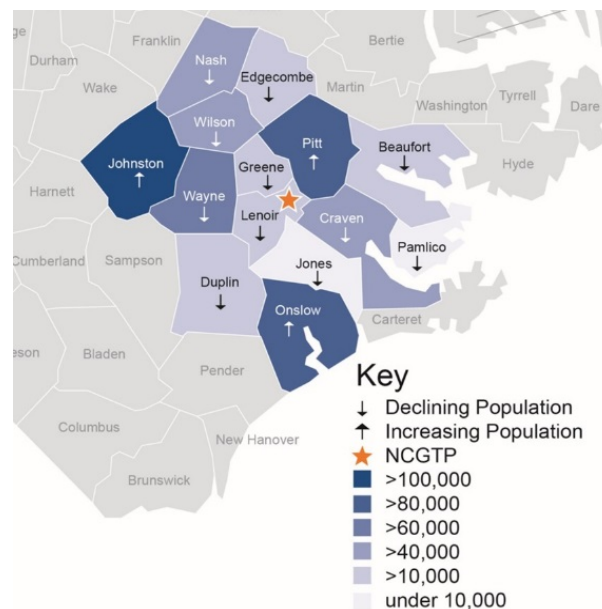


**Workforce availability is the top consideration for many companies evaluating a new investment.**

Just over 900,000 people live within a 60-minute drive-time of the NCGTP site. The population has grown by 2.3 percent over the past 10 years, less than half the growth rate of North Carolina and well below the growth rate of the more urbanized parts of the state. The growth rate for the counties surrounding NCGTP has also slowed considerably over recent years and 20-year demographic projections anticipate overall regional population loss. The working age population is similarly projected to decrease. Both population and job growth in North Carolina's 80 rural counties has significantly lagged behind the growth in the 20 more urbanized counties in every industry sector. In the NCGTP area, only Pitt County is designated urban and Johnston County is designated suburban.

The US military supports 578,000 jobs in North Carolina, with more than two thirds of those jobs residing in the private sector. 78,000 active duty personnel are projected to separate from the military from 2015 to 2018, many with strong skillsets in professional, scientific and technical services. 7,500 military personnel based in the 14 counties surrounding NCGTP exited the military over the last five years.

North Carolina is a right-to-work state, precluding employers from requiring their workers to join a labor organization. This, among other factors contributing to North Carolina's business-friendly environment, is attractive to industries seeking site locations.



**Figure 6:** 2017 Working Age Population and Growth Trend in NCGTP Region (ages 25-64)

## Customized Training

Declining regional population and urbanization that attracts businesses to metropolitan centers present a challenge to NCGTP's ability to attract new job-creating industries to Eastern North Carolina. Through strong workforce training programs, however, this is also an area where NCGTP can have the greatest long-term positive economic impact on the region. By partnering with the state's network of colleges and universities, NCGTP can support the development of a strong regional talent pool and customize workforce training to match the needs of specific targets. The Spirit AeroSystems Composite Center of Excellence, which is home to workforce training programs developed specifically to meet the needs of Spirit AeroSystems (Spirit), exemplifies the value of this partnership approach. In addition to using the facility to train its onsite personnel, Spirit has also used the Center to train employees based at its Wichita KS headquarters.

The Composite Center, which includes a 2,950-sf composites training lab operated by Lenoir Community College, is available for use by others interested in hands-on training customized to the aerospace, marine, and wind energy industries. Through partnerships with additional institutions with a strong connection to traded industries, NCGTP can build upon this model to make a lasting positive impact on the region's workforce development.

### Potential Educational Partners for Customized Workforce Training

*Lenoir Community College* – advanced machining, aerospace manufacturing readiness, aviation management, global logistics technology

*Craven Community College* – aerospace

*Wayne Community College* – aerospace

*Pitt Community College* – manufacturing

*East Carolina University* – engineering and engineering science, logistics

*NC State University* – aerospace engineering, materials science engineering, Biotech center, agricultural institute

*North Carolina A&T University* – agribusiness and agriscience; transportation and supply chain management

*Mount Olive University* – food science

## Capturing Exiting Military Workforce

North Carolina currently has the fourth largest military population in the US. The North Carolina Department of Commerce reports that 78,000 active duty personnel will separate from the military in North Carolina from 2015 to 2018. With several bases in close proximity, including Fort Bragg, Camp Lejeune Marine Corps Base, Cherry Point Marine Corps Air Station and Naval Depot, New River Marine Corps Air Station, and Seymour Johnson Air Force Base, NCGTP is in a good position to attract this skilled personnel.

As of 2014, 114,000 veterans reside in North Carolina's Southeast region, of which more than 30 percent are below the age of 50. While overall veteran unemployment in North Carolina is low (3.1 percent as of January 2018), veteran unemployment in Eastern North Carolina has been significantly higher (8.7 percent as of January 2016)

The exiting military workforce and existing veterans in the NCGTP region represent a strong, skilled talent pool upon which NCGTP can draw. To date, however, connection with military bases to capture this workforce has been inconsistent with limited success. A more focused outreach to military and veterans organizations will tap the potential of this workforce.

### Actions to Advance Workforce Training Needs:

- Collaborate with educational institutions to develop a skilled workforce that is customized to the needs of targeted industries
- Capture exiting Military workforce and veterans





## Economic Trends

National and global trends that are likely to impact the future of NCGTP include:

- North Carolina is consistently ranked among the best business, tax, regulatory and legal climates in the country.
- Agribusiness continues to be a top contributor to the North Carolina economy, with prime crop and animal production sites located in the counties surrounding NCGTP.
- North Carolina has witnessed the decline of its traditional manufacturing industries, yet the state's manufacturing output continues to increase and there is growth in advanced industries.
- North Carolina has risen 14 spots to become the fourth most-attractive state in the nation for aerospace manufacturing, according to the annual PwC *2017 Aerospace Manufacturing Attractiveness Rankings*.
- The education and skills of the residents in the NCGTP region will be the most important competitive factor for future economic success as additional skills and education are demanded by industry.
- Technological trends are disruptive but are also creating new opportunities.

## Existing Industry Clusters

Traded clusters are groupings of industries that serve markets outside of a region and contain a supply chain that supports an industry such as suppliers, infrastructure, and machinery. Traded clusters often account for less than 40 percent of a region's employment, however, they are usually responsible for 50 percent or more of a region's income and innovation.

In 2017, nearly 75,000 workers in the NCGTP region were employed in traded (freight-dependent) industries. This accounts for 22 percent of the total regional workforce. Wages within a traded cluster are, on average, \$14,000 higher than other jobs in the region; however, regional decline in traded industry jobs has been twice as severe than overall regional employment loss over the last decade. In the next ten years, the outlook for traded clusters is predicted to grow at a moderate pace of ten percent.

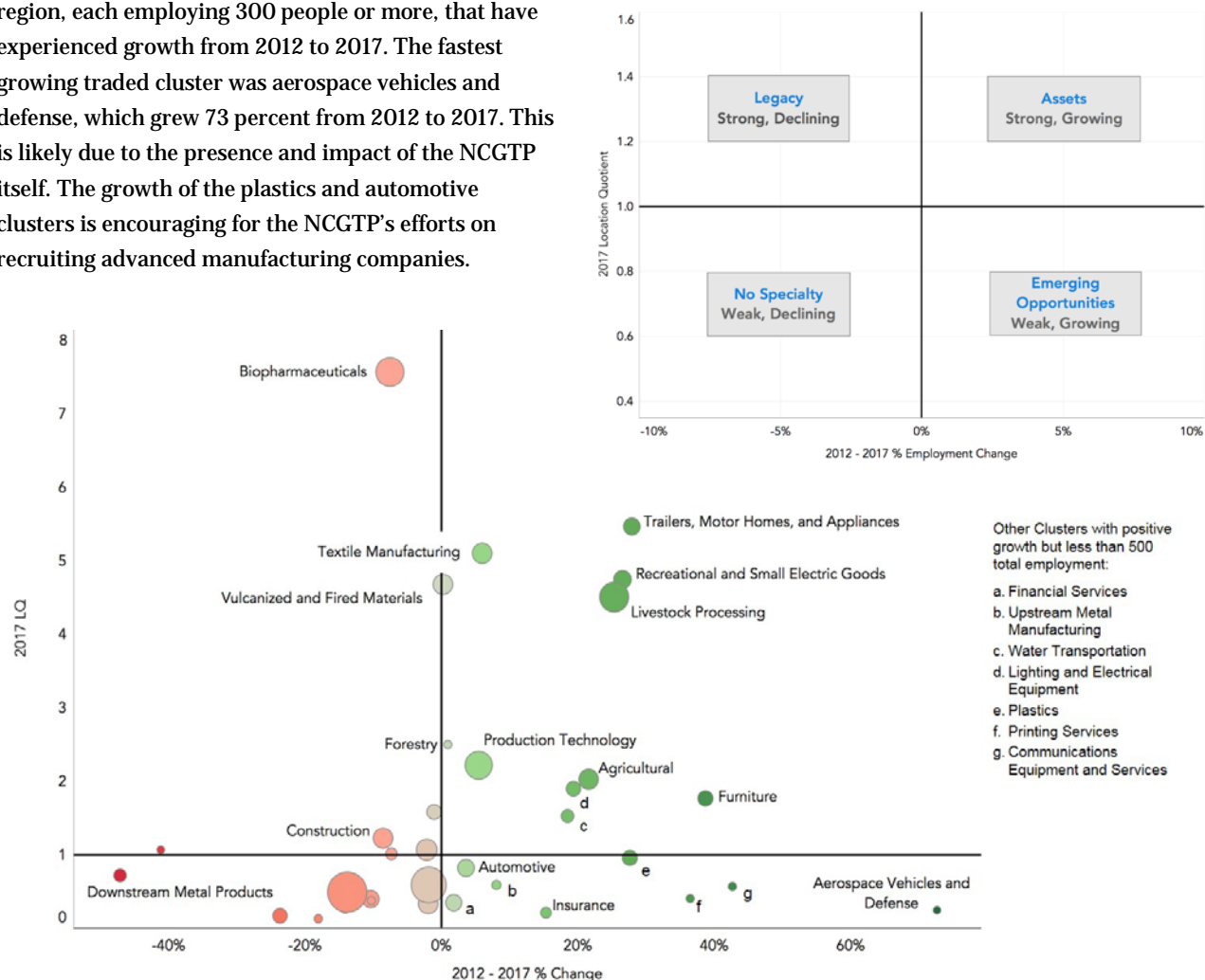


**Figure 7:** Aircraft Fuselage Manufacturing by Spirit AeroSystems at Their Existing NCGTP Facility

Evaluation of the relative strength of various industries, both for relative strength in the region and for growth trends, reveals certain traded sectors that offer strong opportunity at NCGTP due to regional presence and growth potential. For industry clusters present in the NCGTP Quad-East region, the cluster matrix shown in **Figure 8** plots the regional strength of various industries (vertical axis), against the five-year growth trends of each industry (horizontal access). Relative regional strength is expressed as Location Quotient (LQ), for which a value of 1.0 indicates an industry is equally present in the NCGTP as it is across the nation as a whole; LQ below 1.0 indicates relative underrepresentation or weakness of the cluster in the Quad-East region.

The top left quadrant (Legacy) includes mature industries that have strong regional presence but are declining in workforce. Interestingly, this includes Biopharmaceuticals, which is one of the strongest regional clusters but appears to have become saturated. Industries in the top right quadrant (Assets), including Agribusiness and Production Technology clusters, are both strongly represented and growing. Traded industries in the bottom right quadrant (Emerging Opportunities), with LQ below 1.0 but experiencing strong growth, are new opportunities for the region.

Eight of the 51 clusters in the region registered as emerging clusters. There are 17 traded clusters in the NCGTP region, each employing 300 people or more, that have experienced growth from 2012 to 2017. The fastest growing traded cluster was aerospace vehicles and defense, which grew 73 percent from 2012 to 2017. This is likely due to the presence and impact of the NCGTP itself. The growth of the plastics and automotive clusters is encouraging for the NCGTP's efforts on recruiting advanced manufacturing companies.



**Figure 8: Industry Cluster Analysis**

Note: The size of each cluster bubble is determined by the size of 2017 employment levels. The color of each cluster is determined by the employment growth from 2012 to 2017.

## Advanced Industry Analysis

Another approach to identify potential marketing targets for the NCGTP is to examine the presence and growth of advanced industries. Advanced industries, as defined by the Brookings Institute<sup>1</sup>, constitute 50 technology-based industries characterized by deep involvement with research and development (R&D) and science, technology, engineering, and math (STEM) workers. Over the past 10 years some of the advanced industries that have shown the greatest growth are:

- Management, Scientific, and Technical Consulting Service
- Motor Vehicle Parts Manufacturing
- Aerospace Product and Parts Manufacturing

## Quality of Life

Quality of life factors are an important contributor to industry attraction. Companies seek locations that offer not only a positive business climate, but also feature the resources and amenities that will allow them to attract good talent. Moderate climate, low cost of living and available housing, outdoor recreational opportunities, strong educational system (K-12 and beyond), arts and culture amenities, and access to health care are all important factors that contribute to quality of life.

**Education:** Eastern North Carolina is home to more than two dozen of the state's 58 community colleges as well as five of North Carolina's 16 public universities. East Carolina University, North Carolina State University and the University of North Carolina at Chapel Hill – three of the world's premier educational and research institutions are nearby.

**Health Care:** More than a dozen systems in Eastern North Carolina, including UNC Lenoir Health Care, Vidant Health and CarolinaEast Health System, provide residents with a network of state-of-the-art health care close to home that includes preventative services as well as specialized care in areas such as cardiology, oncology and radiology.

**Recreational Attractions & Culture:** Recreational amenities and attractions in close proximity to NCGTP are a championship golf course, historic Grainger Stadium, world-class eateries in central Kinston along with shopping and dining on the New Bern waterfront, and nearby beaches.

**Military Facilities:** For veterans, access to amenities offered at and near Eastern North Carolina's many military facilities is an important feature of the NCGTP region.

*Advanced industries* engage technology research and development (R&D) and STEM (science, technology, engineering, and math) workers. These dynamic industries are an important component to supporting innovative and sustainable economic growth.

Emerging opportunities of interest to NCGTP include:

- ✓ Drone technology
- ✓ Autonomous vehicle technology and testing



### Quality of Life



<sup>1</sup> <https://www.brookings.edu/research/americas-advanced-industries-what-they-are-where-they-are-and-why-they-matter/>

## Supply Chain Access: Logistics Services

Clusters targeted for location at NCGTP are primarily in traded, or freight-dependent, industries. These users will be attracted to locations that offer infrastructure and services that will facilitate supply chain connection, both to suppliers and to customers. This may include regional transportation connections as well as on-site capabilities and services to support the packaging, storage, handling distribution, import, and export of goods.

### *Actions to Advance Logistics Needs:*

- Activate NCGTP magnet site status within FTZ 214.
- Allow NCGTP to serve as a global point of entry and exit by enhancing on-site logistics support services, such as US Customs, FTZ services, on-site third-party logistics (3PL) or fourth-party logistics (4PL).
- Enhance NCGTP capabilities to support on-site distribution and handling needs of target industries, such as temperature-controlled storage, container unloading and reloading, and enhanced truck-rail transload capabilities.
- Attract value-added contracted logistics to NCGTP such as E-Commerce fulfillment or return centers and contracted repair centers.



### *Rickenbacker Global Logistics Park*

The Rickenbacker Global Logistics Park (RGLP), put into operation in 2008 by the Columbus Regional Airport Authority, is located 18 miles southeast of Columbus, Ohio. The 1,777-acre master-planned industrial park surrounds an international cargo airport and an intermodal rail terminal. The site is 11 miles from the nearest interstate.

RGLP is a public/private partnership of five separate industrial campuses that focus on specific logistics, rail transport, intermodal, and air cargo uses. An internal heavy-haul road allows for overloaded containers to pass directly between a manufacturing or distribution facility to the intermodal terminal.

In addition its transportation assets, companies located at RGLP also have access to 15-year 100% real property tax abatement and a Foreign Trade Zone #138.





## Industry Attraction: Best Practices for Multimodal Site Development

Industry experts agree that 70 percent to 90 percent of sites are eliminated from consideration by prospective industries (across markets) **before** any contact is initiated. Multimodal industrial parks take a varied approach to attract businesses; however, there is a commonality of success factors:

Location Factors	Site-Specific Factors
<ul style="list-style-type: none"> <li>Proximity and connectivity to population centers</li> <li>Convenient interstate access</li> <li>Adjacent to rail (critical for megasites)</li> <li>Nearby passenger air service (for use by employees and business partners)</li> </ul>	<ul style="list-style-type: none"> <li>Availability of reasonably-priced land with limited impediments to development</li> <li>Engaged state and local economic development teams</li> <li>Facility site amenities to support manufacturing and distribution of goods, including air cargo services, heavy haul roads, rail equipment, truck or rail car storage, logistics support services, and foreign trade zone (FTZ) and related services</li> <li>Engaged railroad providers to support transload operation</li> <li>Significant public or private developer involvement to provide for: <ul style="list-style-type: none"> <li>Site master planning</li> <li>Development of connective infrastructure and on-site facilities</li> <li>Marketing, including dedicated sales team, web materials, and facility brochures</li> </ul> </li> </ul>

In addition to evaluating the market potential for the NCGTP, site specific factors heavily influence industry targeting. The chart below summarized the strengths and weakness of NCGTP for potential industry targets. Business Plan strategies and tactics are aimed to build upon attractive attributes and overcome site location challenges.

Attributes attractive to many target industries:	Site location challenges for certain industries:
<ul style="list-style-type: none"> <li>11,500 ft. runway; CAT1 Instrument Landing System</li> <li>Central east coast landing location, with proximity to RTP</li> <li>Minimal commercial aircraft service</li> <li>Existing aerospace related tenants</li> <li>Military aircraft use; proximity to six military bases and veteran workforce</li> <li>Foreign Trade Zone (FTZ) #214</li> <li>Numerous existing sites adjacent to the airport, with over 900 acres available for lease</li> <li>Significant private land, which appears developable, adjacent to the airport</li> <li>Rural location, uncongested with excellent buffers</li> <li>Proximity to major ports in NC, SC, and VA</li> <li>Proximate road system with access to key markets</li> <li>Rail access, including on-site transload capabilities</li> <li>Composite Center of Excellence for on-site training in partnership with local educational institutions</li> <li>Wetlands permitting in place</li> <li>Existing on-site utilities on site: dark fiber; excess water and sewer capacity, natural gas</li> <li>Strong, motivated leadership</li> </ul>	<ul style="list-style-type: none"> <li>The presence of the International Association of Machinists and Aerospace Workers</li> <li>Likely labor draw limitations for large projects requiring more than 1,000 employees</li> <li>No proximate Interstate access; however, this will be addressed by the completion of Interstate 42</li> <li>Property lease versus ownership</li> <li>Perception of challenges related to lease approvals required from federal agencies (FAA/DOD)</li> <li>Lack of large (greater than 500 acres) contiguous sites</li> <li>Proximity to coast and potential hurricane activity</li> <li>Perceived risk associated with locating near an active runway, including vibration and airport-related terrorism</li> <li>Lack of on-site US Customs services</li> </ul>

Evaluation of each of the 17 traded clusters within the NCGTP Quad East region against important site attraction factors reveals industry grouping that rank “High” or “Medium” for NCGTP attraction as summarized in **Figure 9** below.

		Aerospace & Automotive			Defense		Agribusiness & Food Science		Other Mfg.	Services	Logistics Services		
		Aircraft Components Mfg.	Maintenance, Repair & Overhaul	Automotive Parts Mfg.	Defense Aircraft Assembly & Testing	Aerospace Vehicles & Defense	Food Processing & Mfg.	Advanced Agricultural Inputs & Services	Production Technology & Heavy Machinery	Business Services	Air Freight/ Distribution	Transportation & Logistics	Distribution & E-Commerce
Significant Regional Cluster	●	●	●	●	○	●	●	●	○	○	○	○	
Growing Regional Cluster	●	●	○	●	●	○	●	●	○	○	●	○	
Projected Growth Cluster	●	●	○	●	●	○	●	●	○	●	●	○	
Regional Business Climate	●	●	●	●	●	●	●	●	●	●	●	●	
Workforce Availability	●	○	○	●	○	○	○	○	○	○	○	○	
Importance of Rail Access	●	○	●	●	●	●	●	●	●	○	●	●	
Importance of Port Access	●	○	●	●	●	●	●	●	●	○	●	●	
Unique Assets Valuable to Industry Target	●	●	○	●	●	○	○	●	○	●	○	●	
Attractiveness of a Leased Site	●	●	○	●	●	○	○	○	●	●	○	●	
Regional Target	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	
EDPNC Target	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	
Recommended NCGTP Target	High	High	Medium	High	High	Medium	Medium	Medium	Medium	High	Medium	Medium	

**Factors that are the same for all industries:**

- State Business Climate (high)
- North Carolina Economic Strength (medium); except for Business Services (high)
- Regional Road Transportation (medium)
- Regional Commercial Air Transportation (low)

● High ● Medium ○ Low

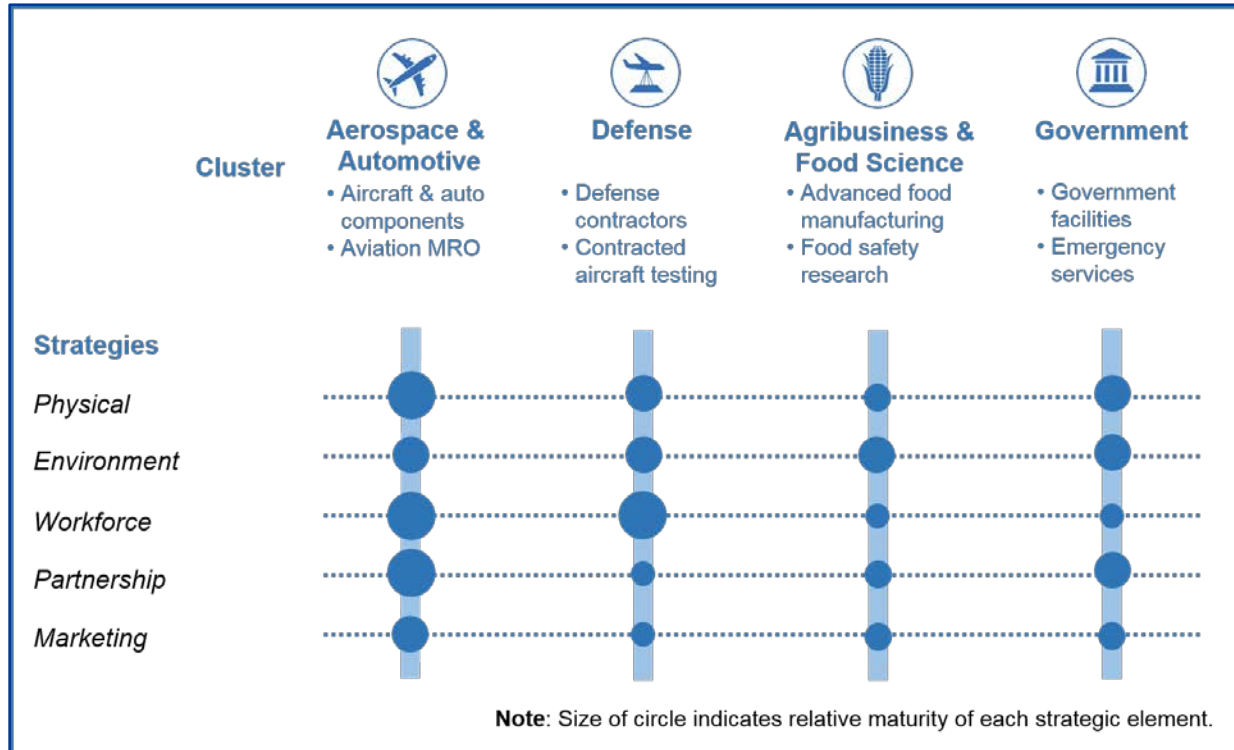
**Figure 9: Factors Affecting Cluster Attraction to NCGTP**

## Top Industry Targets

In consideration of the NCGTP industry analysis and SWOT analysis, NCGTP will focus its resources on the following industries:

- **Aerospace and Automotive**, including maintenance, repair and overhaul (MRO) operations, civilian aircraft assembly and testing, civilian aircraft components manufacturing as well as automotive parts manufacturing, which has a supply chain with much commonality with aerospace components manufacturing.
- **Defense**, including defense aircraft components manufacturing and defense aircraft assembly and testing as well as defense contractor functions and services.
- **Agribusiness and Food Science**, including food safety research and development, advanced agribusiness inputs and services, and food processing and manufacturing.
- As a state asset, NCGTP also offers a unique opportunity to support statewide economic interests by housing regional **Government** functions and serving as a base for national- and state-level disaster response and recovery functions.

NCGTP will avail itself of the expertise of industry, academic, and government by establishing advisory councils to guide the direction of each targeted cluster. Secondary areas of focus for NCGTP that have good connectivity to these primary clusters include production technology and machinery, and back-office business services. Strategic areas addressed in this targeted focus are summarized in **Figure 10**.



**Figure 10:** NCGTP Cluster Approach



## Aerospace, Aviation and Automotive Cluster

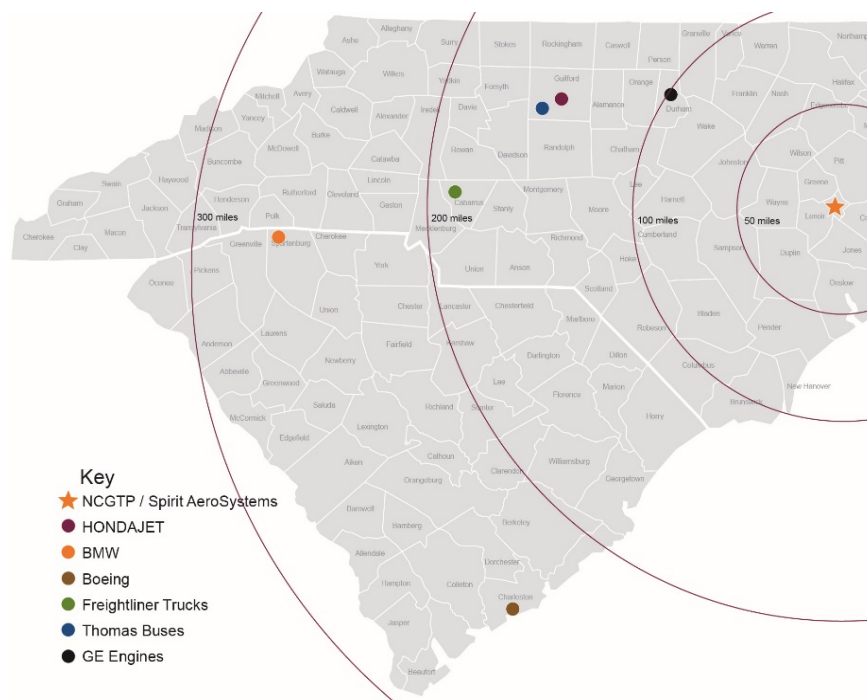
### Aviation and Automotive Manufacturing Supply Chain

Large aviation and automotive manufacturing facilities in the Mid-Atlantic region present an opportunity for NCGTP to build upon its existing aviation presence, with Spirit AeroSystems as its current anchor tenant. Each of these facilities is supported by a robust supply chain that includes manufacturers of various aircraft and vehicle component parts. A simple review of North Carolina and its surrounding area illustrate a few potential targets to be analyzed including but not limited to HondaJet in Greensboro NC, Boeing in Charleston SC, and BMW in Greenville SC. These companies are major final assembly manufacturing facilities that depend upon the input of thousands of companies within their supply chains. NCGTP has the opportunity to attract suppliers that will benefit from:

- **Proximity to the final assembly plant.** Suppliers that are currently located far from their product destinations may reduce their transportation and logistics costs by locating at NCGTP.
- **Improved margins.** The NCGTP manufacturing cluster is best geared for companies with medium to medium-high margins. The overall goal will be to evaluate firms within the supply chains and develop a work force that matches the skill level of the suppliers.
- **Skilled work force.** Work force can be quantified in quantity and quality. Overall, the multi-county area around Lenoir County provides good quantity. With a collaborative effort with state resources (i.e. community college), a work force can be created to meet suppliers' needs.
- **Ability to cross-pollinate supply chains.** A supply chain vendor may be able to serve multiple manufacturing facilities within the NCGTP's sphere of influence.

Strategic targeting of component manufacturers will allow NCGTP to analyze, promote, and enhance the site's favorable metrics for location of these suppliers to NCGTP. Recruitment targets will be prioritized through a data-driven process to identify and attract prospects that will value NCGTP assets and location.

As an example, supply chain vendor information was gathered for the HondaJet manufacturing facility in Greensboro NC. The information collected for each supply company included: location, gross sales, number of employees, product supplied to HondaJet, and other companies the supplier also serves. The sample supplier data, which is provided in Appendix C, was

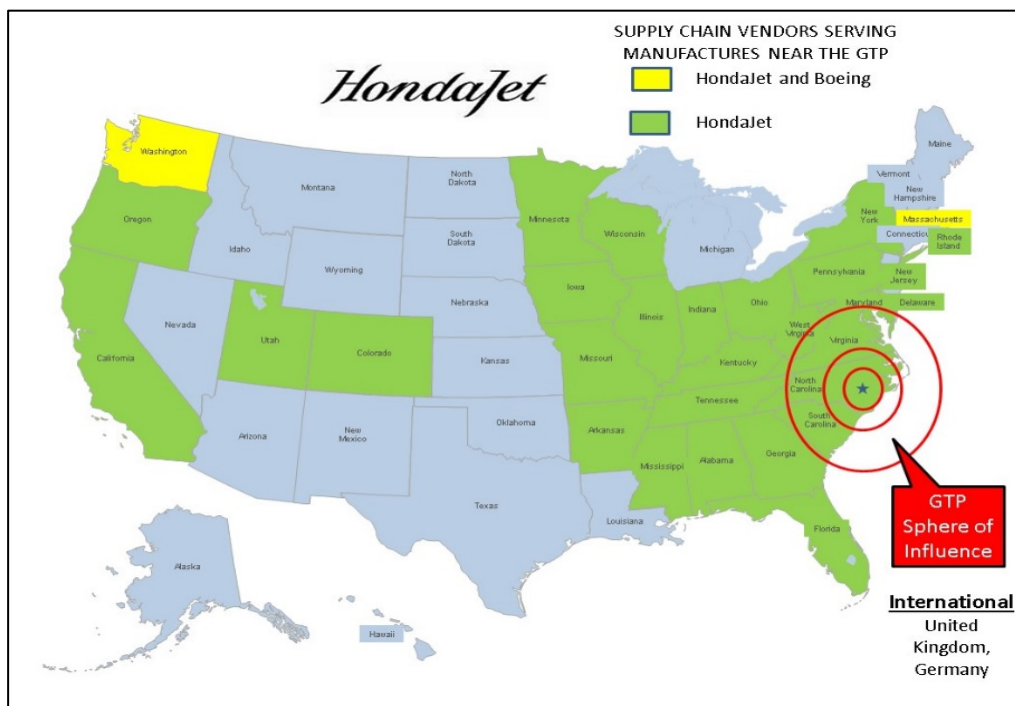


**Figure 11: Major Aviation and Automotive Assembly Plants near NCGTP**

obtained from a third-party vendor and represents only a small fraction of the data available. Boeing has a supplier portal for equipment procurement which offers insight into its input supply chain. Data held by the Economic Development Partnership of North Carolina (EDPNC), the NC Department of Commerce, and other economic development entities can also be used to define the regional supply chain.

A map of HondaJet vendors shows the range of states within which those companies are located. States denoted in green represent supply chain vendors that service at least one major manufacturing facility within 300 miles of NCGTP (sphere of influence). States denoted in yellow represent locations of suppliers that service at least two major manufacturing facilities in close proximity to NCGTP. This data allows targeting of supply chain vendors based on:

- **Proximity** - Prioritizing supply chain vendors, geographically removed from a final assembly facility within the NCGTP's sphere of influence, are deemed better recruitment prospects. In this case, supply chain vendors in the mid-west would be deemed to be better recruitment prospects than vendors in South Carolina.
- **Estimated Number of Jobs created at the NCGTP** – seek supply chain vendors with medium level (minimum) manufacturing process that will likely offer the NCGTP larger job creation
- **Work Force** – seek supply chain vendors with medium level (minimum) manufacturing process that will likely offer the NCGTP higher wage rates



**Figure 12:** Locations of HondaJet Suppliers.



## Aviation Maintenance, Repair, and Overhaul (MRO)

NCGTP's mid-Atlantic location provides easy connectivity to air facilities and fleets across the US east coast. Additionally, North Carolina is home to several large aviation MRO facilities:

- HAECO Americas – Greensboro, NC
- DRS - Elizabeth City, NC – support Aviation Logistics Center – Coast Guard Base Elizabeth City
- Mountain Air Cargo – support FedEx fleet at NCGTP

While new aircraft demand is high, MRO facilities continue to maintain high levels of production as illustrated by a large expansion currently underway at HAECO Americas facility in Greensboro, NC. While the MRO facilities require a strong technical workforce, the overall margins remain competitive as an industry and are suitable for expansion at the NCGTP. Developing a strong technical work force will be of particular importance to MRO facilities in North Carolina.



Figure 13: NCGTP Air Connectivity

### *Aerospace, Aviation and Automotive Opportunities:*

- Component manufacturing in support of regional aerospace, aviation, and automotive manufacturing and assembly
- Aircraft maintenance, repair and overhaul (MRO)
- Staging for global aerospace logistics (e.g. Antonov Companies)

### *Aerospace, Aviation and Automotive Cluster Needs:*

- Well-maintained airfield
- Import / export services
- Access to skilled workforce (18,000 annual exiting military personnel)
- Statewide aviation policy and marketing focus
- Supply chain connectivity

The action plan for the NCGTP includes:

- Network with the existing MRO facilities in the region to determine future needs
- Investigate potential MRO facility needs for aircraft manufacturers in the region
- Review supply chain for the large MRO facilities in the NCGTPs sphere of influence





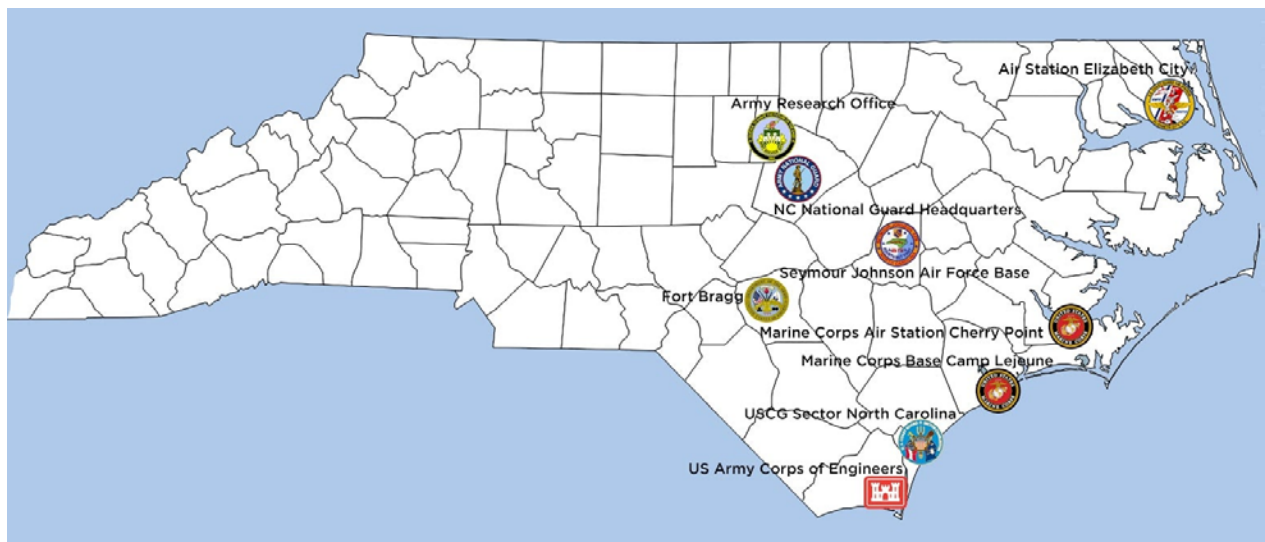
## Defense Cluster

### Defense Aerospace

Among the numerous mission-critical military facilities within the state, North Carolina hosts major military aerospace installations, including:

- *Fleet Readiness Center East, Marine Corps Air Station Cherry Point, Cherry Point NC* - The Fleet Readiness Center East is one of three major depot operated by the US Navy operates over 2.1M square feet of aircraft maintenance facilities valued at over \$1.3B. The facility services nine Navy aircraft and is the only F-35 fighter service facility in the US. The facility utilizes a strong mix of military and civilian personnel.
- *Aviation Logistics Center, Base Elizabeth City, Elizabeth City NC* – The ALC is the largest fully operational base in the coast guard inventory. In addition, it operates as the only Maintenance Repair and Overhaul (MRO) facility for the entire US Coast Guard. As such, every Coast Guard aircraft (fixed wing and rotary) come to the ALC for full servicing once every three years. The facility utilizes a strong mix of military and civilian personnel.
- *Seymour Johnson Air Force Base, Goldsboro NC* – Seymour Johnson is a Tactical Air Command and an active Air Combat Command (ACC) base. Designated as the 4<sup>th</sup> Fighter Wing, the base is home to the F-15E Strike Eagle and provides worldwide deployable aircraft and personnel capable of executing combat missions in support of the Aerospace Expeditionary Force. The Wing also provides logistical support to an Air Force Reserve unit.

Each of these facilities utilizes a public procurement process, supported by numerous supply chain vendors. NCGTP opportunities to support military aerospace supply chain needs are similar to those for the Aerospace and Aviation discussion above.



**Figure 14:** Military Facilities in North Carolina

## Defense Contractors

North Carolina is home to the third largest military population in the United States. The combined population including active duty, reserves and the civilian workforce exceeds over 134,000 personnel. Under the most recent Base Realignment and Closure process, North Carolina military footprint has grown dramatically. With the additions of the U.S. Army Forces Command and U.S. Army Reserve Command, Fort Bragg will be the largest Army installation in the world. In addition, the Marine Corps will add an additional 11,500 Marines. As the military continues to invest in North Carolina, private sector defense contractors will continue to open new facilities in our region.

### *Defense Cluster Opportunities:*

- Military MRO facilities and other support service roles (e.g. Lockheed Martin)
- Private sector military flight training (e.g. Discovery Aviation Defense)

### *Defense Cluster Needs:*

- Well-maintained airfield
- Military-friendly facilities
- Access to skilled workforce
- Supply chain connectivity

To harness opportunities in the Defense cluster, the action plan for NCGTP includes:

- Target defense MRO facilities supporting Fleet Readiness Center East
- Identify and catalog current defense Contractor(s) serving the military complex in North Carolina.
- Seek defense Contractor(s) needing a staging area close to the North Carolina military complex. These complexes offer versatility to be used for military contracts and civilian contracts.
- Be innovative in identifying new opportunities such as private sector flight training and military training to support the Eastern North Carolina military complex, drone technology development and testing, and contracted adversary air services.
- Identify opportunities to become storage depot for military equipment



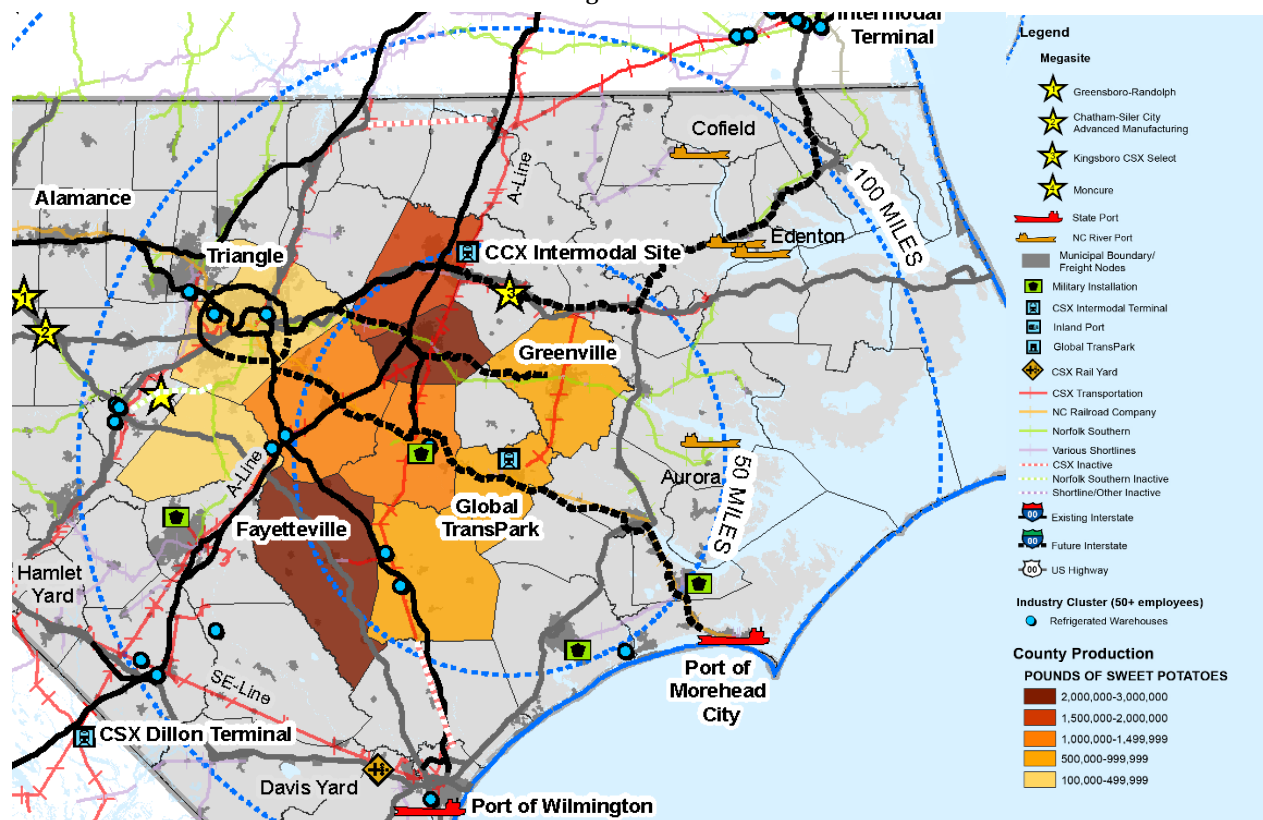




## Agribusiness & Food Science Cluster

NCGTP sits in a rich agribusiness center. The 14-county region surrounding NCGTP represents 29 percent of North Carolina's total cash receipts for livestock and crop production, representing more than 30 percent of the state's production of corn and soybeans and 50 percent of the state's output of sweet potatoes, beef cows, hogs, and turkeys. Location within this food-rich region represents an opportunity to grow a higher-skilled workforce to support food research and production.

While agribusiness is a major contributor of the North Carolina economy, livestock and crop production and processing generates relatively few jobs. Employment opportunities in agribusiness – particularly higher paying jobs – are in food science and advanced food manufacturing.



**Figure 15: Sweet Potato Production in NCGTP Region**

See Appendix C for additional graphics showing density of crop and animal production near NCGTP.

Establishment of an agribusiness and food science cluster at NCGTP will take advantage of its location to support careers in value-added food production as well as food safety research and development. Incorporation of a food science institute to incubate science- and technology-based careers in agribusiness will generate significant benefits to the long-term economic health of the rural counties surrounding NCGTP.

Through partnering with the state's academic institutions, such as Mount Olive University, North Carolina A&T University, and North Carolina State University, NCGTP can promote careers in food science technology, research and development. Further, collaboration with food and beverage manufacturers offers direct connection to industry. Such a model has consistently propelled the University of California at Davis to the world's top agribusiness research

university. UC Davis sits within California's rich central valley growing region and collaborates with growers and producers in emerging agri-food innovations, food production systems, and food science technologies and solutions.

A food science institute at NCGTP would build upon and complement the David H. Murdock Research Institute (DHMRI) located at the North Carolina Research Center in Kannapolis NC. This contracted research campus provides research and development solutions at the intersection of human health, agribusiness, and nutrition. Established as a 501(c) 3 organization, DHMRI is a public/private partnership that connects industry to academia.

***Agribusiness & Food Science Opportunities:***

- Advanced food science institute
- Partnership with University of Mount Olive, NC State, NC A&T

***Agribusiness & Food Science Cluster Needs:***

- Incubator: research institute as educational partnership
- New facilities to support food science research and development
- Supply chain connectivity, including proximity to crop and animal production

To take advantage of its proximity to North Carolina's rich agribusiness resources and provide incubator services for Agribusiness and Food Science industries, the NCGTP action plan includes:

- Collaborate with state and regional academic institutions to establish an incubator food science institute at NCGTP
- Seek private sector partners interested in agribusiness and food science research





## Government Cluster

### Consolidated Government Center

Since World War II, NCGTP has housed a variety of government functions and also supported temporary uses by various public agencies. The Army Reserve Center, for example, has been a long-time tenant of NCGTP. In recent years, the principal agencies located at NCGTP have included the North Carolina Forest Service, the NCDem, and the Lenoir County Sheriff's Department. NCDOT recently located its Division 2 office at the NCGTP.

Of particular interest for economic development is the current NC Forest Service location in WWII-era facilities next to the runway. These facilities are not adequate for today's needs and they occupy a site better suited for a user seeking commercial runway access. Direct runway access was a key factor in attracting Spirit AeroSystems to NCGTP.

Discussions date to the mid-2000s regarding the possibility of building a state agency "campus" to support these functions, and allow multi-agency uses of the combined facilities. Such facilities would not require significant acreage and could allow access to the airfield when necessary but not on a daily, recurring basis.

### Disaster Response and Recovery

Collocation of various governmental entities also facilitates coordination in times of disaster response and recovery. Because of its central location in Eastern North Carolina and the topography of the site itself, NCGTP has often been the center for disaster relief and recovery for the eastern half of the state. These disasters have included hurricanes, related floods, forest fires, and terror response. In support of its disaster response and recovery capabilities, the NCGTP has:

- Dual-capacity electric systems;
- Facilities constructed to withstand hurricane force winds and rain; and
- Multiple, permanent backup generators at critical locations, including the ARFF building, runway, terminal building, response and recovery buildings, and NCDOT Division 2 headquarters.

NCGTP's role in disaster response and recovery to protect regional economic interests may be expanded by building upon the existing relationship with NCDem and NC National Guard to establish NCGTP as a staging area for state-controlled resources. While FEMA has typically mobilized and staged its disaster response activities on an event-by-event basis, this state-level relationship could also position NCGTP to serve as a staging area for federally-controlled resources as part of FEMA Region 4 response efforts. Many large shippers such as big box stores like Lowes and Walmart, may need post-event staging areas. The suitability of the NCGTP site and location, including the historical ability to operate post-event, will be incorporated into NCGTP value proposition and marketing materials.

#### **Governmental Use Opportunities:**

- Optimized land use
- Stable core tenant that will attract contractors interested in serving those organizations
- Capacity for regional economy to respond and recover from catastrophic events

#### **Governmental Use Needs:**

- New, consolidated government facility
- Institutional collaboration (federal, state)
- Emergency response capabilities (FEMA relationship, staging area)



## 3 Marketing

Economic developers across the globe work to attract companies, talented employees, and academic expertise into their market. Competition for jobs, investment, and workforce is fierce. Never has it been more important to create an economic development strategy that sets the stage for success.

Cluster-focused economic development is the foundation of the NCGTP marketing approach. Cluster-based economic development, which took hold in the 1990's, is an approach that efficiently, effectively and collaboratively creates economic growth. Michael Porter of Harvard Business School, states that "Clusters are geographic concentrations of interconnected companies, specialized suppliers, service providers, and firms in related industries, and associated institutions." Economic clusters are created when industries and institutions become linked with suppliers of specialized services, machinery, and infrastructure that are within proximity, forming a supply chain. Focusing the marketing message on clusters that are highly correlated with NCGTP assets increases the probability of creating jobs, developing skilled workers, attracting talent, fueling investment, stimulating trade, improving productivity, raising incomes and creating wealth. When marketing tactics resonate with targeted clusters, NCGTP will receive the greatest return on marketing investment and obtain a competitive advantage in the global competition for company locations and talented workers.



### Stakeholder Engagement: Our Process

Thought leaders and influencers from government, partners, and the private sector played a key role in the development of the NCGTP Strategic Plan.

To leverage stakeholder influence, knowledge, creativity and vision, the consultant team designed a structured approach to engage stakeholders early and often during plan development.

The Stakeholder Engagement process involved a diverse group of attendees who may be affected by the Strategic Plan recommendations and those who could influence the implementation of recommendations. In developing the list of NCGTP stakeholders, we asked:

1. Who will be affected by plan outcomes?
2. Who can influence implementation of recommended actions?
3. Who can contribute ideas, knowledge, and expertise?
4. Who can provide implementation resources?

The initial list of stakeholders was approximately 70 people, so the Stakeholder Engagement process was designed to engage a large audience of stakeholders through all phases of the project. The Stakeholder Engagement process consisted of a series of workshops as well as a stakeholder survey. A list of stakeholder categories who provided input during the strategic planning process can be found in the Appendix section.

- NCGTP Visioning Workshop December 6, 2017
- Stakeholder Survey January 15, 2018
- NCGTP Opportunities Workshop January 18, 2018
- Presentation to NCGTP Board of Directors February 1, 2018
- Recommendations Workshop February 16, 2018
- Strategic Plan Review February 22, 2018





## State and Regional Economic Development (Recruitment)

NCGTP can maximize its success by concentrating its resources on those industries that are being targeted by state and regional organizations charged with client origination activities. The North Carolina East Alliance, North Carolina's Southeast, and the Economic Development Partnership of North Carolina (EDPNC) devote resources to marketing and client generation for the NCGTP and the surrounding area. Most new clients, especially larger clients, begin by contacting a state or regional economic development organization.

EDPNC Targeted Industries	Regional Targeted Industries
<ul style="list-style-type: none"> <li>• Aerospace and Defense</li> <li>• Aircraft Manufacturing and Assembly</li> <li>• Automotive manufacturing</li> <li>• Food Processing</li> <li>• Furniture</li> <li>• Information Technology and Analytic Instruments</li> <li>• Plastics</li> <li>• Textile Manufacturing</li> <li>• Business Services</li> <li>• Production Technology and Heavy Machinery</li> </ul>	<ul style="list-style-type: none"> <li>• Aerospace and Defense</li> <li>• Aircraft Manufacturing and Assembly</li> <li>• Air Freight</li> <li>• Automotive manufacturing</li> <li>• Distribution and E-Commerce</li> <li>• Textile Manufacturing</li> <li>• Transportation and Logistics</li> <li>• Production Technology and Heavy Machinery</li> </ul>



## Marketing and Economic Development Action Plan



A viable marketing and economic development program requires actions that capture the attention of the site selection community and industry decision makers within targeted clusters. The site selection process includes a detailed evaluation of project needs, which are then measured against the merits of potential locations.

A site selector will scout a prospective location by visiting the location's web site and eliminate the location without the economic development team even knowing it was being considered. The recent launch of the a new NCGTP web site significantly enhances the opportunity for site selectors, location advisors, real estate agents and industry decision makers to find information that keeps NCGTP "on the list."

Telling the NCGTP's unique story can differentiate it from competitors and shine a light on why a company should locate or expand at NCGTP instead of a competing site.

### Key Plan Components

For each strategy, tactics to achieve successful implementation of the strategy have been identified, along with an estimated start date for each tactic. The Marketing and Economic Development Action Plan has an implementation timeline of 2018 to 2021. The most urgent business recruitment and marketing activities include:

1. Selection of an economic development marketing and communications firm
2. Hiring marketing, economic development, and communications staff

3. Augmenting the recently launched [www.NCGTP.com](http://www.NCGTP.com) website to align with targeted clusters
4. Enhancing the appearance of the NCGTP entrance and site
5. Developing collateral materials to support business recruitment
6. Investigating available site certification programs
7. Directly marketing to and conducting face-to-face visits with decision-makers active in targeted clusters
8. Attending tradeshow with preset appointments that expose NCGTP assets to targeted clusters
9. Partnering with state and regional economic development entities on business recruitment and marketing activities, including Economic Development Partnership of North Carolina (EDPNC), North Carolina Department of Commerce, North Carolina East Alliance and North Carolina's Southeast Regional Economic Development Partnership
10. Collaborating with Universities and Community Colleges to develop and market training programs that are attractive to targeted clusters

## Measuring Impact

A set of metrics has been established to measure the impact of the Marketing and Economic Development Action Plan. The metrics will be reviewed quarterly so that modifications to an approach can be made in a responsive and timely manner.

The metrics include factors to track:

- Utilize a customer relationship management (CRM ) program (manage NCGTP relationships and interactions with current and potential customers)
- Effectiveness of on-line marketing efforts (web site analytics)
- Economic Factors (# jobs created, capital investment, wage, etc.)
- Prospect Activity and Trends (# visits, project source, site/building attributes, etc.)
- Outreach activities (trade shows, desk side meetings, collateral developed, etc.)

## Mid-Point Check In

Implementation of the NCGTP's Marketing and Economic Development Action Plan will be a multi-year process (2018 – 2021). The foundation for the program will be laid in Fiscal Year 2018 - 2019.

Because of rapid changes occurring in technology and target markets, it is recommended that the Marketing and Economic Development Action Plan undergo a facilitated review by stakeholders at the two-year mark to responsively identify necessary changes in approach.

## The Plan

The complexity of the site selection process, the rapidly changing economy, global demographic shifts, and the fierce competition for talented workers creates economic development challenges for regions throughout the world. Creating economic growth in the midst of these challenges can be daunting. Details on the Marketing and Economic Development Action Plan are provided in Appendix E.

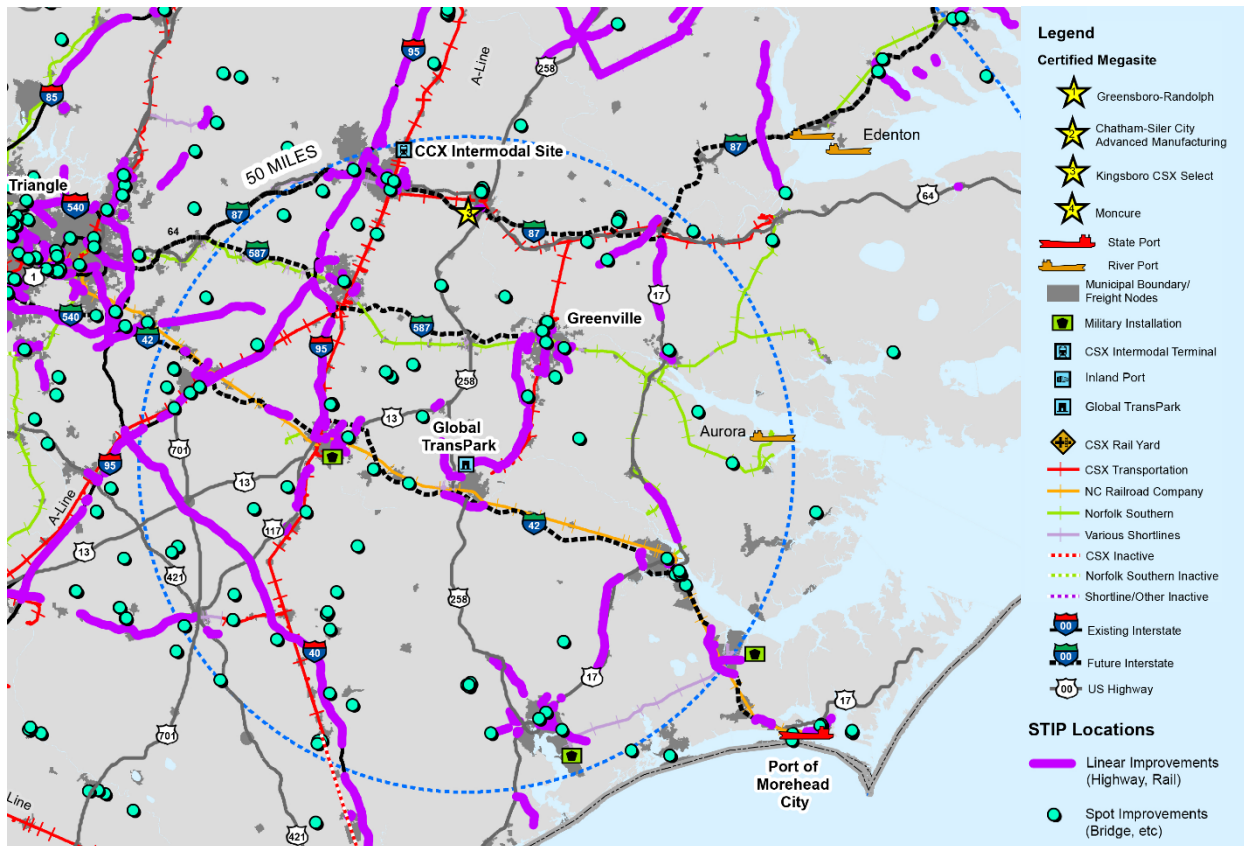
### *Action Items to Advance Marketing Objectives:*

- Increase business attraction and marketing capacity
- Enhance brand identity
- Directly engage clients and stakeholders
- Leverage collaboration and partner relationships





## 4 Capital Assets



**Figure 16: NCGTP Transportation Network**



## Land and Site Improvements

## Existing Landside Improvements

NCGTP includes a multitude of building, equipment and land assets that stretch across 2,500 acres of NCGTP -owned property. These assets are bisected by an 11,500-foot long runway. Approximately 800 acres of the park is currently undeveloped and another 328 acres is set aside for wetland mitigation.

A majority of the existing building area located throughout the park, totaling approximately one million square feet, is leased; with Spirit AeroSystems being the largest lessee at present. A listing of these facilities are provided in Appendix G. Multiple building uses are supported including office, industrial, commercial and warehouse. Also present is an operational air traffic control tower and terminal building. NCGTP Administration is located in the Spirit AeroSystems Composite Center of Excellence, a 20-year-old, 33,000-square-feet, multiuse facility with multiple conference rooms and training areas.



## Site Identity and Aesthetics

While there are multiple access points into NCGTP from adjacent highways such as the CF Harvey Parkway, the park lacks good entry and perimeter signage, wayfinding, or branded building identification.



**Figure 17:** Main Entrance to Spirit AeroSystems Composite Center of Excellence / NCGTP Administration



**Figure 18:** Auditorium and dining space at Spirit AeroSystems Composite Center of Excellence / NCGTP Administration

## Facilities & Property Management

Forward-looking planning for industry location requires that NCGTP take a more proactive role in making sites available and attractive to target clusters. Today, the data available to NCGTP staff on the conditions, constraints, and features of various parcels within and adjacent to the NCGTP complex is insufficient to be responsive to site location inquiries.

Certifications that establish site readiness for development are an important factor for site attraction. The underlying information required to obtain certification from various economic development entities must be consolidated into a single database. Some investigations may need to be performed or updated. A comprehensive GIS database that documents developable parcel size, environmental permitting status, availability and capacity of utilities, geotechnical conditions, transportation services, and other features is an important tool to allow NCGTP staff to quickly respond to site inquiries.

### *Facilities and Property Management Needs:*

- Maintain site assets in state of good repair - address immediate needs to address deferred maintenance and required modernization
- Enhance physical appearance and site identity with the addition of perimeter and way finding signage.
- Proactively manage asset lifecycle costs by conducting a comprehensive review of building systems and maintaining an asset management system.
- Develop and further improve GIS database to assure availability of real-time parcel data, constraints, and documentation to facilitate response to site inquiries. This tool should be attractive, user friendly and easily accessible.
- Prepare conceptual site specific layouts and renderings based on targeted industry needs.
- Investigate opportunities to expedite and/or eliminate approvals required from FAA and DOD.



## Land Use Planning

Tenants of NCGTP-owned sites include a variety of aviation, logistics, and governmental users. The locations of these leases within the NCGTP complex are not optimized to maximize the availability to assemble larger parcels for new users. Certain tenants with no interest in aviation use, for example, occupy sites adjacent to the airfield. A comprehensive review of land uses and longer-term relocation or consolidation of clusters within the NCGTP is proposed.

Further, the 800 acres of undeveloped area owned by NCGTP is scattered across multiple parcels of land with the largest contiguous area being less than 300 acres. Interspersed with these parcels, and within the boundaries of the NCGTP US Army Corps 404 permit area, are multiple privately owned parcels. These sites also fall within the NCGTP zoning authority. There is an opportunity to assemble larger parcels within the NCGTP area of jurisdiction to consolidate land for designation as a megasite if desired by target industries.

Effective master planning of the NCGTP site, as well as use of the NCGTP zoning authority within six miles of the NCGTP boundary, can support the improved connection of industries located at the park with local amenities and supportive services. This may include gas stations, restaurants, and other services that improve quality of life for employees. Completion of the C.F. Harvey Parkway Extension project, which will provide improved access to NCGTP from nearby communities, also offers an opportunity to plan for uses that will support regional industry needs.

**Land Use Planning Recommendations:**

- Prepare comprehensive land use master plans.
- Proactively plan land use to support recruitment of targeted industries and retention of existing.
- Optimize land uses to allow for assembly of larger parcels
- Investigate and pursue site certifications that are relevant and recognized by targeted industries.
- Research, review and catalog site due diligence for NCGTP-owned and privately-owned sites within the 404 permitting area, including: property ownership control, geotechnical and environmental conditions, cultural resources, utilities (location and capacities), topographical maps, boundary surveys including location of any easements, wetlands permitting status and documentation of related approvals
- Consider optioning additional property adjoining the NCGTP for site development purposes. Larger parcels (500 to 1,000 acres) should be considered.
- Pursue joint zoning efforts to protect land uses surrounding NCGTP and along CF Harvey Parkway (could also begin to address Quality of Life concerns on regional basis)



**Utilities**

Overall, the NCGTP site has ready access to utilities services, including ample water, power, sewer and natural gas. Certain undeveloped parcels, however, do not have on-site utility connections. Existing capacity, reserve capacity, and new utility investment needs must be reviewed and evaluated to match targeted users. Preparation of a utility master plan will define these needs so that required funding can be obtained and utility investments can be made.

**Table 1:** NCGTP Available Utility Service

Utility	Water	Sewer	Power	Natural Gas
Provider(s)	City of Kinston Neuse Regional Water and Sewer Authority	City of Kinston	City of Kinston Duke Energy	Piedmont Natural Gas
Available Capacity	10 MGD	6.5 MGD	24 mVA	Information not available

Note: MGD = million gallons per day      mVA = mega Volt Amps

Further details on existing utilities and available capacity are provided in Appendix J.

**Utility Needs:**

- Coordinate with utility partners to identify and secure future utility services to match target user needs
- Develop site utility master plan
- Seek funding for construction of new utility services as needed





## Airfield and Supporting Facilities

### Existing Facilities

NCGTP is centered on its primary asset – an airfield and supporting facilities served by Runway 05-23. The runway is 11,500 feet in length and is one of the longest runways on the east coast of the US. The runway has an all-weather capability with a full Category One Instrument Landing System (ILS). The runway is a high use general aviation facility with business aviation traffic, general aviation traffic and a high concentration of military aircraft. The airport is served by an Air Traffic Control Tower (ATCT) via the FAA Contract Tower Program.



**Figure 19:** Taxiway, air control tower, and terminal building at runway.

Airfield assets include:

- 11,500-feet x 150-feet Runway
- Full Parallel Taxiway
- Main Apron – ~675,000 square feet
- One main cargo apron

### Air Traffic Control Tower

The NCGTP air traffic control tower (ATCT) is operated by the Federal Aviation Administration (FAA). FAA is under consistent pressure to reduce contracted ATCT operations nationwide; closure of the tower would have a significant negative impact on NCGTP from both a military user standpoint and for recruitment of new aviation-based industries. If FAA drops NCGTP from its program, an alternative source of funding will be needed.

#### ***Actions to Maintain and Enhance NCGTP Airfield Assets:***

- Maintain airfield in state of good repair; consider ongoing maintenance needs for currently unused or underused portions of the airfield
- Demonstrate continued demand for FAA-contracted ATCT services to assure continued ATCT services
- Incorporate airfield needs into Master Plan update, including Terminal Redevelopment Program and Apron Redevelopment Program





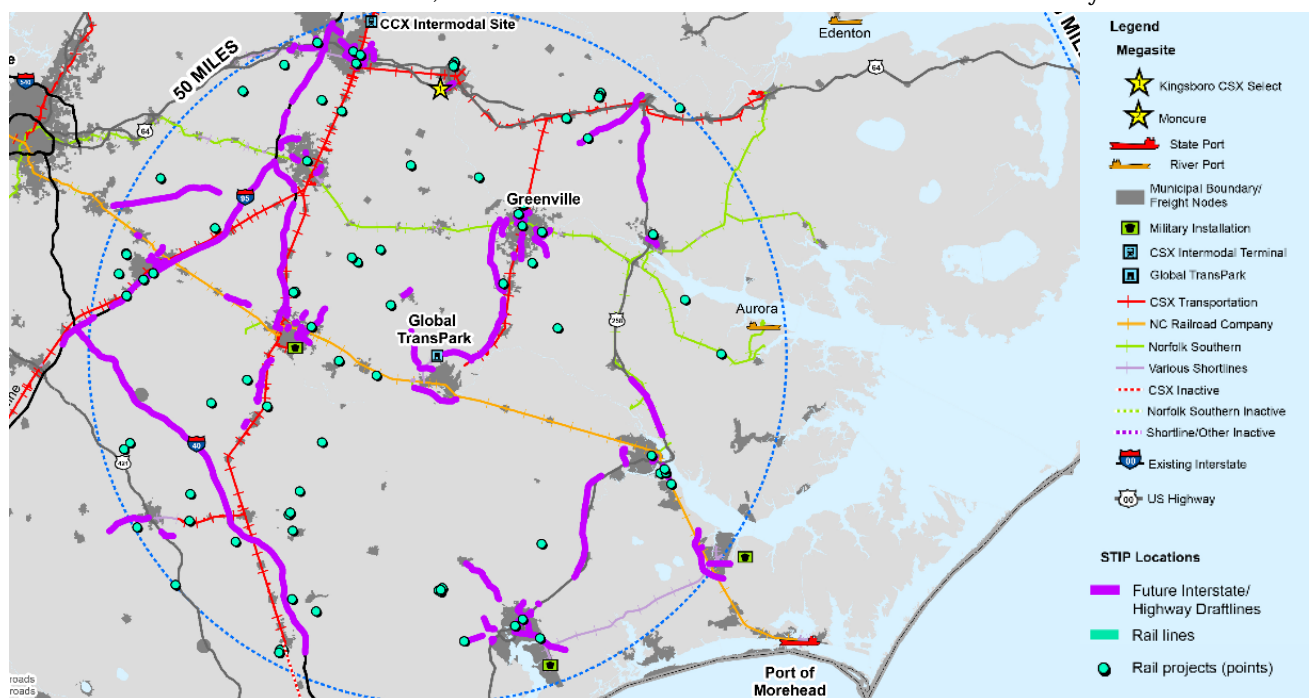
## Highway Access

### Regional Highway Network

The NCGTP location within the center of Eastern North Carolina places it within easy reach of several key state highways, state and regional ports, and population centers. The US 70 Corridor, part of the state's Strategic Transportation Corridors Framework, provides access to Raleigh to the west, Seymour Johnson and the Port of Morehead City to the east. It also provides access to Interstate 95, the major north-south highway corridor in the eastern United States. US 70 is accessed via the C.F. Harvey Parkway (NC 148).

US 258, located west of the NCGTP, provides additional north-south highway access and links the site to the military community of Jacksonville (including Camp Lejeune and MCAS Cherry Point) to the south and Greenville to the north. Further north, US 258 crosses US 64 (the future I-87 corridor, with access to Rocky Mount at the proposed CCX Intermodal Freight Terminal) and extends north to the Port of Virginia. Accessed via the C.F. Harvey Parkway, US 258 is also a Strategic Transportation Corridor for the state.

Roadway connectivity to and from the NCGTP is provided via several secondary roads. Airport Road (SR 1578) and Rouse Road (SR 1572) are thoroughfares that provide access into Kinston, just south of NCGTP. Poole Road/Dawson Station Road (SR 1575) extends west and north of NCGTP, providing access to potential development north of the runway. Finally, Taylor Heath Road (SR 1703)/ Cameron Langston Road (SR 1727) provides a connection between NC 58 east of NCGTP to NC 11, which extends north to Greenville. Each are two-lane roadways.



**Figure 20: Regional Highway Network, including STIP Projects**

#### **Actions to Improve Highway Access:**

- Advocate for state highway projects that promote connectivity to NCGTP.
- Incorporate internal roadway loops and circulation into the NCGTP land use master plan.
- Secure grant funding for construction of internal roadway loops and circulation.



## Rail Access

### Current Rail Service

NCGTP has rail service to the south side of the runway via a rail spur that was built and is owned by NCDOT. Under a lease agreement with NCDOT, Gulf & Ohio Railways, Inc. (G&O) operates, maintains and markets freight service on this NCGTP rail line interconnects with Norfolk Southern (NS), which has an exclusive lease of the NCRR-owned rail corridor connecting NCGTP to the Port of Morehead City and other points inland. Rail use has been limited due to carrier pricing, which has not been competitive with truck rates.

### Future CSX Connection

The closest CSX rail line to the site is the AA-line, which branches from the ABC-line and runs from Parmelle to Kinston. The AA-line terminus is approximately 4 miles (perpendicular) east of the NCGTP site. A preliminary engineering report was completed by the NCDOT Rail Division in November 2017 (NCDOT STIP P-5602E) to examine the feasibility for extending the existing NCGTP spur track to tie to the CSX AA line at Elmer (Kinston), north of Kinston, thus providing service options from two Class I railroads. Project approval and environmental documents are under development by NCDOT for the preferred alignment, with anticipated project completion in 2020. This roadway alignment could be the basis for a CSX rail connection to NCGTP, since NCDOT will be purchasing right-of-way and the rail could potentially follow the same corridor. The least costly rail alternative was estimated at approximately \$37 million.

The CSX connection at NCGTP would provide NCGTP with dual rail carrier access and would also link the NCGTP to the Port of Wilmington. Dual rail service could potentially introduce competitive rates as a result. Without more demand for rail movements at the NCGTP or in the region, however, a second connection may not be viable. As of 2014, the AA-line that is currently in use carries approximately two trains per week from Kinston to the junction with the ABC-line in Plymouth. The ABC-line runs from Plymouth NC to Rocky Mount NC and carries approximately 14 trains per week before connecting to the A-line, which is the backbone of the CSX National Gateway rail corridor.

### Rail Access to Northerly NCGTP Sites

Currently rail access to NCGTP parcels the northern side of the runway is unavailable. Prior concepts to provide rail service to undeveloped NCGTP parcels on the north side of the runway showed an alignment immediately adjacent to the runway; however, that would limit airside access from the northerly property. A modified alignment that abuts the future NCGTP Spine Road is proposed for future consideration. The updated conceptual land use plan reflects this modified alignment, which would provide rail access to NCGTP's larger parcels, which is required for certain site certifications and is one of the various criteria generally included for megasite certification.

#### Access to Improve Rail Access:

- Improve on-site rail facilities to meet needs of target industries, including permanent on-site transload facility
- Examine options for extending rail service to the northern side of the runway.
- Continue pursuing extension of rail service to CSX. Having access to two Class I railroads promotes competition and will be attractive to existing and prospective industries desiring rail service.
- Consider expanded role of short line operator to meet NCGTP's long-term rail service needs.







## Port Access

### Current Port Access

NCGTP lies within 100 miles of the two NC Ports at Wilmington and Morehead City. Truck connections primarily transport via US 421 and I-40 to Port of Wilmington and via US 70 to Port of Morehead City. This represents an approximate four-hour turn time (round-trip truck delivery time) between NCGTP and either of the State ports. As noted under Rail Service above, there is also a physical rail connection directly from the NCGTP site to the Port of Morehead City via G&O and NS. No rail connection is currently available between NCGTP and the Port of Wilmington.

In addition to North Carolina ports, NCGTP is located within close proximity to the Port of Virginia and to the Port of Charleston. Together, these seaports handle more than three million containers per year --about two-thirds of the regional demand-- and more than one million tons of non-containerized goods, excluding coal. Both ports are investing significantly in terminal capacity and inland road and rail connectivity. Located 300 miles southwest of NCGTP, drive time to Port of Charleston is about five hours via I-95. Distance to Port of Virginia's largest terminal is 150 miles and a three-hour travel time. NS and CSX also provide rail service into Charleston and Virginia terminals.

### Potential Inland Port Uses

The land available at NCGTP and proximity to the two NC Port facilities generates a potential opportunity to move certain near-port activities off the waterfront to an inland site. Since the Port of Wilmington, the Port of Morehead City, and NCGTP are all located within FTZ #214, there is further potential for complementary uses that would establish NCGTP as an "inland port" that supports the logistics functions of the seaport. These near-port functions could include stripping and stuffing of containers, wherein inbound international containers are emptied and reloaded into domestic containers for transport to final hinterland destinations. Any outbound waterborne cargo generated from the NCGTP could then be loaded into the empty international containers for transport to the Port of Wilmington for export. The benefit of such an operation to shippers is to keep international containers closer to the seaport, reducing the need for repositioning of empty containers and the cost associated with that operation.

Cold storage and flash-freeze capabilities could also support packaging and distribution of North Carolina food products.

#### Actions to Improve Port Access:

- Collaborate with NC Ports to identify opportunities for near-port services to be provided at NCGTP. Jointly market and share leads.

**Inland Port Greer**, opened in 2013, is owned and operated by the South Carolina State Ports Authority (SCSPA) as an inland extension of the services provided at the Port of Charleston. Located 212 miles from the seaport terminals along the I-85 corridor and the Norfolk Southern (NS) Crescent Corridor, the facility provides overnight intermodal service by NS to and from the port, six days per week. The facility, primary users include BMW and Michelin, serves the needs of regional manufacturers by reducing their drayage time and cost. The inland port also provides regional shippers with access to empty containers.

To assure the availability of scheduled train service from the Greer site, SCSPA has guaranteed a minimum rail revenue to NS so trains will not be delayed or rail rates negatively affected by the need to move smaller volumes. This has been an effective means to attract inland port users.



## 5 Investment

Successful delivery of the NCGTP Business Plan objectives will require:

- Targeted capital investments to restore NCGTP assets to a state of good repair and improve ability to attract new users.
- A fully resourced organization, with the staffing capacity and functional expertise to address core operations and carry out planned strategic actions.
- Reliable, multi-year funding stream for staffing and contracted resources.
- Key operational processes and organizational best practices to achieve success, including critical milestones over next one to three years.



### Capital Investment Needs

Of primary priority to NCGTP is protection of its existing infrastructure assets. Lack of dedicated funding to adequately maintain the State's investment in the NCGTP airfield, surrounding hangars, buildings, and landside infrastructure have put much of the NCGTP complex in a state of disrepair. Today, several buildings suffer from some combination of roof leaks, outdated fire/life safety systems, inefficient heating and cooling systems, and outdated light fixtures.

Proposed NCGTP capital investments constitute a combination of capital maintenance (renewals of existing assets to restore them to a state of good repair), upgrades to existing facilities, new on site investments to support multi-modal transportation access and circulation, and offsite regional transportation improvements planned by others that will benefit NCGTP current and future users.

**Table 2:** Capital Investment Plan

Investment	Benefit / Purpose	2019	2020	2021	Totals
Building Renewals – structural repairs	Required to return facilities to state of good repair (SOGR)	\$1,300,000	\$1,300,000		<b>\$2,600,000</b>
Building Renewals – HVAC, systems, electrical upgrades	Required to return facilities to state of good repair (SOGR)	\$600,000	\$600,000		<b>\$1,200,000</b>
Pavement / Parking Lot Renewals	Required to return facilities to state of good repair (SOGR)	\$300,000	\$300,000		<b>\$600,000</b>
Equipment Renewals	Replace or overhaul equipment past useful life	\$560,000	\$340,000	\$995,000	<b>\$1,895,000</b>
Training Center Technology	Improved capabilities for workforce development	\$60,000	\$60,000		<b>\$120,000</b>
Energy and Systems Audit	Proactive management and upgrade of building systems and energy usage	\$25,000	\$25,000		<b>\$50,000</b>
Improved Signage & Wayfinding	Enhanced NCGTP identity		\$175,000		<b>\$175,000</b>
<b>Totals</b>		<b>\$2,845,000</b>	<b>\$2,800,000</b>	<b>\$995,000</b>	<b>\$6,640,000</b>

Additional proposed long-term transformational projects include:

- Completion of the NCGTP Spine Road to provide access to north side parcels
- North side rail connection
- Secondary Class I rail connection to allow for dual rail service



## Consistent and Reliable Funding for NCGTP Operations

The financial position of NCGTP has been inconsistent and uncertain for many years. State support for NCGTP routine operations has been reduced several times. Today, net of repayment of NCDOT loan, NCGTP receives approximately \$500,000 in annual operating support from the State. Uncertainty in continued available funding has made it difficult to recruit and retain staff for important functional positions to support ongoing NCGTP operations and growth. To the advantage of NCGTP success, on the other hand, recent restructuring of NCGTP debt has significantly reduced annual debt servicing requirements so NCGTP is currently generate positive cash flow.

With a primary objective of attracting job and economic activity to the region, NCGTP's lease agreements have been executed at below-market rates to incentivize industry location. Prior agreements with the U.S. military and GTP Foundation also offer use of NCGTP land at virtually zero cost. State government tenants (NCDOT and NCDDEM) are leasing space at market rates; however, several existing private tenant leases are below market.

Working within the constraints of its current operating budget, the NCGTP currently operates with a skeleton staff – with only 11 full time employees handling the full range of airport operations, industrial park operations, tenant needs, financial management, and industry recruitment. Many staff are handling multiple roles. For example, the Airport Director is also managing the non-airfield facilities and grounds.

To realize NCGTP Business Plan objectives, adequate resources are needed to address the full range of functions required to operate and grow the multi-modal industrial complex and its centerpiece airfield. The needs presented here may be addressed through a combination of full-time staff and contracted resources. NCGTP has been unable to fill certain budgeted positions due to uncertain and inconsistent funding of the organization. The use of contracted resources for routine maintenance of building and grounds, janitorial services, and marketing support will help alleviate this challenge. Still, a longer term commitment of funds toward NCGTP's core operations is needed to avoid disruptive staff turnover and inability to fill open positions. The designation of all NCGTP staff as exempt, unprotected employment positions (as compared to other positions within NCDOT) further challenges the recruitment of staff.

Additional multi-year funding commitments are needed, above and beyond currently budgeted amounts, to realize objectives as shown in **Table 3**.

### *Functional Resources and Staffing Needs:*

- Address staffing needs and funding to provide resources needed to operate, maintain, and grow the industrial park.
- Engage supportive professional expertise in land planning and zoning to support NCGTP mission.
- Adopt multi-year budget that provides stability for staffing and resource planning



**Table 3:** NCGTP Additional Operational and Maintenance Resource Needs (5-Year Projection)

Expense	Purpose / Benefit	2019	2020	2021	2022	2023
Facilities manager	Adequate resources to meet basic operating needs	80,000	81,000	82,000	83,000	85,000
Conceptual Master Planning and Due Diligence	Ready access to site data for agile response to site location opportunities; GIS database	200,000	10,000	10,000	10,000	10,000
Marketing Action Plan	Proactive targeting and capture of industry opportunities	175,000	75,000	75,000	75,000	75,000
Asset Management System	Efficient use of maintenance resources for NCGTP-owned assets	375,000	20,000	20,000	20,000	20,000
Supply chain analyses (biannual update)	Strategic targeting of supply chains within primary industry clusters	25,000		25,000		25,000
Strategic Plan update	Reevaluation and update of NCGTP objectives to reflect market conditions					150,000
Routine Maintenance – Airfield	Protect and maintain NCGTP assets	By NCDOT Division of Aviation				
Routine Maintenance - Grounds	Protect and maintain NCGTP assets	150,000	500,000	500,000	500,000	500,000
Routine Maintenance - Buildings	Protect and maintain NCGTP assets	485,000	485,000	485,000	485,000	485,000
US Customs	Support import/export operations				300,000	300,000

**Notes:**

1. Figures shown are over and above FY18 budgeted expenses of \$3 million for operations and maintenance
2. 2018 budget (\$400,000 annually) for marketing is anticipated to cover hire of new marketing specialist as well as implementation of the Marketing Action Plan.
3. Staff costs assume additional 30 percent for fringe benefits and annual 1.5% escalation
4. Estimates for recurring maintenance costs assume that all deferred maintenance has been corrected.
5. Routine annual building maintenance is based upon \$1.40 per square foot estimated cost, net of \$215,000 amount budgeted for repairs and maintenance in FY2018; excludes Spirit AeroSystems Building.

## GTP Foundation

The GTP Foundation is a non-profit corporation, organized and operated within the requirements of Internal Revenue Code section 501(c) (3), that was established for the specific purpose to lessen the burdens of government by supporting and undertaking functions that otherwise would be provided by NCGTP. The GTP Foundation has been designated certain authorities to support NCGTP under NC General Statutes 63-A. As a charitable organization, the GTP Foundation can also accept contributions and make distributions to NCGTP.

The GTP Foundation owns and leases a building on NCGTP-owned land, generating approximately \$200,000 in annual lease revenue. Today, this lease revenue goes back into the GTP Foundation fund, whose balance has now grown to \$5 million. Monetary contributions from the GTP Foundation fund to NCGTP have been made based on individual project requests. Previously, the GTP Foundation contributed to Spirit AeroSystems rent as part of the package to attract their manufacturing operation to NCGTP. Over the last five years contributions received from the GTP Foundation were \$130,075 in 2013 and \$55,000 in 2017.

**GTP Foundation Needs:**

- Clarify or redefine role of GTP Foundation to support realization of NCGTP Business Plan objectives.



This page left intentionally blank

# Action Plan



This page left intentionally blank

## Action Plan to Realize Strategic Plan Objectives

Strategy / Tactic		Success Measure	Planning Horizon / Timing	Re-evaluation
Specific actions to realize Business Plan objectives		Defined outcomes		
<b>INDUSTRY TARGETS</b>				
<b>Strategy 1: Expand the role of NCGTP in regional Workforce Training</b>				
<b>Tactic 1.1</b>	<b>Collaborate with educational institutions to develop a skilled workforce for targeted industries</b>			
1.1.1	Expand existing academic partnership to engage ECU, NC State, NC A&T as well as LCC in specific training programs at NCGTP.	Memoranda of understanding for enhanced on-site training and cluster incubation	Near-term 2018	Annually
1.1.2	Promote greater use of Spirit AeroSystems Composite Center of Excellence for advanced manufacturing training.	Incorporate into website and marketing materials; promote use in news releases	Near-term	Quarterly
<b>Tactic 1.2</b>	<b>Capture exiting Military workforce and veterans</b>			
1.2.1	Partner with NC Military Affairs Commission.	Targeted retraining and workforce recruitment to veterans	Near-term 2018	Annually
1.2.2	Work with State leadership to establish state initiative to make exiting military and veteran workforce data available to NCGTP for recruitment and training.	Targeted retraining and workforce recruitment to veterans	Near-term 2018	Annually
<b>Strategy 2: Broaden Logistics Support Services that are performed and offered at NCGTP</b>				
<b>Tactic 2.1</b>	<b>Enhance import / export capabilities</b>			
2.1.1	Activate magnet site within Foreign Trade Zone 214.	Decisive action to activate magnet site, with current contracted operator or new operator	Near-term 2018-2019	Monitor
2.1.2	Secure on-site FTZ operator.	Available on-site import/export services for NCGTP users	Near-term 2019-2020	2 year
2.1.3	Provide US Customs services.	Updated discussion and cost estimate for US Customs to provide on-call inspection services to NCGTP-based importers and exporters	Near-term / Medium-term 2019-2020	2 year, following action to activate foreign trade zone and definitive discussions with NC Ports re near-port uses at NCGTP

Strategy / Tactic		Success Measure	Planning Horizon / Timing	Re-evaluation
Specific actions to realize Business Plan objectives		Defined outcomes		
<b>Tactic 2.2</b>	<b>Enhance NCGTP capabilities to support on-site distribution and handling needs of target industries</b>			
<b>2.2.1</b>	Attract additional or expand existing on-site Third Party Logistics (3PL) services to support NCGTP users.	Land use master plan that incorporates additional logistics support uses. Identify complementary logistics services that would be useful to existing tenants.	Near-term 2019	Annually
<b>2.2.2</b>	Attract additional packaging services to NCGTP.	Land use master plan that incorporates potential logistics support uses.	Near-term 2019	Annually
<b>2.2.3</b>	Evaluate development of temperature-controlled distribution facility for sensitive products.	Conceptual plan (size/location) incorporated into land use master plan for temperature-controlled facility	Near-term 2018	Annually
<b>Tactic 2.3</b>	<b>Attract value-added logistics to NCGTP</b>			
<b>2.3.1</b>	Target E-commerce fulfillment or return centers or contracted repair centers.	Market research; identify and contact targeted list of E-commerce center service providers.	Medium-term 2019-2020	Bi-annually
<b>Strategy 3: Grow core focus on Aerospace and Automotive components industry</b>				
<b>Tactic 3.1:</b>	<b>Target component aviation and automotive parts manufacturing</b>			
<b>3.1.1</b>	Build upon NCGTP's existing aviation base by targeting suppliers to nearby assembly plants (HondaJet, Boeing, BMW).	Identification of commonality among suppliers to nearby plants	Near-term 2018-2019	2 years
<b>3.1.2</b>	Conduct detailed examination of aviation of supply chain to identify parts manufacturers that would benefit from NCGTP assets and location.	Targeted supplier list for aviation supply chain	Near-term 2018-2019	2 years
<b>Tactic 3.2:</b>	<b>Attract aircraft maintenance, repair, and refueling operations (MRO)</b>			
<b>3.2.1</b>	Identify aviation of supply chain for existing MRO facilities manufacturers that would benefit from NCGTP assets and location.	Targeted list of MRO suppliers	Near-term 2018-2019	2 years
<b>3.2.2</b>	Identify private sector MRO companies that support Fleet Readiness Center East and Aviation Logistics Center at the Coast Guard Base in Elizabeth City – i.e. Lockheed Martin.	Identify existing private sector MRO companies supporting military MRO facilities in NC	Near-term 2018-2019	2 years
<b>Tactic 3.3</b>	<b>Consider future passenger air service</b>			
<b>3.3.1</b>	Monitor health of passenger aviation industry and FAA changes; be opportunistic as industry events change.	Connectivity to the charter flight market and low budget market.	Long-term	5 years

Strategy / Tactic		Success Measure	Planning Horizon / Timing	Re-evaluation
Specific actions to realize Business Plan objectives		Defined outcomes		
<b>Strategy 4: Attract Defense industry users to NCGTP site</b>				
<b>Tactic 4.1</b>	<b>Target defense contractors that provide contracted military aircraft testing (adversary air)</b>			
4.1.1	Private sector staging area near the NC military complex	Versatile facilities that can support military and civilian's clients	Near-term 2018	Annually
<b>Tactic 4.2</b>	<b>Attract defense contractors that value non-military site close to multiple military facilities</b>			
4.2.1	Determine need for private sector need for staging / support facility near the NC military complex.	Complete Market Analysis	Near-term 2018	Annually
<b>Strategy 5: Establish a base for Agribusiness &amp; Food Science at NCGTP</b>				
<b>Tactic 5.1</b>	<b>Pursue establishment of a food science institute at NCGTP</b>			
5.1.1	Collaborate with state and regional academic institutions to define objectives and scope of proposed research institute at NCGTP.	Memorandum of understanding with academic institutions on mission and purpose of institute at NCGTP.	Near-term / Medium-term 2018-2020	Year 2
5.1.2	Solicit North Carolina-based private sector partners to collaborate on research.	Identification of 2-3 funding partners for institute development.	Near-term 2018-2019	Year 2
<b>Tactic 5.2</b>	<b>Incorporate Agribusiness &amp; Food Science cluster into NCGTP land use master plan</b>			
5.2.1	Identify proposed location to house R&D facilities and surrounding private sector uses.	Updated land use master plan	Near-term 2018	Year 2
<b>Strategy 6: Consolidate Government uses at NCGTP</b>				
<b>Tactic 6.1</b>	<b>Develop a consolidated Government Facility</b>			
6.1.1	Convene State-level discussion with NC Forest Service, Division of Emergency Management, and Highway Patrol about interest in a consolidated "campus" at NCGTP.	Approved plan to design and build a state agency site at NCGTP	Near-term 2019	Every 5 years
6.1.2	Develop land use master plan that consolidates Government uses to optimal location.	Optimize land uses	Near-term 2018-2019	Biannually
<b>Tactic 6.2</b>	<b>Formalize NCGTP as center for regional Disaster Response</b>			
6.2.1	Work with NCDEM and NC National Guard to establish potential role of NCGTP in mission critical response activities.	Memorandum defining state need for staging of state-controlled resources	Near-term 2019	Annually
6.2.2	Brief and enlist support of Congressional delegation on potential for increased uses at NCGTP.	Allocation of FEMA resources; designation by FEMA	Near-term 2018-2019	Every 2 years

Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
6.2.3	Build upon NCDEM to establish relationship with FEMA Region 4 to determine potential for NCGTP as staging area for federally-controlled resources.	Memorandum defining potential federal uses of NCGTP site	Near-term 2019	Annually
6.2.4	Work with EDPNC to identify and target private sector firms that may need staging areas post-event.	Contact list of high-volume retailers seeking resilient supply chain alternatives	Near-term 2019	Annually
6.2.5	Develop value proposition tailored to NCGTP offering disaster response / recovery and suitability of location for post-event operations.	Marketing materials tailored to illustrate NCGTP post-event benefits and suitability (e.g. statistics on ability to operate post-event such as number of days disrupted)	Near-term 2018	Annually
<b>MARKETING</b>				
<b>Strategy 7: Create and Implement a Best In Class Marketing Plan</b>				
<b>Tactic 7.1</b>	<b>Increase business attraction and marketing capacity</b>			
7.1.1	Develop and distribute an RFP to be distributed to "best in field" economic development marketing firms.	Improved resources and capacity to market to target clusters	Near-term 2018 Q2	3 months
7.1.2	Select a marketing firm to assist with implementation of the Economic Development Marketing Plan.	Improved resources and capacity to market to target clusters	Near-term 2018 Q3	3 months
7.1.3	Develop job description for marketing professional to lead implementation of the Economic Development Marketing Plan.	Improved resources and capacity to market to target clusters	Near-term 2019	3 months
7.1.4	Hire a marketing professional to lead implementation of the Economic Development Marketing Plan.	Improved resources and capacity to market to target clusters	Medium-term 2020	1 year
<b>Tactic 7.2</b>	<b>Enhance Brand Identity</b>			
7.2.1	Conduct a brand identity analysis to understand the vision, mission, brand message, logo and tag line.	Communication of distinct NCGTP identity and user benefits	Near-term 2019 Q3	1 year
7.2.2	Increase business attraction and marketing capacity.	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q3	Quarterly
7.2.3	Enhance brand identity.	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q3	Quarterly
7.2.4	Directly engage clients and stakeholders.	Communication of distinct NCGTP identity and user benefits	Near-term 2019 Q1	Quarterly
7.2.5	Leverage collaboration and partner relationships.	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q2	Quarterly

Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
7.2.6	Establish a program for gateway and wayfinding throughout the NCGTP campus.	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q3	Annually
7.2.7	Pursue NCGTP zip code.	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q3	3 months
7.2.8	Promote benefits of locating in Foreign Trade Zone 214.	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q3	Continually
7.2.9	Investigate available site certification programs and pursue programs that resonate with targeted clusters	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q2	Quarterly
7.2.10	Partner with and host conferences and trade events to create exposure and awareness (e.g., Aviation Conference).	Communication of distinct NCGTP identity and user benefits	Near-term 2018 Q1	Quarterly
<b>Tactic 7.3</b>	<b>Directly Engage Clients and Stakeholders</b>			
7.3.1	Conduct face-to-face visits with decision-makers, site selection consultants, real estate professionals, and corporate representatives active in targeted clusters.	Targeted industry engagement	Near-term 2018 Q2	Quarterly
7.3.2	Attend tradeshows that expose NCGTP assets to targeted clusters.	Targeted industry engagement	Near-term 2018 Q2	Quarterly
7.3.3	Analyze how NCGTP assets resonate with targeted sectors and develop collateral material to support recruitment of these sectors.	Targeted industry engagement	Near-term 2018 Q3	Annually
7.3.4	Communicate announcements, accolades, and other positive messages through targeted outreach.	Targeted industry engagement	Near-term 2018 Q2	Continually
7.3.5	Use public relations efforts to generate favorable coverage and publicity for NCGTP and to position it as an ideal location for targeted industries.	Targeted industry engagement	Near-term 2018 Q3	Continually
7.3.6	Host an annual economic development summit to celebrate existing industry and to illuminate assets and accomplishments.	Targeted industry engagement	Near-term 2018 Q4	Annually
<b>Tactic 7.4</b>	<b>Leverage Collaboration and Partner Relationships</b>			
7.4.1	Not-for-profit entity restructuring to increase stakeholder engagement, champion the NCGTP brand, generate leads, provide market intelligence, and augment the real estate and incentive portfolio.	Leveraged use of resources with common or complementary objectives	Near-term 2018 Q4	6 months



Strategy / Tactic		Success Measure	Planning Horizon / Timing	Re-evaluation
Specific actions to realize Business Plan objectives		Defined outcomes		
7.4.2	Partner with local regional, and state economic development entities on business recruitment and marketing activities, including Lenoir County, EDPNC, North Carolina Department of Commerce, North Carolina's East Alliance and North Carolina's Southeast.	Leveraged use of resources with common or complementary objectives; more stable strategy for lead generation and lead sharing among state partners.	Near-term 2018 Q2	Continually
7.4.3	Partner with Universities and Community Colleges to develop and market training programs attractive to targeted clusters.	Leveraged use of resources with common or complementary objectives	Near-term 2018 Q2	Continually
7.4.4	Partner with infrastructure providers to extend the NCGTP brand, including Duke Energy, Electricities, PSNC, Century Link, and North Carolina Rail Road.	Leveraged use of resources with common or complementary objectives	Near-term 2018 Q2	Continually
7.4.5	Collaborate with the NC Ports to create business recruitment and retention opportunities.	Leveraged use of resources with common or complementary objectives	Near-term 2018 Q2	Continually
7.4.6	Participate in events held by trade associations representing targeted clusters.	Leveraged use of resources with common or complementary objectives	Near-term 2018 Q2	Quarterly
7.4.7	Collaborate with NC Department of Commerce to establish a Quad East statistical region.	Ability to track NCGTP regional economic and demographic data	Near-term 2018 Q4	Annually
<b>CAPITAL ASSETS</b>				
<b>Strategy 8: Maintain and Enhance NCGTP Land and Capital Assets</b>				
<b>Tactic 8.1</b>	<b>Proactively manage NCGTP facilities and land</b>			
8.1.1	Develop GIS database to assure availability of real-time parcel data, constraints, and documentation to facilitate response to site inquiries.	Single source of information for real-time access to parcel data, constraints, and documentation	Near-term 2018 Q4	Regular updates
8.1.2	Augment in-house zoning and real estate expertise.	Facilitate land use planning / zoning within 6-mile authority of NCGTP	Near-term 2019	Annually
8.1.3	Investigate means to expedite land use approvals required from DoD and FAA for certain parcels.	Elimination of barriers to site attraction within limits of FAA / DoD jurisdiction	Near-term 2018-2019	5 years
8.1.4	Prepare conceptual site specific layouts and renderings based on targeted industry needs.	Parcel-specific information to provide to prospective users	Near-term 2018	Annually
<b>Tactic 8.2</b>	<b>Maintain site due diligence on existing and new land</b>			
8.2.1	Research, review and catalog site due diligence completed to date.	Increases site readiness	Near-term 2018 Q3	Continually
8.2.2	Complete site due diligence on additional property.	Increases site readiness	Near-term 2018 Q4	Continually

Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
<b>8.2.3</b>	Investigate and pursue site certifications that are relevant and recognized by targeted industries.	Increases exposure and attractiveness of sites to targeted industries.	Near-term 2018 Q3	Annually
<b>Tactic 8.3</b>	<b>Use NCGTP zoning authority to advance land use interests surrounding NCGTP</b>			
<b>8.3.1</b>	Coordinate with surrounding municipalities (city/county) to develop a Comprehensive Land Use Plan that protects NCGTP and regional economic development interests and supports recruitment of targeted industries.	Oversight to protect development interests of NCGTP and region. Regional Comp Plan to address long-term growth and land uses required to support quality of life and future development in the region.	Near-term 2019 Q2	10 years
<b>Tactic 8.4</b>	<b>Pursue options to control / obtain property near NCGTP</b>			
<b>8.4.1</b>	Initial focus on areas within the existing US Army Corps 404 permit boundary. Complete in conjunction with Tactic 8.2.	Provide larger, contiguous land options to industry.	Near-term 2018 Q4	Annually
<b>8.4.2</b>	Discuss options to modify lease area boundary with Spirit AeroSystems.	Allows NCGTP to market areas not being used by Spirit AeroSystems; specifically pad ready parcels adjacent to CF Harvey Parkway.	Near-term 2018 Q3	Dependent on lease negotiations with Spirit AeroSystems.
<b>8.4.3</b>	Transfer parcel from NC Department of Agribusiness to NCGTP.	Allow assembly of larger parcels for development within 404 Permit Area	Near-term 2019	1 year
<b>Tactic 8.5</b>	<b>Maintain NCGTP in a State of Good Repair</b>			
<b>8.5.1</b>	Address deferred maintenance needs.	Multi-year, fully funded plan to address existing deferred maintenance deficiencies, improve efficiency of equipment/systems. Provides safer environment and boosts employee morale and image of NCGTP	Near-term 2018 Q3 (start)	Annually – monitor progress of component renewals
<b>8.5.2</b>	Implement upgrades to NCGTP information technology to assure reliability, security, and capacity of IT system.	IT reliability, security, capacity	Near-term 2018-2019	2 years
<b>Tactic 8.6</b>	<b>Enhance physical appearance and site identity</b>			
<b>8.6.1</b>	Design and install new perimeter wayfinding signage in conjunction with marketing and branding strategy, including coordination with municipalities on gateways.	Urban design program that matches new brand identify Entrance signage and wayfinding installed on primary roadways	Near-term 2019 Q3 Medium-term 2020	5 years
<b>8.6.2</b>	Review and update NCGTP's Exclusive Development Ordinance.	Update Ordinance to complement industry recruitment effort and promote design consistency	Near-term 2019 Q3	5 years

Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
<b>Tactic 8.7</b>	<b>Proactively manage asset lifecycle costs</b>			
<b>8.7.1</b>	Conduct comprehensive review of building systems (fire, HVAC) to identify and implement opportunities for more efficient O&M (retro-commissioning).	Reduction of energy usage and cost	Near-term 2018 Q2	Annually
<b>8.7.2</b>	Implement asset management program to address long-term needs for asset renewal or replacement.	Future capital needs are defined, well-organized, and defensible.	Near-term 2018 Q2	Annually
<b>Tactic 8.8</b>	<b>Proactively plan land use to support recruitment of targeted industries and retention of existing</b>			
<b>8.8.1</b>	Prepare comprehensive land use master plan of NCGTP that optimizes land use.	Defines future land use strategy and associated capital needs.	Near-term 2018 Q2	Bi-annually
<b>8.8.2</b>	Implement near- and long-term strategy to relocate existing uses where appropriate.	Optimizes existing land use	Near-term 2018 Q2	Bi-annually
<b>8.8.3</b>	Pursue adjustment of US Army Corps 404-permitted boundary to meet future land use needs.	Expedites site readiness	Near-term 2018 Q2	Bi-annually
<b>8.8.4</b>	Determine ways to stream line approval processes for land use/ownership changes with FAA and DoD.	Expedites site readiness	Near-term 2018 Q2	Dependent on discussions with FAA and DoD
<b>Strategy 9: Expand Utility Capacity as Needed to Match Potential User Needs</b>				
<b>Tactic 9.1</b>	<b>Identify utility needs to support and recruit targeted industries.</b>			
<b>9.1.1</b>	Prepare comprehensive utilities master plan of NCGTP that considers future land use and promotes redundancy. Complete in conjunction with Tactics 8.3 and 8.8.	Defines future strategy and associated capital needs.	Near-term 2018 Q2	Bi-annually
<b>Tactic 9.2</b>	<b>Seek funding opportunities</b>			
<b>9.2.1</b>	Research sources for grant and low interest loans to support utility improvements. Develop/maintain relationships with funding providers. Examples include USDA-RD, NCDEQ, Golden Leaf and NCRR.	Provides alternative funding sources.	Near-term 2018 Q2	Every 4 months
<b>Tactic 9.3</b>	<b>Engage with utility providers</b>			
<b>9.3.1</b>	Coordinate regularly with utility providers to promote support and investment in industry recruitment strategy.	Increase site readiness	Near-term 2018 Q2 Every 4 months	Continually

Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
9.3.2	Discuss options with NRWASA and the City of Kinston for a larger allotment of water through the City of Kinston if future development requires greater water service.	Increase site readiness	Near-term 2018	Annually
9.3.3	Conduct an evaluation with the regulatory agencies and the City of Kinston to determine if the City can withdraw a larger amount of water from the ground.	Increase site readiness	Near-term 2018	Annually
9.3.4	If the demand for water encroaches upon the limits of production for the NRWASA water treatment plant, evaluate expansion of the plant to a 30 MGD facility.	Increase site readiness	Near-term 2018	2-5 years
9.3.5	If future water demand for NCGTP exceeds the City's distribution system capacity, examine options for connecting into the 30 MGD transmission line along Hwy 58.	Increase site readiness	Near-term 2018	Annually
9.3.6	Update preliminary engineering report (previously prepared for Greene County) and cost estimate to serve the northern parcels so the project cost is known to serve these parcels with sewer capability.	Increase site readiness	Near-term 2018	2-5 years
9.3.7	Further examine age, condition and capacity of the current sewer system, especially the main 30" interceptor prior to adding significant flows to the sewer system. CCTV inspection should be conducted to study pipe integrity and determine whether improvements need to be made to the sewer system.	Increase site readiness	Near-term 2018	2-5 years
9.3.8	Build out sewer to northern parcels that are not currently being served.	Increase site readiness	Medium-term 2020 or as needed for targeted users	Annually
9.3.9	Evaluation of current power service, via City of Kinston and Duke Energy, to determine what additional improvements are needed if any to attract targeted industry.	Increase site readiness	Near-term 2018	Annually
9.3.10	If additional capacity is needed, the City of Kinston substations should be built out since transmission capabilities are higher than service than service that is provided by the substations. The City of Kinston substations can be built to 60 mVA if future demand requires more service.	Increase site readiness	Near-term or as needed	Annually

Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
9.3.11	Supply greater power service to parcels that are located outside the City of Kinston. Duke Power currently has limited reserve capacity to these sites that will limit future growth if additional capacity cannot be supplied. This additional service could be by either power supplier.	Increase site readiness	Near-term 2019	Annually
9.3.12	Determine current limits of gas distribution capacity.	Increase site readiness	Near-term 2018	Annually
9.3.13	Assess whether the current limits meet the current and future tenant needs.	Increase site readiness	Near-term 2018	Annually
9.3.14	Collaborate with Dominion Energy to identify opportunities for power facilities that will support industry location	Increase available utility service	Near-term 2018-2019	Continually
<b>Strategy 10: Maintain and Enhance NCGTP Aviation and Aerospace Facilities</b>				
<b>Tactic 10.1</b>	<b>Maintain airfield in state of good repair</b>			
10.1.1	Evaluate long-term Capital Improvement Plan and seek strategic funding sources for the Division of Aviation and FAA.	Seek multi-year plan and funding for maintaining infrastructure	Near-term 2018	Annually
10.1.2	Evaluate long-term maintenance goals / needs for currently unused or underused portions of the airfield.	Seek multi-year plan and funding for pavement maintenance and preservation.	Near-term 2018	Annually
<b>Tactic 10.2</b>	<b>Implement landside improvements to support airfield operations</b>			
10.2.1	Seek grant funding from Division of Aviation to address airfield deferred maintenance needs.	Return airfield to state of good repair	Near-term 2019	Annually
10.2.2	Evaluate long-term need to maintain unused or underused portions of the airfield.	Reduce long-term maintenance or reconstruction costs for portions of airfield/apron that are no longer needed and may be decommissioned	Near-term 2018	Biannually
10.2.3	Demonstrate continued demand for FAA-contracted Air Traffic Control Tower services	Continued FAA support of Air Traffic Control Tower	Near-term 2018	Annually
10.2.4	Incorporate airfield needs, including landside access and supporting facilities, into master plan update.	Well-defined terminal redevelopment and apron redevelopment program and funding needs	Near-term 2018	Biannually

Strategy / Tactic		Success Measure	Planning Horizon / Timing	Re-evaluation
Specific actions to realize Business Plan objectives		Defined outcomes		
<b>Strategy 11: Enhance NCGTP Highway Access and Connectivity</b>				
<b>Tactic 11.1</b>	<b>Advance plans for supporting regional highway investments</b>			
11.1.1	Advocate for priority STIP projects to secure high rankings for NCGTP-supportive projects in STI prioritization process.	NCDOT STI funding for regional highway investments	Near-term 2018	Annually
11.1.2	Collaborate with NCDOT, RPO to secure high rankings for NCGTP-supportive projects in STI prioritization process.	NCDOT STI funding for regional highway investments	Near-term 2018	Annually
<b>Tactic 11.2</b>	<b>Advance plans for on-site circulation</b>			
11.2.1	Incorporate roadway loops and circulation into the NCGTP land use master plan.	Communication of clear plan for access to target site users	Near-term 2018	Biannually
11.2.2	Complete clearing and prepare roadbed for future construction of Spine Road.	Advance work to provide roadway access to north side parcels	Medium-term	1 year
11.2.3	Construct Spine Road.	Creates dedicated highway access to northern portion of Park and increase marketability of property in this area.	Long-term	5 years
<b>Strategy 12: Enhance Rail Access and Connectivity</b>				
<b>Tactic 12.1</b>	<b>Improve on-site rail facilities</b>			
12.1.1	Develop permanent on-site transload facility to support expanded short line rail operations for NCGTP users.	Provide enhanced rail capability to users	Medium-term 2020, or as needed by targeted users	2 years
12.1.2	Develop concepts and pursue funding for rail connection to north side of runway.	Conceptual plan and funding	Medium-term 2020, or as needed by targeted users	2 years
12.1.3	Construct rail connection to north side of runway.	Rail access to north side parcels	Long-term, or as needed by target users	5 years
<b>Tactic 12.2</b>	<b>Advance concepts for secondary rail connection to serve NCGTP</b>			
12.2.1	Pursue planning and environmental efforts for new rail connection along CF Harvey Parkway extension alignment.	Rail connection studies incorporated into ongoing development efforts for CF Harvey Parkway extension to establish future ROW needs for rail connection to AA-Line	Near-term 2019	2 years
12.2.2	Collaborate with NCDOT to develop a plan of action should Class 1 rail lines become available.	Plan of action for potential acquisition and rail operation	Near-term 2019	2 years
12.2.3	Pursue construction of new rail connection to CSX AA-Line.	Funding for engineering and construction of rail connection	Medium-term 2020	2 years & 5 years



Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
<b>Tactic 12.3</b>	<b>Pursue competitive rail service</b>			
12.3.1	Evaluate expanded role for Short Line rail operator.	Memorandum of understanding with short line operator to establish interest and rights for operation of expanded rail operation at NCGTP, interconnect service to NS including possible service, and future interconnect service to CSX.	Near-term 2019	2 years and 5 years
12.3.2	Evaluate business case for scheduled rail service to NC Ports (e.g. model used by SCSPA at Inland Port Greer with guaranteed volume).	Analysis of potential aggregated benefits (shipping cost, time) to target customers that would be generated by guaranteed scheduled rail service to NC Ports	Near-term 2018 Q4	2 years
12.3.3	Collaborate with NCRR and NS for improved rail access / service.	Defined State-level policy on means to improve rail access and service to Eastern North Carolina over NCRR-owned rights of way, perhaps to include trackage rights to short line operator to handle intrastate short haul routes to and from the Port of Morehead City	Near-term 2019	2 years
<b>Strategy 13: Enhance Port Access and Connectivity</b>				
<b>Tactic 13.1</b>	<b>Evaluate potential near-port functions that may be located at NCGTP</b>			
13.1.1	Collaborate with NC Ports to identify near-port functions that could be performed at NCGTP to free up waterfront property.	Strategy session with NC Ports leadership to identify and target areas where NCGTP and NC Ports can work together to attract and support needs of businesses supporting waterborne commerce through NC	Near-term 2018 Q4	2 years
<b>INVESTMENT</b>				
<b>Strategy 14: Secure Funding and Resources to Support Business Plan Objectives</b>				
<b>Tactic 14.1</b>	<b>Pursue grant funding for capital investments needs</b>			
14.1.1	Collaborate with State and regional funding partners, including RPO, NCDOT, NCDEM and others to identify and pursue funding sources for NCGTP capital needs.	Continued state of good repair and modernization of NCGTP assets to attract users	Near-term 2018	Annually

Strategy / Tactic Specific actions to realize Business Plan objectives		Success Measure Defined outcomes	Planning Horizon / Timing	Re-evaluation
<b>Tactic 14.2</b>	<b>Augment management capabilities and resources</b>			
14.2.1	Maintain consistent leadership to realize vision.	Clear and achievable performance objectives for NCGTP director and senior staff	Near-term 2018 Q2 and ongoing	Annually
14.2.2	Establish multi-year funding program to support daily requirements for management and operations of NCGTP.	Multi-year funding plan to match NCGTP needs for staffing and contract support related to NCGTP management and administration, air operations, park operations, marketing, and routine maintenance.	Near-term 2018 Q2	Annually
<b>Tactic 14.3</b>	<b>Enhance organizational capacity to meet facility operations and maintenance needs</b>			
14.3.1	Develop approach to address routine requirements for maintenance of buildings and grounds.	Multi-year staffing and contracting plan, along with associated plan for funding from NCGTP revenues and other sources, to meet building and grounds maintenance needs	Near-term 2018 Q3	Evaluate performance annually; Update plan after 2 years
14.3.2	Develop approach to address routine requirements for maintenance of airfield and associated assets.	2-year staffing and contracting plan, along with associated plan for funding primarily from NCDOT Aviation Division grants, to meet airfield maintenance needs	Near-term 2018 Q3	Evaluate performance annually; Update plan after 2 years
<b>Tactic 14.4</b>	<b>Clarify / redefine role of GTP Foundation to support realization of NCGTP Business Plan objectives</b>			
14.4.1	Work with GTP Foundation Board to position for increased and consistent operational, functional, marketing support for NCGTP growth and economic development.	Annual plan for allocating resources to projects/operations at NCGTP	Near term 2019	Biannually
14.4.2	Collaborate with GTP Foundation on funding, including potential use of nearly \$5 million in liquid assets and annual lease revenues of \$200,000 toward best advantage of NCGTP operation and its economic goals.	Annual plan for allocating resources to projects/operations at NCGTP	Near-term 2019	Biannually
14.4.3	Define roles that may be obtained or supported by GTP Foundation.	Updated GTP Foundation bylaws and policy to enhance support of NCGTP growth objectives and strategies	Near-term 2018	5 years

# **Appendix A**

## **NCGTP Strategic Plan Approach**

This page left intentionally blank

## Appendix A – NCGTP Strategic Plan Approach

### Contents

Overall Plan Approach .....	A-2
Due Diligence .....	A-2
Outreach .....	A-3
Investments .....	A-4
Recommendations .....	A-4
Outcomes .....	A-4
Strategic Plan Team .....	A-4

## Overall Plan Approach

The Business Plan development process included four phases – Due Diligence, Outreach, Investments, and Recommendations – with prioritized recommendations summarized in an actionable, market-driven plan to restructure, reposition, and drive increased revenue and business for NCGTP.

## Due Diligence

### Kick-Off and Goal-Setting

As an early activity to engage and focus the combined Strategic Plan team, a Goal-Setting workshop kicked-off and focused the Strategic Plan team efforts. This meeting clarified the approach, established a timeline, and set target dates for project workshops that were critical to delivery of a meaningful, actionable Business Plan prior to March 15.

### Research and Analysis

The team made use of available baseline economic and industry data to the extent practicable, in order provide the most value from the current effort. This allowed team resources to be focused on industry outreach and analysis that will lead to development of industry-driven recommendations for the future success of NCGTP.

Sources of information included (among others):

- NCGTP records, including asset inventory, summary lease information, land records, budgets, audit reports, prior reports and assessments, legislative reports
- Hoover's data
- EMSI data
- ESRI data
- NC Agricultural Statistics Book, 2017
- NC Commerce, Economic Impact of the Military on North Carolina, 2015
- NC Military Affairs Commission, Strategic Plan for Supporting and Enhancing North Carolina Military Missions and Installations, 2016
- NCDOT Maritime Strategy, 2012 (underlying economic data)
- NC Ports Strategic Plan, 2015
- NC Commerce data
- NC Office of State Budget and Management data
- US Census Bureau data
- EDPNC marketing materials
- NC East Alliance marketing materials
- North Carolina's Southeast Regional Economic Development Partnership marketing materials
- Brookings Institute data and analysis
- Regulatory documents: NC General Statutes Chapter 63-A, NCGTP Exclusive Development Ordinance
- Aviation supply chain data



## Outreach

### Visioning

An initial Visioning workshop was conducted to encourage open-ended discussion of opportunities for NCGTP, including envisioning:

- The industrial park's role as a regional inland port that is fully integrated with the region's multimodal freight network.
- The full range of potential users of the mega-site.
- Projected market and industry sectors to target and resources (workforce, infrastructure, etc.) needed to effectively support.
- Ties to area-wide industry to make off-site users more efficient, and competitive.
- Goals of workforce availability and training including opportunities to engage military veterans.
- Regional industry drivers and disruptors affecting the ability to attract job-creating businesses to NCGTP.
- Strategies for regional economic development collaboration.

The Visioning workshop convened key stakeholders to jointly perform PEST (political, economic, social and technological) and SWOT (strengths, weaknesses, opportunities and threats) analyses for NCGTP.

### Opportunities

Economic data analysis was supplemented with stakeholder outreach to identify and prioritize logistic and market opportunities that will best fit existing and potential enhanced NCGTP assets over the next decade.

Additionally, the team conducted a sample supply chain analysis for Aviation & Automotive component manufacturing to examine opportunities within that targeted industry cluster.

The unique physical, operational, regulatory, or institutional needs of various potential industry user groups were examined. Firsthand information was collected on market drivers and site location decisions.



**Figure A-1:** NCGTP Business Plan Stakeholder Visioning Workshop

## Investments

The team evaluated existing infrastructure to determine how NCGTP can best make use of its most significant assets, including the second longest runway on the US east coast, 2,500-acres of development-ready property, Class 1 rail access, front-door highway connections including a recently-upgraded four-lane highway, and close proximity to international seaports. The team assessed the general condition of existing facilities, evaluated connectivity to the Quad-East initiative, and, in a qualitative manner for future investment, considered opportunities for quality of life improvements.

A conceptual capital investment plan was developed to tie infrastructure needs with targeted industry opportunities that have been targeted. Information related to proposed highway and rail projects was developed or obtained from prior NCGTP planning documents and feasibility studies, NCDOT STIP, and the Kinston Comprehensive Transportation Plan.

## Recommendations

From the data gathered above, the team produced a draft set of recommended actions, including industry targets, asset investments, and other supportive activities. NCGTP stakeholders were convened to review, discuss, and prioritize Business Plan recommendations.

## Outcomes

The final product is an actionable, market-driven business and marketing plan to restructure, reposition, and drive increased revenue and business for NCGTP. This plan identifies specific goals and strategic actions to be taken to drive measurable growth for GTP over the next decade and beyond. The plan incorporates the following elements:

- Strategies for success
- Tactics to support each strategy
- Key metrics to evaluate progress
- Organizational best practices for effective delivery of strategies

## Strategic Plan Team

NCGTP staff	Allen Thomas, executive director Amanda Conner, business development specialist Mary Jane Westphal, controller Rick Barkes, aviation director
Dewberry	Rachel Vandenberg PE, project manager Brian Bradner PE, land use and development planning Beth Smyre PE, transportation planning
Stewart, Inc.	Lee Anne Nance, stakeholder engagement and marketing action plan
The Conti Group LLC	Gene Conti PE, transportation policy and planning
WE PLLC	Richard Walls PE, aviation opportunities and planning
Economic Leadership	Ted Abernathy, economic trends and industry cluster analysis
Strategic Development Group	Mark Williams, site attraction and target industries
McCallum Sweeney Consultants	Quick Assess of NCGTP site

# **Appendix B**

## **Stakeholder Engagement**

This page left intentionally blank

## Appendix B - Stakeholder Engagement

### Contents

Category List of Stakeholders Engaged in Strategic Plan Development.....	B-2
PEST Analysis.....	B-4
SWOT Analysis.....	B-5

## List of Stakeholders Engaged in Strategic Plan Development

Category	Organization
Academia	East Carolina University
Academia	Lenoir Community College
Academia	NC Community College System
Consultant Team	Stewart
Economic Development	Carteret County
Economic Development	Craven EDC
Economic Development	EDPNC
Economic Development	Greene EDC
Economic Development	GTP Foundation Board of Directors
Economic Development	Lenoir EDC
Economic Development	NC Department of Commerce
Economic Development	NC East Alliance
Economic Development	NC Economic Development Partnership
Economic Development	NC Southeast Alliance
Economic Development	North Carolina Military Business Center
Economic Development	Piedmont Triad Partnership
Economic Development	Wayne County Economic Development Alliance
Elected Officials	City of Kinston
Elected Officials	Lenoir County
Elected Officials	NC General Assembly
Government	City of Kinston
Government	Eastern Carolina Council of Governments (RPO)
Government	FTZ #214
Government	Lenoir County
Government	NC Department of Commerce
Government	NC General Assembly
Government	NC Ports
Government	NCDOT
Government	NCDOT Strategic Logistics
Government	REID ST. Consulting
Industry	DB Schenker
Industry	ECS Southeast, LLP
Industry	Greenville Utilities
Industry	Hanes Brands
Industry	Samet Development
Industry	Smith Moore Leatherwood
Industry	Zapata-LJP, PLLC
Military	NCIS



Category	Organization
Military	North Carolina Military Business Center
NC General Assembly	NC General Assembly
NCGTP Board Member	NCDOT
NCGTP Board Member	NCGTP Board of Directors
Railroads	North Carolina Railroad
Railroads	Gulf & Ohio Railroad
Strategic Plan Team	Dewberry
Strategic Plan Team	Economic Leadership
Strategic Plan Team	NC GTP & FTZ
Strategic Plan Team	NCGTP
Strategic Plan Team	The Conti Group LLC
Strategic Plan Team	WE, PLLC.
Utilities	Duke Energy
Utilities	Piedmont Natural Gas

## PEST Analysis

Summary of political, economic, social and technological factors affecting NCGTP success as identified in stakeholder workshop:

**Political Factors (P):** Government policies and regulations, taxes, incentives, and other business climate influencers.

**Economic Factors (E):** Factors such as interest rates, geopolitical stability, inflation, and other economic threats.

**Socio-cultural Factors (S):** Aspects such as demographics, lifestyle choice, education, and other factors that impact client attitude and perception.

**Technological Factors (T):** Factors that might impact technological processes, innovation, adoption, and adaptability.

### *Political Factors (P):*

- Incentive Policy
- Political not in alignment
- Regulatory approval speed (permitting)
- National Trade Policy
- Land use Policies
- Funding
- Future military BRAC

### *Economic Factors (E):*

- Tax policy
- Quality Of Life – may determine workforce attraction
- Availability/cost of housing
- Transportation (type, new technology, gas rail)
- Time/cost to market
- Workforce preparation
- Regional shared impacts
- Supply chain logistics – changing agility
- Remote learning
- Broadband
- New opportunities (autonomous vehicles, etc.)
- Supporting infrastructure
- Skill gaps Flat workforce growth
- Consolidation (i.e. with parts)
- Separation
- Prioritization

### *Socio-cultural Factors (S):*

- Generational
- “Starbucks”
- Tax policy
- Lifestyle – Quality of life
- Family
- Commute times
- Access to healthcare
- Housing
- Resiliency (roads, power, etc.)
- Environmental
- Lack of soft skills
- Loss of population
- Quality of life (family, kids, rec.)
- “Flattening” of population
- Military

### *Technological Factors (T):*

- Education
- Trades
- Supply chain
- Logistics
- Agile
- Changes (absorption)
- STEM/STEAM
- Advance manufacturing technology
- Adopt transportation
- Remote learning
- Broadband
- Autonomous vehicles
- Customized training

## SWOT Analysis

**Strengths (S):** internal attributes and resources that support a successful outcome for NCGTP.

**Weaknesses (W):** internal attributes and resources that work against a successful outcome for NCGTP.

**Opportunities (O):** external factors the NCGTP can capitalize on or use to its advantage.

**Threats (T):** external factors that could jeopardize NCGTP's success.

	Regional transportation	Site Access	Available Land	Available facilities / space	Site amenities / resources	Utilities	Environmental / permits / zoning	Quality of life	Workforce	Location	Institutional relationships	Vision (reputation, message)	Regional industry & supply chain	Funding	Business environment / incentives	Education	Military	Political support / commitment	Global economy / trade
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
<b>STRENGTHS</b>																			
Team 1	2*		1			2	2*	1*	5		1				2*	2	2	1	1
Team 2	1		1	1*	5*	1		2*	1	1*	1*				1			1*	
Team 3	3*	2	1				1		1*				2			1*	1	2*	2*
Team 4		2*	2*		2*	2	2*		3							3			
<b>WEAKNESSES</b>																			
Team 1		1		2				1	1	2*	1	2			1*	1*			
Team 2	3*	6*		1	2			2*	1			1					1	1	
Team 3	1	1	1*	2*	2				2*	1		4*	1					3*	
Team 4					1*					1*	1*	5*							
<b>OPPORTUNITIES</b>																			
Team 1	3*	1			1					1	2*	1*	3*				1		
Team 2	3*	1								1	2*	1*	4*				1		
Team 3					1*				5*		2*	4*	2*		1*	3*			
Team 4		1*	2				1		1*			3*				1*			
<b>THREATS</b>																			
Team 1							2	1	1*	1*		1		1*	1*		1	1*	1
Team 2	1									3*	3*	2		1				2*	
Team 3					1				3*	3*	1	3*							
Team 4			1				1		1*			2*		1*		1*		2*	

\* Identified by team as "most important"

# indicates how many times this category occurred in SWOT list for each team; some issues identified by SWOT teams appear under more than one category

## TEAM 1

### STRENGTHS (S):

- Transportation assets – rail, power, highways\* 1 6
- Certified site 3 6 7
- 404 Permit\* 7
- Affordability/cost of living\* 8 15
- Available space 4
- On-site training 5 9 16
- Work ethic in region 9 15
- University connection (Mount Olive, ECU, Satellites) 9 16
- Military bases/retirees 9 17
- NC/VA Ports 1 19
- Established base 4
- 2 regions – internal cooperation 11 18
- 15,000 existing military, opp, strength, threat. 9 17

### WEAKNESSES (W):

- Available space 4
- Too much energy 4
- Work force – trained/educated/committed 9
- Incentives available/structure ROI?\* 15
- Remote? Location/commutes\* 10
- Educational systems-Elementary/Sec.\* 16
- Rail – NS, CSX, resistance 2
- Access to Healthcare 8
- County silos – internal competition? Where are silos?: At every level (comm. College, counties, etc.) 11
- Eastern NC stereotype? 10 12
- Reputation of NC GTP? What is it? Propagated in NC? 12

### OPPORTUNITIES (O):

- Ag based industry – food processing\* 13
- Regional approach\* 1 11
- Aviation opportunities 5 13
- New cook/reboot\* 12
- Consolidate public agencies 11
- Access to several urban centers RDU/WLM/Norfolk 1 10
- Better rail/CSX 1 2
- Auto parts/military rehab 13 17

### THREATS (T):

- Urbanization/rural population loss\* 9 10
- Change in trend?
- Incentive competition\* 15
- Public safety/gangs 8
- New BRAC 17
- Global trading arena 19
- Litigation on Trans projects 7
- Funding stability\* 14 18

### Categories:

- 1 Regional transportation
- 2 Site access
- 3 Available land
- 4 Available facilities / space
- 5 Site amenities / resources
- 6 Utilities
- 7 Environmental / permits / zoning
- 8 Quality of life
- 9 Workforce
- 10 Location
- 11 Institutional relationships
- 12 Vision (reputation, message)
- 13 Regional Industry & supply chain
- 14 Funding
- 15 Business environment / incentives
- 16 Education
- 17 Military
- 18 Political support / commitment
- 19 Global economy / trade

\* Top 3 “Most Important”

- Reputation 12
- Zoning/Permitting 7

## TEAM 2

### STRENGTHS (S):

- Already established\* 4 5
- Commercial service available (airport) 5
- Land-use authority 5
- Good infrastructure 1 6
- Collaborative effort – stakeholders\* 11 18
- Marketing presence (mature) 5
- Absence of Flight restrictions 24/7 5
- Kinston\* 8 10
- Possibility for growth 3
- Lower labor cost – lower cost of living 8 9 15

### WEAKNESSES (W):

- Limited facilities for infrastructure – components exist - rail, roads\* 1 2
- Perceived lack of quality of life\* 8
- Lack of infrastructure 2
- One rail leg 2
- Small staff vs. value of resources 5
- Lack of developable property – choice properties 4
- Lack of direction/support 12 18
- No trans load facility 2 5
- Perception of lack of “extracurricular” activities for families, singles 8
- Lack of commuter transit system (transportation) 1 2
- Clearance restriction of railroad – GTP to Ports\* 1
- Road restrictions (daylight only) 2
- NC not so military friendly states (taxes, etc.) 9 17

### OPPORTUNITIES (O):

- Property available between GTP and rail 3
- Import/export rail 2
- CSX hub\* 1
- Capitalizing on agricultural industry in NC (crops, etc.) 13
- External opportunity to return to small time of life 8 10
- Traditional training/apprenticeship 9
- Kinston 8 10
- Become more diversified in companies/tenants\* 13
- Military realignment\* 17
- Expand on existing businesses – feeder industries (capitalize)\* 13
- Aviation corridor\* 1 13

### THREATS (T):

- Attitude of rejuvenation of park (competition across state) 11 12 18
- Regional parochialism\* 11 18

### Categories:

- 1 Regional transportation
- 2 Site access
- 3 Available land
- 4 Available facilities / space
- 5 Site amenities / resources
- 6 Utilities
- 7 Environmental / permits / zoning
- 8 Quality of life
- 9 Workforce
- 10 Location
- 11 Institutional relationships
- 12 Vision (reputation, message)
- 13 Regional Industry & supply chain
- 14 Funding
- 15 Business environment / incentives
- 16 Education
- 17 Military
- 18 Political support / commitment
- 19 Global economy / trade

\* Top 3 “Most Important”

- Transportation opportunity elsewhere (neighboring counties) ①
- Urban magnetism\* ⑩
- Political turnover – shrinking\* ⑩
- Lack of sustained commitment ⑫ ⑭
- Comparison to Raleigh/Charlotte when this area should stand on its own (stops conversation)\* ⑩

### TEAM 3

#### STRENGTHS (S):

- Statewide asset\* ① ⑮
- State owned ⑮
- Shovel ready – permitting ⑦
- Infrastructure roadway lengths/improvements ②
- Land and sites ③
- On-site training – ICC and ECU\* ⑨ ⑮
- Biz-centric airport ⑬
- Industrial – ramp access ②
- Proximity to ports and connectivity\* ① ⑲
- Military bases ⑮
- Non-NC ports ① ⑲
- Spirit – presence and supply chain ⑬

#### WEAKNESSES (W):

- Lack of civilian aerospace supply i.e. machining/component manufacturing ⑬
- At the eastern end of the road! ① ② ⑩
- FAA meeting oversight
- Aerospace strategy (NC) is incoherent and not comprehensive ⑫ ⑮
- Political will ⑫ ⑮
- Small GTP team ⑤
- Incomplete industrial strategy (NC)\* ⑫ ⑮
- Quantifying available workforce\* ⑨
- Opioid situation ⑨
- Underutilized facilities\* ③ ④
- Limited use of training center – docs not show well?? ④ ⑤
- Upgrade the signage entry (where is “the” entry?) ⑤ ⑫

#### OPPORTUNITIES (O):

- On-site training – manufacturing and aerospace\* ⑨
- Partner with research universities\* ⑨ ⑪ ⑮
- Increase career pathways – aerospace/manufacturing\* ⑨
- Leverage proximity with ECU\* ⑨ ⑪ ⑮
- Targeted marketing ⑫
- Proactive marketing\* ⑫
- Leverage NC aerospace links with other NC regions\* ⑤
- Certification programs (workforce)\* ⑨ ⑮
- Incentives – industry-specific\* ⑮
- Re-cast the value proposition\* ⑫

#### Categories:

- ① Regional transportation
- ② Site access
- ③ Available land
- ④ Available facilities / space
- ⑤ Site amenities / resources
- ⑥ Utilities
- ⑦ Environmental / permits / zoning
- ⑧ Quality of life
- ⑨ Workforce
- ⑩ Location
- ⑪ Institutional relationships
- ⑫ Vision (reputation, message)
- ⑬ Regional Industry & supply chain
- ⑭ Funding
- ⑮ Business environment / incentives
- ⑯ Education
- ⑰ Military
- ⑱ Political support / commitment
- ⑲ Global economy / trade

\* Top 3 “Most Important”



- Economic impact analysis – clear message 12

#### THREATS (T):

- Missed expectations 12
- Declining population and work force\* 9
- Eastern NC stereotype 10 12
- Access to jobs and education for those with limited transport 9
- Filling the pipeline\* 9
- Impact of deferred maintenance 5
- Lack of a clear value proposition\* 12

#### TEAM 4

##### STRENGTHS (S):

- Upgraded broadband 6
- Freeway access west\* 2
- Runway\* 5
- Permitted sites\* 3 7
- Regional STEM initiative 9 16
- ECU – Biz, e & t 9 16
- CC training – manufacturing academy & A&P 9 16
- General infrastructure 2 5 6
- Land control 3 7

##### WEAKNESSES (W):

- Silos \* 11
- Mega-site spin 12
- Knowledge of general public with GTP talking points 12
- Understaffed/economic development\* 5 12
- Perception of ENC? As if it's all the same\* 10 12
- Past governance (who's in charge)\* 12

##### OPPORTUNITIES (O):

- ECU and NCSU\* 9 16
- Rail interconnect/use\* 2
- Really develop megasite 3
- Broader land control 3 7
- Better inform public 12
- Regional marketing selling regional quality of life (New Bern, Goldsboro, etc.)\* 8 12
- Better state ED? Promotion 12

#### THREATS (T):

- Encroachment 3 7
- Recurring funding\* 14 18
- Labor-skilled/STEM\* 9 16
- Clear message/regional 12
- Speed of making a decision on sale/lease\* 12 18

#### Categories:

- 1 Regional transportation
- 2 Site access
- 3 Available land
- 4 Available facilities / space
- 5 Site amenities / resources
- 6 Utilities
- 7 Environmental / permits / zoning
- 8 Quality of life
- 9 Workforce
- 10 Location
- 11 Institutional relationships
- 12 Vision (reputation, message)
- 13 Regional Industry & supply chain
- 14 Funding
- 15 Business environment / incentives
- 16 Education
- 17 Military
- 18 Political support / commitment
- 19 Global economy / trade

\* Top 3 "Most Important"

\*Factors most critical to the NC GTP's success per each team.

This page intentionally left blank

# **Appendix C**

## **Industry Analysis**

This page left intentionally blank

# Appendix C - Industry Analysis

## Contents

Economic Competitiveness of the North Carolina Global TransPark.....	C-2
Industry Cluster Maps .....	C-32
Aviation Supply Chain Data.....	C-45

Industry analysis conducted to support the development of the NCGTP Business Plan included the following evaluations of economic competitiveness, regional industry presence, strength, and growth trends:

*Economic Competitiveness of the North Carolina Global TransPark* evaluates demographic, labor and employment trends impacting the NCGTP and opportunities for industry growth.

*Industry Cluster Maps* were developed to show industry locations with at least 50 employees within 150 miles of the NCGTP. The density of agricultural production (crops and animals) along with locations of food production facilities with at least 50 employees were also mapped.

Sample *Aviation Supply Chain Data* was collected for HondaJet to illustrate the input suppliers to regional assembly plants that may be targeted by NCGTP to expand its Aerospace & Automotive Cluster.

## Economic Competitiveness of the North Carolina Global TransPark

Prepared by Economic Leadership of Raleigh, North Carolina



**Any competitiveness analysis begins with a current assessment of strengths and weaknesses.** By understanding the North Carolina Global TransPark (NCGTP) competitive position its leaders can better allocate the organization's limited resources to meet its goals. Identifying and achieving a differentiated competitive advantage, the economic development goal of all successful places, requires not one, but a mix of factors. These almost always include some combination of: the business climate including costs and regulatory issues the depth of workforce talent, the connective infrastructure (roads, air service, water & sewer, energy and broadband), currently available buildings and shovel ready sites, and the quality of life factors that appeal to current and potential workers. The most recent survey of factors companies considered when evaluating new investment, conducted by Area Development, is in the box on the right. (A physical assessment of the NCGTP, including existing and needed infrastructure has been completed separately.)

This analysis looks at the demographic, labor and employment trends impacting the NCGTP and the opportunities for industry growth. A broad geographic range was determined to be the best initial filter for analysis. The impact area designated is a 60-minute drive-time of the site. It reflects the belief that persons within the range would commute for good jobs within the NCGTP. Many already commute outside their county for work. Attractive commuting distance would be, in part, determined by the job quality, including the ages and benefits.

While the 60-minute commute was deemed appropriate, we also recognize that there are many other competing communities and sites within the drive-time that represent competition for new investment. The presence of a unique runway feature differentiates the NCGTP site, but other sites may have greater concentrations of near-by workers, access to interstate highways, and be less expensive.

Just over 900,000 people live in the area. The population has grown by 2.3 percent over the past 10 years, less than half the growth rate of North Carolina and well below the growth rate of

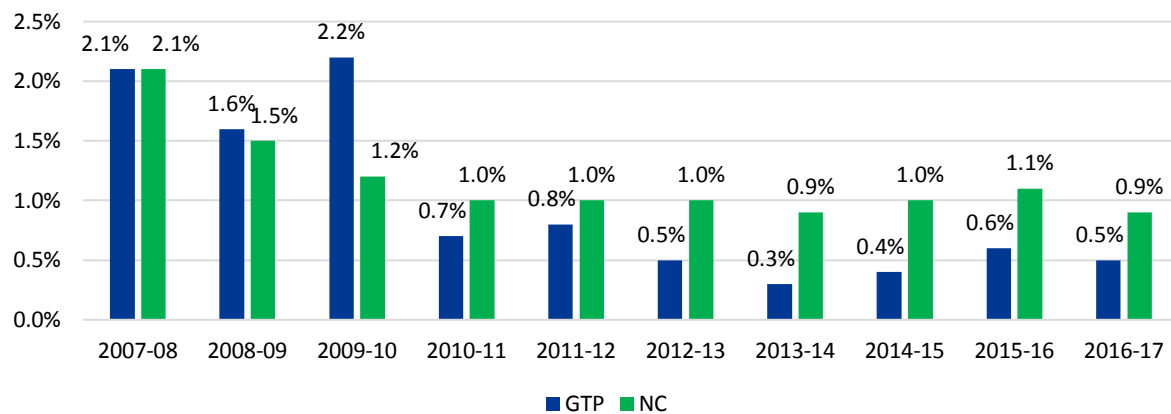
### Top Factors for Companies Considering New Investment

- (1) Availability of skilled labor
- (2) Highway accessibility
- (3) Labor costs
- (3) Proximity to major markets
- (3) State & local incentives
- (3) Available land
- (3) Tax exemptions
- (8) Energy availability and costs
- (9) Proximity to suppliers
- (10) Training programs/Technical schools
- (11) Availability buildings
- (12) Accessibility to a major airport

*Source: Area Development 31th Annual Survey of Corporate Executives, March 2017*

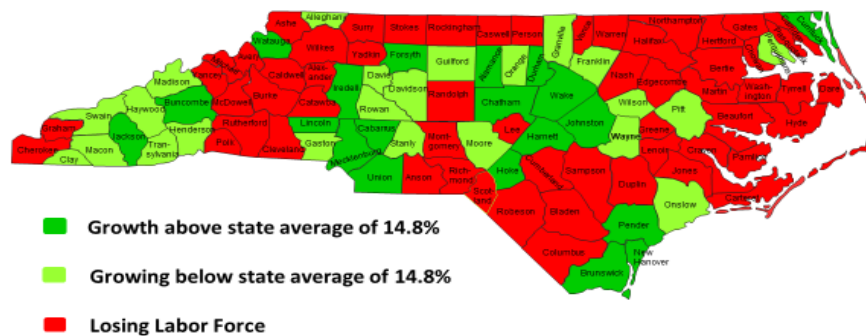
the more urbanized parts of the state. The growth rate for the area has also slowed considerably over the past few years.

### Population Growth 2007 – 2017 (60-minute drive time zip code area)



Projections for the next 20 years show uneven growth across the region, with many of the NCGTP region's counties expecting population loss and only Johnston County expecting growth at, or above, the state average.

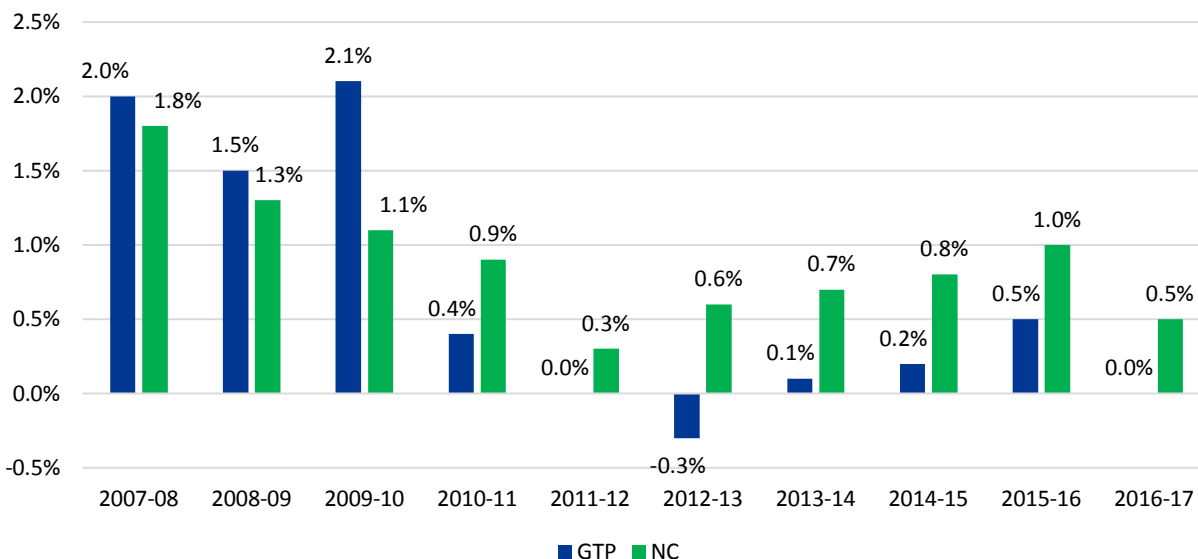
### PROJECTED CHANGE IN LABOR FORCE AGE POPULATION Ages 25 – 64 2016 - 2036 North Carolina state average 14.8%



The availability of appropriately skilled labor is the top consideration for many companies evaluating a new investment. The growth in the workforce in the region has also lagged the state average and current projections suggest that the trend will continue.



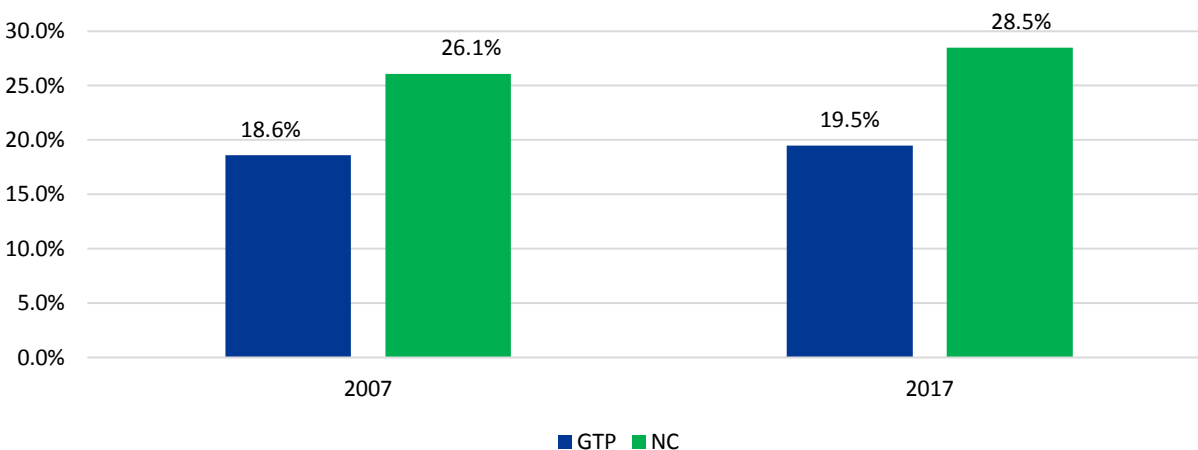
### Working Age (25 -64 years) Growth 2007 – 2017 (60-minute drive time of NCGTP)



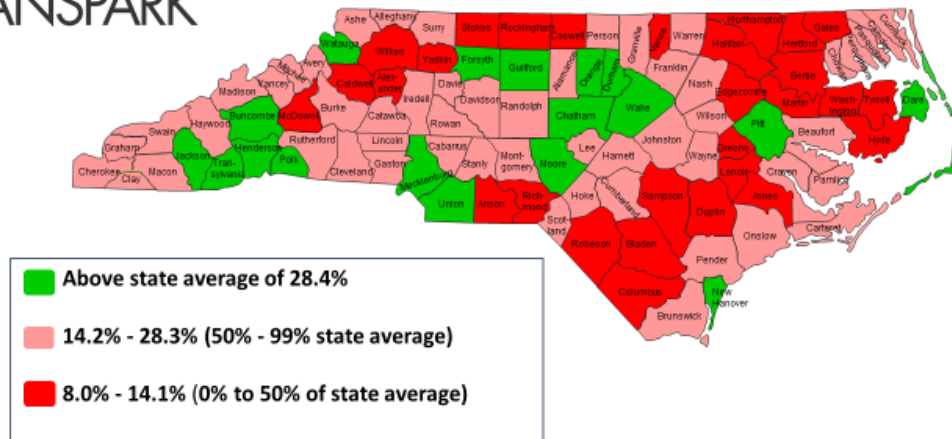
The percentage of the workforce that has attained a bachelor's degree or higher, is below the state average, but has remained consistent over the past decade. In the area, only Pitt County, home to East Carolina University and the region's biggest hospital, exceeds the state average.

### Percentage of Labor Force with BA Degree or Higher 2007 – 2017

(60-minute drive time 14 county area)



## Percent of people 25+ with Bachelor's Degree or Higher North Carolina State Average 28.4%



## National and Global Trends Likely to Impact the Future of the NCGTP.

No one can predict the future, but some trends seem certain to impact NCGTP's growth strategies for the future.

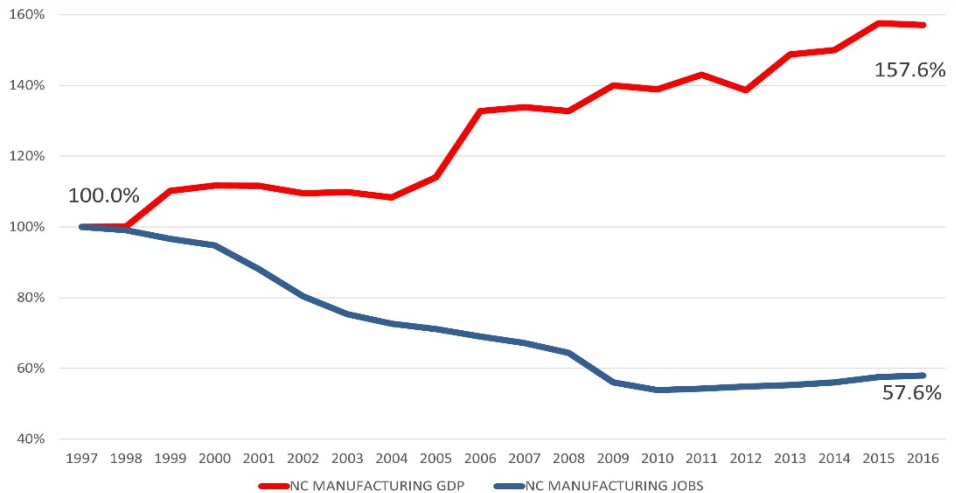
Competitive challenges in business climate (tax burden, regulatory and legal), infrastructure, workforce preparedness, and entrepreneurial dynamism have emerged as key factors over the past decade. After the great recession many states have made changes to their practices to improve their competitiveness. North Carolina has been aggressively improving its tax climate over the past few years. The state and the NCGTP currently enjoy a strong business climate with North Carolina consistently ranked as among the best business, tax, regulatory and legal climate in the country.

**The economy is experiencing rapid transformation.** National unemployment is hovering near four percent, close to what is considered full employment, and in recent months wages have begun to show some positive signs. But these averages mask the economic unevenness among places and people. In the past few years, urban-rural divisions have received considerable attention in North Carolina and around the country.

Over the past 30 years, North Carolina has witnessed the decline of its traditional manufacturing industries. Changes in the production and consumption of agricultural goods, tobacco, textiles and furniture have had negative effects on many places. Yet despite those losses, manufacturing output continues to increase. As the chart below, shows North Carolina had both an increase in manufactured goods and a decrease in the workers needed to produce those goods.

In Eastern North Carolina manufacturing jobs, (and agriculture) has been the foundations of many communities. Globalization, and especially technology advancements, has changed the economic dynamics. Being successful in attracting significant growth in manufacturing jobs for the NCGTP is not impossible but will be a challenge. The U. S. Bureau of Labor Statistics projects that over the period, 15 of the 20 most rapidly declining industries in the nation will be in manufacturing.

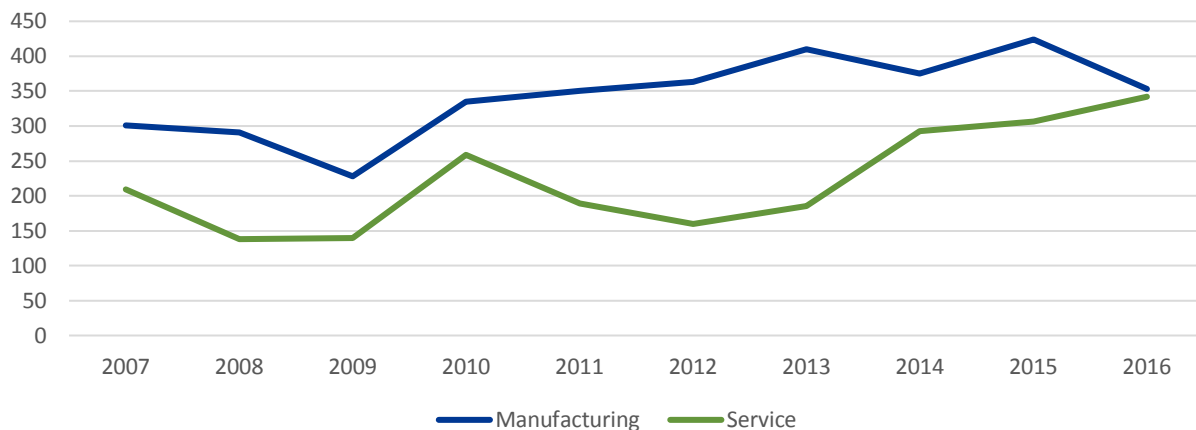
**North Carolina Manufacturing Jobs and Manufacturing GDP Growth**  
1997 – 2016 (normalized as percent of levels in 1997)



Source: US Bureau of Labor Statistics QCEW  
US Bureau of Economic Analysis GDP

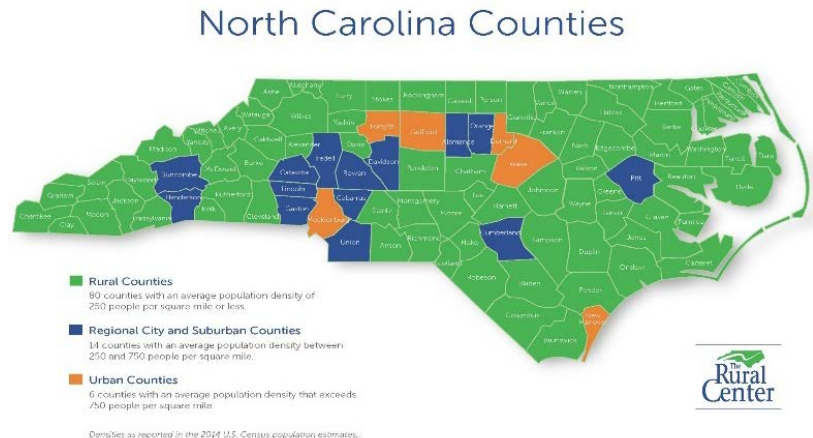
Southern Business and Development magazine reports annually on the types of large projects (over 200 jobs and/or \$300 million in investment) that locate in the 18 Southern states. Southern states have continued to attract population growth and new investments. Post-recession manufacturing projects have continued to grow, at the expense of other regions of the country and service projects have grown dramatically.

**Major Project Locations in the South**  
2007-2016



Source: Mike Randle, Southern Business and Development, January 2018

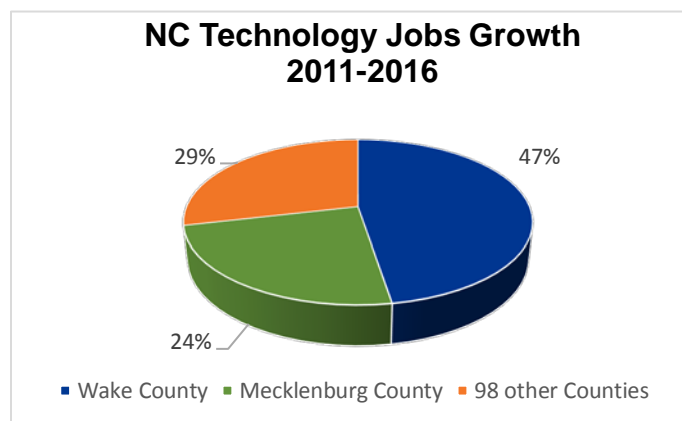
**The United States continues to urbanize.** Today more than 90 percent of the country's GDP and 86 percent of the jobs are in urban areas, with growth happening in larger communities that offer new 21<sup>st</sup> century infrastructure such as commercial airports and large research universities and hospitals. Educated workers, especially younger workers, seem to be even more attracted to an urban lifestyle, and research shows that they are congregating in fewer, more dense communities.



At a think-tank event at Barton College in Wilson North Carolina, Enrico Moretti, an economist at the University of California, Berkeley, and author of *The New Geography of Jobs*, stated "For every college graduate who takes a job in an innovation industry, five additional jobs are eventually created in that city, such as for waiters, carpenters, doctors, architects and teachers." He emphasized the huge impact of being able to attract young college graduates.

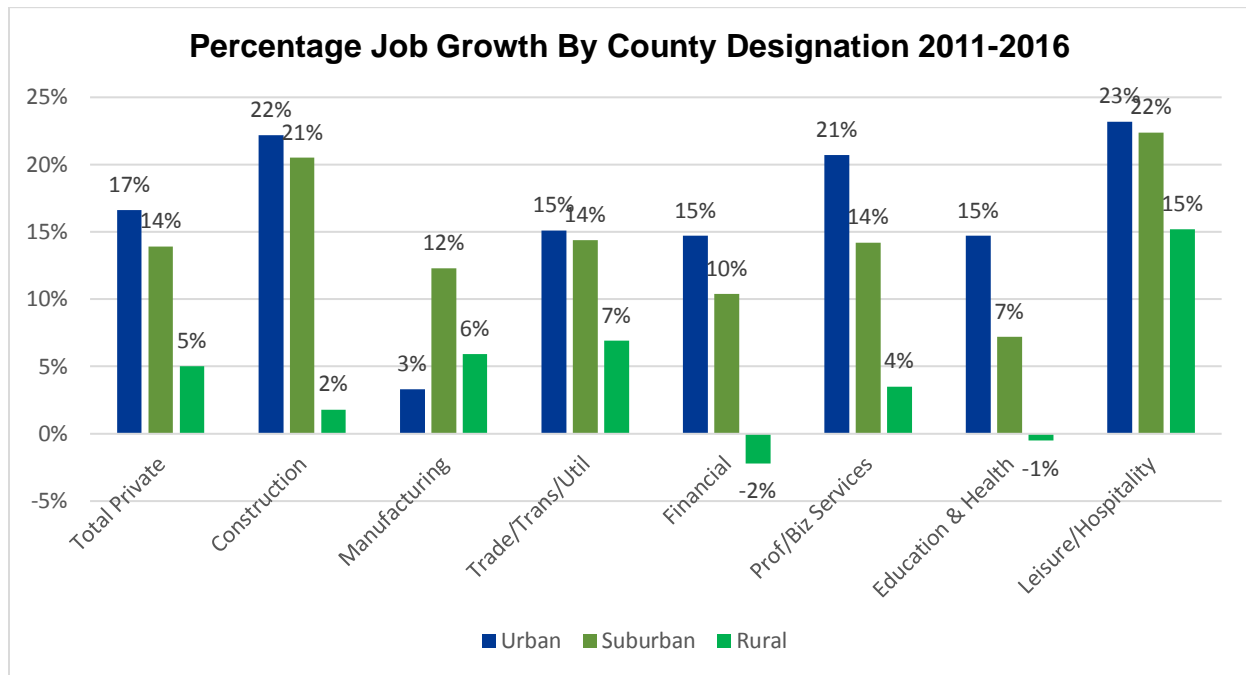
According to the designations of the North Carolina Rural Center, only Pitt County in NCGTP area is designated as a regional city (Greenville). All the other counties are designated as rural. Over the past 5 years the growth in North Carolina's 80 rural counties has significantly lagged behind the growth in the 20 more urbanized counties in every industry sector.

A similar national and regional pattern of industry cluster concentrations, particularly with technology sector employment, will also influence the region. The recent *NC State of Technology Report 2017*, showed that while North Carolina added technology jobs at the third fastest rate in the country over the past five years, close to half of the job gains were in Wake County.



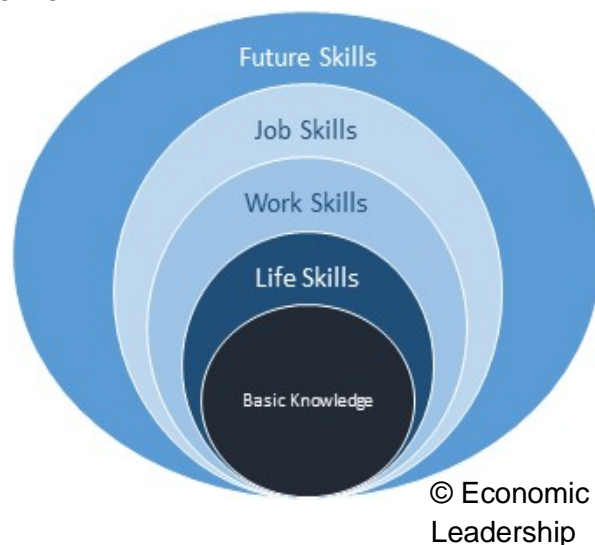
**The Rising Skills Demand.** The education and skills of the residents in the NCGTP region will be the most important competitive factor for future economic success. North Carolina is experiencing low unemployment and a high demand for skilled workers. Today, employers continually point to gaps between what they need to be successful and the skills of the available work force. The availability of a qualified labor pool is currently the number one site location factor, and the

availability of a skilled workforce is projected to become even more important in the coming years.



The following breakdown of skills, created by Economic Leadership, better explains the “skills gap” and the skills that NCGTP citizens will need to successfully compete for better jobs in the future. Each tier builds upon the previous set of skills

**Basic Knowledge** is the set of core competencies being taught by elementary, middle and high schools in North Carolina. The curriculum details expected learning in English, mathematics, science, social studies and other areas of focus. From the employers’ perspective, this course of study would result in proficiency in reading comprehension, writing and, increasingly important, applied math. Almost all jobs today, and in the future, will require these skills and the actual and perceived quality of NCGTP Schools will be important for companies considering investment.



**Life Skills** are made up of those personal attributes that are sometimes described as “soft skills.” They include motivation (initiative), responsibility, honesty, punctuality, personal accountability, flexibility/adaptability and conflict resolution. These are hard to measure, but

nevertheless critical. A company considering investment will usually talk to existing company human resource directors to gauge the community.

**Work Skills** are sometimes considered “soft skills” since many are viewed as personal traits. These skills are extremely important to employers, and they are also generally transferable between jobs. Today, most jobs demand that a good employee have teamwork, problem solving, flexibility, perseverance and communication skills. More often innovation, creativity, leadership, selling and negotiation abilities are valued. Integrating the acquisition of these skills into the K-12 curriculum has become the norm as communities migrate toward more demand-driven workforce policies.

**Job Skills** are specific to an individual job. A diesel mechanic or pastry chef must receive specific training for the task. Regional Community Colleges and on-the-job experience with employers will be the primary provider of this training. Whether it is a degree or certificate, many employers are demanding more skills than the basic knowledge conferred by a high school diploma.

Finally, **Future Skills** are emerging as abilities that can add worth to the employee, especially in these rapidly changing economic times. Once, being able to use a computer was new. Today, the ability to use and interface with technology, manage multiple simultaneous priorities, comfortably absorb and apply data, and successfully interact with colleagues and customers that are different are highly valued. These skills should be gained during school years and augmented by ongoing education and practice.

Dozens of successful workforce training programs exist within the NCGTP region, include successful apprenticeship and STEM efforts. Targeting future investment will depend on maintaining a successful workforce pool or demonstrating the ability to attract new workers to the region.

**Technological Trends** are impacting every facet of the economy and society. A quick internet search of "how technology changes everything" will result in thousands of hits. Robotics, the internet of everything, 3-D printing, drones, artificial intelligence, and wearable technology are redefining corporate activities daily. Each creates new opportunities and methods, job displacement, greater consumer choice and control. NCGTP may find niche markets to target by being future focused.

**Real estate markets will continue its current transformation** as square footage per employee in office space is reduced, retail moves on-line, warehousing consolidates, and new industrial space is built for machines and employee interdependence.

Each of these and many other trends will impact the future of the NCGTP, as will other projects and investments in the region. The **Carolina Connector Intermodal Rail Terminal (CCX)**, being constructed in Rocky Mount will be complete in the next few years. The project will support rail-to-rail and truck-to-truck transfer of containerized goods. The impact of the project



will likely reposition eastern North Carolina as a major logistics hub, and if well aligned with the ports and the NCGTP, could be the competitive advantage that creates success. The logistics advantage will strengthen the region's competitiveness for future growth in value-added agriculture, vehicle and vehicle parts, transportation equipment, and machinery.

## Global Trans Park - Industry Cluster Analysis

The Global TransPark (GTP) is an initiative of the North Carolina Department of Transportation. It is a 2,500-acre industrial park located alongside the Kinston Regional Jetport about 30 miles outside of Greenville, North Carolina. The park features a longer than average airplane runway, on-site rail connection, and 'shovel-ready' industrial sites. The NCGTP began in 1992 to be an economic driver for all Eastern North Carolina and has received over \$200 million in taxpayer money from the state throughout its existence.

The NCGTP currently employs about 1,000 private-sector and 400 public sector workers. These workers earn on average about \$59,000 in annual wages. The anchor tenant is Spirit AeroSystems who manufactures commercial airline parts and employs 850 workers at the NCGTP. Just recently, December 2017, the company announced a \$55.7 million expansion in operations at the NCGTP.

Despite this growth, the NCGTP has not produced the economic development that was initially anticipated. The authority that manages the NCGTP has been making changes in personnel in the past year and are looking to ramp up their targeted recruiting efforts. One method of focusing recruitment and expansion efforts for the NCGTP is a focus on industry clusters. This is a way of utilizing regional strengths in the area surrounding the NCGTP as a draw for potential companies to locate at the NCGTP. This report reviews traded clusters within the region surrounding the NCGTP.

Traded clusters are groupings of industries that serve markets outside of a region (internationally and/or domestically). Clusters also contain a supply chain that supports an industry such as suppliers, infrastructure and machinery. Focusing on clusters in economic development strategy narrows effort to those industries which are most likely to thrive in a region. This is particularly important as the competition for investment and jobs is intense.

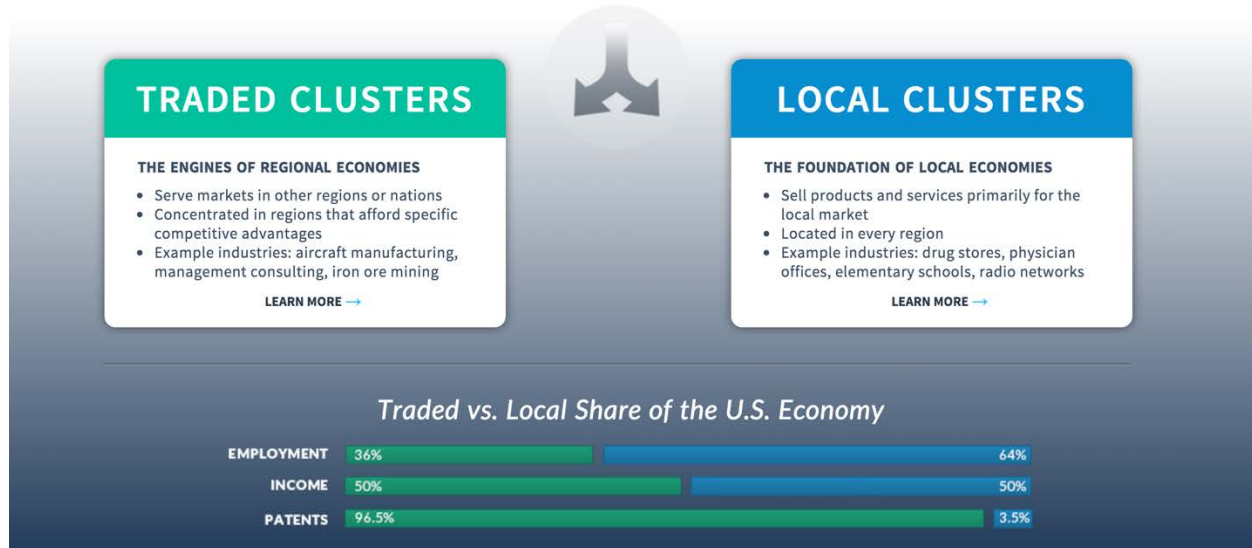
*"What makes clusters unique is not just that companies with similar or complementary interests, competencies, and needs congregate around each other. It's that an entire value chain exists within a cluster: suppliers, manufacturers, distributors, academic institutions, researchers, and workforce training, as well as those who provide relevant support services."*

*-Bloomberg*

Studies have shown that assets that support clusters are more efficient and cost effective than providing subsidies and solutions to individual companies. Most organizations, including the NCGTP, have a limited marketing budget and cluster targeting can provide insight into the most likely targets for marketing success.



Cluster: a regional concentration of related industries ⓘ



Source: US Cluster Mapping

Traded clusters often account for less than 40 percent of a region's employment, however, they are usually responsible for 50 percent or more of a region's income and innovation.

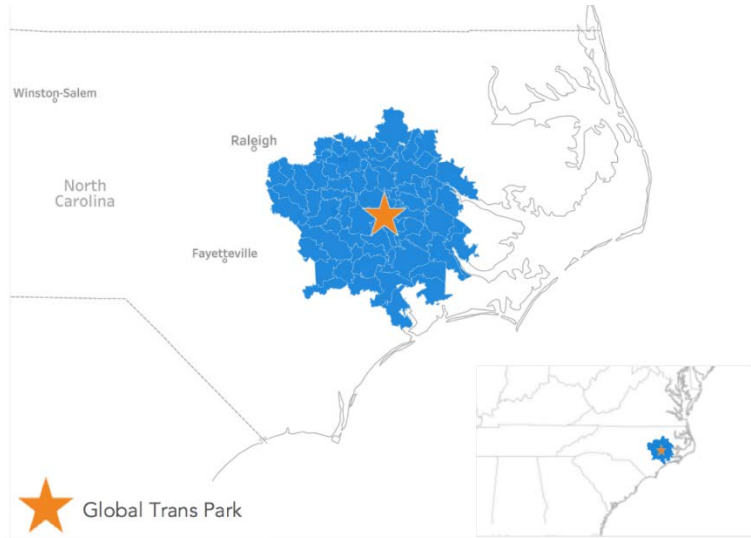
The NCGTP already specifically targets certain focus industries including:

- Aerospace and aviation
- Advanced manufacturing
- Logistics and exporting
- Defense and security
- Emergency response and disaster relief

These focus industries make sense given the on-site benefits of the NCGTP. However, there may be certain industries that would thrive being located at the NCGTP because there was already a strong presence of similar industries in the greater region. This analysis evaluates the region surrounding the NCGTP and determines which clusters are thriving and/or emerging that may be of interest to NCGTP's economic develop efforts.

The NCGTP vision includes being an employment growth center for the broader region. The region in this cluster analysis was calculated by creating a 60-minute drive time radius around the NCGTP. This may be an aggressive assumption of the acceptable commuting time for the surrounding workforce, but if the NCGTP is successful in attracting higher wage jobs, we feel 60-minute commutes provide a sense of the maximum workforce for the project. All the zip codes that were included in this radius made up the final NCGTP region. Currently commuting pattern in the northwest portion of the designated area are predominately toward Wake County, but with adequate highway access we believe that a commute toward NCGTP is possible.

## Map of the NCGTP Region



To determine the most intriguing traded clusters in the NCGTP region we combined over 670 industries into 51 traded clusters as defined by US Cluster Mapping. These traded clusters were then evaluated on recent growth, location quotients, wages, and employment. Employment and wage data was gathered using the latest industry data from Economic Modeling Specialists International (EMSI).

In 2017, over 74,930 of the workers in the NCGTP region were employed in traded clusters. This accounts for 22 percent of the total workforce in the region. Wages in traded cluster are on average \$14,000 higher than other jobs in the region. In the past ten years, traded clusters have experienced significant reductions in the region. There has been a 19 percent decline in employment in traded clusters. Although the region overall has lost employment, this decline is more than twice the rate of total job loss, a 7 percent decline. In the next ten years, the outlook for traded clusters is predicted to grow at a moderate pace of ten percent.

More recently, over the past 5 years, the loss of traded cluster jobs has continued, but at a slower rate. Expectations for the next five years show moderate grow.

## Traded Clusters in the Region

Total Traded Cluster Employment	74,930
2012-2017 TC Employment Growth	-1.4%
Average TC Wage	\$62,480
Expected 2017-2022 TC Employment Growth	5.5%

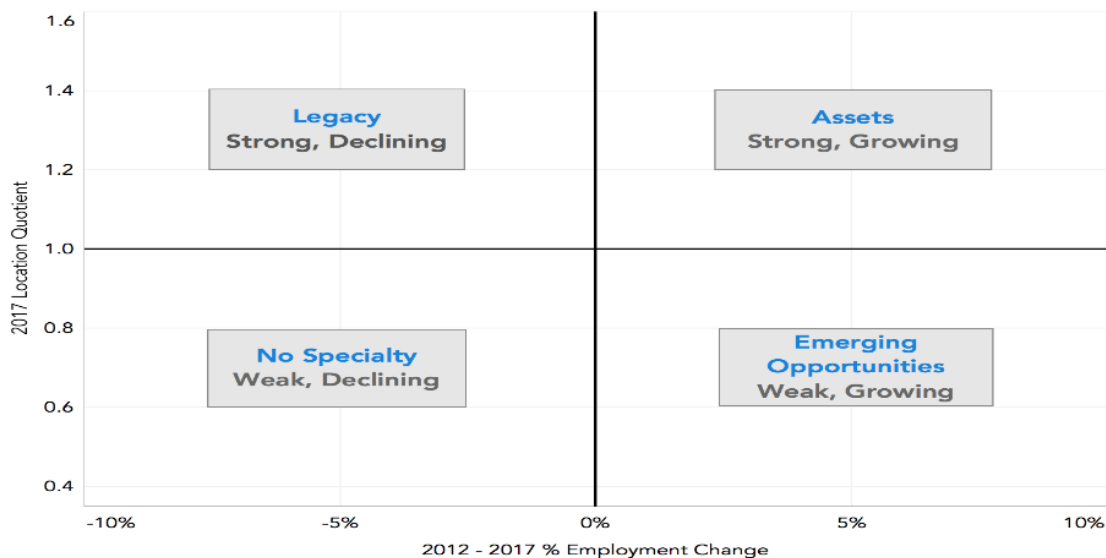
Source: EMSI 2017.4

To look at industry clusters that have a unique strength in the region, or a high concentration compared to national levels location quotients were measured. Location quotients are the concentration of clusters employment in the region compared to national employment levels. A location quotient (LQ) of 1.25 or greater demonstrates a high concentration of workers in one cluster. This can reveal what clusters are unique to the NCGTP region and generating money from outside of the region through exporting. LQs were also mapped alongside employment growth to see which clusters are thriving or declining.

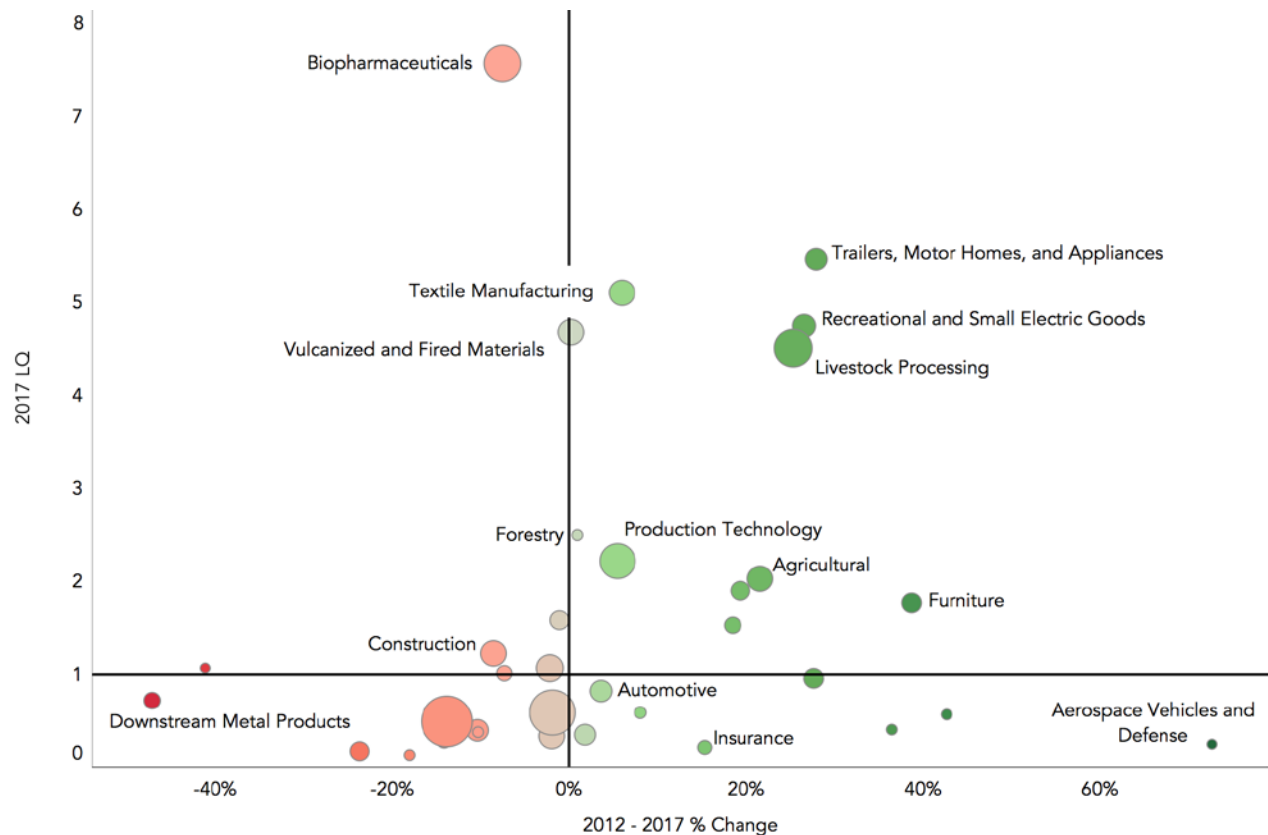
Generally, asset and emerging clusters will be the top clusters relevant to the NCGTP strategically. This is based on asset clusters having a concentrated presence in the region and experiencing recent job growth. “Legacy clusters” are traditional industries that have long sustained a region but are seeing steady declines in their workforce. Tobacco, textiles, and furniture are legacy clusters present in many areas of North Carolina. If a cluster lacks job growth and does not have a strong concentration compared to national levels, these clusters are deemed ‘no specialty’ and are not included in the list of relevant clusters.

“Emerging clusters,” are those with high growth but low LQ levels. Employment levels are also considered in determining the traded clusters that should be part of the NCGTP Authority’s focus. The chart below demonstrates where a cluster may fall on the map and how it corresponds to its strength and growth.

### Example Chart for Cluster Mapping



### Cluster Map of NCGTP Region



Source: EMSI 2017.4

Note: The size of each cluster bubble is determined by the size of 2017 employment levels. The color of each cluster is determined by the employment growth from 2012 to 2017.

The cluster map above excluded tobacco manufacturing which has a LQ of 53 and employs 1,550 employees in the region. The tobacco cluster has seen employment decline by 15 percent in the past five years. This strong concentration combined with declining employment places the cluster in the legacy category. With an extremely high LQ, tobacco manufacturing was removed from the cluster map to allow for greater detail to be shown.

The NCGTP region has several highly-concentrated industry clusters. Some of these industries employ workers at percentages 4 to 7 times higher than the national average. The top industry clusters in the region include biopharmaceuticals, textile manufacturing, vulcanized and fired materials, livestock processing, appliances, furniture, and production technology. Overall, 16 out of the 51 traded clusters had higher concentrations in the NCGTP region than nationally. Nine of these highly-concentrated clusters experienced employment growth in the last five years.

Biopharmaceuticals was the only major strong cluster that saw a decline in employment in the last five years. Interestingly, many sectors that are now standard “legacy” clusters in the state,

like textiles and furniture are growing their employment in the NCGTP region. Furniture was actually the fastest growing high-concentration cluster in the region, in many other regions across the state furniture registers as a legacy cluster. The chart below shows just the strongest concentrated clusters in the region for more detail. Livestock processing and production technology are two asset clusters that also employ sizeable numbers of workers.

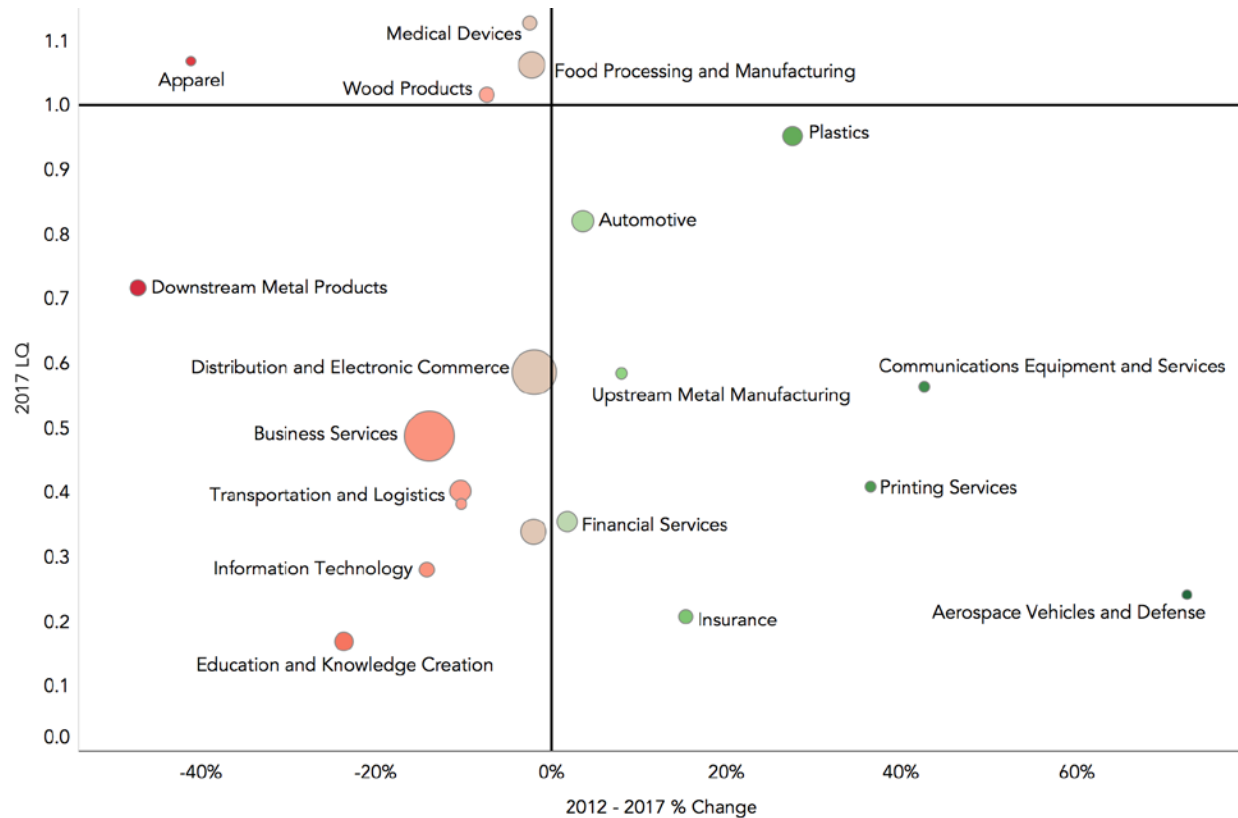
### Current Strong Clusters in NCGTP Region



Source: EMSI 2017.4

Other smaller employing clusters are assets to the NCGTP region including recreational and small electric goods manufacturing, agricultural inputs and services, trailers/motor homes/ and appliances manufacturing, and lighting and electrical equipment. Vulcanized and fired materials has a strong concentration in the region with a LQ of over 4.5, but employment growth was negligible since 2012.

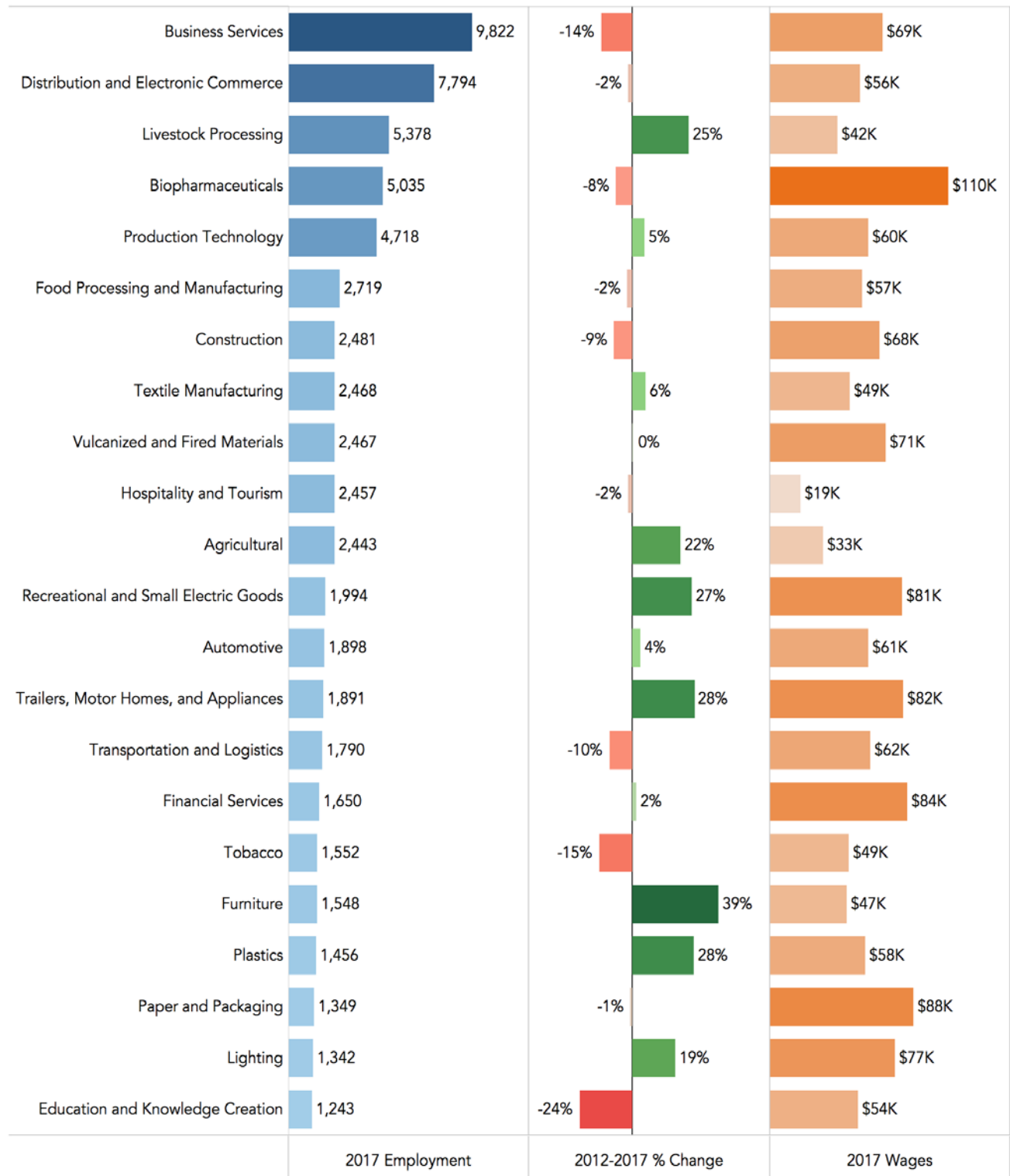
### Current Weak Clusters in NCGTP Region



Source: EMSI 2017.4

The two highest employing clusters, distribution and electronic commerce and business services have seen a decline in employment and show no regional specialty. Eight of the 51 clusters in the region registered as emerging clusters. Many of these clusters employ smaller numbers of workers and have a low concentration relative to national levels. **The fastest growing traded cluster was aerospace vehicles and defense at a rate of 73 percent from 2012 to 2017. This is likely due to the presence and impact of the NCGTP itself.** The growth of the plastics and automotive clusters is encouraging for the NCGTP's efforts on recruiting advanced manufacturing companies. Given the NCGTP focus on multi-modal transportation, it was intriguing that the overall NCGTP region did not have a specialty in the transportation and logistics cluster. This is likely to change after the opening of the CCX project. The chart on the next page lists the top employing clusters in the NCGTP region, clusters with less than 300 employees were not included.

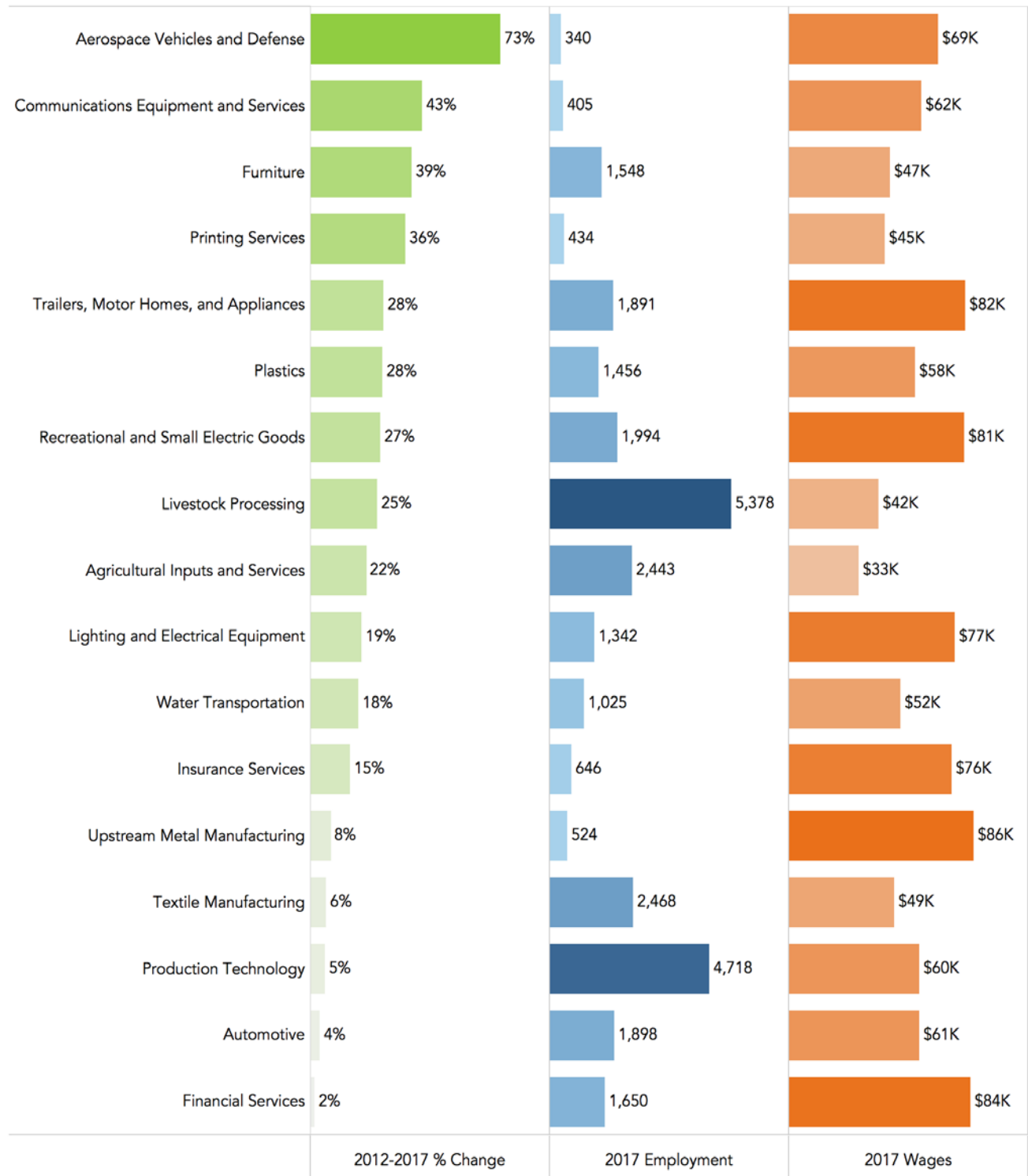
## Top Traded Clusters by Employment



Source: EMSI 2017.4



## Fastest Growing Traded Clusters

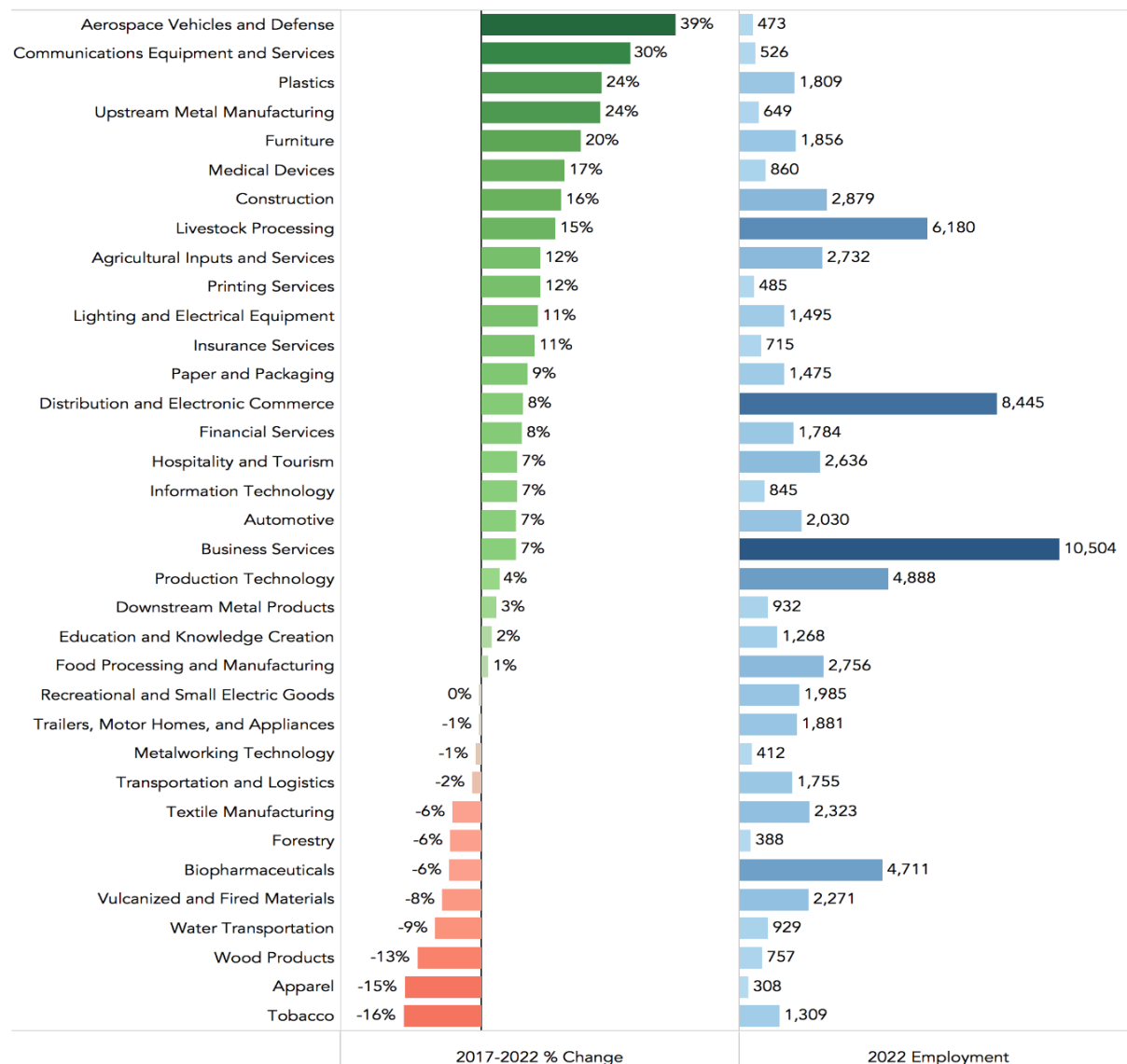


Source: EMSI 2017.4

The NCGTP region had 17 traded clusters that employed over 300 people and experienced growth from 2012 to 2017. Aerospace growth is obviously a result of the NCGTP's expansion. **Communications equipment and services grew by 43 percent in the past five years and may be an emerging regional cluster for the NCGTP Authority to track.**

Trailer/motor home/appliances manufacturing, upstream metal manufacturing, lighting equipment, and recreation/small electric goods manufacturing are growing clusters in the region that also pay higher wages than many other traded clusters. While some of these may not be appropriate for location in the NCGTP, they will still be important influences on the marketing strategy because they will be competing for regional labor.

### Predicted Future Employment Growth by Cluster

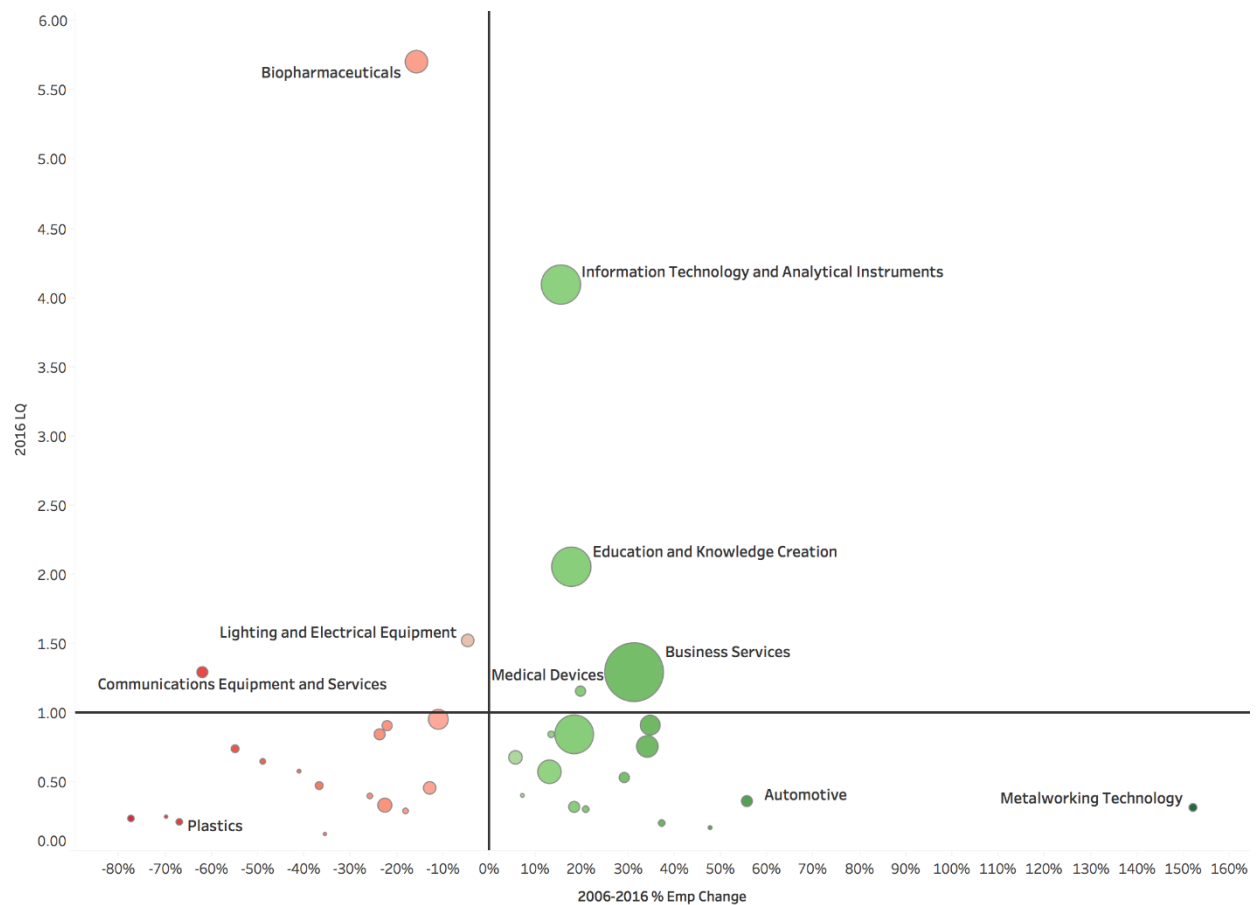


Source: EMSI 2017.4

Twenty-three of the traded clusters are predicted by EMSI's models to hire more workers in the upcoming five years. Some highly-concentrated clusters in the region are predicted to see a decline in their workforce such as textiles, biopharmaceuticals, vulcanized/fired materials, and tobacco.

Another consideration for future targeting is the influence of the Research Triangle Region and the supply chain opportunities that are being created for the NCGTP. As the second fastest growing metro in the country, the Raleigh-Cary and Durham-Chapel Hill metro clusters are expanding rapidly and creating supply chain demand in proximate regions.

### Triangle Cluster Map



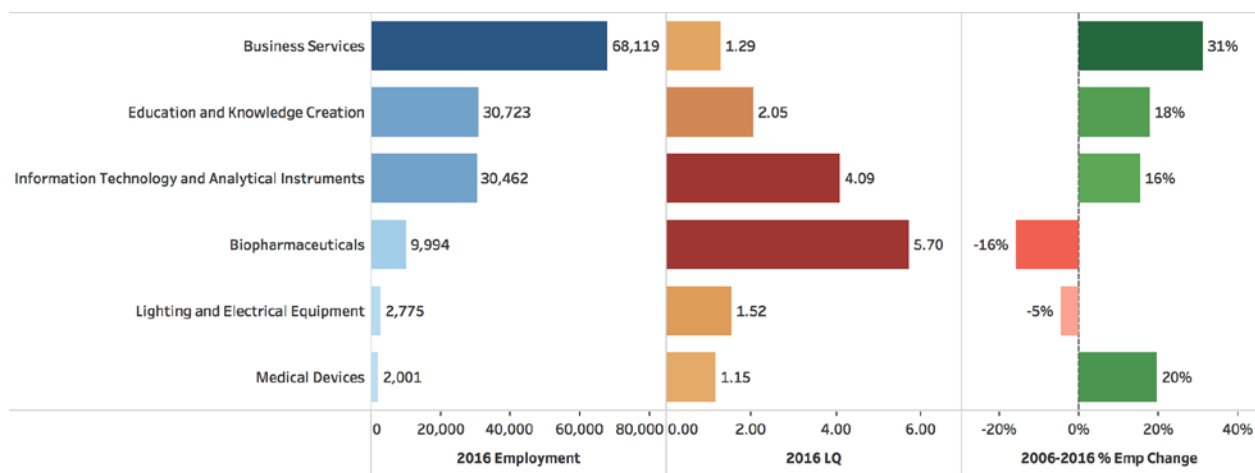
Source: EMSI 2017.2

Note that Electric Power and Distribution had such strong job growth it did not fit on the chart above. Its concentration is equal to national averages with an LQ of 1.00. Biopharmaceuticals, education, and research have been hallmarks of the Triangle region for years. However, Biopharmaceuticals employment declined by 16 percent in the past 10 years. The region's highly educated workforce has driven the area to be a major tech hub. Information Technology and Analytical Instruments employment growth in the Triangle is some of the fastest in the nation.

### Triangle Asset Clusters:

- Biopharmaceuticals
- Medical Devices
- Information Technology and Analytical Instruments
- Education and Knowledge Creation
- Business Services
- Lighting and Electrical Equipment

### Triangle Asset Cluster Performance Metrics



Source: EMSI 2017.2

The Triangle region has four asset clusters. Medical Device growth in the Triangle could be the best opportunity for the NCGTP as the healthcare sector continues to grow nationally.

There are several assets already present in the region surrounding the NCGTP for economic developers to build their recruitment efforts. There are also emerging clusters that could offer an opportunity for the region to work together to develop the infrastructure and innovation required to support a thriving cluster.

#### Asset Clusters Relevant to NCGTP:

- Vulcanized and fired materials
- Livestock processing
- Recreational and small electric goods
- Trailer, motor homes, and appliances
- Lighting and electrical equipment

#### Emerging Clusters:

- Communications equipment
- Automotive
- Plastics
- Upstream metal manufacturing

### **Vulcanized and Fired Materials**

Products manufactured out of sand, clay, or rubber. The final products from these firms are often brick, glass, and tires.

Top Regional Employer: Bridgestone Firestone, Inc (2,200 employees), Tire Manufacturing

### **Livestock Processing**

Companies in this cluster process meat from livestock. The NCGTP may be interested in looking for value add food processing manufacturing to complement the strong livestock processing asset cluster within the region.

Top Regional Employer: Butterball (1,000 employees), Poultry Processing

### **Recreational and Small Electric Goods & Trailer, Motor Homes, and Appliances**

The biggest employer for the NCGTP region for these clusters is Electrolux which makes major household appliances.

Top Regional Employer: Electrolux Major Appliances (700 employees), Major Household Appliance Manufacturing

### **Lighting and Electrical Equipment**

This cluster includes electronic components and electrical equipment manufacturing. This can include fiber optic cables, generators, and switchboard manufacturing.

Top Regional Employers: SPX (290 employees), Transformer Manufacturing

Eaton's Cooper Interconnect (110 employees), Motor and Generator Manufacturing

### **Communications Equipment**

This cluster includes equipment components as well as communications services.

Top Regional Employers: Skyware Global (300 employees), Wireless Communications Equipment Manufacturing

Embarq Communications (165 employees), Telecommunications

### **Automotive**

This cluster includes the value chain necessary for car and truck manufacturing. This includes metal mills, foundries, engine parts, automotive parts, and vehicle manufacturing.

Top Regional Employers: Asmo Greenville of North Carolina (433 employees), Motor Vehicle Parts Manufacturing

Uchiyama Manufacturing America (300 employees), Motor Vehicle Parts Manufacturing

North Carolina Ashai (150 employees), Motor Vehicle Parts Manufacturing

### Plastics

Companies in this cluster form plastic materials, components, and products. The cluster also includes the machinery required for plastic and rubber manufacturing.

Top Regional Employers: Associated Materials LLC (600 employees), Plastics Product Manufacturing

Calcor EMS (500 employees), Plastics Product Manufacturing

Carolina Technical Plastics (150 employees), Plastics Product Manufacturing

### Upstream Metal Manufacturing

Metal mills, processing, and metal products (pipes, tubes, wires, springs, etc.) are included in this cluster.

Top Regional Employers: Roberts Co (280 employees), Iron and Steel Mills

Superior Essex (240 employees), Fabricated Wire Product Manufacturing

## Advanced Industry Analysis

Another approach to identify potential marketing targets for the NCGTP is to examine the presence and growth of advanced industries, as defined by the Brookings Institute. Their definition of advanced industries specifies that the industry's research and development spending per worker must fall in the 80th percentile of industries or higher, and that the share of workers in an industry whose occupations require a high degree of Science Technology Engineering and Math knowledge must also be above the national average (2% of all workers). The 50 industries they identified invest heavily in technology innovation and employ skilled technical workers to "develop, diffuse, and apply new productivity-enhancing technologies."

While this may be a higher bar than necessary for NCGTP marketing, these industries are representative of the ultimate vision of NCGTP as a magnet for high-quality jobs for the future of eastern North Carolina. The twelve industries with the highest number of jobs in 2017 within the 60-minute commute radius of the NCGTP are listed below.

- Pharmaceuticals and Medicine Manufacturing
- Household Appliance Manufacturing
- Management, Scientific, and Technical Consulting Service
- Motor Vehicle Parts Manufacturing
- Electrical Equipment Manufacturing
- Other General-Purpose Machinery Manufacturing
- Agriculture, Construction, and Mining Machinery Manufacturing
- Wired and Wireless Communication
- Architectural, Engineering and Related Services
- Ship and Boat Building

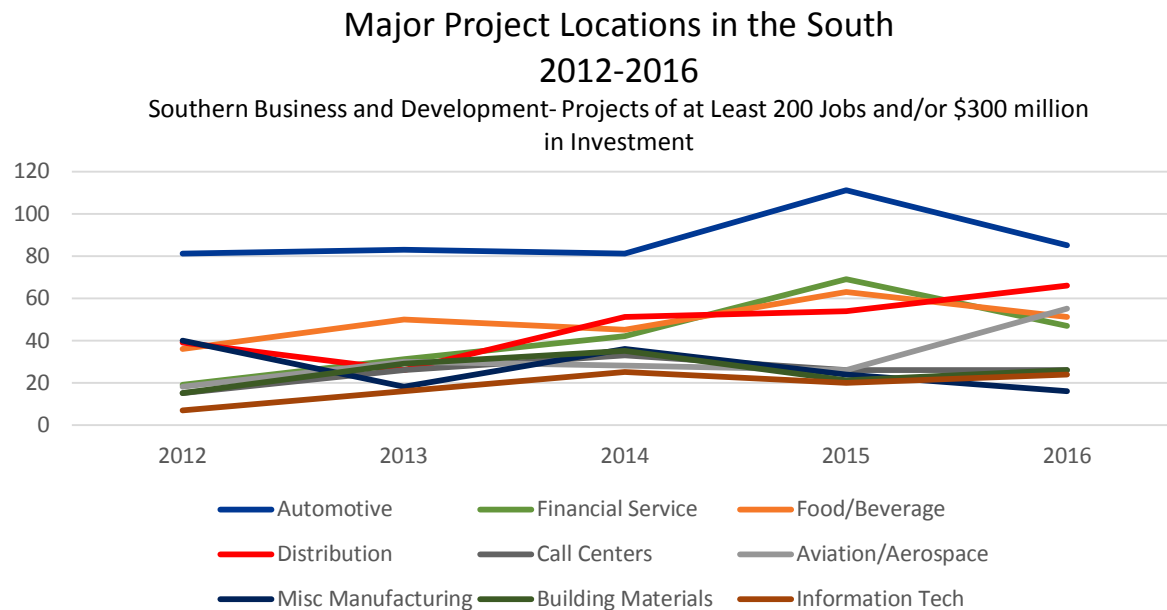
- Medical Equipment and Supplies Manufacturing
- Resin, Synthetic Rubber, and Artificial and Synthetic Fiber

Over the past 10 years some of the advanced industries that have shown the greatest growth are:

- Management, Scientific, and Technical Consulting Service
- Motor Vehicle Parts Manufacturing
- Aerospace Product and Parts Manufacturing

Management, Scientific, and Technical Consulting Service has been one of top growth industries across North Carolina and may offer a services opportunity to some parts of the region.

Southern Business and Development also tracks major projects by type. As the chart shows, automotive remains a consistent target for impactful projects. Both Aviation and distribution have shown strong growth in recent years.



Source: Mike Randle, Southern Business and Development, January 2018

A final consideration for the NCGTP before determining specific industry targets and concentrating marketing resources, is the targeting of regional and state organizations charged with client origination activities. The NCEast Alliance, North Carolina's Southeast and the North Carolina Partnership for Economic Development devote resources to marketing and client generation for the NCGTP and the surrounding area. It is very likely that most of the new clients, especially larger clients, will begin by contacting a state or regional organization.



Their current targets are listed below.

### **North Carolina Partnership for Economic Development**

- Aerospace and Defense
- Automotive, Truck, and Heavy Machinery
- Biotechnology and Pharmaceuticals
- Business & Financial Services
- Corporate Headquarters
- Energy
- Film
- Food Processing and Manufacturing
- Furniture
- Information Technology
- Plastics and Chemicals
- Textiles



### **NCEAST Alliance**

- Advanced Machining and Manufacturing
- Aerospace and Defense
- Life Sciences
- Logistics
- Marine Trades
- Motor Vehicle Assembly and Parts
- Tourism
- Value-Added Agriculture



### **North Carolina's Southeast**

- Advanced Textiles
- Agri-Industry and Food Processing
- Aviation and Aerospace
- Biotechnology
- Defense and Military
- Distribution and Logistics
- Energy
- Metalworking



## Employment Data

NCGTP 14 County Region - region is all counties that include areas within 60 minute drive time of NCGTP

<b>TOTAL POPULATION</b>				
<b>County Name</b>	<b>2012 Population</b>	<b>2017 Population</b>	<b>2012 – 2017 Change</b>	<b>2012 – 2017 % Change</b>
Beaufort County, NC	47,497	47,520	23	0.0%
Craven County, NC	105,313	103,302	(2,011)	(1.9%)
Duplin County, NC	59,466	58,988	(478)	(0.8%)
Edgecombe County, NC	55,748	52,816	(2,932)	(5.3%)
Greene County, NC	21,392	21,147	(245)	(1.1%)
Johnston County, NC	174,836	194,688	19,852	11.4%
Jones County, NC	10,272	9,797	(475)	(4.6%)
Lenoir County, NC	59,168	57,045	(2,123)	(3.6%)
Nash County, NC	95,241	93,744	(1,497)	(1.6%)
Onslow County, NC	183,817	188,721	4,904	2.7%
Pamlico County, NC	13,041	12,746	(295)	(2.3%)
Pitt County, NC	172,899	178,737	5,838	3.4%
Wayne County, NC	124,554	124,329	(225)	(0.2%)
Wilson County, NC	81,756	81,791	35	0.0%
NCGTP 14 County Region	1,205,000	1,225,370	20,370	1.7%

<b>WORKING AGE POPULATION AGES 25-64</b>				
<b>County Name</b>	<b>2012 Population</b>	<b>2017 Population</b>	<b>2012 – 2017 Change</b>	<b>2012 – 2017 % Change</b>
Beaufort County, NC	24,287	23,240	(1,047)	(4.3%)
Craven County, NC	50,497	48,658	(1,839)	(3.6%)
Duplin County, NC	30,555	29,489	(1,066)	(3.5%)
Edgecombe County, NC	28,483	26,401	(2,082)	(7.3%)
Greene County, NC	11,922	11,555	(367)	(3.1%)
Johnston County, NC	94,270	103,242	8,972	9.5%
Jones County, NC	5,299	4,972	(327)	(6.2%)
Lenoir County, NC	30,319	28,517	(1,802)	(5.9%)
Nash County, NC	50,503	47,833	(2,670)	(5.3%)
Onslow County, NC	82,102	85,905	3,803	4.6%
Pamlico County, NC	6,816	6,284	(532)	(7.8%)
Pitt County, NC	83,547	85,762	2,215	2.7%
Wayne County, NC	64,475	63,092	(1,383)	(2.1%)
Wilson County, NC	42,336	41,219	(1,117)	(2.6%)
NCGTP 14 County Region	605,411	606,169	758	0.1%

EDUCATIONAL ATTAINMENT - ADULT POPULATION WITH HIGH SCHOOL DIPLOMA OR HIGHER					
County Name	2012 Population	2017 Population	2012 - 2017 Population Change	2012 - 2017 Population % Change	2017 % of adult population with HS or higher
Beaufort County, NC	27,825	28,689	864	3.1%	83.7%
Craven County, NC	58,596	59,225	629	1.1%	87.2%
Duplin County, NC	28,216	28,262	46	0.2%	71.1%
Edgecombe County, NC	28,871	27,064	(1,807)	(6.3%)	74.5%
Greene County, NC	10,946	11,070	124	1.1%	73.8%
Johnston County, NC	95,938	106,873	10,935	11.4%	82.8%
Jones County, NC	6,005	5,964	(41)	(0.7%)	81.7%
Lenoir County, NC	31,684	30,427	(1,257)	(4.0%)	77.0%
Nash County, NC	54,530	53,184	(1,346)	(2.5%)	82.2%
Onslow County, NC	88,141	92,686	4,545	5.2%	89.3%
Pamlico County, NC	8,520	8,748	228	2.7%	88.1%
Pitt County, NC	88,959	94,738	5,779	6.5%	87.9%
Wayne County, NC	66,677	68,220	1,543	2.3%	82.6%
Wilson County, NC	43,587	44,183	596	1.4%	79.3%
NCGTP 14 County Region	638,494	659,331	20,837	3.3%	83.1%

EDUCATIONAL ATTAINMENT - ADULT POPULATION WITH BA OR HIGHER					
County Name	2012 Population	2017 Population	2012 - 2017 Population Change	2012 - 2017 Population % Change	2017 % of adult population with BA or higher
Beaufort County, NC	5,701	6,134	433	7.6%	17.9%
Craven County, NC	15,070	15,227	157	1.0%	22.4%
Duplin County, NC	4,127	4,449	322	7.8%	11.2%
Edgecombe County, NC	4,017	3,627	(390)	(9.7%)	10.0%
Greene County, NC	1,377	1,459	82	6.0%	9.7%
Johnston County, NC	23,016	25,447	2,431	10.6%	19.7%
Jones County, NC	916	999	83	9.1%	13.7%
Lenoir County, NC	5,211	4,919	(292)	(5.6%)	12.5%
Nash County, NC	12,311	12,650	339	2.8%	19.5%
Onslow County, NC	18,077	20,291	2,214	12.2%	19.5%
Pamlico County, NC	1,753	1,986	233	13.3%	20.0%
Pitt County, NC	29,513	31,941	2,428	8.2%	29.6%
Wayne County, NC	13,860	15,717	1,857	13.4%	19.0%
Wilson County, NC	9,780	9,835	55	0.6%	17.7%
NCGTP 14 County Region	144,728	154,681	9,953	6.9%	19.5%

<b>MILITARY OCCUPATIONS</b>				
<b>County Name</b>	<b>2012 Jobs</b>	<b>2017 Jobs</b>	<b>2012 - 2017 Change</b>	<b>2012 - 2017 % Change</b>
Beaufort County, NC	121	117	(4)	(3.3%)
Craven County, NC	9,542	8,693	(849)	(8.9%)
Duplin County, NC	152	145	(7)	(4.6%)
Edgecombe County, NC	141	132	(9)	(6.4%)
Greene County, NC	49	45	(4)	(8.2%)
Johnston County, NC	446	450	4	0.9%
Jones County, NC	26	25	(1)	(3.8%)
Lenoir County, NC	149	137	(12)	(8.1%)
Nash County, NC	240	218	(22)	(9.2%)
Onslow County, NC	48,718	42,760	(5,958)	(12.2%)
Pamlico County, NC	62	51	(11)	(17.7%)
Pitt County, NC	473	453	(20)	(4.2%)
Wayne County, NC	4,846	4,252	(594)	(12.3%)
Wilson County, NC	206	193	(13)	(6.3%)
NCGTP 14 County Region	65,171	57,670	(7,501)	(11.5%)
NAICS Code	Description			
55-9999	Military Occupations			

<b>MANUFACTURING JOBS</b>				
<b>County Name</b>	<b>2012 Jobs</b>	<b>2017 Jobs</b>	<b>2012 - 2017 Change</b>	<b>2012 - 2017 % Change</b>
Beaufort County, NC	2,993	2,620	(373)	(12.5%)
Craven County, NC	3,290	3,827	537	16.3%
Duplin County, NC	6,039	6,138	99	1.6%
Edgecombe County, NC	2,939	3,104	165	5.6%
Greene County, NC	326	236	(90)	(27.6%)
Johnston County, NC	6,322	6,917	595	9.4%
Jones County, NC	34	39	5	14.7%
Lenoir County, NC	5,317	7,179	1,862	35.0%
Nash County, NC	7,067	7,345	278	3.9%
Onslow County, NC	811	988	177	21.8%
Pamlico County, NC	167	170	3	1.8%
Pitt County, NC	6,757	6,289	(468)	(6.9%)
Wayne County, NC	5,639	5,638	(1)	(0.0%)
Wilson County, NC	8,701	7,231	(1,470)	(16.9%)
NCGTP 14 County Region	56,402	57,722	1,320	2.3%
NAICS Code	Description			
31-33	Manufacturing			

<b>LOGISTICS/TRUCKING JOBS</b>				
<b>County Name</b>	<b>2012 Jobs</b>	<b>2017 Jobs</b>	<b>2012 - 2017 Change</b>	<b>2012 - 2017 % Change</b>
Johnston County, NC	1,055	1,128	73	6.9%
Wilson County, NC	702	547	(155)	(22.1%)
Onslow County, NC	353	442	89	25.2%
Nash County, NC	347	488	141	40.6%
Wayne County, NC	345	370	25	7.2%
Lenoir County, NC	340	459	119	35.0%
Craven County, NC	324	217	(107)	(33.0%)
Beaufort County, NC	319	330	11	3.4%
Pitt County, NC	291	301	10	3.4%
Edgecombe County, NC	234	111	(123)	(52.6%)
Duplin County, NC	149	211	62	41.6%
Jones County, NC	41	17	(24)	(58.5%)
Pamlico County, NC	38	42	4	10.5%
Greene County, NC	32	21	(11)	(34.4%)
NCGTP 14 County Region	4,567	4,684	117	2.6%
NAICS Code	Description			
484	Truck Transportation			
493	Warehousing and Storage			

<b>AG JOBS</b>				
<b>County Name</b>	<b>2012 Jobs</b>	<b>2017 Jobs</b>	<b>2012 - 2017 Change</b>	<b>2012 - 2017 % Change</b>
Beaufort County, NC	658	860	202	30.7%
Craven County, NC	825	618	(207)	(25.1%)
Duplin County, NC	7,698	7,918	220	2.9%
Edgecombe County, NC	1,790	1,344	(446)	(24.9%)
Greene County, NC	437	438	1	0.2%
Johnston County, NC	2,006	2,343	337	16.8%
Jones County, NC	175	189	14	8.0%
Lenoir County, NC	3,197	3,776	579	18.1%
Nash County, NC	2,891	4,250	1,359	47.0%
Onslow County, NC	456	401	(55)	(12.1%)
Pamlico County, NC	175	173	(2)	(1.1%)
Pitt County, NC	2,170	1,927	(243)	(11.2%)
Wayne County, NC	5,116	5,090	(26)	(0.5%)
Wilson County, NC	3,695	3,207	(488)	(13.2%)
NCGTP 14 County Region	31,288	32,534	1,246	4.0%

#### AG JOBS

NAICS Codes	Description
111000	Crop Production
112000	Animal Production
113110	Timber Tract Operations
113210	Forest Nurseries and Gathering of Forest Products
113310	Logging
114111	Finfish Fishing
114112	Shellfish Fishing
114119	Other Marine Fishing
114210	Hunting and Trapping
115111	Cotton Ginning
115112	Soil Preparation, Planting, and Cultivating
115113	Crop Harvesting, Primarily by Machine
115114	Postharvest Crop Activities (except Cotton Ginning)
115115	Farm Labor Contractors and Crew Leaders
115116	Farm Management Services
115210	Support Activities for Animal Production
115310	Support Activities for Forestry
311111	Dog and Cat Food Manufacturing
311119	Other Animal Food Manufacturing
311211	Flour Milling
311212	Rice Milling
311213	Malt Manufacturing
311221	Wet Corn Milling
311224	Soybean and Other Oilseed Processing
311225	Fats and Oils Refining and Blending
311230	Breakfast Cereal Manufacturing
311313	Beet Sugar Manufacturing
311314	Cane Sugar Manufacturing
311340	Nonchocolate Confectionery Manufacturing
311351	Chocolate and Confectionery Manufacturing from Cacao Beans
311352	Confectionery Manufacturing from Purchased Chocolate
311411	Frozen Fruit, Juice, and Vegetable Manufacturing
311412	Frozen Specialty Food Manufacturing
311421	Fruit and Vegetable Canning
311422	Specialty Canning
311423	Dried and Dehydrated Food Manufacturing
311511	Fluid Milk Manufacturing
311512	Creamery Butter Manufacturing
311513	Cheese Manufacturing
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing
311520	Ice Cream and Frozen Dessert Manufacturing
311611	Animal (except Poultry) Slaughtering

311612	Meat Processed from Carcasses
311613	Rendering and Meat Byproduct Processing
311615	Poultry Processing
311710	Seafood Product Preparation and Packaging
311811	Retail Bakeries
311812	Commercial Bakeries
311813	Frozen Cakes, Pies, and Other Pastries Manufacturing
311821	Cookie and Cracker Manufacturing
311824	Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour
311830	Tortilla Manufacturing
311911	Roasted Nuts and Peanut Butter Manufacturing
311919	Other Snack Food Manufacturing
311920	Coffee and Tea Manufacturing
311930	Flavoring Syrup and Concentrate Manufacturing
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing
311942	Spice and Extract Manufacturing
311991	Perishable Prepared Food Manufacturing
311999	All Other Miscellaneous Food Manufacturing
312111	Soft Drink Manufacturing
312112	Bottled Water Manufacturing
312113	Ice Manufacturing
312120	Breweries
312130	Wineries
312140	Distilleries
312230	Tobacco Manufacturing
424410	General Line Grocery Merchant Wholesalers
424420	Packaged Frozen Food Merchant Wholesalers
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers
424440	Poultry and Poultry Product Merchant Wholesalers
424450	Confectionery Merchant Wholesalers
424460	Fish and Seafood Merchant Wholesalers
424470	Meat and Meat Product Merchant Wholesalers
424480	Fresh Fruit and Vegetable Merchant Wholesalers
424490	Other Grocery and Related Products Merchant Wholesalers
424510	Grain and Field Bean Merchant Wholesalers
424520	Livestock Merchant Wholesalers
424590	Other Farm Product Raw Material Merchant Wholesalers
424810	Beer and Ale Merchant Wholesalers
424820	Wine and Distilled Alcoholic Beverage Merchant Wholesalers
424910	Farm Supplies Merchant Wholesalers
424930	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers
424940	Tobacco and Tobacco Product Merchant Wholesalers



## Industry Cluster Maps

Existing site locations with at least 50 employees are mapped to illustrate industry locations within 150 miles of the NCGTP on the following pages.

***Automotive, Aerospace Equipment & Electronics Manufacturing***

***Machinery, Electrical, Metal & Non-Metallic Mineral Products Manufacturing***

***Food, Beverage & Tobacco Products***

***Logistics, Distribution & Warehousing***

***Furniture, Wood & Paper Products Manufacturing***

***Chemical, Pharmaceutical, Plastic & Rubber Products Manufacturing***

Additionally, the density of agricultural production (crops and animals) along with locations of food production facilities with at least 50 employees are shown.

***Hog Production and Processing***

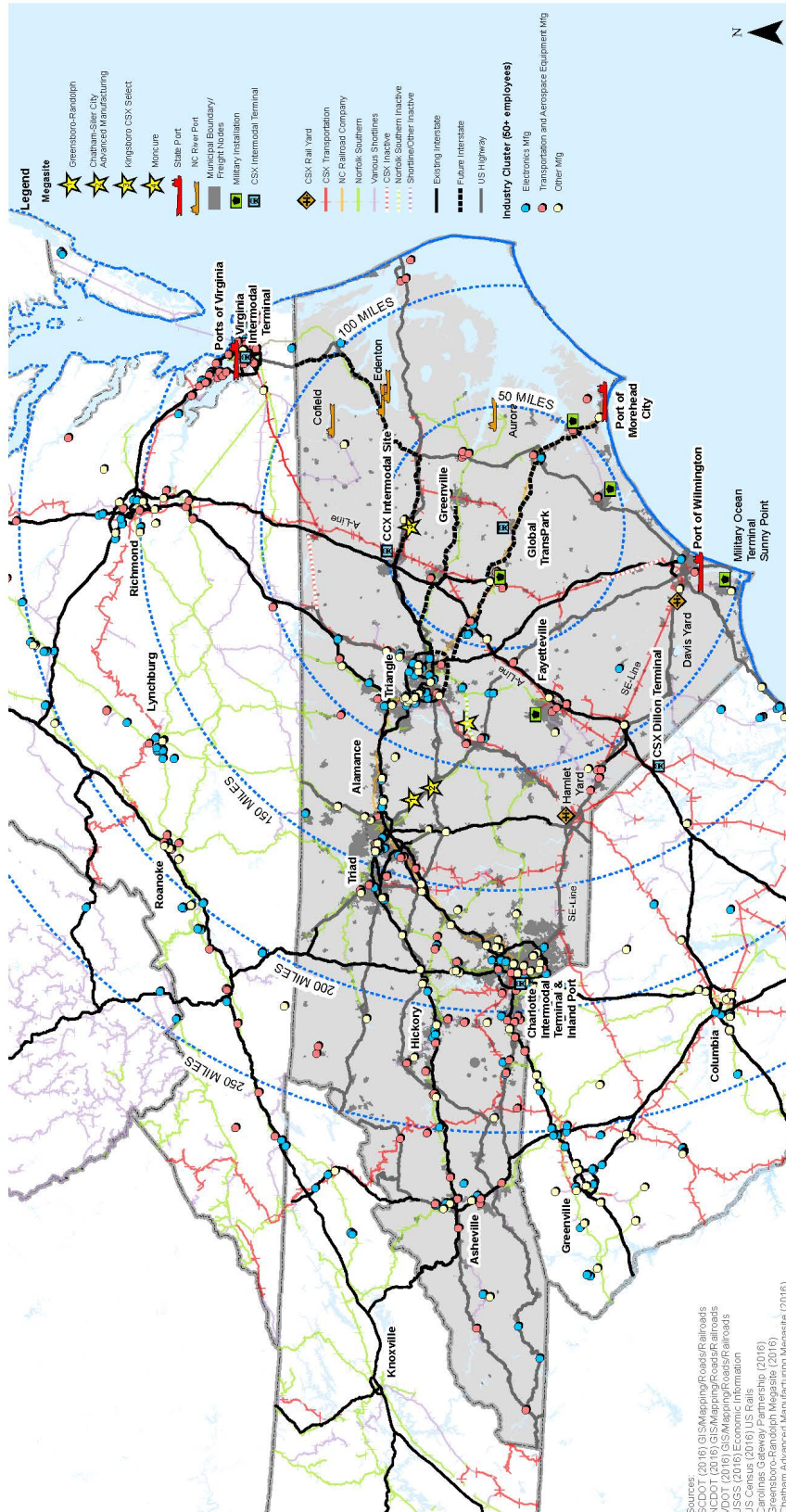
***Poultry Production and Processing***

***Sweet Potato Production***

***Cotton Production and Products***

***Peanut Production and Products***

***Tobacco Production and Manufacturing***

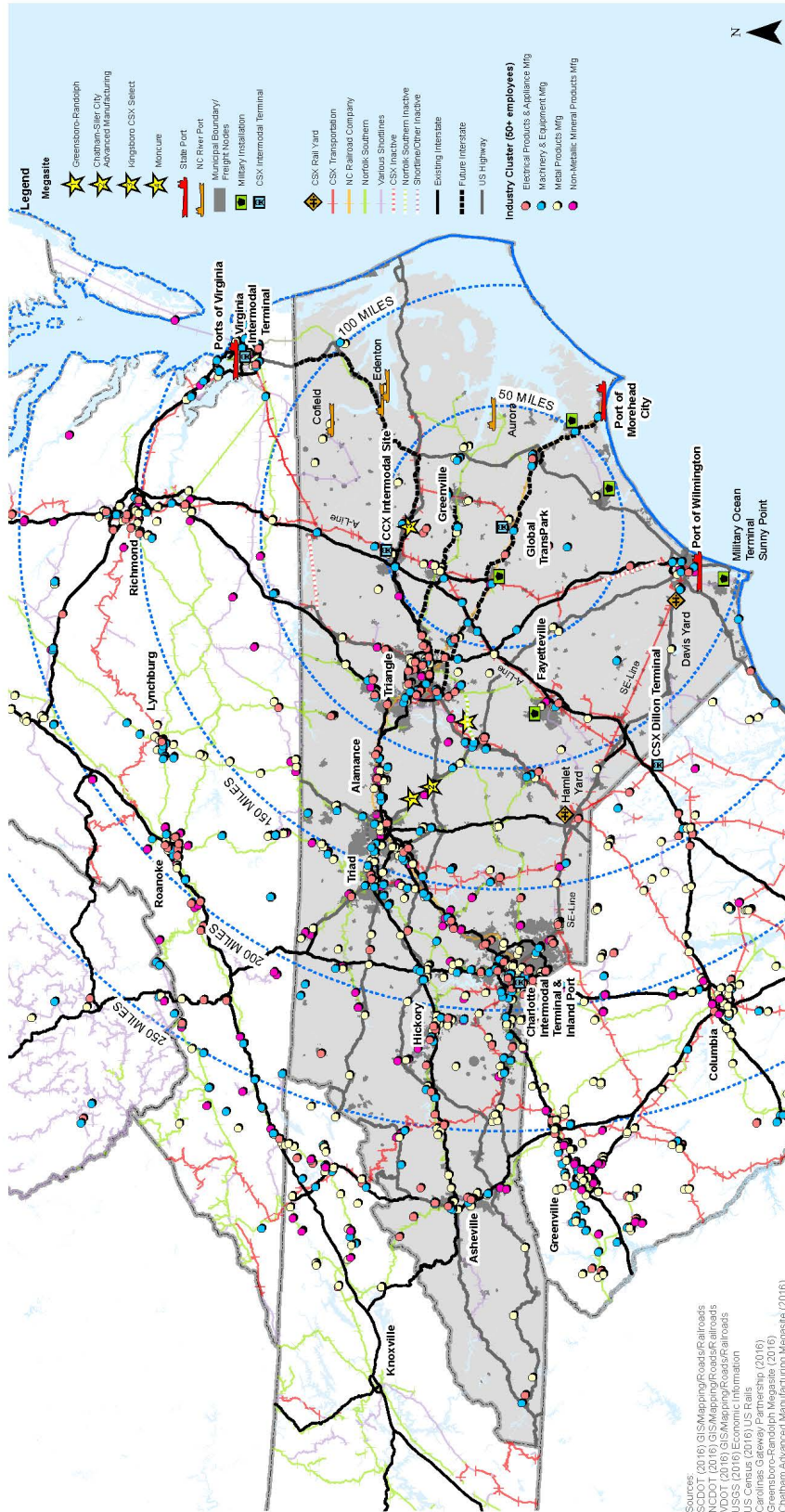


Prepared By: **Dewberry**

## Global TransPark Electronics, Transportation & Aerospace Equipment Manufacturing

March 2018

Sources:  
SCDOT (2016) GIS Mapping/Roads/Railroads  
NCDOT (2016) GIS Mapping/Roads/Railroads  
VDOT (2016) GIS Mapping/Roads/Railroads  
US Census Bureau (2016) Census Information  
US Census Bureau (2016) US Census Information  
Carolina Gateway Partnership (2016)  
Greensboro-Randolph Megastore (2016)  
Chatham Advanced Manufacturing Megastore (2016)

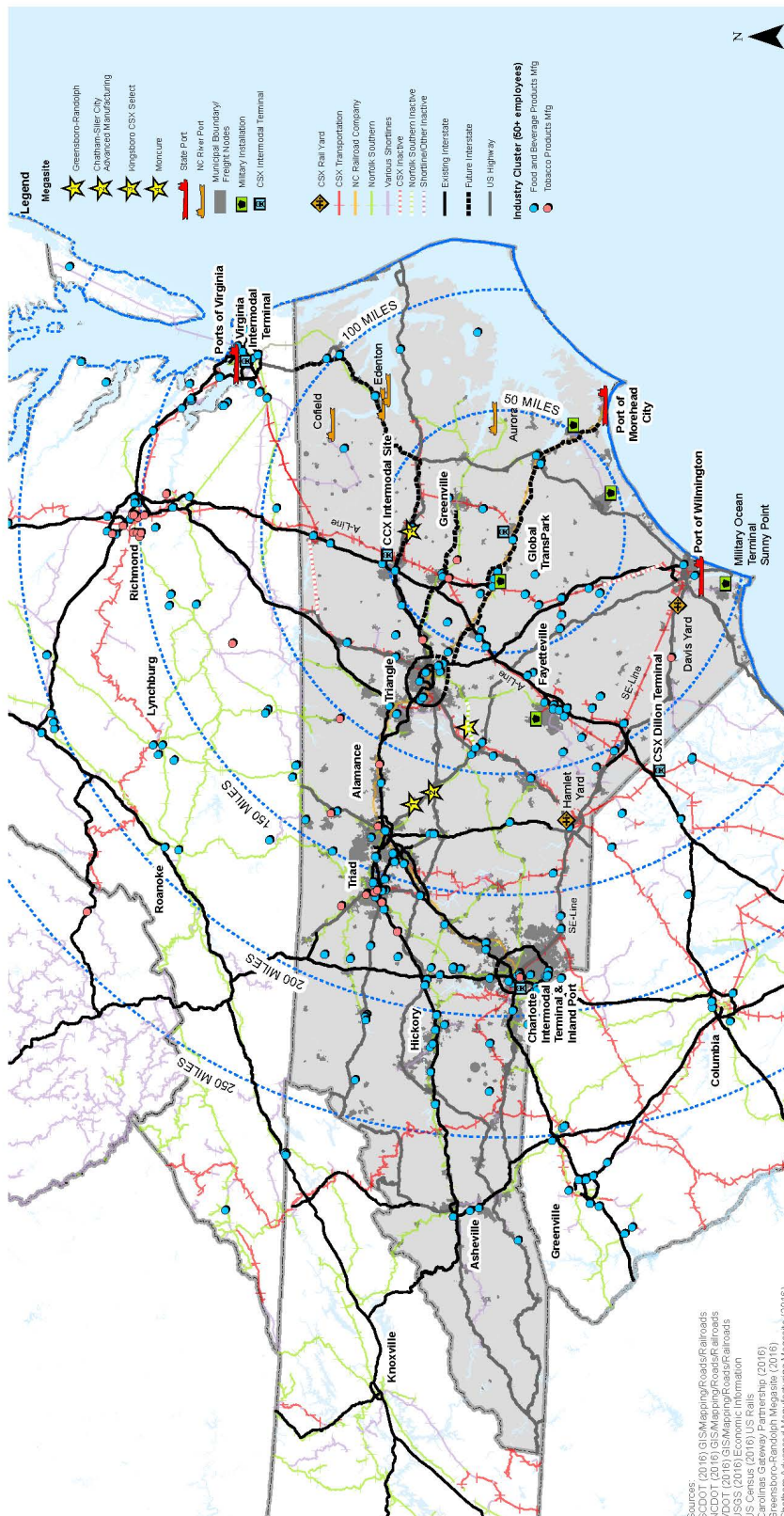


Prepared By:  
**Dewberry**

## Global TransPark Machinery, Electrical, Metal & Non-Metallic Mineral Products Manufacturing March 2018

Sources:  
SCDOT (2016) GIS Mapping/Roads/Railroads  
NCDOT (2016) GIS Mapping/Roads/Railroads  
US Census (2016) GIS Mapping/Roads/Railroads  
US Census (2016) US Census  
US Census (2016) US Census  
Carolina Gateway Partnership (2016)  
Greenboro-Randolph Megastar (2016)  
Chatham-Advanced Manufacturing Megastar (2016)





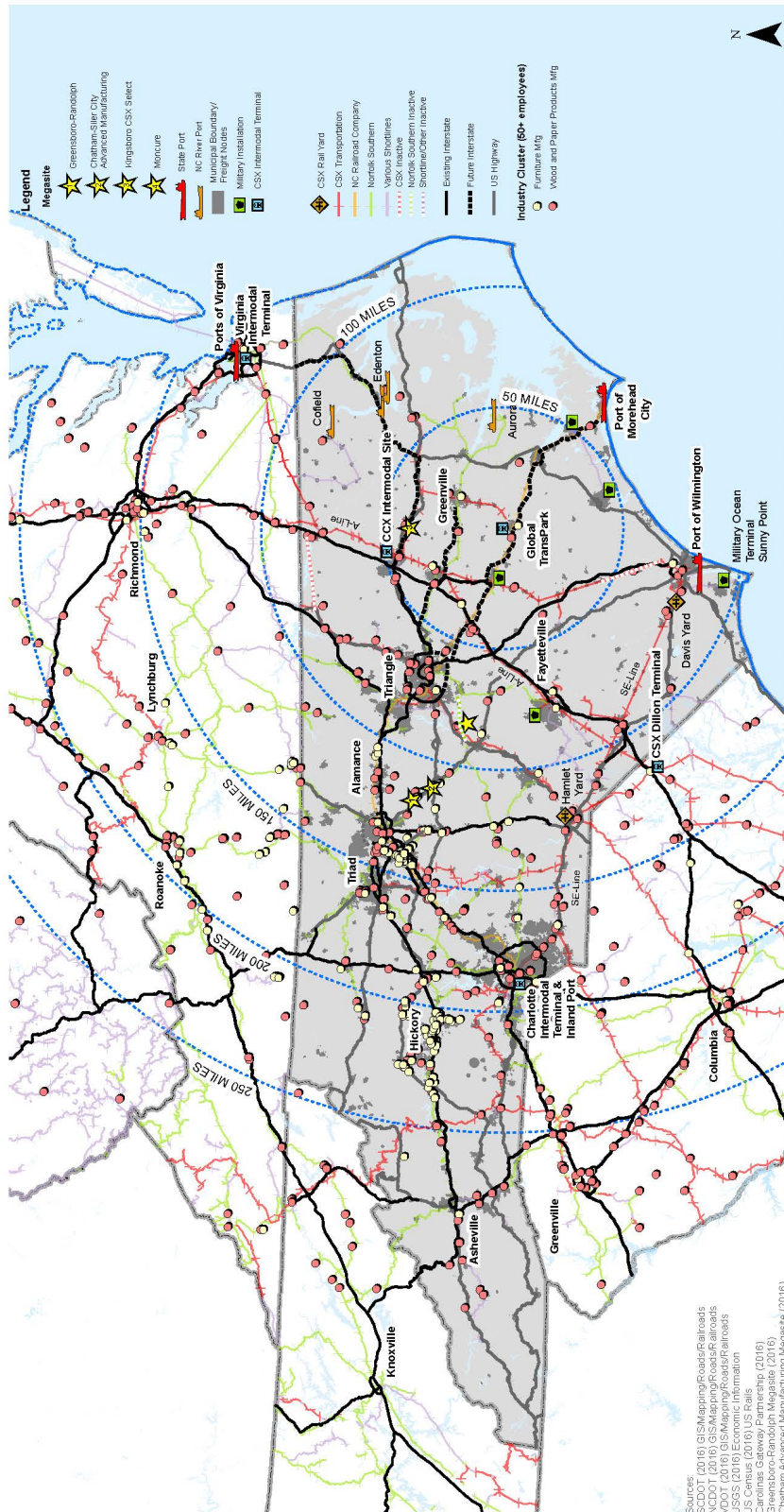
Prepared By:  
**Dewberry**

## Global TransPark Food & Beverage Products and Tobacco Products Manufacturing March 2018

Sources:  
 (2016) GIS Mapping/Roads/Railroads  
 NCDOT (2016) GIS Mapping/Roads/Railroads  
 VDOT (2016) GIS Mapping/Roads/Railroads  
 USGS (2016) Economic Information  
 US Census (2010) US Railroads  
 US Census (2010) US Railroads  
 Greensboro-Randolph Megastate (2016)  
 Chatham Advanced Manufacturing Megastate (2016)



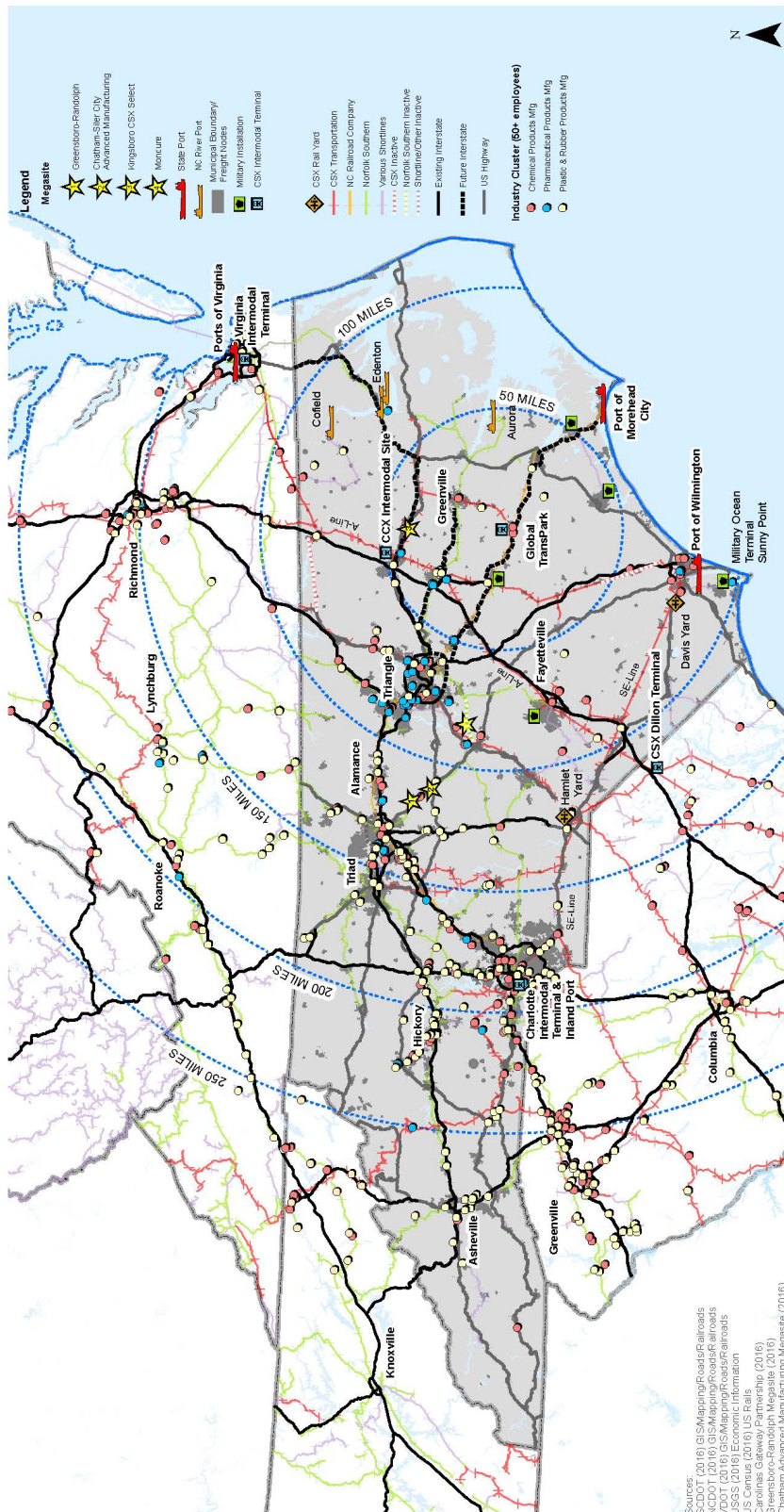




Prepared By:  
**Dewberry**

## Global TransPark Furniture, Wood & Paper Products Manufacturing March 2018

Sources:  
SCDOT (2016) GIS Mapping/Roads/Railroads  
NCDOT (2016) GIS Mapping/Roads/Railroads  
VDOT (2016) GIS Mapping/Roads/Railroads  
US Census Bureau (2016) Economic Information  
US Census (2010) US Facts  
Carolina Gateway Partnership (2016)  
Greensboro-Randolph Megastar (2016)  
Chatham Advanced Manufacturing Megastar (2016)



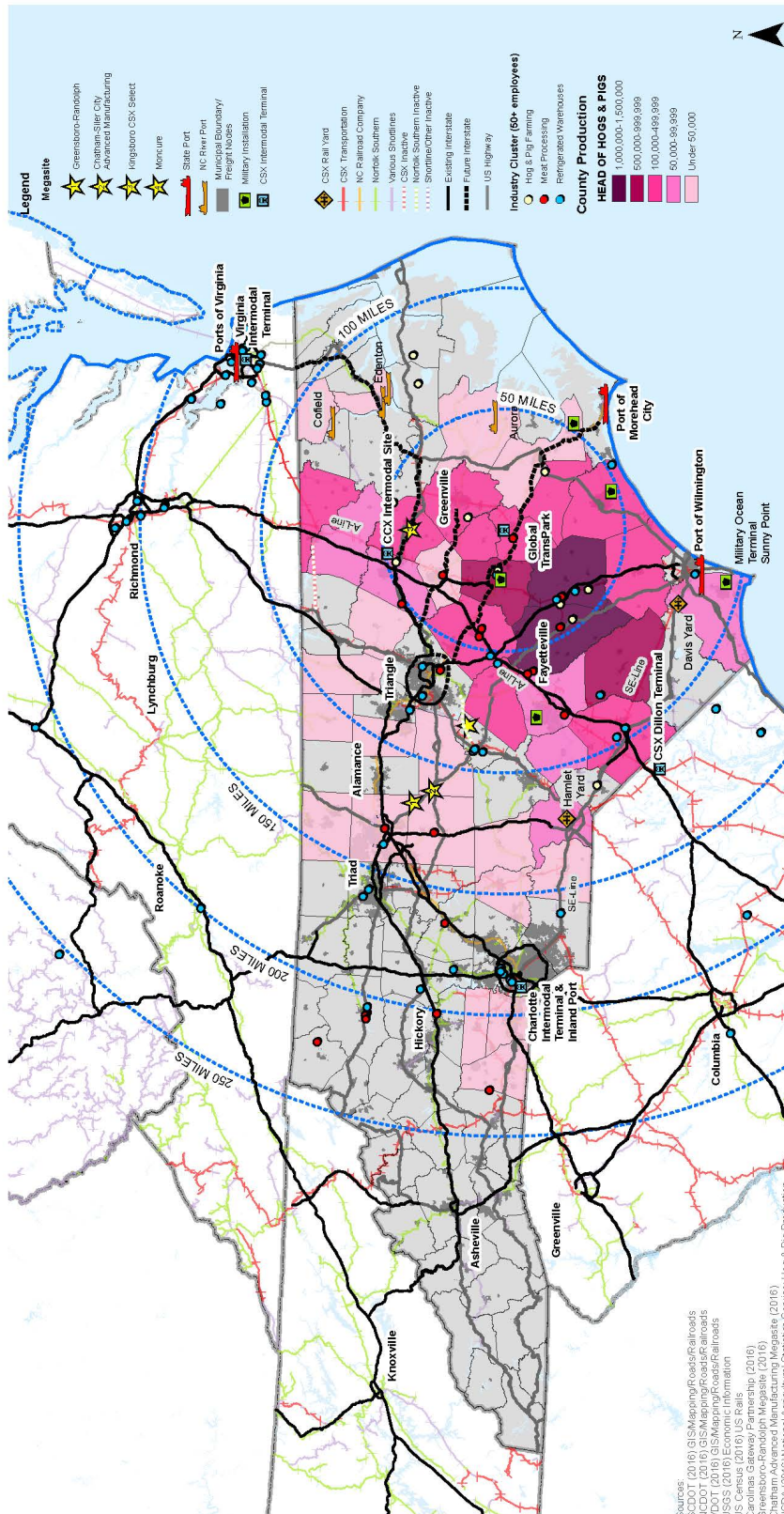
Prepared By: **Dewberry**

## Global TransPark Chemical, Pharmaceutical, Plastic & Rubber Products Manufacturing

March 2018

Sources:  
SCDOT (2016) GIS Mapping/Roads/Railroads  
NCDOT (2016) GIS Mapping/Roads/Railroads  
VDOT (2016) GIS Mapping/Roads/Railroads  
US Census Bureau (2016) Economic Information  
US Census (2016) US Fairs  
Carolina Gateway Partnership (2016)  
Greensboro-Randolph Megastore (2016)  
Chatham Advanced Manufacturing Megastore (2016)





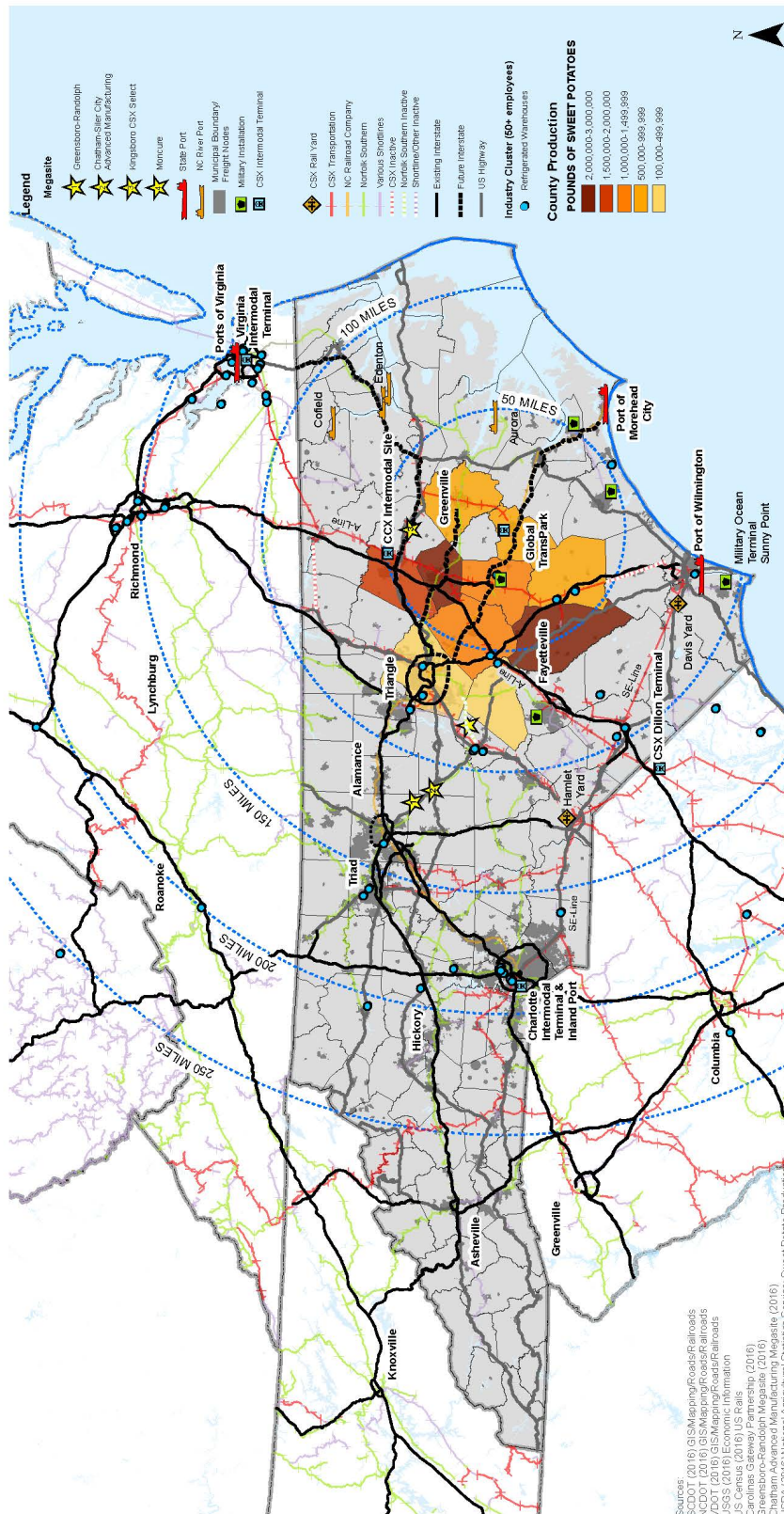
Prepared By:  
**Dewberry**

## Global TransPark Hog Production by County and Meat Processing

March 2018



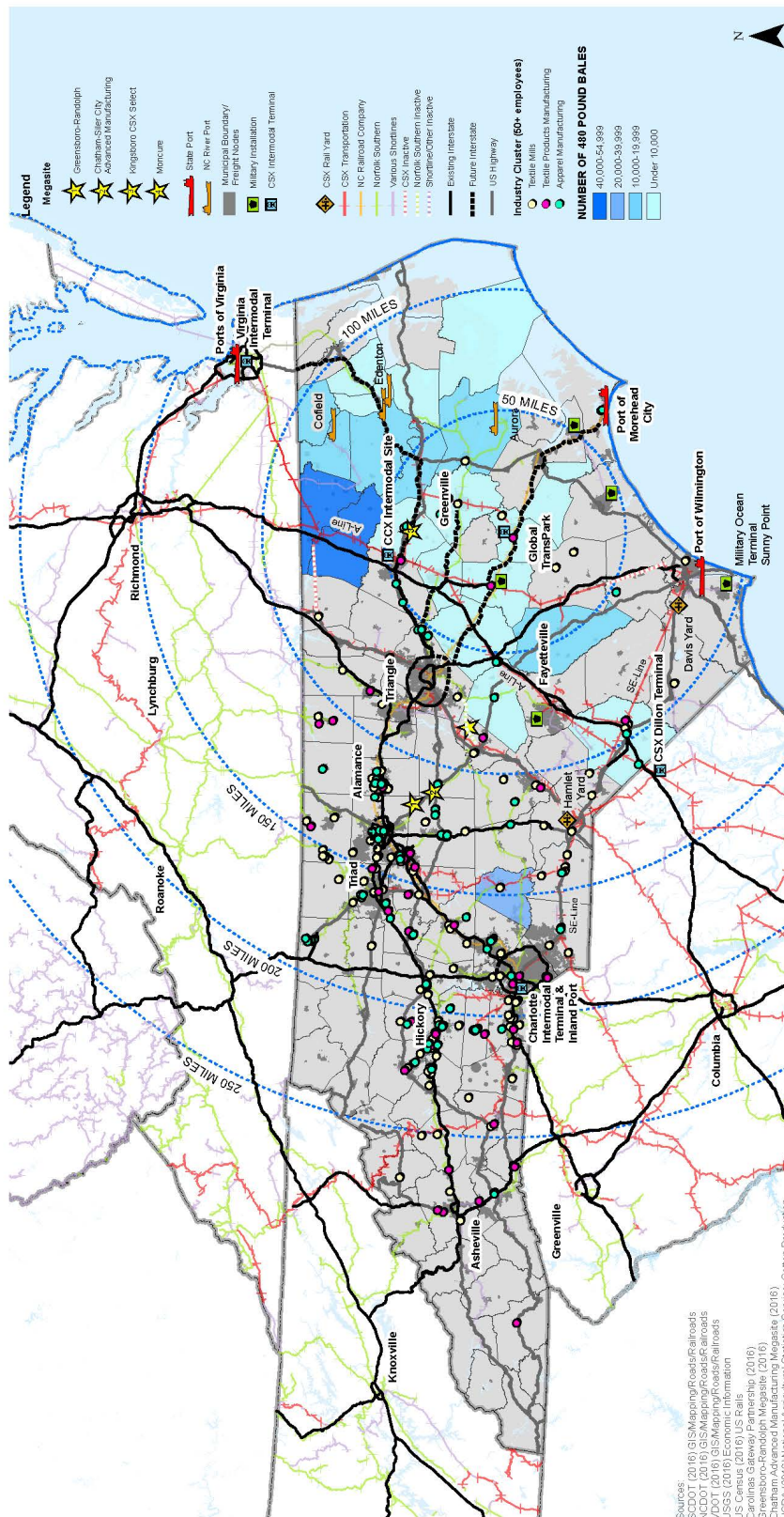




Prepared By:

 **Dewberry**

**Global TransPark**  
**Sweet Potato Production**  
March 2018

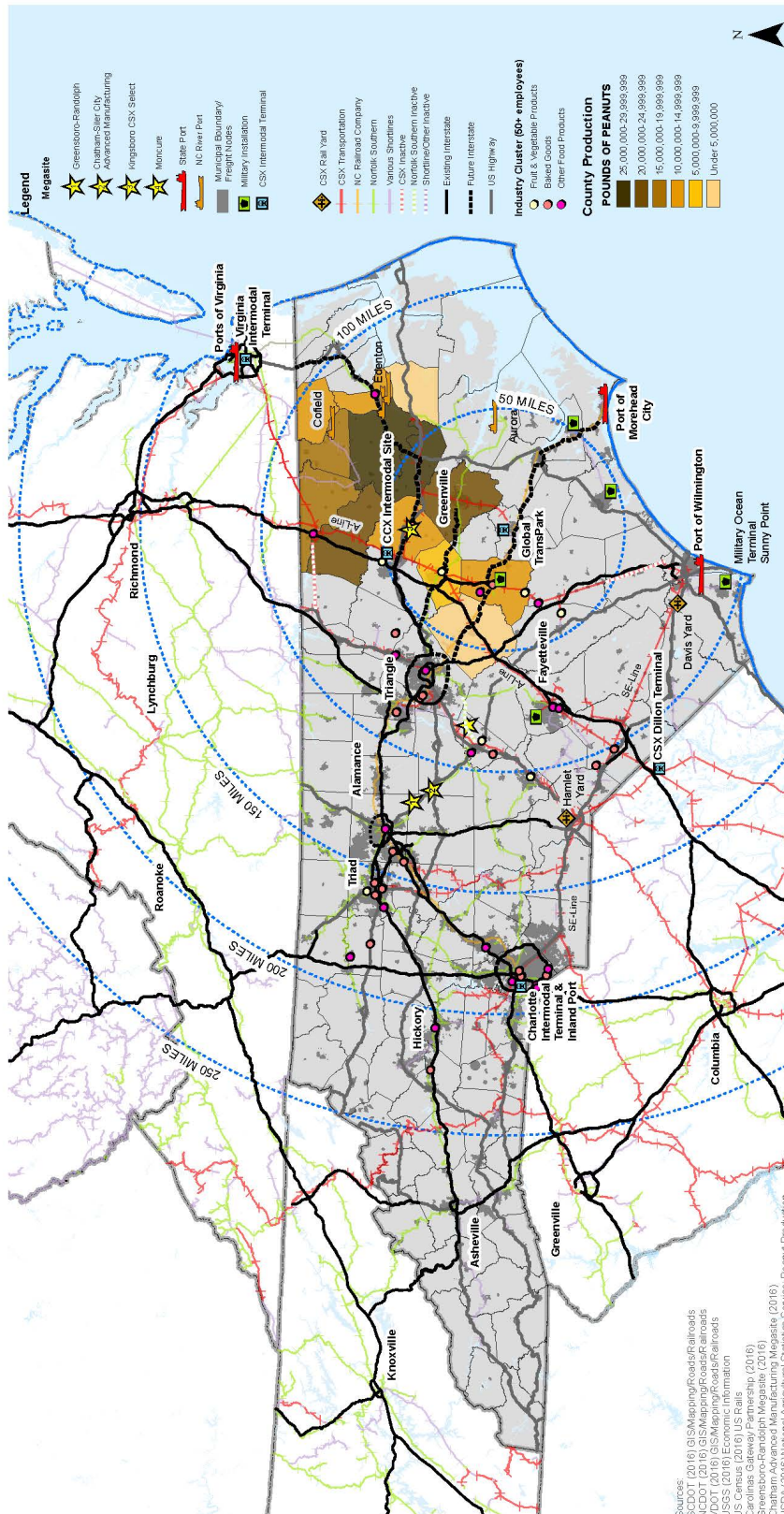


Prepared By: **Dewberry**

## Global TransPark Cotton Production and Textile Manufacturing March 2018

Sources:  
SCDOT (2016) GIS Mapping Roads/Railroads  
NC DOT (2016) GIS Mapping Roads/Railroads  
US Census (2016) Economic Information  
US Census (2016) US Rails  
Carolina Gateway Partnership (2016)  
Carolina Gateway Partnership (2016)  
Carolina Gateway Partnership (2016)  
USDA (2016) National Agricultural Statistics Service: Cotton Production





Prepared By: **Dewberry**

## Global TransPark Peanut Production and Selected Food Manufacturing March 2018





## Aviation Supply Chain Data

### HondaJet

Company	Product	Product Classification	Locations	Other Companies	Website
Hexcel Composites	Epoxy Resins: HexMC carbon fibre/epoxy for outlet guide vanes	Materials	26 location - Closest PN and MS	Boeing	<a href="http://www.hexcel.com/">http://www.hexcel.com/</a>
<a href="#">AMETEK Aerospace &amp; Defense</a>	Circuit Breaker Panels: Circuit breaker panels & interior cabin load control, utilizing AMPHION solid-state power controller	Electrical Component	HQ - 50 Fordham Rd, Wilmington, MS	Boeing Dreamliner	<a href="http://www.ametekaerospaceanddefense.com/">http://www.ametekaerospaceanddefense.com/</a>
<a href="#">Astronics Advanced Electronic Systems (AES)</a>	Inverters: EmPOWER inverter	Electrical Component	Kirkland, Washington	Boeing	<a href="https://www.astronics.com/about/subsidiary?subsidiaryItem=astronics%20advanced%20electronic%20systems">https://www.astronics.com/about/subsidiary?subsidiaryItem=astronics%20advanced%20electronic%20systems</a>
<a href="#">Eaton Electrical Sensing &amp; Controls Division</a>	Solid State Circuit Breakers: Electrical system circuit breakers	Electrical Component	HQ Irvine, California - PN, RI, OH	---	
<a href="#">Fokker Elmo</a>	Wire Harnesses: Electrical wiring interconnection system (EWIS)	Electrical Component		---	
<a href="#">Astronics Advanced Electronic Systems (AES)</a>	Ice Protection/Prevention Equipment: Windshield heat controller	Mechanical Component	Kirkland, Washington	Boeing	<a href="https://www.astronics.com/about/subsidiary?subsidiaryItem=astronics%20advanced%20electronic%20systems">https://www.astronics.com/about/subsidiary?subsidiaryItem=astronics%20advanced%20electronic%20systems</a>
<a href="#">Cox &amp; Company, Inc.</a>	Ice Protection/Prevention Equipment: Electro-expulsive ice protection systems	Mechanical Component	1664 Old Country Rd Plainview, NY 11803 T 212-366-0200		<a href="http://coxandco.com/">http://coxandco.com/</a>
<a href="#">Device Technologies Inc.</a>	Metal Grommets: Spring-Fast grommet edging system	Components / Non-Mechanical Components	155 Northboro Rd., Unit 8 Southborough, MA 01772-1033		<a href="http://www.devicetech.com/">http://www.devicetech.com/</a>
<a href="#">Vector Informatik GmbH</a>	Data Bus: Bus interface for CAN	Components / Passive Electronic Components	Stuttgart, Germany		<a href="https://vector.com/">https://vector.com/</a>
<a href="#">GKN Aerospace - Alabama</a>	Aircraft Structural Components: Fuselage structural sub-assembly	Components / Structural Components	AL - Engineering Design Center		
<a href="#">GKN Aerospace Transparency Systems</a>	Windshields: All-acrylic front and side windshields	Components / Windows & Glass	12122 Western Ave, Garden Grove, CA 92841	Boeing – 737, 747, 757, 767, 777	<a href="https://www.gkn.com/en/our-divisions/gkn-aerospace/our-solutions/special-products/transparencies/">https://www.gkn.com/en/our-divisions/gkn-aerospace/our-solutions/special-products/transparencies/</a>
<a href="#">Vision Systems North America</a>	Windows: Nuance electronically dimmable windows	Components / Windows & Glass	1801 Penn St Unit 104, Melbourne, FL 32901		<a href="http://www.vision-systems.fr/">http://www.vision-systems.fr/</a>
<a href="#">Avcorp Industries Inc.</a>	Wings: Wing structural sub-assembly	Airframe Systems / Airframe Assemblies	10025 River Way, Delta BC V4G 1M7		<a href="https://www.avcorp.com/">https://www.avcorp.com/</a>
<a href="#">BHW Components Ltd</a>	Wing Flaps: Ailerons	Airframe Systems / Airframe Assemblies	Lancashire, United Kingdom		<a href="http://www.aerospacemail.com/companies/view/2908/bhw-components-ltd">http://www.aerospacemail.com/companies/view/2908/bhw-components-ltd</a>
<a href="#">CPI Aero, Inc.</a>	Wing Flaps: Flap & vane assemblies	Airframe Systems / Airframe Assemblies	91 Heartland Blvd, Edgewood, NY 11717		<a href="http://www.cpiaero.com/">http://www.cpiaero.com/</a>
<a href="#">Eaton Electrical Sensing &amp; Controls Division</a>	Aircraft & Helicopter Controllers: Throttle control, landing gear controls, flap controls, avionic switches	Airframe Systems / Airframe Assemblies	HQ Irvine, California - PN, RI, OH		
<a href="#">GKN - Fokker Aerostructures</a>	Empennages:	Airframe Systems / Airframe Assemblies			<a href="https://www.gkn.com/en/our-divisions/gkn-aerospace/about-gkn-aerospace/fokker-technologies/">https://www.gkn.com/en/our-divisions/gkn-aerospace/about-gkn-aerospace/fokker-technologies/</a>
<a href="#">GKN Aerospace - Alabama</a>	Fuselage Sections: Composite fuselage	Airframe Systems / Airframe Assemblies	AL - Engineering Design Center		
<a href="#">LMI Aerospace, Inc.</a>	Wing Flaps: Aileron & flap assemblies	Airframe Systems / Airframe Assemblies	101 Coleman Blvd Ste E, Savannah, GA 31408		<a href="http://www.lmiaerospace.com/">http://www.lmiaerospace.com/</a>
<a href="#">Rockwell Collins (EMTEQ)</a>	Cabin Management Systems: SkyPro integrated cabin management & in-flight entertainment system (option)	Airframe Systems / Cabin Interiors	WI, MT, FL, NY		<a href="http://emteq.com/">http://emteq.com/</a>
<a href="#">Crane Aerospace/Hydro-Aire Inc.</a>	Anti-Skid Brakes & Systems: Anti-skid brake control system	Airframe Systems / Landing Assemblies	Burbank, CA		<a href="http://www.craneae.com/AboutUs/Hydro-Aire.aspx">http://www.craneae.com/AboutUs/Hydro-Aire.aspx</a>

Company	Product	Product Classification	Locations	Other Companies	Website
<a href="#">Esterline Control &amp; Communication Systems (Korvy)</a>	Control Panels: Cockpit control panels	Avionics / Avionic Components	Everett, WA 98204 Platteville, WI 53818-0636 Everett, WA 98204 Sylmar, CA 91342 Rancho Santa Margarita, CA 92688-2604 Harrow HA1 4TR United Kingdom Everett, WA 98204		<a href="http://www.esterline.com/controlandcommunication/">http://www.esterline.com/controlandcommunication/</a>
<a href="#">Gogo Business Aviation</a>	Airborne Communication Systems: ATG 5000 or SwiftBroadband high-speed wireless internet options	Avionics / Communications (Airborne)	Itasca, IL		<a href="https://business.gogoaer.com/">https://business.gogoaer.com/</a>
<a href="#">Sun Country Industries</a>	Cockpit Control Systems: Cockpit control column	Avionics / Flight and Data Management	6801 Gruber Ave NE, Albuquerque, NM 87109		<a href="http://www.mcnelly-group.com/suncountryindustries/">http://www.mcnelly-group.com/suncountryindustries/</a>
<a href="#">Garmin International</a>	Electronic Flight Instrument Systems: G3000 all-glass avionics system, with three screens; Moving Maps: Synthetic Vision Technology (SVT)	Avionics / Indicators and Instruments	Lenexa, KS		<a href="https://www.garmin.com/en-US/">https://www.garmin.com/en-US/</a>
<a href="#">Meggitt Avionics</a>	Electronic Flight Instrument Systems: Electronic standby indicator, inc. integrated secondary flight display & magnetic heading sensor	Avionics / Indicators and Instruments	Fareham, HANTS, uk		<a href="https://www.meggitt-avionics.co.uk/">https://www.meggitt-avionics.co.uk/</a>
<a href="#">Garmin International</a>	Onboard Airport Navigation Systems: SafeTaxi and FliteCharts airport diagrams and terminal procedures	Avionics / Navigation Aids (Airborne)	Lenexa, KS		<a href="https://www.garmin.com/en-US/">https://www.garmin.com/en-US/</a>
<a href="#">AMETEK Aerospace &amp; Defense</a>	Power Distribution Equipment: Primary power distribution & integrated generator control functions	Power Systems / Electrical Power Systems	HQ - 50 Fordham Rd, Wilmington, MS	Boeing Dreamliner	<a href="http://www.ametekaerospaceanddefense.com/">http://www.ametekaerospaceanddefense.com/</a>
<a href="#">CPI Aero, Inc.</a>	Engine Inlets:	Power Systems / Engine Components	91 Heartland Blvd, Edgewood, NY 11717		<a href="http://www.cpiaero.com/">http://www.cpiaero.com/</a>
<a href="#">Marshall Aerospace</a>	Nacelles:	Power Systems / Engine Components	Cambridge Airport, England		<a href="http://marshalladg.com/">http://marshalladg.com/</a>
<a href="#">Unison Industries, LLC</a>	Engine Controls: Electrical systems for HF120 engine	Power Systems / Engine Components	7575 Baymeadows Way, Jacksonville, FL 32256		<a href="https://www.unisonindustries.com">https://www.unisonindustries.com</a>
<a href="#">GE Honda Aero Engines</a>	Turbofan Engines: HF118 development engines; HF120 production engines	Power Systems / Engines	HQ - West Chester, OH - DURHAM, NC		<a href="http://www.gehonda.com/">http://www.gehonda.com/</a>
<a href="#">AMETEK Aerospace &amp; Defense</a>	Fuel Probes: Fuel gauging systems	Power Systems / Fuel Systems	HQ - 50 Fordham Rd, Wilmington, MS	Boeing Dreamliner	<a href="http://www.ametekaerospaceanddefense.com/">http://www.ametekaerospaceanddefense.com/</a>
<a href="#">Nova-Tech Engineering</a>	Jigs & Fixtures: Wing to body tooling fixture	Production / Tooling	1705 Engineering Ave, Willmar, MN 56201		<a href="http://nteglobal.com/">http://nteglobal.com/</a>
<a href="#">Nova-Tech Engineering, LLC</a>	Jigs & Fixtures: Wing to fuse join jig	Production / Tooling	1705 Engineering Ave, Willmar, MN 56201		<a href="http://nteglobal.com/">http://nteglobal.com/</a>
<a href="#">Paragon D &amp; E</a>	Tooling:	Production / Tooling	5225 33rd St SE, Grand Rapids, MI 49512		<a href="http://www.paragonde.com/">http://www.paragonde.com/</a>
<a href="#">dSPACE Inc.</a>	Electric/Electronic Test Equipment: Hardware-in-the-loop simulators for electrical & avionic subsystem testing	Testing / Test Equipment	dSPACE Inc. 50131 Pontiac Trail Wixom, MI, USA 48393-2020		<a href="https://www.dspace.com/en/inc/home.cfm">https://www.dspace.com/en/inc/home.cfm</a>
<a href="#">Vector Informatik GmbH</a>	Electric/Electronic Test Equipment: Software tool for measurement & calibration; Electric/Electronic Test Equipment: Oscilloscope for CAN busline voltage; Electronic Analysers: Software tool for LRU & network analysis	Testing / Test Equipment			

# Appendix D

## Site Attraction

This page left intentionally blank

## Appendix D – Site Attraction

### Contents

2017 North Carolina Project Announcements .....	D-3
Business Sector Targeting Strategies .....	D-11
McCallum Sweeney Consulting Quick Assess of NCGTP .....	D-29

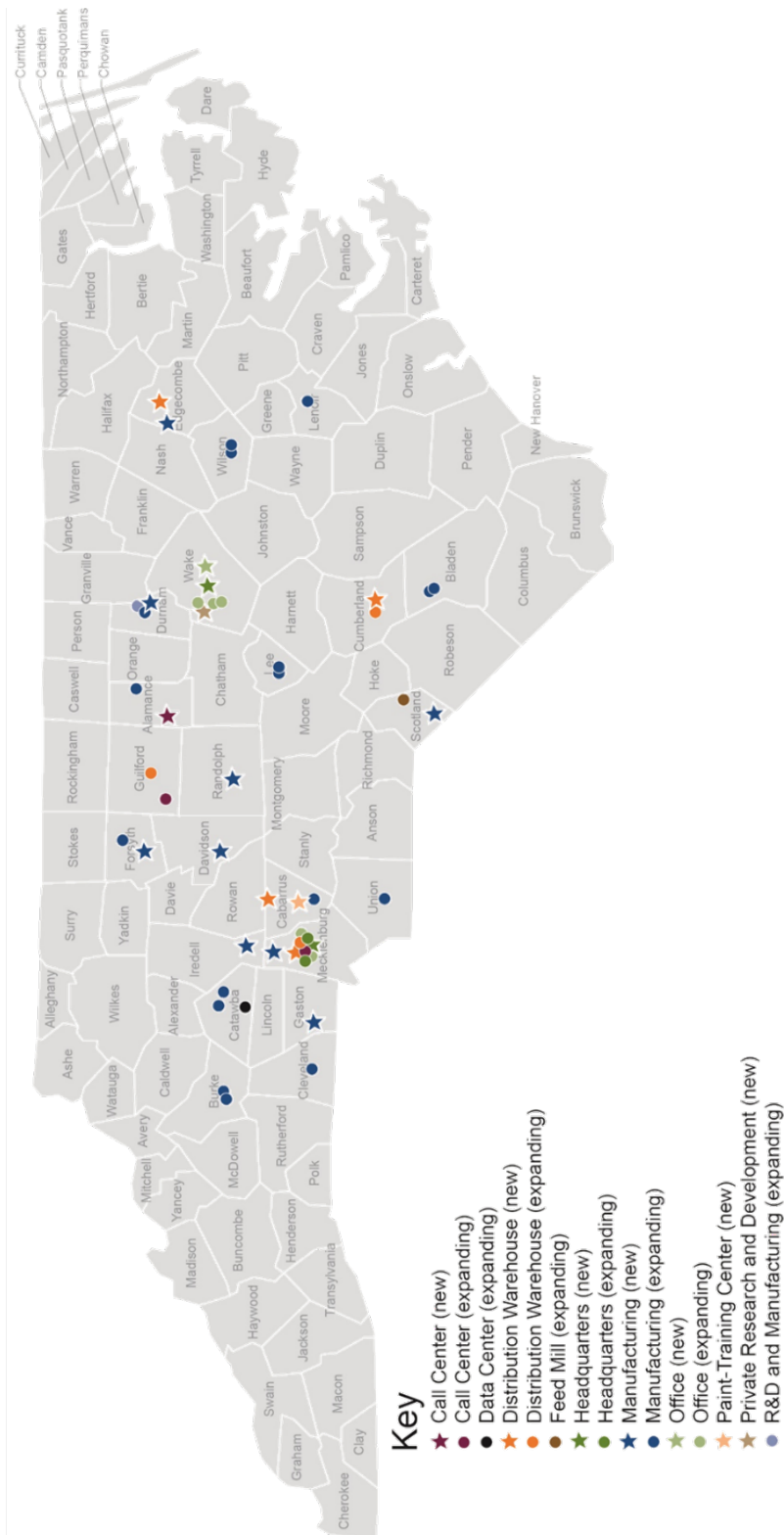
Larger site locations in North Carolina, as illustrated by project announcements for the most recent calendar year, have been attracted primarily to the state's more urbanized areas. The majority of announcements for new or expanding facilities that involved at least \$30 million of private investment and/or at 200 new jobs are located within North Carolina's three largest metropolitan areas: Charlotte, Raleigh-Durham, and the Piedmont Triad.

Within eastern North Carolina, the Spirit AeroSystems expansion at NCGTP was among the larger announcements outside of the urban centers.

A complete listing of *2017 North Carolina Project Announcements*, as assembled by the North Carolina Department of Commerce, is provided on the following pages.

In consideration of the unique assets of NCGTP, regional demographics, and target industries, Strategic Development Group has developed recommendations for *Business Sector Targeting Strategies* to best position NCGTP for site attraction.

Additionally, a *McCallum Sweeney Consulting Quick Assess of NCGTP* offers recommendations for site readiness and site certification that are consistent with the tactical actions identified in the NCGTP Business Plan.



**Figure D-1: 2017 Announcements for New or Expanding Facilities of at Least \$30 Million or 200 New Jobs**



## 2017 North Carolina Project Announcements

### North Carolina Department of Commerce Economic Development Projects Report

Projects Announced between 1/1/2017 and 12/31/2017

The Community Investment Report (CIR) database of economic development announcement information for North Carolina measures capital investment and job creation by new and existing businesses in the state. The CIR database and reporting are managed by the Economic Development Partnership of North Carolina (EDPNC). For inquiries about this information, call (919) 447-7793.

Job creation and investment figures are totals of announced or planned jobs, not actual hiring counts of workers or actual investment. The CIR database does not include every dollar of capital investment, or job announcement in North Carolina, but it is the most complete source of statewide, project-level economic development activity currently available. As a result, the data provides the Department of Commerce and the entire economic development community with a measure of the type and value of investment in the state. In addition, for reporting purposes, confidential data have been aggregated with publicly announced data to produce totals for capital investment and job creation. Please contact the CIR staff with any additional questions regarding data collection and methodology.

County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Alamance	11/1/2017	PRA Group	500	New	43,000	\$4,000,000	Call Center	561422		United States
Alamance	12/13/2017	Airgas	35	Expanding	0	\$470,000,000	Manufacturing	325120	Air Separation Unit. The facility will take	United States
Alamance	7/2/2017	Cambro Manufacturing	0	Expanding	250,000	\$10,000,000	Manufacturing	326150	Food Service industry products, including	United States
Alamance	10/7/2017	LabCorp	0	Expanding	10,000	\$5,450,000	Private Research & Development	621511	Renovation and expansion of laboratory	United States
Alexander	5/24/2017	Borealis Compounds, Inc	37	New	50,000	\$15,000,000	Manufacturing	325991	Chemicals, Plastics & Rubber	Austria
Alleghany	2/18/2017	NAPCO	35	Expanding	65,000	\$1,500,000	Manufacturing	322130	Binders for packaging of baseball cards	United States
Anson	6/6/2017	USB Recycling	45	New	23,000	\$500,000	Electronics sorting, recycling	423930	Electronics sorting, recycling and refurb	China
Ashe	9/22/2017	Northwestern Emergency Vehicles	15	Expanding	25,000	\$2,550,000	Manufacturing	336111	Northwestern Emergency Vehicles, Inc.	United States
Bladen	8/23/2017	Smithfield Foods	280	Expanding	500,000	\$115,000,000	Manufacturing	112210	Pork Processing	China
Bladen	5/26/2017	Smithfield Foods	30	Expanding	0	\$45,000,000	Manufacturing	311611	World's largest pork processor and	United States
Bladen	2/19/2017	Specialty Product Technologies	20	Expanding	164,796	\$578,000	Manufacturing	334514	Manufactures parts for water meter pr	United States
Brunswick	12/16/2017	ITI Technologies	35	New	48,000	\$3,413,060	Manufacturing	325199	Specialty chemical company that devel	United States
Buncombe	10/6/2017	Aeroflow Healthcare	80	Expanding	35,000	\$1,502,000	Distribution Warehouse	339112	Medical Equipment Provider	United States
Buncombe	10/18/2017	Fox Factory Holding Corp.	47	Expanding	20,000	50	Headquarters-Business	336991	Designer, manufacturer and marketer	United States
Buncombe	5/24/2017	Riverbend Malt House	15	Expanding	74,000	\$9,500,000	Manufacturing	312120	Brewery	United States
Buncombe	11/30/2017	East Fork Pottery	26	Expanding	0	\$794,000	Manufacturing	327110		United States
Burke	4/19/2017	Continental Teves, Inc	160	Expanding	52,000	\$40,000,000	Manufacturing	336111	Braking Systems for automobiles	Germany
Burke	12/15/2017	Critical Resources (Critical Capabilities)	151	Expanding	102,300	\$33,865,000	Manufacturing	332992		United States
Burke	12/22/2017	Greenworks Tools (Sunrise Global	187	New	510,000	\$23,225,000	Manufacturing	333112	Manufacturer of Greenworks-branded	United States
Burke	12/7/2017	Veka	102	New	175,000	\$18,000,000	Manufacturing	326199	extruded vinyl parts for windows, door	Germany
Burke	4/22/2017	Kellex Corporation	32	Expanding	159,000	\$1,800,000	Manufacturing	337121		United States
Cabarrus	8/15/2017	Amazon	600	New	1,000,000	\$35,000,000	Distribution Warehouse	493110		United States
Cabarrus	9/19/2017	JJ Haines	172	Expanding	500,000	\$6,400,000	Distribution Warehouse	423220		United States
Cabarrus	3/30/2017	Linder Industrial Machinery Co	75	Expanding	20,000	\$7,600,000	Headquarters-Business	551114	service and lease of industrial machin	United States
Cabarrus	2/22/2017	Corning Incorporated	200	Expanding	0	\$109,000,000	Manufacturing	335921	Expansion of existing optical fiber man	United States
Cabarrus	11/23/2017	PreGel America	0	Expanding	110,000	\$14,000,000	Manufacturing	311520	PreGel America is the U.S. division of P	Italy
Cabarrus	11/1/2017	Intertape Polymer Group	10	Expanding	0	\$3,500,000	Manufacturing	325520	Manufacturer of a tamper-resistant pac	Canada
Cabarrus	8/13/2017	Classic Graphics	50	Expanding	100,000	\$1,500,000	Manufacturing	323111		United States
Cabarrus	12/2/2017	PMU Industries	12	Expanding	9,000	\$500,000	Manufacturing	326111	Manufacture Plastics Bags	United States
Cabarrus	5/18/2017	Avaita	75	New	0	\$30,000,000	Paint-Training Center	325510		United States
Cabarrus	10/25/2017	Standard Process	15	New	10,000	50	Private Research & Development	311999	Nutritional supplement company	United States

County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Caldwell	12/16/2017	Sealed Air	25 Expanding		125,000	\$10,200,000	Manufacturing	326112		United States
Caldwell	2/10/2017	AMP Services	40 Expanding		36,179	\$5,000,000	Manufacturing	335122	Warehouse Distribution and beginning	United States
Caldwell	5/28/2017	Adhesion Biomedical, LLC	40 Expanding		20,000	\$3,500,000	Manufacturing	541712	They produce surgical adhesives	United States
Caldwell	4/15/2017	Ryan-Al Door Systems	52 New		30,649	\$1,750,000	Manufacturing	423390		United States
Caldwell	1/19/2017	McCreary Modern	55 Expanding		0	\$1,000,000	Manufacturing	337121	Furniture	United States
Caldwell	2/10/2017	Automated Solutions	20 Expanding		77,000	50	Manufacturing	326112	Plastics packaging	United States
Catawba	1/18/2017	Apple	0 Expanding		220,000	\$300,000,000	Data Center	518210		United States
Catawba	5/2/2017	Room & Board, Inc	13 New		250,000	\$12,870,000	Distribution Warehouse	493110		United States
Catawba	2/21/2017	Corning Incorporated	210 Expanding		0	\$67,000,000	Manufacturing	335921	Optical cables	United States
Catawba	10/21/2017	The Physimians Group	50 Expanding		73,980	\$53,480,000	Manufacturing	335921	Fiber Optic Cable	Italy
Catawba	12/16/2017	Sarstedt Inc	0 Expanding		0	\$6,000,000	Manufacturing	423450		Germany
Catawba	8/5/2017	SHURTAPE TECHNOLOGIES INC,	0 Expanding		0	\$2,200,000	Manufacturing	322220	Interior Office upfit of existing office	United States
Catawba	7/7/2017	Williams-Sonoma (Sutter Street Mfg)	72 Expanding		411,000	\$1,190,000	Manufacturing	337125		United States
Catawba	8/6/2017	Utili-Serve	0 Expanding		23,000	\$1,520,754	Office	238210	Contractor that provides electrical engi	United States
Catawba	12/14/2017	Corrher Implements	0 Expanding		0	\$5,000,000	Wholesale industrial machi	423830		United States
Chatham	12/9/2017	EPC, Inc. (Engineered Plastic	35 Expanding		15,000	\$2,900,000	Manufacturing	326199	Plastic injection molding and assembly	United States
Cherokee	8/19/2017	AEGIS Power Systems	6 Expanding		30,000	\$2,000,000	Manufacturing	335999		United States
Chowan	12/16/2017	Regulator Marine	32 Expanding		80,000	\$3,200,000	Manufacturing	336612	Manufactures offshore sports fishing ba	United States
Clay	12/8/2017	Advanced Digital Cable Inc.	15 Expanding		0	\$6,000,000	Manufacturing	331420	Manufacturer of electronic, industrial a	United States
Cleveland	3/7/2017	Disney	1 Expanding		0	\$500,000	Data Center	518210		United States
Cleveland	12/5/2017	Forest Products Group	25 New		50,000	\$500,000	Distribution Warehouse	423990	<a href="http://www.forestproductsgroup.com/">http://www.forestproductsgroup.com/</a>	United States
Cleveland	12/6/2017	Kerns Trucking	10 Expanding		0	\$3,488,012	Headquarters-Corporate	484121	<a href="http://kernstrucking.com/aboutus.php">http://kernstrucking.com/aboutus.php</a>	United States
Cleveland	2/9/2017	Clearwater Paper Corporation	180 Expanding		1,400,000	\$330,000,000	Manufacturing	322121	Premium and ultra-premium grades of	United States
Cleveland	8/15/2017	Albemarle Corporation	170 Expanding		50,000	\$20,000,000	Manufacturing	325180		United States
Cleveland	4/5/2017	Patrick Yarns	20 Expanding		0	\$1,400,000	Manufacturing	313310	Manufacturer of high performance pro	United States
Cleveland	6/7/2017	Commercial Vehicle Group	0 Expanding		10,000	\$600,000	Manufacturing	336211	Commercial Vehicle Group makes innov	United States
Cleveland	10/18/2017	Fibers Innovators International	80 New		60,000	50	Manufacturing	313110	Polyester Thread	United States
Columbus	12/15/2017	Direct Market Access	13 Expanding		0	\$375,000	Distribution Warehouse	423120	Distribution of Automotive Parts	United States
Cumberland	3/4/2017	eClerx	40 New		40,000	\$1,000,000	Call Center	541511	Customer service call center / technical	India
Cumberland	9/22/2017	Issues & Answers	75 New		17,000	\$250,000	Call Center	541910	Call center - marketing research and pu	United States
Cumberland	4/6/2017	CACI	15 Expanding		37,000	\$5,000,000	Computer Systems Design	541512	Defense contractor specializing in comp	United States
Cumberland	12/29/2017	DHL Global Forwarding	140 New		627,000	\$44,610,000	Distribution Warehouse	488510	Third party logistics company for	United States
Cumberland	12/23/2017	Campbell Soup	199 Expanding		62,700	\$44,606,988	Distribution Warehouse	493110	Distribution warehouse for Campbell So	United States
Cumberland	12/16/2017	Kinlaw's Meat Market	11 Expanding		0	\$515,000	Manufacturing	311612	Processes Meats	United States
Cumberland	8/19/2017	K3 Enterprises	32 Expanding		54,000	\$1,777,032	Office	541611	Information solutions company	United States
Cumberland	10/22/2017	Advanced Computer Learning	75 Expanding		0	\$612,810	Office	541511	Delivers training software and services,	United States
Davidson	10/12/2017	WoodBridge Furniture	14 New		63,000	\$5,000,000	Headquarters-Corporate	551114		United States

County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Davidson	7/25/2017	EGGER Wood Products LLC	400 New	New	4,500,000	\$300,000,000	Manufacturing	321999	wood products for furniture and construction	Austria
Davidson	9/21/2017	Goose & The Monkey	12 New	New	20,000	\$1,200,000	Manufacturing	312120		United States
Davidson	10/13/2017	Bull City Ciderworks	25 New	New	15,000	\$1,000,000	Manufacturing	312120		United States
Davidson	6/29/2017	Radians Inc.	30 Expanding	Expanding	14,000	\$500,000	Manufacturing	315990	Manufacturer of safety products	United States
Davidson	4/22/2017	Ennis Flint	20 Expanding	Expanding	222,608	\$262,000	Manufacturing	325510	Manufacturer	United States
Davidson	9/21/2017	Tapped Tees	15 New	New	10,000	\$1,000,000	Office	315990		United States
Davie	6/23/2017	Morrisofa Global	1 New	New	92,000	\$0	Distribution Warehouse	423210	Importer and distributor of upholstered	United States
Davie	8/19/2017	AccuMED	40 Expanding	Expanding	60,000	\$6,445,000	Manufacturing	315210		United States
Durham	2/3/2017	Elite Flooring	20 Expanding	Expanding	42,000	\$3,513,831	Distribution Warehouse	541614	Flooring Products	United States
Durham	2/7/2017	KBI Biopharma	20 Expanding	Expanding	10,000	\$10,179,000	Headquarters, R&D and manufacturing	541711	Biological products, contract CRO	United States
Durham	12/14/2017	Corning	317 Expanding	Expanding	0	\$189,000,000	Manufacturing	325412		United States
Durham	11/30/2017	bluebird bio	70 New	New	125,000	\$30,000,000	Manufacturing	325414	bluebird bio is a clinical-stage company	United States
Durham	2/1/2017	Biogen	25 Expanding	Expanding	30,000	\$23,709,138	Manufacturing	325411	Pharmaceutical products	United States
Durham	3/12/2017	Park Communications	20 New	New	84,000	\$7,975,227	Manufacturing	323111		United States
Durham	8/5/2017	Ufestar Pharma	0 New	New	96,000	\$7,784,000	Manufacturing	325412	Pharmaceutical Manufacturing	India
Durham	4/13/2017	Medicago	0 Expanding	Expanding	8,000	\$5,983,440	Manufacturing	325414		Japan
Durham	3/16/2017	IBM	0 Expanding	Expanding	20,000	\$6,984,634	Private Research & Development	541711		United States
Durham	4/7/2017	Metabolon	26 Expanding	Expanding	13,000	\$1,679,296	Private Research & Development	541711		United States
Durham	2/5/2017	Precision Bioscience	98 Expanding	Expanding	39,000	\$1,234,207	Private Research & Development	541711	Genome editing	United States
Durham	5/13/2017	Hemosonics	20 Expanding	Expanding	4,090	\$612,500	Private Research & Development	541711		United States
Durham	2/9/2017	Lonza	60 New	New	15,044	\$40,000	Private Research & Development	541711		Switzerland
Durham	3/11/2017	BioAgility	60 Expanding	Expanding	21,000	\$0	Private Research & Development	541712	Contact research organization	United States
Durham	2/1/2017	Power Secure	300 Expanding	Expanding	258,600	\$35,000,000	R&D and manufacturing	335311	Power systems	United States
Edgecombe	12/14/2017	Corning Incorporated	111 New	New	0	\$86,000,000	Distribution Warehouse	493110		United States
Edgecombe	6/13/2017	Project Cold Storage	100 New	New	200,000	\$22,700,000	Distribution Warehouse	493120	Cold Storage Facility	United States
Edgecombe	12/21/2017		290	New	0	\$580,000,000	Manufacturing	326211	Tire manufacturing	China
Edgecombe	2/9/2017	Keihin Carolina System Technologies, Inc.	42 Expanding	Expanding	0	\$13,800,000	Manufacturing	336111		Japan
Forsyth	9/23/2017	Johnson Controls	60 Expanding	Expanding	0	\$38,000,000	Manufacturing	335911	Company that specializes in efficient energy	Ireland
Forsyth	7/9/2017	Beaufort	15 Expanding	Expanding	80,000	\$6,800,000	Manufacturing	337125	Produces tables, lounge furniture and upholstery	United States
Forsyth	6/21/2017	HPFabrics, Inc.	390 New	New	423,000	\$3,900,000	Manufacturing	313110	Manufacturer of raw fabrics	Turkey
Franklin	3/2/2017	Canyon Stone	10 Expanding	Expanding	24,898	\$365,000	Distribution Warehouse	493110	stone manufacturing and installation services	United States
Franklin	12/2/2017	Capital Concrete Pumping	4 Expanding	Expanding	23,000	\$210,000	Distribution Warehouse	238110		United States
Franklin	10/2/2017	Focus Design Builders	10 New	New	3,000	\$25,000	Headquarters-Business	236220		United States
Franklin	4/15/2017	Palziv North America	40 Expanding	Expanding	0	\$5,200,000	Manufacturing	326150	Manufacturers cross-linked, closed-cell foam	Israel
Franklin	6/3/2017	Eagle Rock Concrete	10 Expanding	Expanding	1,026	\$320,000	Manufacturing	423320		United States
Franklin	2/3/2017	Captive-Aire Systems	10 Expanding	Expanding	34,390	\$250,000	Manufacturing	333415	commercial kitchen ventilation equipment	United States
Franklin	9/3/2017	Swiss Tool Craft, LLC	5 Expanding	Expanding	5,000	\$75,000	Manufacturing	332710		United States



County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Franklin	5/3/2017	Accu Tech USA, Inc.	5	Expanding	2,500	\$30,000	Manufacturing	339995		United States
Franklin	9/16/2017	Cedar Peaks Enterprises	75	Expanded	38,390	\$589,500	Office	237310		United States
Gaston	8/2/2017	Dixon Valve & Coupling Co	10	Expanding	70,000	\$3,000,000	Distribution Warehouse	423840		United States
Gaston	10/1/2017	Pharr Yarns Inc.	0	Expanding	0	\$1,895,488	Distribution Warehouse	313310		United States
Gaston	12/22/2017	Dhollandia MFG, LLC	150	New	0	\$30,000,000	Manufacturing	336390	Manufacturer of hydraulic lifts for truck	Belgium
Gaston	12/29/2017	Firestone Fibers & Textile Company	25	Expanding	110,000	\$15,000,000	Manufacturing	314994	Fibers	United States
Gaston	8/17/2017	Daimler Trucks North America LLC	0	Expanding	0	\$950,000	Manufacturing	423120		United States
Gaston	6/23/2017	Daimler Trucks North America LLC	0	Expanding	0	\$500,000	Manufacturing	336211		United States
Gaston	2/5/2017	Industrial Fabricators	0	Expanding	8,200	\$405,000	Manufacturing	238190		United States
Granville	12/16/2017	Shalag US, Inc.	10	Expanding	0	\$2,350,000	Manufacturing	313230	Manufactures non-woven fabrics	Israel
Guilford	3/9/2017	Anomaly Squared	100	Expanding	60,000	\$5,360,000	Call Center	561422	Call Center for insurance and mortgage	United States
Guilford	4/27/2017	Levolor	0	Expanding	0	\$800,000	Call Center	442291	Window Treatment - Blinds	United States
Guilford	2/22/2017	Alorica	600	Expanding	0	\$0	Call Center	561422	call center	United States
Guilford	5/26/2017	Coca-Cola Bottling Co. Consolidated	20	Expanding	135,300	\$4,000,000	Distribution Warehouse	312111		United States
Guilford	6/20/2017	Sunbelt	0	Expanding	0	\$750,000	Distribution Warehouse	423840	Abrasives	United States
Guilford	3/1/2017	Pratt Industries	400	Expanding	360,000	\$0	Distribution Warehouse	322211		United States
Guilford	10/27/2017	Liv. able	0	Expanding	142,000	\$20,000,000	Furniture Showroom	337121		United States
Guilford	4/23/2017	Najaran Furniture	0	New	40,000	\$4,200,000	Furniture Showroom	423210	New Furniture Showroom Building	United States
Guilford	11/7/2017	Parker House Furniture	0	Expanding	38,770	\$2,000,000	Furniture Showroom	337122		United States
Guilford	10/10/2017	International Market Centers, Inc	0	Expanding	0	\$1,193,000	Furniture Showroom	561110	furniture showroom upgrades	United States
Guilford	4/21/2017	Lexington Home Brands	0	Expanding	0	\$750,000	Furniture Showroom	337121		United States
Guilford	4/22/2017	JLA Furniture	0	Expanding	0	\$500,000	Furniture Showroom	337121		China
Guilford	4/5/2017	200 Steele	0	Expanding	100,000	\$0	Furniture Showroom	423210		United States
Guilford	11/1/2017	Procter & Gamble	0	Expanding	0	\$1,595,000	Headquarters-Business	325612	Lab alteration, new finishes and	United States
Guilford	6/6/2017	Tiger Leather	0	Expanding	40,000	\$5,000,000	Headquarters-Corporate	316998		United States
Guilford	1/21/2017	Ecolab	0	Expanding	22,000	\$1,250,000	Headquarters-Corporate	339999	Up-fit of commercial offices to include	United States
Guilford	2/9/2017	Procter & Gamble	0	Expanding	0	\$8,886,923	Manufacturing	325620	family, personal, and household care products	United States
Guilford	6/15/2017	Bright Plastics	0	Expanding	35,000	\$3,200,000	Manufacturing	326199	Plastic injection molding firm that creates	United States
Guilford	6/4/2017	Cambrex Corp.	5	Expanding	24,299	\$2,155,825	Manufacturing	325414	Manufacturer of small molecule active	United States
Guilford	2/23/2017	Mickey Truck Bodies	25	New	20,000	\$1,000,000	Manufacturing	336211	body and trailer supplier	United States
Guilford	9/28/2017	Piedmont Hoist & Crane	10	Expanding	20,000	\$876,000	Manufacturing	333120	Producer of hoist and crane equipment	United States
Guilford	10/11/2017	Davis Furniture	0	Expanding	20,000	\$876,000	Manufacturing	337211	Addition to plant #7	United States
Guilford	11/11/2017	Riverdale Global	30	New	200,000	\$870,000	Manufacturing	325130	Manufacturer of liquid color and additives	United States
Guilford	2/4/2017	Thomas Built Bus	100	Expanding	0	\$0	Manufacturing	336120	School Buses	Germany
Guilford	5/27/2017	Precision Design Machinery	40	Expanding	30,000	\$0	Manufacturing	333993	Machinery builder for the packaging and	United States
Guilford	8/2/2017	Core Technology Molding	22	Expanding	30,000	\$0	Manufacturing	326199		United States
Guilford	3/10/2017	Guerrilla RF	7	Expanding	7,200	\$0	Manufacturing	334419	Provider of microchips for wireless networks	United States

County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Guilford	4/8/2017	ABCO Automation Inc.	0	Expanding	83,700	\$0	Manufacturing	333999		United States
Guilford	8/24/2017	Superion	80	Expanding	0	\$3,460,000	Office	423430	software primarily for the public sector	United States
Guilford	7/22/2017	Ennis-Flint	0	Expanding	31,940	\$1,000,000	Office	237310	Company makes products related to tra	United States
Guilford	1/14/2017	Bee Safe Storage	30	Expanding	0	\$0	Office	531130		United States
Halifax	9/27/2017	AEL Span	150	New	318,000	\$6,000,000	Distribution Warehouse	493110		United States
Halifax	7/7/2017	Culpeper Wood Preservers	20	New	40,000	\$2,700,000	Manufacturing	321114	Wood treating and preservation	United States
Henderson	11/12/2017	Kyocera Industrial Ceramics	15	Expanding	50,000	\$7,300,000	Manufacturing	327110	Produces a wide range of advanced ind	United States
Henderson	10/4/2017	Microtech Knives Inc.	25	Expanding	0	\$3,250,000	Manufacturing	332215	Manufactures knives	United States
Henderson	7/14/2017	Mahindra Vehicle Sales and Service	22	New	10,000	\$500,000	Office	336999	Mahindra manufactures auto, farm and	United States
Hoke	12/15/2017	Butterball	50	Expanding	0	\$22,300,000	Manufacturing	311615	Turkey bacon production line	United States
Hoke	10/22/2017	XPX Armor & Equipment	120	Expanding	20,000	\$1,700,000	Manufacturing	315280	XPX Armor & Equipment manufactures	United States
Iredell	12/1/2017	Cheney Brothers (formerly Pate	105	Expanding	200,000	\$19,500,000	Distribution Warehouse	424490	Foods/Chemicals/Paper Products Distrib	United States
Iredell	8/10/2017	TrueLearn, Inc.	44	New	0	\$435,000	Headquarters-Corporate	611710	On-line test preparation tools for phys	United States
Iredell	12/22/2017	Tristone Flowtech	302	New	215,000	\$23,614,000	Manufacturing	336390	Manufacturer of automotive rubber an	Germany
Iredell	12/17/2017	Mack Molding	120	Expanding	60,000	\$6,000,000	Manufacturing	326199	Plastic parts	United States
Iredell	7/12/2017	Biss Product Development	8	Expanding	0	\$0	Manufacturing	541420	focuses on consumer products, with a f	United States
Johnston	4/29/2017	Selma Precision Technologies	38	New	100,000	\$9,500,000	Manufacturing	332721	Manufactures high-precision machine d	India
Johnston	12/7/2017	OPW Fueling Containment Systems	80	Expanding	150,000	\$7,780,000	Manufacturing	333913	Underground fuel containment systems	United States
Johnston	4/22/2017	Metalium Recycling	25	Expanding	67,298	\$241,426	Provider of Waste Disposal	562998	Provider of Waste Disposal Services	United States
Lee	3/1/2017	Pilgrim's Pride	350	Expanding	0	\$117,000,000	Manufacturing	311615	Chicken Processing	United States
Lee	8/8/2017	Pfizer, Inc	40	Expanding	20,000	\$100,000,000	Manufacturing	325414		United States
Lenoir	3/11/2017	Moen Incorporated	35	Expanding	150,000	\$15,000,000	Distribution Warehouse	493110		United States
Lenoir	10/27/2017	EZ Flo International Inc	10	New	140,000	\$1,600,000	Distribution Warehouse	332913	EZ-FLO International is excited to comp	United States
Lenoir	12/5/2017	Spirit AeroSystems North Carolina Inc	0	Expanding	12,000	\$55,766,455	Manufacturing	336411	In 2008, Spirit AeroSystems, Inc.	United States
Lenoir	8/12/2017	ABC	55	Expanding	0	\$16,125,000	Manufacturing	325620	Cosmetic Manufacturer	United States
Lenoir	2/24/2017	Lyndon Steel Company	25	Expanding	63,000	\$4,500,000	Manufacturing	332312	Fabrication	United States
Madison	10/27/2017	Advanced Super Abrasives	47	Expanding	110,000	\$26,000,000	Manufacturing	333515		United States
Martin	2/20/2017	Metcore Industrial Solutions	12	Expanding	0	\$881,000	Manufacturing	332322	Manufacturer of high-precision sheet m	United States
McDowell	3/23/2017	Baxter Healthcare	90	Expanding	1,200,000	\$7,400,000	Manufacturing	325412	Produce IV Solutions	United States
McDowell	6/24/2017	Ethan Allen Inc	16	Expanding	275,000	\$400,000	Manufacturing	337122		United States
McDowell	3/23/2017	Taylor Staves	28	Expanding	3,500	\$395,000	Manufacturing	321912	Production of containers for wine and	United States
Mecklenburg	5/26/2017	Verizon Wireless Corp.	300	Expanding	165,000	\$12,000,000	Call Center	561422	Call Center	United States
Mecklenburg	5/12/2017	Yomura	6	New	5,000	\$4,000,000	Data Center	518210		Hong Kong
Mecklenburg	6/23/2017	Staples	20	New	600,000	\$64,000,000	Distribution Warehouse	493110	Distribution Facility	United States
Mecklenburg	6/24/2017	LKQ Corporation	15	Expanded	350,000	\$30,000,000	Distribution Warehouse	493110		United States
Mecklenburg	5/24/2017	Mutual Distributing Co.	30	Expanding	511,000	\$27,400,000	Distribution Warehouse	424810	Wholesale wine and beer distributor	United States
Mecklenburg	7/28/2017	Atlantic Packaging	25	Expanding	80,000	\$10,000,000	Distribution Warehouse	493110	An advanced research, testing and ship	United States

County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Mecklenburg	9/8/2017	Hangsha Import and Export USA	30 New	New	21,528	\$1,200,000	Distribution Warehouse	333924	Stocking new trucks, spare parts center,	China
Mecklenburg	2/18/2017	Brands	30 Expanding	Expanding	25,000	\$1,125,000	Distribution Warehouse	424950		Germany
Mecklenburg	3/11/2017	Skywalk GmbH	11 New	New	18,000	\$200,000	Distribution Warehouse	314910	company manufactures paragliding, kite	Germany
Mecklenburg	3/8/2017	TOL Logistics	54 Expanding	Expanding	0	\$0	Distribution Warehouse	484230		United States
Mecklenburg	9/2/2017	Meva	30 New	New	0	\$0	Distribution Warehouse	332311		Germany
Mecklenburg	1/17/2017	Hertz Kompressoren	20 New	New	100,000	\$0	Distribution Warehouse	333912		Germany
Mecklenburg	11/29/2017	Henry Avocado Corp.	0 New	New	25,000	\$0	Distribution Warehouse	493120	Cold-storage distribution center	United States
Mecklenburg	7/11/2017	Charter Communications	655 Expanding	Expanding	150,000	\$6,615,000	Headquarters-Business	515210		United States
Mecklenburg	9/1/2017	Artisan Brewing Ventures	45 New	New	28,000	\$6,000,000	Headquarters-Business	312120		United States
Mecklenburg	7/1/2017	Sunlight Financial	25 New	New	35,000	\$5,000,000	Headquarters-Business	522220		United States
Mecklenburg	7/1/2017	PHT International	25 Expanding	Expanding	3,500	\$1,500,000	Headquarters-Business	424690		China
Mecklenburg	1/10/2017	GenPak	150 Expanding	Expanding	260,000	\$15,800,000	Headquarters-Corporate	325211	Genpak headquarters	United States
Mecklenburg	9/26/2017	NN, Inc.	200 New	New	0	\$10,912,217	Headquarters-Corporate	551114	Makes high-precision metal and plastic	United States
Mecklenburg	6/23/2017	Sitehands	249 Expanding	Expanding	15,000	\$3,900,000	Headquarters-Corporate	551114		United States
Mecklenburg	10/21/2017	Caesarstone	69 New	New	0	\$3,223,438	Headquarters-Corporate	327991	Corporate Headquarters for Manufactur	Israel
Mecklenburg	2/7/2017	Oerlikon Metco	93 New	New	100,000	\$62,000,000	Manufacturing	332117	Advanced component manufacturing, a	Switzerland
Mecklenburg	7/8/2017	Daumar Industries	40 New	New	150,000	\$21,000,000	Manufacturing	326112	Daumar Industries of Spain and Miami	Spain
Mecklenburg	1/26/2017	Intoplast Group	19 Expanding	Expanding	0	\$18,000,000	Manufacturing	326113	Plastics manufacturer with customers i	United States
Mecklenburg	12/2/2017	Company Box	22 Expanding	Expanding	0	\$12,000,000	Manufacturing	323111	Commercial Printing Company	United States
Mecklenburg	2/24/2017	Priston Laboratories	123 Expanding	Expanding	0	\$10,331,776	Manufacturing	325412		United States
Mecklenburg	4/1/2017	Southeastern Metal Products	70 Expanding	Expanding	44,000	\$5,100,000	Manufacturing	332322	Contract company that makes sheet me	United States
Mecklenburg	3/5/2017	Selenium Medical	50 New	New	80,000	\$20,000	Manufacturing	339112		France
Mecklenburg	8/11/2017	Allstate Insurance	2,250 Expanding	Expanding	500,000	\$22,600,000	Office	524210	Project Clipper 2 is a regional operati	United States
Mecklenburg	5/11/2017	AXA	550 Expanding	Expanding	140,000	\$18,000,000	Office	524210	Charlotte operations center, primarily i	France
Mecklenburg	3/15/2017	WeWork	15 New	New	51,547	\$16,495,040	Office	531312		United States
Mecklenburg	11/11/2017	Empowered Benefits	30 Expanding	Expanding	16,500	\$3,000,000	Office	511210	Cloud-based benefits administration an	United States
Mecklenburg	7/2/2017	Greatstar	6 New	New	15,000	\$2,000,000	Office	561110		China
Mecklenburg	9/17/2017	TZ Insurance Solutions	110 Expanding	Expanding	50,000	\$1,000,000	Office	524210		United States
Mecklenburg	3/5/2017	Thomas and Hutton	20 New	New	25,000	\$605,000	Office	541330		United States
Mecklenburg	7/26/2017	Logical Position	40 New	New	0	\$0	Office	541810	Digital Marketing Agency	United States
Mecklenburg	9/3/2017	Magapor	30 New	New	0	\$0	Office	333111		Spain
Mecklenburg	9/2/2017	PCI Pal	10 New	New	0	\$0	Office	522320	Financial technology company focused	United Kingdom
Montgomery	5/27/2017	Carolina Structural Systems	71 New	New	0	\$1,350,000	Manufacturing	321992	Manufacturing	United States
Moore	4/23/2017	Reliance Packaging	11 Expanding	Expanding	129,250	\$3,500,000	Manufacturing	326112	Plastic Film Manufacturer	United States
Moore	10/20/2017	Minhas Furniture House Inc.	129 Expanding	Expanding	125,000	\$2,500,000	Manufacturing	337121	Upholstered household furniture: Recic	Canada
Nash	5/16/2017	Poppies	0 Expanding	Expanding	50,000	\$2,100,000	Distribution Warehouse	236210		Belgium
Nash	8/24/2017	LS Tractors USA, LLC	31 Expanding	Expanding	4,250	\$11,500,000	Manufacturing	423830		South Korea



County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Nash	3/17/2017	Grammar Industry LLC	5 New	New	0	\$300,000	Transportation	336999		United States
New Hanover	5/21/2017	Bennett Brothers Yachts	6 Expanding	Expanding	0	\$500,000	Manufacturing	336612	Yacht Manufacturer	United States
Northampton	6/24/2017	Seymour Peanut Company dba Hampton	21 Expanding	Expanding	25,650	\$5,175,377	Manufacturing	311911	Seymour Peanut Company is one of the	United States
Northampton	6/25/2017	Northampton Peanut Company	21 Expanding	Expanding	26,650	\$4,900,000	Manufacturing	311911	Peanut Processor	United States
Onslow	10/21/2017	Armstrong Marine	15 Expanding	Expanding	191,000	\$1,000,000	Manufacturing	336612	Designs and builds welded aluminum b	United States
Orange	3/9/2017	AKG of America	10 Expanding	Expanding	32,000	\$3,700,000	Manufacturing	333415	cooling products for the industrial, Mod	Germany
Pender	8/9/2017	EdgeWorks Manufacturing	69 Expanding	Expanding	100,000	\$4,900,000	Manufacturing	316998	Company makes holsters and other tact	United States
Pender	6/23/2017	Mojotone	15 Expanding	Expanding	40,000	\$2,000,000	Manufacturing	339992	Makes amplifiers, sound system cabine	United States
Pitt	4/22/2017	Grady-White Boats	44 Expanding	Expanding	350,000	\$5,800,000	Manufacturing	336612	Boat manufacturer	United States
Pitt	5/25/2017	Pitt Street Brewing Company	15 New	New	7,500	\$305,000	Manufacturing	312120	Brewery	United States
Pitt	2/18/2017	AE Wiring	25 New	New	17,000	\$250,000	Manufacturing	332618	Wiring harnesses	South Africa
Randolph	5/27/2017	Ace/Avant Concrete Construction	0 Expanding	Expanding	22,000	\$5,000,000	Headquarters-Corporate	236220	Ace/Avant is constructing a new headq	United States
Randolph	7/7/2017	ChrisCo Machinery	0 Expanding	Expanding	9,450	\$402,570	industrial equipment serv	811310		United States
Randolph	8/15/2017	Fibertex Personal Care	145 New	New	40,000	\$114,125,000	Manufacturing	313230	Fibertex Personal Care will manufactur	Denmark
Randolph	4/4/2017	MAS Holdings	133 New	New	0	\$20,000,000	Manufacturing	315190		Sri Lanka
Randolph	2/18/2017	Pilgrim's Pride Corporation	15 Expanding	Expanding	0	\$13,000,000	Manufacturing	311119	Pilgrim's Pride is renovating a previous	United States
Randolph	4/9/2017	SouthCorr Packaging	22 Expanding	Expanding	50,000	\$8,369,290	Manufacturing	322211		United States
Randolph	6/11/2017	Piedmont Custom Meats	40 New	New	0	\$4,150,000	Manufacturing	311612	Cutting and packaging plant	United States
Randolph	4/22/2017	Sapona Plastics	25 Expanding	Expanding	91,833	\$2,960,291	Manufacturing	339994		United States
Randolph	8/16/2017	Edwards Wood Products	0 Expanding	Expanding	17,692	\$1,525,050	Manufacturing	321113	Lumber products	United States
Randolph	9/7/2017	Hughes Furniture Industries	0 Expanding	Expanding	104,300	\$1,472,000	Manufacturing	337121		United States
Randolph	1/27/2017	Technimark	50 Expanding	Expanding	30,000	\$0	Manufacturing	326199	Manufacturer of injection-molded pack	United States
Randolph	3/1/2017	Amor Furniture and Bedding	30 Expanding	Expanding	32,000	\$0	Manufacturing	337121	Manufacturer of promotional ac up	United States
Richmond	12/22/2017	Plastek Industries	63 Expanding	Expanding	0	\$4,210,731	Manufacturing	326199	Plastic Injection Molding and Assembly	United States
Robeson	6/24/2017	Absolute Bus	61 Expanding	Expanding	0	\$2,437,228	Manufacturing	336999	Manufactures commercial shuttle buse	United States
Robeson	6/23/2017	Ventura Coach Corporation	61 Expanding	Expanding	16,500	\$2,000,000	Manufacturing	336310		United States
Robeson	6/7/2017	Apparel USA	157 New	New	20,000	\$1,450,000	Manufacturing	315280	textile - cut & sew production of fine cl	India
Rockingham	12/1/2017	Elevated Environmental Corp.	20 Expanding	Expanding	16,000	\$512,000	Headquarters-Corporate	562910	Corporate Headquarters for an environ	United States
Rockingham	6/22/2017	Smith-Carolina	10 Expanding	Expanding	35,000	\$1,500,000	Manufacturing	327390	Maker of precast concrete products	United States
Rockingham	10/8/2017	Plastic Revolutions	35 Expanding	Expanding	0	\$600,000	Plastic recycler	423930	Plastic recycler	United States
Rowan	9/22/2017	Daimler	0 Expanding	Expanding	124,500	\$27,000,000	Manufacturing	336112		Germany
Rowan	1/14/2017	Amrep Inc.	40 New	New	30,000	\$2,000,000	Manufacturing	336120	Refuse Truck Body Manufacturing	United States
Rowan	8/19/2017	Premtec (New York Airbrake)	28 Expanding	Expanding	38,000	\$1,158,000	Manufacturing	423860		Germany
Rutherford	8/3/2017	Michelle Parisou	15 Expanding	Expanding	0	\$520,000	Manufacturing	315210		United States
Rutherford	8/19/2017	Manual Woodworkers and Weavers	35 Expanding	Expanding	225,181	\$366,040	Manufacturing	314110	Manual Woodworkers and Weavers	United States
Scotland	1/25/2017	Montaire Farms	65 Expanding	Expanding	50,000	\$44,000,000	Feed Mill	311119	agricultural food processing	United States
Scotland	9/20/2017	Edwards Wood Products	46 New	New	270,000	\$50,000,000	Manufacturing	321113	Wood products manufacturing	United States

County	Announced Date	Company	Announced Jobs	Facility Type	Total Square Footage	Announced Investment	Project Type (Primary)	NAICS Primary	Product	Parent Country
Scotland	7/2/2017	FCC North Carolina	28	Expanding	0	\$826,500	Manufacturing	336350	Manufactures automotive parts, has tw	Japan
Surry	8/24/2017	Altec Industries	50	Expanding	205,000	\$5,000,000	Manufacturing	333120	Provides equipment, products and serv	United States
Union	5/26/2017	Consolidated Metco Inc.	80	Expanding	253,000	\$40,000,000	Manufacturing	336340	Production of the truck-hub and brake-	United States
Union	6/3/2017	Greiner Bio-One	10	Expanding	0	\$9,700,000	Manufacturing	326199	Please note this is for 2nd quarter,	Austria
Union	6/14/2017	American Wick Drain Corp.	5	Expanding	0	\$8,700,000	Manufacturing	237110	Makes drainage systems for building fo	United States
Union	6/9/2017	ASSA ABLOY Entrance Systems	30	Expanding	35,000	\$6,000,000	Manufacturing	332321	Please note this was for 2nd quarter,	United States
Vance	11/29/2017	Mako Medical	150	Expanding	0	\$15,400,000	Distribution Warehouse	621511	Testing facility and warehouse space	United States
Vance	4/20/2017	Weitron	31	New	53,000	\$12,800,000	Distribution Warehouse	423740	Packager and Distributor of Refrigerant	United States
Vance	4/22/2017	Robco Manufacturing, Inc.	10	Expanding	55,000	\$3,000,000	Manufacturing	332999	Manufacture aluminum marine structur	United States
Wake	2/1/2017	Charter Communications	160	Expanding	0	50	Call Center	515210	Cable Company	United States
Wake	10/14/2017	PlantResponse	35	New	0	50	Headquarters-Business	541711	Biotechnology Company	Spain
Wake	7/26/2017	A Wireless	250	New	0	\$4,950,000	Headquarters-Corporate	551114		United States
Wake	4/19/2017	Trilliant, Inc	130	New	20,000	\$1,800,000	Headquarters-Corporate	551114		United States
Wake	1/26/2017	Grafted Growers	31	New	12,000	\$1,659,000	Manufacturing	115112	specialized horticulture grafting of plan	United States
Wake	11/22/2017	Hitech Group	45	New	0	\$1,500,000	Manufacturing	333242	OEM Systems Manufacturer for Medical	Netherlands
Wake	1/21/2017	Argos Therapeutics Inc.	1	Expanding	40,000	50	Manufacturing	541712	Immuno-oncology company focused on	United States
Wake	5/11/2017	Credit Suisse	1,200	Expanding	80,000	\$65,000,000	Office	523999		Switzerland
Wake	5/24/2017	MetLife	0	Expanding	219,000	\$63,000,000	Office	541512	Global technology and operations at M	United States
Wake	7/8/2017	Infosys	2,000	New	100,000	\$8,730,000	Office	541611	Information/Communication Technolog	India
Wake	10/29/2017	MetLife	500	Expanding	0	50	Office	524210	Global insurance and asset management	United States
Wake	9/23/2017	Pendo	150	Expanding	43,000	50	Office	518210	Pendo's cloud-based technology he	United States
Wake	6/24/2017	Infoamerica	50	Expanding	0	50	Office	541511	IT consulting firm	India
Wake	11/3/2017	Lighthouse Networks	50	Expanding	25,700	50	Office	523220	Financial Technology Firm	United States
Wake	6/7/2017	FieldBase	20	Expanding	0	50	Office	541511	Tech Firm	United States
Wake	11/8/2017	Simplilearn	15	New	0	50	Office	511210	Education technology	India
Wake	12/15/2017	Varonis	0	Expanding	36,000	50	Office	518210	Varonis specializes in securing file and e	United States
Wake	5/6/2017	VitalSource Technologies	0	Expanding	10,000	50	Office	541512	Education Technology Company	United States
Wake	6/4/2017	Hoganas Environmental Solutions, LLC	77	New	30,000	\$4,260,000	Private Research & Develop	541712	R&D for water purification technologies	United States
Wake	12/20/2017	Conduent Business Services, LLC	200	New	0	\$2,700,000	Private Research & Develop	541611	global technology and innovation hub	United States
Wake	11/5/2017	Chiesi USA	0	Expanding	55,000	50	Private Research & Develop	541720	Pharmaceutical Company	Italy
Wayne	6/24/2017	Storck Foods, LLC	60	New	31,552	\$2,480,000	Manufacturing	311612	Manufacturer of all natural meat protei	South Africa
Wilkes	2/8/2017	Jenkins Millwork	10	Expanding	65,000	\$4,200,000	Assembly and Distribution	423310	Jenkins Millwork is one of the regions la	United States
Wilson	4/14/2017	LeBlou of Wilson	8	Expanding	0	\$1,200,000	Distribution Warehouse	312112		United States
Wilson	1/10/2017	Bridgestone Americas	16	Expanding	50,000	\$180,000,000	Manufacturing	326211		Japan
Wilson	11/22/2017	Frsenius Kabi	445	Expanding	0	\$150,000,000	Manufacturing	325412	Fresenius Kabi is a leading global health	Germany
Wilson	12/16/2017	Linamar Forgings Carolina, Inc.	31	Expanding	0	\$6,885,788	Manufacturing	332111	Product lines which would be new for	Canada
Wilson	2/12/2017	Dilmar	4	New	0	\$1,000,000	Oli Company	424720		United States

## Business Sector Targeting Strategies



### **Optimal locations. Superior service.**

Like any major industrial site, NCGTP displays distinct site conditions that will be attractive to certain business sectors and not attractive to others. Our goal for this portion of the project is to begin to identify business sectors that will value the assets of the NCGTP and who are not concerned by what some sectors may consider are the park's liabilities. This approach will generate the most successful economic development effort, focused on accelerating creation of jobs and investment at the site as well as in surrounding areas of eastern North Carolina. Minimal or no resources should be allocated to the attraction of sectors that perceive certain conditions in the NCGTP to be negative.

Based on background research conducted on the site, interviews with NCGTP executives, and a site inspection, the following summary outlines three key items:

1. Site conditions that will generally be considered positive and which business sectors are likely to be attracted to these conditions.
2. Site conditions that may be considered negative and which business sectors will be most concerned by these conditions and should not be business recruiting targets.
3. Overall recommendations; most recommendations are related to either site development or targeted marketing and will require additional work by NCGTP leadership.

### ***Assets of the Park:***

The following attributes of the NCGTP are attractive assets for many business sectors:

- 11,500 ft. runway with CATI Instrument Landing System
- Rail spur on site connected to Norfolk Southern
- Foreign Trade Zone #214
- Proximity to major ports in NC, SC, and VA
- Numerous existing sites adjacent to the airport, with over 900 acres available for lease
- Significant private land, which appears developable, adjacent to the airport
- Rural location, excellent buffers
- Minimal commercial aircraft service
- Numerous existing aerospace related tenants
- Significant military use of the runway
- Composite Center of Excellence for on-site training
- Wetlands permitting in place
- Existing utilities on site including dark fiber; excess water and sewer capacity
- Proximate road system with significant access to key markets
- Proximate to six NC military facilities

- Central east coast/European landing zone location
- Strong, motivated airport leadership

### ***Business Sectors Attracted to the Park's Assets:***

Based on the site attributes listed above, the following business sectors may have the greatest potential for site location projects:

- Aerospace component manufacturing and assembly (both private sector and military)
- Large fulfillment center distribution hub facilities for package delivery entities (i.e. Amazon, FedEx, UPS, DHL)
- Large private sector and military/defense contractor facilities that prefer relatively sparse population, significant airport buffers, or minimal commercial air traffic
- Maintenance and Repair Operations (MRO's)
- Heavy haul manufacturers requiring rail and dual access to rail, the NCGTP runway and proximate to SE Ports
- Equipment and assembly and other business sectors attracted to foreign trade zones
- Commercial or military aircraft testing applications
- General manufacturers that have a logistical (or other specific) reason to be in eastern North Carolina

### ***Site Location Challenges:***

The following site characteristics will present site location challenges to certain business sectors:

- The presence of the International Association of Machinists and Aerospace Workers
- Likely labor draw limitations for large projects requiring more than 1,000 employees (See Demographics summary below comparing the NCGTP site to the Greensboro-Randolph County mega-site)
- No proximate Interstate access
- Only leased sites are available, while some industries prefer to own the underlying land
- Perception of challenges related to lease approvals required from federal agencies
- Lack of large contiguous sites – the largest site appears to be 319 acres
- Perceived risk associated with locating near an active runway, including vibration and airport-related terrorism

### ***Business Sectors with Limited Recruiting Potential Due to Site Challenges:***

Based on the site attributes listed above, we believe the following business sectors will have the least potential to consider site location projects at the NCGTP:

- Businesses typically concerned about the presence of labor unions (i.e. automotive)
- Businesses employing more than 1,000 people
- Businesses with high bays, stacks, or towers that may not be permitted close to the airport
- Businesses that emit steam or other effluents that could impact airport operations
- Businesses preferring to own their sites versus leasing them
- Businesses requiring sites greater than 300 acres

### ***Previous Challenges of the Park:***

The following is a list of other previous marketing challenges we believe have impacted NCGTP's ability to attract business locations:

- Minimal previous marketing strategies were apparent
- Slow momentum related to previous NCGTP business recruiting
- Significant negative press
- The park was not positioned as positively as it should have been with state recruiters
- Dated or non-existent site information and marketing materials

### ***Overall Recommendations:***

#### **Site Development Recommendations:**

1. Consider optioning additional property adjoining the airport for site development purposes. This property will be attractive to prospects that want to be near the airport but do not desire to lease the property. Larger parcels (500 -1,000 acres) should be considered.
2. Site due diligence for existing and new sites should be conducted per the items below (typically included in site certifications), if not already completed.
  - property ownership control
  - geotechnical status
  - environmental status
  - endangered species status
  - archeological status
  - locations of utilities
  - water and sewer excess capacity details
  - electrical service details
  - gas service details (line size, pressure)
  - topographical maps
  - site surveys including location of any easements
  - wetlands permitting status and documentation of related approvals

#### **Targeted Marketing Recommendations:**

1. Conduct additional targeted marketing research to further define business sectors and specific company recruiting targets outlined above. Develop a strategy to actively target business prospects and increase U.S. and global awareness of site attributes. This strategy should address developing ongoing relationships with:
  - Direct corporate contacts
  - Site selection consultants
  - Military, defense contractor, and aerospace associations
2. Develop strategies to address general marketing initiatives, including:
  - Formulation of specific goals and objectives for a GTP marketing organization
  - Staffing and funding the program to attain goals and objectives



- Increasing the positive profile of the GTP through further site enhancement, such as certification and optioning of larger sites
  - Development of print and social media content and related dissemination
  - Continued enhancement of the GTP web presence, with additional information presented electronically related to site conditions and regional labor draw characteristics
3. Site fliers – both hard copy and electronic – should be enhanced to include detailed links to information summarized in item “2” above.
  4. Conduct briefings with State and local economic developers, utilities, and railroads (Norfolk Southern) to ensure these entities fully understand the assets of the GTP and are actively selling to site location prospects.

## Demographics comparison of NCGTP site with Greensboro-Randolph County mega-site

### Total Population

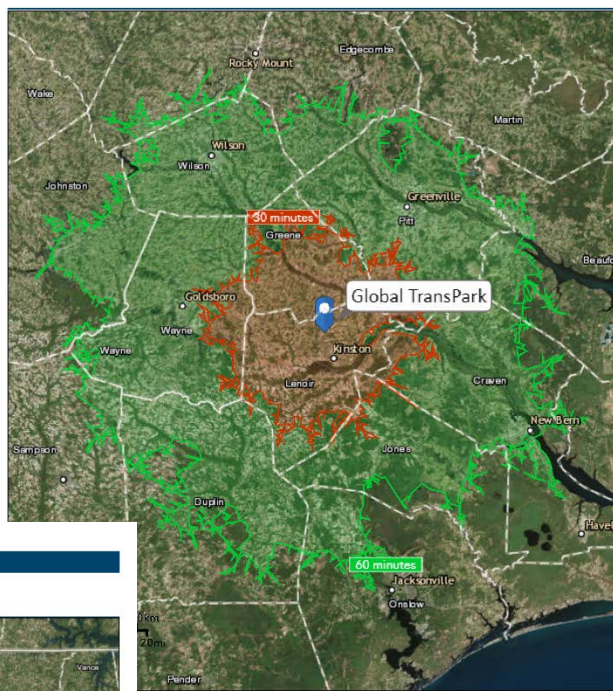
2017 Total Population			
	30-Minute Drive Time	60-Minute Drive Time	
NC Global TransPark	95,689	659,882	
Greensboro.- Randolph Megasite	507,553	1,928,997	

Population Employed in Manufacturing			
	30-Minute Drive Time	60-Minute Drive Time	
NC Global TransPark	6,337	40,223	
Greensboro.- Randolph Megasite	35,487	129,009	



Custom Map

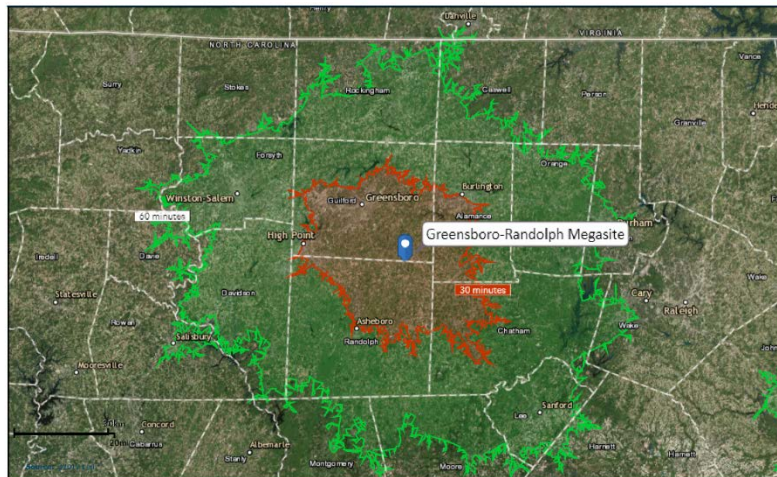


January 17, 2018

Page 1 of 1



Custom Map




January 17, 2018


©2018 Esri

Page 1 of 1





*Community Profile - NCGTP*


 <b>esri</b>				<b>Community Profile</b>	
Global TransPark				Prepared by Esri	
2850-3998 Rouse Road Ext, Kinston, North Carolina, 28504				Latitude: 35.32678	
Drive Time: 30, 60 minute radii				Longitude: -77.60623	
				<b>30 minutes</b>	<b>60 minutes</b>
<b>Population Summary</b>					
2000 Total Population				91,606	555,719
2010 Total Population				95,876	636,656
2017 Total Population				95,689	659,882
2017 Group Quarters				3,763	17,394
2022 Total Population				95,014	674,085
2017-2022 Annual Rate				-0.14%	0.43%
2017 Total Daytime Population				94,602	668,132
Workers				40,493	299,028
Residents				54,109	369,104
<b>Household Summary</b>					
2000 Households				35,941	216,038
2000 Average Household Size				2.46	2.49
2010 Households				37,996	251,275
2010 Average Household Size				2.43	2.46
2017 Households				37,584	259,574
2017 Average Household Size				2.45	2.48
2022 Households				37,180	264,715
2022 Average Household Size				2.45	2.48
2017-2022 Annual Rate				-0.22%	0.39%
2010 Families				25,387	164,436
2010 Average Family Size				2.98	3.02
2017 Families				24,831	167,589
2017 Average Family Size				3.02	3.05
2022 Families				24,452	169,914
2022 Average Family Size				3.03	3.07
2017-2022 Annual Rate				-0.31%	0.28%
<b>Housing Unit Summary</b>					
2000 Housing Units				40,458	239,623
Owner Occupied Housing Units				61.0%	58.5%
Renter Occupied Housing Units				27.8%	31.7%
Vacant Housing Units				11.2%	9.8%
2010 Housing Units				42,509	280,216
Owner Occupied Housing Units				57.7%	55.1%
Renter Occupied Housing Units				31.7%	34.6%
Vacant Housing Units				10.6%	10.3%
2017 Housing Units				42,866	291,741
Owner Occupied Housing Units				53.9%	51.6%
Renter Occupied Housing Units				33.8%	37.3%
Vacant Housing Units				12.3%	11.0%
2022 Housing Units				43,232	300,982
Owner Occupied Housing Units				52.7%	50.8%
Renter Occupied Housing Units				33.3%	37.2%
Vacant Housing Units				14.0%	12.0%
<b>Median Household Income</b>					
2017				\$38,315	\$40,758
2022				\$40,986	\$44,037
<b>Median Home Value</b>					
2017				\$104,712	\$127,851
2022				\$114,045	\$139,536
<b>Per Capita Income</b>					
2017				\$21,291	\$23,006
2022				\$24,234	\$26,123
<b>Median Age</b>					
2010				40.2	36.1
2017				41.0	37.1
2022				42.1	38.0
<b>Data Note:</b> Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.					
<b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.					

©2018 Esri		Page 1 of 7	
		Community Profile	
Global TransPark		Prepared by Esri	
2850-3998 Rouse Road Ext, Kinston, North Carolina, 28504		Latitude: 35.32678	
Drive Time: 30, 60 minute radii		Longitude: -77.60623	
		30 minutes	60 minutes
<b>2017 Households by Income</b>			
Household Income Base		37,584	259,574
<\$15,000		17.9%	16.9%
\$15,000 - \$24,999		14.4%	13.8%
\$25,000 - \$34,999		13.3%	12.3%
\$35,000 - \$49,999		15.5%	15.1%
\$50,000 - \$74,999		17.1%	17.1%
\$75,000 - \$99,999		10.4%	10.7%
\$100,000 - \$149,999		7.7%	9.3%
\$150,000 - \$199,999		2.2%	2.5%
\$200,000+		1.5%	2.3%
Average Household Income		\$52,979	\$57,350
<b>2022 Households by Income</b>			
Household Income Base		37,180	264,715
<\$15,000		17.8%	16.7%
\$15,000 - \$24,999		13.5%	13.0%
\$25,000 - \$34,999		12.1%	11.2%
\$35,000 - \$49,999		13.9%	13.5%
\$50,000 - \$74,999		16.2%	15.6%
\$75,000 - \$99,999		11.9%	12.6%
\$100,000 - \$149,999		9.6%	11.4%
\$150,000 - \$199,999		3.0%	3.2%
\$200,000+		2.0%	2.8%
Average Household Income		\$60,712	\$65,405
<b>2017 Owner Occupied Housing Units by Value</b>			
Total		23,097	150,641
<\$50,000		16.8%	14.1%
\$50,000 - \$99,999		31.1%	24.4%
\$100,000 - \$149,999		22.1%	20.5%
\$150,000 - \$199,999		12.8%	14.8%
\$200,000 - \$249,999		6.5%	9.8%
\$250,000 - \$299,999		4.8%	5.9%
\$300,000 - \$399,999		2.8%	5.0%
\$400,000 - \$499,999		1.5%	2.6%
\$500,000 - \$749,999		0.9%	1.8%
\$750,000 - \$999,999		0.3%	0.4%
\$1,000,000 +		0.3%	0.6%
Average Home Value		\$134,667	\$163,069
<b>2022 Owner Occupied Housing Units by Value</b>			
Total		22,790	152,890
<\$50,000		14.5%	11.8%
\$50,000 - \$99,999		29.3%	22.4%
\$100,000 - \$149,999		22.2%	20.1%
\$150,000 - \$199,999		13.1%	14.6%
\$200,000 - \$249,999		7.1%	10.2%
\$250,000 - \$299,999		5.8%	6.9%
\$300,000 - \$399,999		3.4%	6.4%
\$400,000 - \$499,999		2.2%	3.6%
\$500,000 - \$749,999		1.4%	2.6%
\$750,000 - \$999,999		0.5%	0.7%
\$1,000,000 +		0.4%	0.9%
Average Home Value		\$149,077	\$184,048
<b>Data Note:</b> Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.			
<b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.			

©2018 Esri		Page 2 of 7	
		Community Profile	
Global TransPark		Prepared by Esri	
2850-3998 Rouse Road Ext, Kinston, North Carolina, 28504		Latitude: 35.32678	
Drive Time: 30, 60 minute radii		Longitude: -77.60623	
		30 minutes	60 minutes
<b>2010 Population by Age</b>			
Total		95,875	636,657
0 - 4		6.4%	6.9%
5 - 9		6.4%	6.6%
10 - 14		6.6%	6.5%
15 - 24		12.4%	15.5%
25 - 34		11.9%	13.1%
35 - 44		12.2%	12.5%
45 - 54		15.4%	13.9%
55 - 64		13.5%	11.9%
65 - 74		8.3%	7.3%
75 - 84		5.2%	4.2%
85 +		1.7%	1.5%
18 +		76.3%	75.9%
<b>2017 Population by Age</b>			
Total		95,686	659,881
0 - 4		6.0%	6.4%
5 - 9		6.1%	6.4%
10 - 14		6.1%	6.2%
15 - 24		11.6%	14.5%
25 - 34		12.9%	13.9%
35 - 44		12.0%	12.1%
45 - 54		12.9%	12.3%
55 - 64		14.5%	12.7%
65 - 74		10.6%	9.3%
75 - 84		5.2%	4.5%
85 +		2.1%	1.7%
18 +		78.2%	77.5%
<b>2022 Population by Age</b>			
Total		95,014	674,084
0 - 4		5.8%	6.3%
5 - 9		5.9%	6.2%
10 - 14		6.3%	6.4%
15 - 24		11.1%	14.0%
25 - 34		12.2%	13.2%
35 - 44		12.3%	12.5%
45 - 54		12.1%	11.5%
55 - 64		13.9%	12.3%
65 - 74		12.2%	10.4%
75 - 84		6.2%	5.4%
85 +		2.1%	1.8%
18 +		78.3%	77.5%
<b>2010 Population by Sex</b>			
Males		46,843	307,158
Females		49,033	329,498
<b>2017 Population by Sex</b>			
Males		47,035	320,126
Females		48,654	339,757
<b>2022 Population by Sex</b>			
Males		46,904	328,132
Females		48,110	345,953
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.			

©2018 Esri		Page 3 of 7	
		Community Profile	
Global TransPark		Prepared by Esri	
2850-3998 Rouse Road Ext, Kinston, North Carolina, 28504		Latitude: 35.32678	
Drive Time: 30, 60 minute radii		Longitude: -77.60623	
		30 minutes	60 minutes
<b>2010 Population by Race/Ethnicity</b>			
Total		95,877	636,656
White Alone		53.8%	59.4%
Black Alone		39.2%	31.8%
American Indian Alone		0.4%	0.4%
Asian Alone		0.6%	1.1%
Pacific Islander Alone		0.1%	0.1%
Some Other Race Alone		4.5%	5.2%
Two or More Races		1.5%	2.0%
Hispanic Origin		7.6%	8.7%
Diversity Index		62.0	61.8
<b>2017 Population by Race/Ethnicity</b>			
Total		95,690	659,882
White Alone		52.4%	58.0%
Black Alone		39.0%	31.7%
American Indian Alone		0.5%	0.4%
Asian Alone		0.8%	1.4%
Pacific Islander Alone		0.1%	0.1%
Some Other Race Alone		5.3%	6.0%
Two or More Races		1.9%	2.3%
Hispanic Origin		9.0%	10.1%
Diversity Index		64.3	64.2
<b>2022 Population by Race/Ethnicity</b>			
Total		95,014	674,085
White Alone		51.4%	56.8%
Black Alone		38.6%	31.4%
American Indian Alone		0.6%	0.5%
Asian Alone		1.0%	1.8%
Pacific Islander Alone		0.1%	0.1%
Some Other Race Alone		6.2%	6.8%
Two or More Races		2.2%	2.7%
Hispanic Origin		10.5%	11.5%
Diversity Index		66.5	66.4
<b>2010 Population by Relationship and Household Type</b>			
Total		95,876	636,656
In Households		96.2%	97.2%
In Family Households		81.0%	80.1%
Householder		26.4%	25.8%
Spouse		17.2%	17.6%
Child		31.3%	30.7%
Other relative		3.9%	3.8%
Nonrelative		2.2%	2.2%
In Nonfamily Households		15.2%	17.1%
In Group Quarters		3.8%	2.8%
Institutionalized Population		2.9%	1.5%
Noninstitutionalized Population		0.9%	1.3%
<p><b>Data Note:</b> Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.</p> <p><b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.</p>			


©2018 Esri		Page 4 of 7	
		Community Profile	
Global TransPark		Prepared by Esri	
2850-3998 Rouse Road Ext, Kinston, North Carolina, 28504		Latitude: 35.32678	
Drive Time: 30, 60 minute radii		Longitude: -77.60623	
		30 minutes	60 minutes
<b>2017 Population 25+ by Educational Attainment</b>			
Total		67,162	438,777
Less than 9th Grade		7.6%	6.7%
9th - 12th Grade, No Diploma		11.3%	9.5%
High School Graduate		25.1%	24.2%
GED/Alternative Credential		6.2%	5.2%
Some College, No Degree		24.0%	22.6%
Associate Degree		11.7%	10.6%
Bachelor's Degree		9.6%	14.0%
Graduate/Professional Degree		4.5%	7.2%
<b>2017 Population 15+ by Marital Status</b>			
Total		78,236	534,152
Never Married		33.1%	34.6%
Married		46.1%	47.5%
Widowed		8.6%	6.8%
Divorced		12.2%	11.1%
<b>2017 Civilian Population 16+ in Labor Force</b>			
Civilian Employed		91.4%	91.6%
Civilian Unemployed (Unemployment Rate)		8.6%	8.4%
<b>2017 Employed Population 16+ by Industry</b>			
Total		39,855	285,267
Agriculture/Mining		4.5%	3.6%
Construction		6.2%	6.9%
Manufacturing		15.9%	14.1%
Wholesale Trade		2.7%	2.7%
Retail Trade		12.2%	11.1%
Transportation/Utilities		3.3%	3.5%
Information		0.8%	1.1%
Finance/Insurance/Real Estate		3.1%	4.2%
Services		45.9%	47.4%
Public Administration		5.5%	5.5%
<b>2017 Employed Population 16+ by Occupation</b>			
Total		39,856	285,265
White Collar		47.9%	52.5%
Management/Business/Financial		10.1%	10.8%
Professional		17.8%	20.3%
Sales		9.3%	9.8%
Administrative Support		10.6%	11.5%
Services		21.4%	19.8%
Blue Collar		30.8%	27.8%
Farming/Forestry/Fishing		2.5%	2.3%
Construction/Extraction		5.2%	5.5%
Installation/Maintenance/Repair		5.0%	4.7%
Production		10.4%	8.4%
Transportation/Material Moving		7.7%	6.8%
<b>2010 Population By Urban/ Rural Status</b>			
Total Population		95,876	636,656
Population Inside Urbanized Area		10.0%	36.2%
Population Inside Urbanized Cluster		36.9%	19.2%
Rural Population		53.1%	44.5%
<b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.			

©2018 Esri		Page 5 of 7	
		Community Profile	
Global TransPark		Prepared by Esri	
2850-3998 Rouse Road Ext, Kinston, North Carolina, 28504		Latitude: 35.32678	
Drive Time: 30, 60 minute radii		Longitude: -77.60623	
		30 minutes	60 minutes
<b>2010 Households by Type</b>			
Total		37,996	251,276
Households with 1 Person		29.2%	28.2%
Households with 2+ People		70.8%	71.8%
Family Households		66.8%	65.4%
Husband-wife Families		43.6%	44.5%
With Related Children		17.2%	18.9%
Other Family (No Spouse Present)		23.3%	21.0%
Other Family with Male Householder		5.0%	4.7%
With Related Children		2.7%	2.7%
Other Family with Female Householder		18.3%	16.3%
With Related Children		12.1%	11.1%
Nonfamily Households		4.0%	6.3%
All Households with Children		32.5%	33.1%
Multigenerational Households		4.5%	4.1%
Unmarried Partner Households		5.5%	5.9%
Male-female		5.0%	5.3%
Same-sex		0.5%	0.6%
<b>2010 Households by Size</b>			
Total		37,996	251,275
1 Person Household		29.2%	28.2%
2 Person Household		33.2%	33.3%
3 Person Household		17.1%	17.0%
4 Person Household		11.9%	12.5%
5 Person Household		5.3%	5.4%
6 Person Household		2.0%	2.1%
7 + Person Household		1.3%	1.3%
<b>2010 Households by Tenure and Mortgage Status</b>			
Total		37,996	251,275
Owner Occupied		64.5%	61.4%
Owned with a Mortgage/Loan		39.7%	40.5%
Owned Free and Clear		24.8%	20.9%
Renter Occupied		35.5%	38.6%
<b>2010 Housing Units By Urban/ Rural Status</b>			
Total Housing Units		42,509	280,216
Housing Units Inside Urbanized Area		10.4%	37.4%
Housing Units Inside Urbanized Cluster		40.0%	19.8%
Rural Housing Units		49.6%	42.7%
<p><b>Data Note:</b> Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.</p>			
<p><b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.</p>			



©2018 Esri

Page 6 of 7

 **esri**

Community Profile

Global TransPark

2850-3998 Rouse Road Ext, Kinston, North Carolina, 28504

Drive Time: 30, 60 minute radii

Prepared by Esri

Latitude: 35.32678

Longitude: -77.60623


		30 minutes	60 minutes
Top 3 Tapestry Segments			
1.	Southern Satellites (10A)	Southern Satellites (10A)	
2.	Rural Bypasses (10E)	Middleburg (4C)	
3.	Down the Road (10D)	Down the Road (10D)	
2017 Consumer Spending			
Apparel & Services: Total \$		\$52,598,521	\$401,310,279
Average Spent		\$1,399.49	\$1,546.03
Spending Potential Index		65	72
Education: Total \$		\$29,330,163	\$245,386,243
Average Spent		\$780.39	\$945.34
Spending Potential Index		54	65
Entertainment/Recreation: Total \$		\$80,620,877	\$591,067,804
Average Spent		\$2,145.09	\$2,277.07
Spending Potential Index		69	73
Food at Home: Total \$		\$135,069,620	\$984,162,095
Average Spent		\$3,593.81	\$3,791.45
Spending Potential Index		71	75
Food Away from Home: Total \$		\$83,919,370	\$635,698,393
Average Spent		\$2,232.85	\$2,449.01
Spending Potential Index		67	73
Health Care: Total \$		\$153,960,443	\$1,090,320,769
Average Spent		\$4,096.44	\$4,200.42
Spending Potential Index		73	75
HH Furnishings & Equipment: Total \$		\$49,423,643	\$368,371,486
Average Spent		\$1,315.02	\$1,419.14
Spending Potential Index		68	73
Personal Care Products & Services: Total \$		\$19,554,330	\$147,453,604
Average Spent		\$520.28	\$568.06
Spending Potential Index		65	71
Shelter: Total \$		\$380,186,571	\$2,931,730,769
Average Spent		\$10,115.65	\$11,294.39
Spending Potential Index		62	70
Support Payments/Cash Contributions/Gifts in Kind: Total \$		\$60,810,279	\$443,173,470
Average Spent		\$1,617.98	\$1,707.31
Spending Potential Index		69	73
Travel: Total \$		\$46,676,235	\$357,063,118
Average Spent		\$1,241.92	\$1,375.57
Spending Potential Index		60	66
Vehicle Maintenance & Repairs: Total \$		\$28,580,941	\$207,891,880
Average Spent		\$760.46	\$800.90
Spending Potential Index		71	75


**Data Note:** Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

**Source:** Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.


**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.


*Community Profile – Greensboro-Randolph Megasite*

 <b>esri</b>				<b>Community Profile</b>	
Greensboro-Randolph Megasite				Prepared by Esri	
27298, Liberty, North Carolina				Latitude: 35.90067	
Drive Time: 30, 60 minute radii				Longitude: -79.64049	
				<b>30 minutes</b>	<b>60 minutes</b>
<b>Population Summary</b>					
2000 Total Population				422,993	1,581,861
2010 Total Population				478,191	1,804,820
2017 Total Population				507,553	1,928,997
2017 Group Quarters				15,448	57,005
2022 Total Population				529,035	2,023,141
2017-2022 Annual Rate				0.83%	0.96%
2017 Total Daytime Population				585,604	2,013,571
Workers				309,341	974,571
Residents				276,263	1,039,000
<b>Household Summary</b>					
2000 Households				168,684	628,279
2000 Average Household Size				2.42	2.43
2010 Households				192,714	719,335
2010 Average Household Size				2.41	2.43
2017 Households				203,564	765,218
2017 Average Household Size				2.42	2.45
2022 Households				212,108	801,883
2022 Average Household Size				2.42	2.45
2017-2022 Annual Rate				0.83%	0.94%
2010 Families				120,553	464,586
2010 Average Family Size				3.00	3.00
2017 Families				125,348	486,978
2017 Average Family Size				3.04	3.04
2022 Families				129,698	507,035
2022 Average Family Size				3.05	3.05
2017-2022 Annual Rate				0.68%	0.81%
<b>Housing Unit Summary</b>					
2000 Housing Units				181,426	675,577
Owner Occupied Housing Units				58.6%	61.0%
Renter Occupied Housing Units				34.3%	32.0%
Vacant Housing Units				7.0%	7.0%
2010 Housing Units				214,692	798,387
Owner Occupied Housing Units				53.6%	57.6%
Renter Occupied Housing Units				36.1%	32.5%
Vacant Housing Units				10.2%	9.9%
2017 Housing Units				226,885	849,644
Owner Occupied Housing Units				50.3%	54.4%
Renter Occupied Housing Units				39.4%	35.6%
Vacant Housing Units				10.3%	9.9%
2022 Housing Units				236,665	891,783
Owner Occupied Housing Units				50.1%	54.1%
Renter Occupied Housing Units				39.5%	35.8%
Vacant Housing Units				10.4%	10.1%
<b>Median Household Income</b>					
2017				\$42,497	\$47,807
2022				\$45,679	\$52,481
<b>Median Home Value</b>					
2017				\$148,559	\$171,536
2022				\$162,297	\$189,885
<b>Per Capita Income</b>					
2017				\$25,149	\$28,190
2022				\$28,104	\$31,776
<b>Median Age</b>					
2010				35.9	37.2
2017				37.1	38.5
2022				37.8	39.2
<b>Data Note:</b> Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.					
<b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.					


©2018 Esri		Page 1 of 7	
		Community Profile	
Greensboro-Randolph Megasite		Prepared by Esri	
27298, Liberty, North Carolina		Latitude: 35.90067	
Drive Time: 30, 60 minute radii		Longitude: -79.64049	
		30 minutes	60 minutes
<b>2017 Households by Income</b>			
Household Income Base		203,564	765,213
<\$15,000		14.7%	13.3%
\$15,000 - \$24,999		13.6%	12.1%
\$25,000 - \$34,999		13.1%	12.0%
\$35,000 - \$49,999		14.8%	14.2%
\$50,000 - \$74,999		17.0%	17.0%
\$75,000 - \$99,999		10.9%	11.2%
\$100,000 - \$149,999		9.7%	11.6%
\$150,000 - \$199,999		3.2%	4.2%
\$200,000+		3.0%	4.5%
Average Household Income		\$61,693	\$69,915
<b>2022 Households by Income</b>			
Household Income Base		212,108	801,878
<\$15,000		14.9%	13.2%
\$15,000 - \$24,999		13.0%	11.3%
\$25,000 - \$34,999		12.0%	10.8%
\$35,000 - \$49,999		13.3%	12.6%
\$50,000 - \$74,999		15.0%	14.9%
\$75,000 - \$99,999		13.1%	13.3%
\$100,000 - \$149,999		11.7%	13.8%
\$150,000 - \$199,999		3.8%	4.9%
\$200,000+		3.4%	5.1%
Average Household Income		\$69,155	\$79,079
<b>2017 Owner Occupied Housing Units by Value</b>			
Total		114,215	462,497
<\$50,000		6.6%	6.5%
\$50,000 - \$99,999		19.1%	15.3%
\$100,000 - \$149,999		25.0%	21.1%
\$150,000 - \$199,999		16.7%	16.3%
\$200,000 - \$249,999		10.7%	11.0%
\$250,000 - \$299,999		6.8%	8.1%
\$300,000 - \$399,999		7.9%	9.9%
\$400,000 - \$499,999		3.2%	4.7%
\$500,000 - \$749,999		2.4%	4.4%
\$750,000 - \$999,999		0.7%	1.3%
\$1,000,000 +		0.9%	1.2%
Average Home Value		\$194,126	\$225,601
<b>2022 Owner Occupied Housing Units by Value</b>			
Total		118,498	482,688
<\$50,000		5.3%	5.1%
\$50,000 - \$99,999		17.1%	13.5%
\$100,000 - \$149,999		23.8%	19.5%
\$150,000 - \$199,999		15.6%	15.0%
\$200,000 - \$249,999		10.5%	10.5%
\$250,000 - \$299,999		7.4%	8.6%
\$300,000 - \$399,999		9.8%	11.8%
\$400,000 - \$499,999		4.5%	6.2%
\$500,000 - \$749,999		3.6%	6.2%
\$750,000 - \$999,999		1.1%	1.8%
\$1,000,000 +		1.4%	1.8%
Average Home Value		\$219,322	\$255,962
<p><b>Data Note:</b> Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.</p> <p><b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.</p>			

©2018 Esri		Page 2 of 7	
		Community Profile	
Greensboro-Randolph Megasite		Prepared by Esri	
27298, Liberty, North Carolina		Latitude: 35.90067	
Drive Time: 30, 60 minute radii		Longitude: -79.64049	
		30 minutes	60 minutes
<b>2010 Population by Age</b>			
Total		478,193	1,804,818
0 - 4		6.5%	6.4%
5 - 9		6.5%	6.6%
10 - 14		6.4%	6.5%
15 - 24		16.0%	14.8%
25 - 34		13.4%	12.8%
35 - 44		13.5%	13.8%
45 - 54		13.5%	14.4%
55 - 64		11.3%	11.8%
65 - 74		6.9%	7.0%
75 - 84		4.3%	4.2%
85 +		1.7%	1.7%
18 +		76.7%	76.5%
<b>2017 Population by Age</b>			
Total		507,553	1,928,998
0 - 4		6.0%	5.9%
5 - 9		6.1%	6.1%
10 - 14		6.1%	6.3%
15 - 24		15.2%	14.3%
25 - 34		14.0%	13.1%
35 - 44		12.5%	12.6%
45 - 54		12.8%	13.3%
55 - 64		12.2%	12.9%
65 - 74		8.8%	9.2%
75 - 84		4.3%	4.4%
85 +		2.0%	2.0%
18 +		78.2%	78.2%
<b>2022 Population by Age</b>			
Total		529,034	2,023,142
0 - 4		5.9%	5.8%
5 - 9		5.9%	5.9%
10 - 14		6.1%	6.2%
15 - 24		14.7%	13.8%
25 - 34		13.7%	13.0%
35 - 44		12.6%	12.6%
45 - 54		12.1%	12.4%
55 - 64		12.1%	12.8%
65 - 74		9.7%	10.3%
75 - 84		5.1%	5.3%
85 +		2.0%	2.0%
18 +		78.5%	78.6%
<b>2010 Population by Sex</b>			
Males		228,403	866,601
Females		249,788	938,219
<b>2017 Population by Sex</b>			
Males		243,493	930,370
Females		264,060	998,627
<b>2022 Population by Sex</b>			
Males		254,366	978,345
Females		274,670	1,044,796
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.			

©2018 Esri		Page 3 of 7	
 <b>esri</b>		Community Profile	
Greensboro-Randolph Megasite		Prepared by Esri	
27298, Liberty, North Carolina		Latitude: 35.90067	
Drive Time: 30, 60 minute radii		Longitude: -79.64049	
		30 minutes	60 minutes
<b>2010 Population by Race/Ethnicity</b>			
Total		478,190	1,804,820
White Alone		57.9%	66.8%
Black Alone		30.8%	22.3%
American Indian Alone		0.7%	0.5%
Asian Alone		3.3%	2.9%
Pacific Islander Alone		0.0%	0.0%
Some Other Race Alone		5.0%	5.4%
Two or More Races		2.4%	2.2%
Hispanic Origin		9.3%	9.9%
Diversity Index		64.2	59.2
<b>2017 Population by Race/Ethnicity</b>			
Total		507,554	1,928,997
White Alone		54.6%	64.5%
Black Alone		32.1%	22.7%
American Indian Alone		0.7%	0.5%
Asian Alone		4.2%	3.7%
Pacific Islander Alone		0.1%	0.1%
Some Other Race Alone		5.6%	6.0%
Two or More Races		2.8%	2.6%
Hispanic Origin		10.5%	10.9%
Diversity Index		67.3	62.2
<b>2022 Population by Race/Ethnicity</b>			
Total		529,035	2,023,140
White Alone		52.0%	62.5%
Black Alone		32.8%	22.9%
American Indian Alone		0.7%	0.5%
Asian Alone		5.0%	4.4%
Pacific Islander Alone		0.1%	0.1%
Some Other Race Alone		6.3%	6.7%
Two or More Races		3.1%	2.9%
Hispanic Origin		11.7%	12.1%
Diversity Index		69.8	65.0
<b>2010 Population by Relationship and Household Type</b>			
Total		478,191	1,804,820
In Households		97.0%	97.0%
In Family Households		77.9%	79.3%
Householder		25.2%	25.7%
Spouse		16.9%	18.4%
Child		29.6%	29.5%
Other relative		4.0%	3.6%
Nonrelative		2.3%	2.1%
In Nonfamily Households		19.0%	17.7%
In Group Quarters		3.0%	3.0%
Institutionalized Population		0.7%	0.8%
Noninstitutionalized Population		2.3%	2.2%
<b>Data Note:</b> Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.			
<b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.			

©2018 Esri		Page 4 of 7	
		Community Profile	
Greensboro-Randolph Megasite		Prepared by Esri	
27298, Liberty, North Carolina		Latitude: 35.90067	
Drive Time: 30, 60 minute radii		Longitude: -79.64049	
		30 minutes	60 minutes
<b>2017 Population 25+ by Educational Attainment</b>			
Total		338,170	1,301,488
Less than 9th Grade		5.0%	5.0%
9th - 12th Grade, No Diploma		9.0%	8.2%
High School Graduate		22.8%	21.0%
GED/Alternative Credential		4.4%	4.4%
Some College, No Degree		21.9%	19.9%
Associate Degree		8.0%	8.2%
Bachelor's Degree		18.9%	20.0%
Graduate/Professional Degree		10.0%	13.3%
<b>2017 Population 15+ by Marital Status</b>			
Total		415,134	1,577,229
Never Married		37.2%	33.9%
Married		45.7%	49.0%
Widowed		6.0%	6.0%
Divorced		11.0%	11.0%
<b>2017 Civilian Population 16+ in Labor Force</b>			
Civilian Employed		93.6%	94.1%
Civilian Unemployed (Unemployment Rate)		6.4%	5.9%
<b>2017 Employed Population 16+ by Industry</b>			
Total		235,011	902,159
Agriculture/Mining		0.5%	0.7%
Construction		6.4%	6.3%
Manufacturing		15.1%	14.3%
Wholesale Trade		3.2%	2.6%
Retail Trade		11.8%	10.6%
Transportation/Utilities		4.9%	4.1%
Information		1.5%	1.5%
Finance/Insurance/Real Estate		6.6%	6.1%
Services		47.5%	51.0%
Public Administration		2.5%	2.8%
<b>2017 Employed Population 16+ by Occupation</b>			
Total		235,010	902,160
White Collar		57.7%	60.6%
Management/Business/Financial		12.4%	13.6%
Professional		19.4%	23.9%
Sales		11.5%	10.2%
Administrative Support		14.4%	12.9%
Services		17.9%	17.2%
Blue Collar		24.4%	22.2%
Farming/Forestry/Fishing		0.3%	0.3%
Construction/Extraction		4.8%	4.8%
Installation/Maintenance/Repair		3.5%	3.3%
Production		8.2%	7.6%
Transportation/Material Moving		7.6%	6.2%
<b>2010 Population By Urban/ Rural Status</b>			
Total Population		478,191	1,804,820
Population Inside Urbanized Area		75.7%	68.6%
Population Inside Urbanized Cluster		6.3%	6.5%
Rural Population		18.0%	24.9%
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.			



©2018 Esri		Page 5 of 7	
		Community Profile	
Greensboro-Randolph Megasite		Prepared by Esri	
27298, Liberty, North Carolina		Latitude: 35.90067	
Drive Time: 30, 60 minute radii		Longitude: -79.64049	
		30 minutes	60 minutes
<b>2010 Households by Type</b>			
Total		192,714	719,335
Households with 1 Person		29.9%	28.6%
Households with 2+ People		70.1%	71.4%
Family Households		62.6%	64.6%
Husband-wife Families		42.0%	46.3%
With Related Children		17.9%	20.0%
Other Family (No Spouse Present)		20.6%	18.3%
Other Family with Male Householder		4.9%	4.5%
With Related Children		2.8%	2.6%
Other Family with Female Householder		15.6%	13.8%
With Related Children		10.7%	9.3%
Nonfamily Households		7.5%	6.8%
All Households with Children		31.7%	32.3%
Multigenerational Households		3.6%	3.4%
Unmarried Partner Households		6.2%	6.0%
Male-female		5.5%	5.2%
Same-sex		0.7%	0.8%
<b>2010 Households by Size</b>			
Total		192,714	719,336
1 Person Household		29.9%	28.6%
2 Person Household		33.4%	34.1%
3 Person Household		16.4%	16.3%
4 Person Household		11.7%	12.5%
5 Person Household		5.2%	5.3%
6 Person Household		2.0%	2.0%
7 + Person Household		1.3%	1.2%
<b>2010 Households by Tenure and Mortgage Status</b>			
Total		192,714	719,335
Owner Occupied		59.7%	63.9%
Owned with a Mortgage/Loan		43.0%	45.6%
Owned Free and Clear		16.7%	18.3%
Renter Occupied		40.3%	36.1%
<b>2010 Housing Units By Urban/ Rural Status</b>			
Total Housing Units		214,692	798,387
Housing Units Inside Urbanized Area		76.7%	68.8%
Housing Units Inside Urbanized Cluster		5.7%	6.5%
Rural Housing Units		17.6%	24.7%
<p><b>Data Note:</b> Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.</p>			
<p><b>Source:</b> U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.</p>			

©2018 Esri

Page 6 of 7

 **esri**

Community Profile

Greensboro-Randolph Megasite  
27298, Liberty, North Carolina  
Drive Time: 30, 60 minute radii

Prepared by Esri  
Latitude: 35.90067  
Longitude: -79.64049

Top 3 Tapestry Segments		30 minutes	60 minutes
1.	Middleburg (4C)	Southern Satellites (10A)	
2.	Southern Satellites (10A)	Salt of the Earth (6B)	
3.	Young and Restless (11B)	Middleburg (4C)	
<b>2017 Consumer Spending</b>			
Apparel & Services: Total \$		\$340,878,475	\$1,440,441,690
Average Spent		\$1,674.55	\$1,882.39
Spending Potential Index		78	87
Education: Total \$		\$224,804,890	\$945,575,198
Average Spent		\$1,104.35	\$1,235.69
Spending Potential Index		76	85
Entertainment/Recreation: Total \$		\$489,951,874	\$2,087,740,630
Average Spent		\$2,406.87	\$2,728.30
Spending Potential Index		77	87
Food at Home: Total \$		\$813,987,250	\$3,423,649,720
Average Spent		\$3,998.68	\$4,474.08
Spending Potential Index		79	89
Food Away from Home: Total \$		\$535,732,667	\$2,256,508,486
Average Spent		\$2,631.77	\$2,948.84
Spending Potential Index		79	88
Health Care: Total \$		\$877,489,873	\$3,765,558,078
Average Spent		\$4,310.63	\$4,920.90
Spending Potential Index		77	88
HH Furnishings & Equipment: Total \$		\$307,857,003	\$1,308,438,818
Average Spent		\$1,512.34	\$1,709.89
Spending Potential Index		78	88
Personal Care Products & Services: Total \$		\$124,959,131	\$530,737,247
Average Spent		\$613.86	\$693.58
Spending Potential Index		77	87
Shelter: Total \$		\$2,547,597,077	\$10,703,708,050
Average Spent		\$12,514.97	\$13,987.79
Spending Potential Index		77	86
Support Payments/Cash Contributions/Gifts in Kind: Total \$		\$364,346,072	\$1,565,040,010
Average Spent		\$1,789.84	\$2,045.22
Spending Potential Index		76	87
Travel: Total \$		\$308,200,936	\$1,332,172,684
Average Spent		\$1,514.02	\$1,740.91
Spending Potential Index		73	84
Vehicle Maintenance & Repairs: Total \$		\$170,982,278	\$725,124,344
Average Spent		\$839.94	\$947.60
Spending Potential Index		78	88

**Data Note:** Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

**Source:** Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.  
**Source:** U.S. Census Bureau. Census 2010 Summary File 1. Esri forecasts for 2017 and 2022 Esri converted Census 2000 data into 2010 geography.



## McCallum Sweeney Consulting Quick Assess of NCGTP

## Memo

**To:** Allen Thomas and Amanda Conner

---

**From:** Lindsey Cannon and Sarah White

---

**Date:** March 1, 2018

---

**Re:** Quick Assess of North Carolina Global TransPark

---

### Overview

On February 13, 2018, McCallum Sweeney Consulting (MSC) visited Kinston, NC to learn more about the approximately 2,500-acre North Carolina Global TransPark (NCGTP). The visit consisted of a meeting with the NCGTP staff to discuss the history and current conditions at the property and the potential for industrial development. After the meeting, MSC was given a windshield tour of the property, including tours of some of the existing buildings. The goal was to assess the property for potential industrial development and determine if the property is a candidate for certification.

NCGTP owns 14 parcels totaling 902 acres that are available for lease. The parcels range from 5 acres to 300 acres. NCGTP also holds a 404 wetlands permit on the property they own as well as surrounding properties. Based on having multiple parcels available for development, MSC recommends that the property proceed with evaluation and potentially certification as a Super Park. For a Super Park, the total park acreage must be over 500 acres, and there must be at least one site that has 100 contiguous, developable acres.

In addition to the parcels currently owned by NCGTP and available for lease, we also recommend including parcels that are currently privately owned adjacent to Highway 58 along Stonyton Creek in the evaluation.

Below you will find our high-level assessment of the property as well as recommendations and a path forward.

## Assessment of NC Global TransPark

After reviewing the information provided at the meeting, we feel the following are the key issues for the property in considering certification. Again, we recommend proceeding under the Super Park criteria in order to capture all of the currently and potentially available acreage.

### Opportunities

- **Transportation Access**

The majority of the property is currently accessed by C.F. Harvey Parkway which provides good access for trucks. C.F. Harvey Parkway is also in the process of being extended to Highway 11 with right-of-way already under control.

The Kinston Regional Jetport's 11,500-foot runway bisects the park, and several parcels within the park have direct runway access.

The property also has rail access available via a Gulf & Ohio Railways short line spur that currently goes through the southern portion of the park. The spur currently connects to Norfolk Southern, but NCGTP has also looked at extending the rail spur to the east to provide connectivity to CSX. Rail also provides connectivity to the state's deepwater ports.

- **Existing Utility Infrastructure**

The majority of utility infrastructure that would be needed to serve industrial users are already in place or in close proximity.

- **Wetlands**

NCGTP already has a 404 permit in place from the U.S. Army Corps of Engineers that covers over 5,000 acres and does not expire until 2028. The acreage includes parcels owned by NCGTP and adjoining properties currently owned by private landowners. Having this 404 permit in place is a key competitive advantage as it saves time and reduces risk to potential prospects.

- **Variety of Site Sizes**

Companies need options and flexibility. The property provides a wide variety of site sizes and configurations that will be attractive to prospects.

- **Training Center / Recruitment**

The Spirit AeroSystems Composite Center of Excellence is located within the park where training can be conducted for existing and potential companies. Eastern North Carolina also has access to several military installments that would allow for recruitment of a skilled workforce. East Carolina University is also located approximately 25 miles from the park.



- Diversification

Currently, NCGTP has parcels that are runway accessible as well as those off the runway which allow for a diversification of end users within the NCGTP.

In regard to ownership, all of the parcels currently owned by NCGTP are only available for lease. Additional private properties located within the 404 permit area may be available for sale which would allow additional flexibility for future prospects that may prefer to purchase property versus lease.

- North Carolina Certified Site

Property has previously been certified under the North Carolina Certified Site Program, and NCGTP plans to pursue recertification.

### Concerns

- Interstate/Highway Access

The property is 40 miles from I-95. Although portions of the route to the interstate are suitable for trucks, the entire route is not currently limited access. There are several planned roadway improvements in the area that will enhance this access, but the improvements will not be completed within 12 months to meet certification criteria. This distance may be perceived as a weakness for some prospects and may eliminate the property from site searches, despite being a good fit for other factors. *Note: Due to the current route to the interstate not being limited access the entire route, the property would not be eligible for Mega Site certification.*

The parcels located north of the runway currently do not have suitable access for truck traffic. An improved road (Spine Road) is planned to provide access to these parcels, but timing for improvements is unknown.

- Ownership

As stated before, NCGTP currently owns several vacant parcels within the park, and these parcels are only available for lease. Aerospace clients are typically accustomed to leasing properties due to FAA regulations, but this can be a deterrent to other types of industrial prospects that wish to purchase their property.

- Zoning/Restricted Use

Due to FAA restrictions, some parcels of the park (located adjacent to the runway) are restricted to aeronautical uses only. Although the runway is an attractive asset to potential aeronautical use operations, this greatly limits the type of prospects that can locate in those areas. Assembling additional acreage not subject to these restrictions will greatly enhance the variety of prospects NCGTP can market the industrial park to in the future.



## Path Forward and Recommendations

Based on the information collected and our visit to the property, we recommend the property move forward with evaluation and potentially certification. Before proceeding with the evaluation phase, the next step is for NCGTP to determine which parcels should proceed to the evaluation phase. In addition to the parcels owned by NCGTP, MSC recommends pursuing options on the privately-owned parcels in the eastern portion of the 404 wetlands permit area that have access to infrastructure along C.F. Harvey Parkway and NC Highway 58 to enhance the configuration, end user, and purchase flexibility of the park.

- **Parcels 1-4**

Currently, these parcels north of the runway are restricted to aeronautical use only (Central Cargo or Airside Industrial). We suggest figuring out what the setback line is for the restricted use to determine if these parcels or portions of these parcels could possibly be rezoned to allow for additional uses.

If these parcels are to be included in the certification acreage, a detailed cost and schedule will be required to provide truck access this area. This includes designing, permitting, engineering, and construction of the planned road (Spine Road) to these parcels. Continue discussions with NCDOT to determine the cost and schedule for these improvements to ensure the improvements can meet the Super Park timeline requirements (12 months).

- **Parcel 5**

Parcel 5 is outside of 404 permit boundary, and the August 2011 wetlands map shows Parcel 5 covered in wetlands that are not permitted. Based on the likelihood of the mitigation schedule being longer than three months, we recommend this parcel not pursue certification. *Note: If desired to collect a base level of information on this parcel, it could be included in the evaluation phase only.*

- **Parcel 6-8 and 10-14**

We recommend these parcels proceed to evaluation and potentially certification.

- **Parcel 9**

The August 2011 wetlands map shows Parcel 9 covered in wetlands that are not permitted under the 404 permit. Based on the likelihood of the mitigation schedule being longer than three months, we recommend this parcel not pursue certification. *Note: If desired to collect a base level of information on this parcel, it could be included in the evaluation phase only.*

- **Additional acreage around C.F. Harvey Parkway and Highway 58**

We recommend pursuing options on some of the privately-owned properties around C.F. Harvey Parkway and Highway 58 which are outlined in red below. We have provided three distinct areas to allow for flexibility in the event some of the landowners are not willing to sell. Before beginning the evaluation phase, we recommend determining which parcels could be optioned. While the options do not have to be in place to begin the evaluation phase, we do recommend having an idea of which parcels could be controlled. Options (or

some other form of acceptable property control) would have to be in place before proceeding to the certification phase.



- Additional acreage around Poole Road and Aviation Drive/Shackleford Drive off C.F. Harvey Parkway

Two parcels (Parcel #24415 and Parcel #27643) totaling 157 acres have the potential to be transferred, purchased, and/or optioned. While these parcels are bisected by Aviation Drive/Shackleford Drive and have some wetlands on Parcel #27643 that are not permitted, obtaining control of these parcels would allow flexibility for smaller users that desire to own their property. If Aviation Drive/Shackleford Drive could be abandoned, then a larger parcel of approximately 100 acres within the permitted wetlands area could be developed (based on the August 2011 wetlands map).

When determining which parcels to include in evaluation and certification, you will need to determine the total acreage and largest contiguous, developable parcel to determine if you will still meet the Super Park criteria. While the evaluation phase is more flexible, the Super Park criteria must be met to achieve certification.

Once the potentially controlled acreage is determined, NCGTP will proceed with the evaluation phase, the first of MSC's two-phase certification process. These two phases are described briefly below. Both phases combined typically take between nine to sixteen months.

- **Evaluation Phase** – The evaluation phase is designed to get an in-depth look at the property and identify any major areas of concern for completing certification. The applicant will be responsible for filling out a lengthy questionnaire and gathering over 25 attachments (i.e. maps, documentation of availability, utility provider letters, etc.). By design, the evaluation phase does not require any outside engineering work, hopefully reducing any unnecessary spending on due diligence studies before a green light is given for the certification phase.



- **Certification Phase** – After the evaluation materials are evaluated, the applicant must receive an invitation to participate in the certification phase from MSC. Additional documentation and due diligence studies (as outlined above) will be necessary to complete certification. Any applicant that proceeds with certification phase requirements prior to receiving an invitation is doing so at his or her risk. The applicant will have up to nine months from the date of the invitation letter to complete the requirements. Some additional follow-up information may be requested after the certification submission is reviewed.

#### Items to Note When Considering Certification

- The MSC infrastructure capacity requirements were provided prior to the site visit. For evaluation and certification, it will be required that utility information be clearly documented in updated written letters/questionnaires from the appropriate utility providers and should include capacity availability of both the lines serving the property and the systems which serve those lines. Since all of the developable areas are not contiguous, multiple responses may be required from the providers that reflect the different developable areas of the park.
- For any utility lines or systems that do not currently provide the required level of service at the property, a detailed cost and schedule estimate must be developed to extend service to the property. This includes design, permitting, engineering, and construction of the lines.
- Any outdated due diligence studies will need to be updated in the certification phase.

#### Additional Recommendations

The following are a list of recommendations that we suggest you pursue in the near term. Some of these items may be addressed during the evaluation and/or certification phase, but we think these items should be prioritized.

- **Setback Line for Runway (Airside Industrial) Use**
  - Determine if there is a specific setback line for restricted runway use on parcels located north of the runway and clarify if the areas located further back from the runway (outside of a potential setback restriction) could be used for non-runway uses. *Example: Uses are restricted to airside uses within 500 feet of the runway, but the remainder of the parcels outside of this 500-foot setback could be used for other industrial applications.*
- **Transportation Access**
  - Summarize all of the ongoing and planned roadway improvements in the area. The summary should include a visual that shows where the improvements will occur in relation to the park as well as a status update including estimated timing and funding sources for improvements.
  - Provide additional details on potential rail connectivity to the CSX line. Details should include route, estimated cost and schedule, and identify any rights-of-way that would have to be acquired.

- Utilities
  - Determine the available capacities for all utilities (electric, natural gas, water, sewer, and telecommunications).
  - Clearly outline the electric territories and how the service provider is determined for the different parcels within the park.
  - A utility map should be developed that is easy to read, shows all the utility infrastructure in the area, and clearly identifies the location, size, voltage, etc. of the utility infrastructure at the property.
- Zoning
  - Develop a zoning map that shows both the zoning for the NCGTP parcels and the surrounding properties.
  - Prepare a document that has the zoning descriptions, including allowable uses, for all the zoning classifications shown in the map above.

# **Appendix E**

## **Marketing and Economic Development Action Plan**

This page left intentionally blank



## Appendix E - Marketing and Economic Development Action Plan

### Contents

Marketing Strategies and Tactics .....	E-2
Marketing Tactics – Action Items by Quarter.....	E-3
Metrics Worksheet .....	E-4

Implementation of the NCGTP Marketing and Economic Development Action Plan will be a multi-year process. This Marketing and Economic Development Action Plan will serve as a guide in creating a “best in class” economic development marketing plan, putting NCGTP on a trajectory of economic growth through increased jobs and capital investment.

Dates in the action plan summaries below indicate planned activity start date.

## Marketing Strategies and Tactics

Action Plan		Timeline
<b>Tactic 7.1: Increase Business Attraction and Marketing Capacity</b>		
7.1.1	Develop and distribute an RFP to be distributed to “best in field” economic development marketing firms	2018 Q2
7.1.2	Select a marketing firm to assist with implementation of the Economic Development Marketing Plan	2018 Q3
7.1.3	Develop job description for marketing professional to lead implementation of the Economic Development Marketing Plan	2019
7.1.4	Hire a marketing professional to lead implementation of the Economic Development Marketing Plan	2020
<b>Tactic 7.2: Enhance Brand Identity</b>		
7.2.1	Conduct a brand identity analysis to understand the vision, mission, brand message, logo and tag line	2019 Q3
7.2.2	Understand how NCGTP assets, such as quality of life, workforce, and transportation, influence targeted sectors; clearly articulate these assets in all marketing and communications efforts	2018 Q3
7.2.4	Continue to enhance web site to align with targeted sectors and to provide relevant and easily accessible information for the site selectors audience	2019 Q1
7.2.6	Establish a gateway and wayfinding throughout the NCGTP campus	2018 Q3
7.2.7	Pursue NCGTP zip code	2018 Q3
7.2.8	Promote benefits of locating in Foreign Trade Zone 214	2018 Q3
7.2.9	Investigate available site certification programs and pursue programs that resonate with targeted clusters	2018 Q2
7.2.10	Partner with and host conferences and trade events to create exposure and awareness (e.g., Aviation Conference)	2018 Q1
<b>Tactic 7.3: Directly Engage Clients and Stakeholders</b>		
7.3.1	Conduct face-to-face visits with decision-makers, site selection consultants, real estate professionals, and corporate representatives active in targeted clusters	2018 Q2
7.3.2	Attend tradeshow that expose NCGTP assets to targeted clusters	2018 Q2
7.3.3	Analyze how NCGTP assets resonate with targeted sectors and develop collateral material to support recruitment of these sectors	2018 Q3
7.3.4	Communicate announcements, accolades, and other positive messages through targeted outreach	2018 Q2
7.3.5	Use public relations efforts to generate favorable coverage and publicity for NCGTP and to position it as an ideal location for targeted industries	2018 Q3
7.3.6	Host an annual economic development summit to celebrate existing industry and to illuminate assets and accomplishments	2018 Q4
<b>Tactic 7.4: Leverage Collaboration and Partner Relationships</b>		
7.4.1	Not-for-profit entity restructuring to increase stakeholder engagement, champion the NCGTP brand, generate leads, provide market intelligence, and augment the real estate and incentive portfolio	2018 Q4
7.4.2	Partner with local regional, and state economic development entities on business recruitment and marketing activities, including Lenoir County, EDPNC, North Carolina Department of Commerce, North Carolina’s East Alliance and North Carolina’s Southeast	2018 Q2
7.4.3	Partner with Universities and Community Colleges to develop and market training programs attractive to targeted clusters	2018 Q2
7.4.4	Partner with infrastructure providers to extend the NCGTP brand, including Duke Energy, Electricities, PSNC, Century Link, and North Carolina Rail Road	2018 Q2
7.4.5	Collaborate with the NC Ports to create business recruitment and retention opportunities	2018 Q2
7.4.6	Participate in events held by trade associations representing targeted clusters	2018 Q4

## Marketing Tactics – Action Items by Quarter

Action Plan		Timeline
<b>Tactic 7.1: Increase Business Attraction and Marketing Capacity</b>		
<b>Tactic 7.2: Enhance Brand Identity</b>		
<b>Tactic 7.3: Directly Engage Clients and Stakeholders</b>		
<b>Tactic 7.4: Leverage Collaboration and Partner Relationships</b>		
<b>2018 Q1</b>		
Tactic 7.2 .10	Partner with and host conferences and trade events to create exposure and awareness (e.g., Aviation Conference)	2018 Q1
<b>2018 Q2</b>		
Tactic 7.1 .1	Develop and distribute an RFP to be distributed to “best in field” economic development marketing firms	2018 Q2
Tactic 7.2 .9	Investigate available site certification programs and pursue programs that resonate with targeted clusters	2018 Q2
Tactic 7.3 .1	Conduct face-to-face visits with decision-makers, site selection consultants, real estate professionals, and corporate representatives active in targeted clusters	2018 Q2
Tactic 7.3 .2	Attend tradeshow that expose NCGTP assets to targeted clusters	2018 Q2
Tactic 7.3 .4	Communicate announcements, accolades, and other positive messages through targeted outreach	2018 Q2
Tactic 7.4 .2	Partner with local regional, and state economic development entities on business recruitment and marketing activities, including Lenoir County, EDPNC, North Carolina Department of Commerce, North Carolina’s East Alliance and North Carolina’s Southeast	2018 Q2
Tactic 7.4 .3	Partner with Universities and Community Colleges to develop and market training programs attractive to targeted clusters	2018 Q2
Tactic 7.4 .4	Partner with infrastructure providers to extend the NCGTP brand, including Duke Energy, Electricities, PSNC, Century Link, and North Carolina Rail Road	2018 Q2
Tactic 7.4 .5	Collaborate with the NC Ports to create business recruitment and retention opportunities	2018 Q2
<b>2018 Q3</b>		
Tactic 7.1 .2	Select a marketing firm to assist with implementation of the Economic Development Marketing Plan	2018 Q3
Tactic 7.2 .2	Understand how NCGTP assets, such as quality of life, workforce, and transportation, influence targeted sectors; clearly articulate these assets in all marketing and communications efforts	2018 Q3
Tactic 7.2 .6	Establish a gateway and wayfinding throughout the NCGTP campus	2018 Q3
Tactic 7.2 .7	Pursue NCGTP zip code	2018 Q3
Tactic 7.2 .8	Promote benefits of locating in Foreign Trade Zone 214	2018 Q3
Tactic 7.3 .3	Analyze how NCGTP assets resonate with targeted sectors and develop collateral material to support recruitment of these sectors	2018 Q3
Tactic 7.3 .5	Use public relations efforts to generate favorable coverage and publicity for NCGTP and to position it as an ideal location for targeted industries	2018 Q3
<b>2018 Q4</b>		
Tactic 7.3 .6	Host an annual economic development summit to celebrate existing industry and to illuminate assets and accomplishments	2018 Q4
Tactic 7.4 .1	Not-for-profit entity restructuring to increase stakeholder engagement, champion the NCGTP brand, generate leads, provide market intelligence, and augment the real estate and incentive portfolio	2018 Q4
Tactic 7.4 .6	Participate in events held by trade associations representing targeted clusters	2018 Q4
<b>2019</b>		
Tactic 7.2 .4	Continue to enhance web site to align with targeted sectors and to provide relevant and easily accessible information for the site selectors audience	2019 Q1
Tactic 7.2 .1	Conduct a brand identity analysis to understand the vision, mission, brand message, logo and tag line	2019 Q3
Tactic 7.1 .3	Develop job description for marketing professional to lead implementation of the Economic Development Marketing Plan	2019
<b>2020</b>		
Tactic 7.1 .4	Hire a marketing professional to lead implementation of the Economic Development Marketing Plan	2020

## Metrics Worksheet

	January-18	February-18	March-18	April-18	May-18	June-18	July-18	August-18	September-18	October-18	November-18	December-18	Person Assigned
Web Site Unique Visits													
Google Analytics Reviewed (Y or N)													
Jobs Announced NEW													
Jobs Announced EXPANSION													
Average Wage of Announced Jobs													
Investment Announced NEW													
Investment Announced EXPANSION													
# Prospect Meetings & Visits													
New Prospects													
Expansions													
Agency RFP Created and Awarded													
Marketing Job Description Created													
Marketing Staff Person Hired													
Brand Identity Analysis Conducted													
Website Enhanced to Align with Targeted Clusters and Site Selector Audience													
Gateway and Wayfinding Program Implemented													
NC GTP Zip Code Registered													
Site Certifications Obtained													
Conferences/ Events Hosted													
Face-to-face visits with Lead/Project Creators													
Trade Shows Attended													
Social Media Posts													
Press Releases Issued													
Annual Economic Development Summit													
Partner/Collaboration Events													
Collateral material created/published													

# **Appendix F**

## **NCGTP Organization, Staffing and Financial Resources**

This page left intentionally blank



## Appendix F – NCGTP Organization, Staffing and Financial Resources

### Contents

Budget History and Performance .....	F-2
Buildings, Cost and Revenue .....	F-2
Current and Future Staffing Needs .....	F-3
2017 Annual Report .....	F-4

## Budget History and Performance

**Table F-1: NCGTP Revenues and Expenditures (Budget vs. Actual)**

Excludes One-Time Grants and Projects							
	FY18	FY17		FY16		FY15	
	BUDGET	BUDGET	ACTUAL	BUDGET	ACTUAL	BUDGET	ACTUAL
<b>REVENUE</b>							
INVESTMENT EARNINGS	\$17,000	\$7,345	\$6,870	\$5,250	\$5,055	\$12,782	\$3,839
RENTAL REVENUE	\$1,255,508	\$1,437,732	\$1,542,471	\$1,315,553	\$1,325,045	\$1,381,429	\$1,221,093
MISCELLANEOUS REVENUES	\$152,896	\$310,284	\$174,787	\$233,524	\$171,948	\$309,128	\$275,399
TRANSFER In - NCDOT	\$750,000	\$750,000	\$750,000	\$750,000	\$750,000	\$739,500	\$750,000
<b>TOTAL REVENUES</b>	<b>\$2,175,404</b>	<b>\$2,505,361</b>	<b>\$2,474,128</b>	<b>\$2,304,327</b>	<b>\$2,252,048</b>	<b>\$2,442,839</b>	<b>\$2,250,331</b>
<b>EXPENSES</b>							
SALARIES/BENEFITS	\$928,011	\$789,172	\$595,347	\$769,366	\$580,548	\$929,494	\$733,211
PROFESSIONAL SERVICES	\$32,152	\$74,482	\$102,946	\$121,865	\$73,911	\$156,626	\$109,297
UTILITIES	\$250,006	\$241,317	\$222,903	\$223,137	\$201,233	\$240,790	\$238,144
REPAIRS & MAINTENANCE	\$215,738	\$394,007	\$319,343	\$348,554	\$231,218	\$91,550	\$59,425
RENT/LEASE	\$10,436	\$11,051	\$10,026	\$11,003	\$9,925	\$14,003	\$10,594
TELEPHONE	\$27,253	\$27,454	\$25,663	\$30,950	\$24,995	\$31,080	\$28,277
INSURANCE	\$64,399	\$65,838	\$60,988	\$72,902	\$62,594	\$62,256	\$56,224
ADVERTISING	\$2,950	\$3,600	\$2,435	\$11,500	\$3,421	\$13,609	\$3,253
TRAVEL	\$19,198	\$15,718	\$9,468	\$16,920	\$8,321	\$20,855	\$11,870
SUPPLIES	\$101,942	\$113,986	\$81,883	\$143,083	\$94,927	\$82,924	\$50,253
EQUIPMENT	\$11,000	\$15,112	\$13,256	\$6,884	\$6,583	\$13,874	\$4,528
DEBT SERVICE	\$361,198	\$611,218	\$609,036	\$611,199	\$611,198	\$4,499,565	\$4,399,697
MISCELLANEOUS	\$59,829	\$434,849	\$128,975	\$196,214	\$95,817	\$95,038	\$51,125
<b>TOTAL EXPENSES</b>	<b>\$3,019,112</b>	<b>\$2,797,804</b>	<b>\$2,182,269</b>	<b>\$2,563,577</b>	<b>\$2,004,691</b>	<b>\$6,251,664</b>	<b>\$5,755,898</b>
<b>CASH BASIS NET PROFIT (LOSS)</b>	<b>(\$843,708)</b>	<b>(\$292,443)</b>	<b>\$291,859</b>	<b>(\$259,250)</b>	<b>\$247,357</b>	<b>(\$3,808,825)</b>	<b>(\$3,505,567)</b>

## Buildings, Cost and Revenue

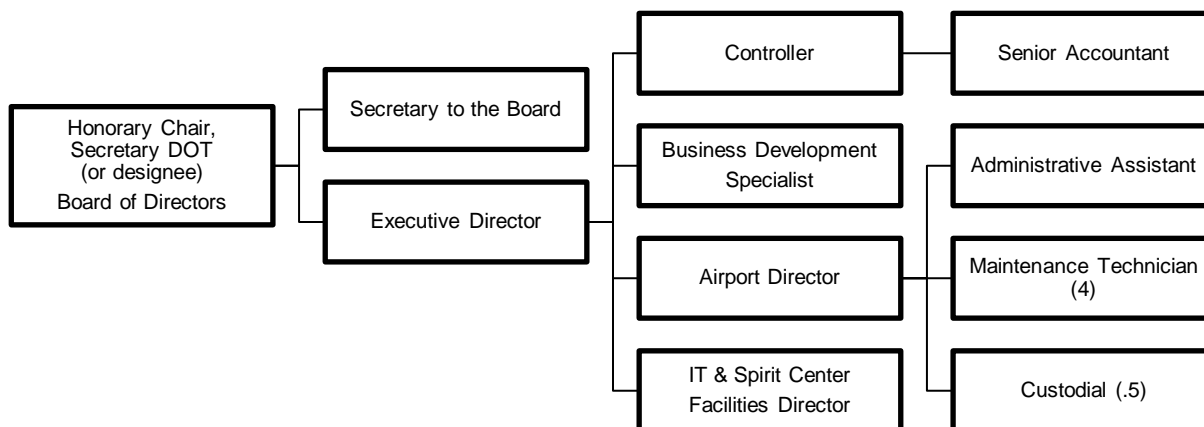
Exclusive of the 600,000-square-foot Spirit AeroSystems building at GTP-6, there is currently approximately 500,000 square feet (sf) of rentable space at NCGTP, comprising a combination of office space, shell buildings, hangars, and the legacy passenger terminal.

These facilities represent a public investment of approximately \$39 million (original purchase or construction and subsequent capital upgrades) over the course of 40 years. This capital investment does not include original land purchase nor construction of the Spirit AeroSystems manufacturing facility, which was built by Spirit AeroSystems at the cost of approximately \$101 million on land that it leases from NCGTP at a cost of \$100 per year. This private investment was a condition of a \$100 million Golden Leaf grant to Spirit AeroSystems.

Approximately 180,000 sf of space within the NCGTP complex is currently vacant, including the 26,000-sf passenger terminal.

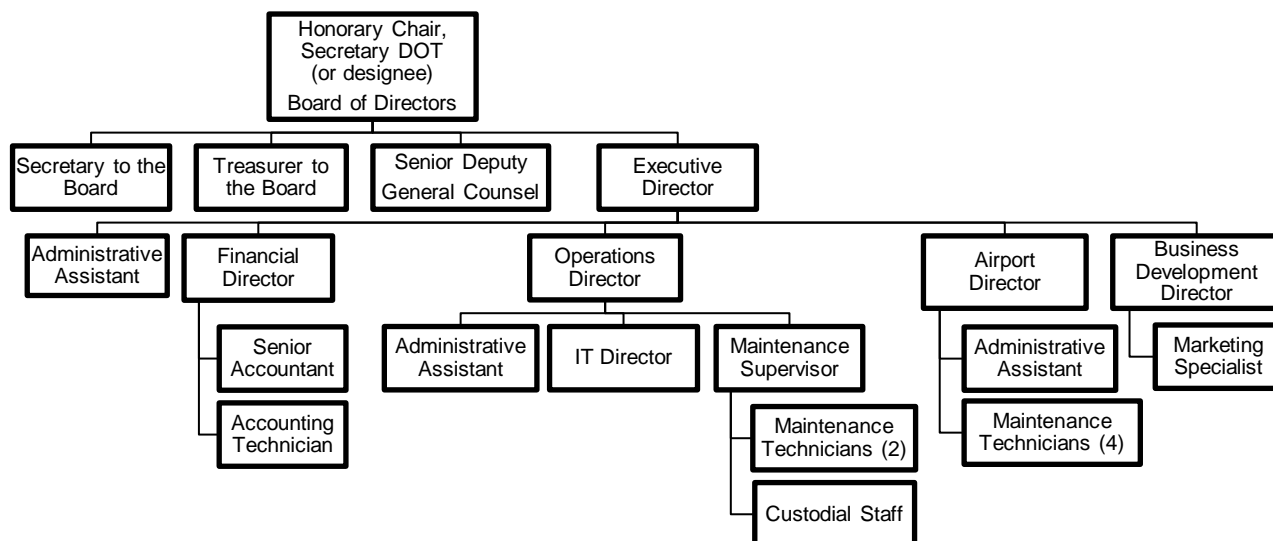
NCGTP generates roughly \$1.3 million per year from lease of its property and buildings.

## Current Organizational Chart



**Figure F-1:** Current NCGTP Organization (2017)

## Standard Capacity Organizational Chart



**Figure F-2:** Proposed NCGTP Organization to Provide Standard Capacity and Capabilities

# NORTH CAROLINA GLOBAL TRANSPARK



## 2017 Annual Report

Citizens of North Carolina,

The North Carolina Global NC GTP (NC GTP) continually focused on a number of areas that offer opportunities for the NC GTP to grow and become more beneficial to the citizens of North Carolina in the 2017 fiscal year. These efforts included a continuation of the work begun in the 2016 fiscal year which concentrated on:

- Increasing revenue
- Creating jobs & promoting economic development
- Reducing debt
- Reducing operating expenses
- Planning for the future

The largest employer at the NC GTP, Spirit AeroSystems, a component manufacturer for the Airbus 350 aircraft, saw a significant increase in employment. The on-demand charter aircraft company, Exclusive Jets LLC, saw a marked increase in aircraft and employment in fiscal year 2017. With both employment increase, the NC GTP resulted in a 70% increase in total private sector employment and a 76% increase in total payroll at the NC GTP since fiscal year 2015.

The NC GTP also played a large role in the Hurricane Matthew emergency management efforts (search, rescue and recovery) by serving as the State's eastern command center and the FEMA field office. The NC GTP was utilized as a base camp for over 1,000 workers and first responders throughout the various disaster rescue missions and recovery initiatives.

The NC GTP continues to implement measures to improve efficiency, provide improved customer service and leverage existing infrastructure that will contribute to job creation and the economic growth of the NC GTP, region and across state of North Carolina.

**Richard W. Barkes**  
Interim Executive Director

## OUR TENANTS



Henley Aviation





## **EXECUTIVE SUMMARY**

The North Carolina Global TransPark (NC GTP) provides a lot of positive growth and community outreach for the eastern part of North Carolina. The NC GTP hosted a regional Manufacturing Day that involved over 600 children from five counties, over 10 manufacturing facilities opened their doors for student tours, and over 60 manufacturing and industrial partners participated to promote career awareness and their viability in eastern NC. The NC GTP has also worked with the United States Military branches by hosting training exercises for the Marine Corps, Navy, Air Force and Army. These scheduled exercises provided revenue for the NC GTP, publicized the NC GTP and supported our Armed Forces. In addition to the improved private sector activity at the NC GTP, the North Carolina Department of Public Safety, Emergency Management section, has expanded their footprint by leasing the Administration Building of the Spirit Composite Center of Excellence Complex in its entirety. This is a direct result of the role the NC GTP played in the Hurricane Matthew efforts by serving as the eastern command center for the rescue and recovery efforts for the state east of Interstate 95. The North Carolina Department of Transportation is locating the Highways Division 2 office at the NC GTP. The Lenoir County Sheriff Department is an occupant at the NC GTP. The Lidl grocery store chain established a presence in eastern North Carolina and conducted all staff development training at the NC GTP, this encompassed over 500 employees for 6 locations from Morehead City to Rocky Mount.

In FY 2017, the NC GTP had another positive year in job growth rate for private sector employment above what was reached in FY 2016. This resulted in a 15% increase in employment and a 35% increase in total payroll. Overall, there has been a 70% increase in jobs and a 76% increase in payroll since 2015.

The NC GTP concentrated on establishing and developing partnerships with state and local economic development groups. This resulted in various outreach meetings to combine marketing efforts with the surrounding counties economic development and manufacturers organizations. In addition, there were coordination efforts with the Gateway Partnership, NC East Alliance, NC Southeast and the North Carolina Economic Development Partnership.

The NC GTP continues to refine and develop a diverse tenant base that is capable of growing its business, creating jobs and contributing to the State and global economy.

## **HIGHLIGHTS**

The North Carolina Global TransPark served as the primary location for the eastern North Carolina Hurricane Matthew rescue and recovery efforts.



During Hurricane Matthew NC GTP housed approximately 1,000 rescue workers during the entire disaster relief operations in various locations around the airport. The NC GTP also acted as the logistical hub for first responders in eastern NC. The terminal building and surrounding area was turned into a little city, that housed the first responders, specifically boat and air crews. Additionally, NC GTP functioned as the Eastern Lenoir County Division of Highways staging area with equipment and men on a 24/7 basis for response out of the NC GTP Aircraft Rescue and Fire Fighting facility. First responders were from all over the United States and North Carolina. They consisted of members from the Coast Guard, National Guard, local water rescue units out of Charlotte, multiple other NC communities, and a boat and water rescue group from the state of Missouri. Members also include the State Emergency Management assets hailing from the Highway Patrol (Ground and Air), FEMA and all branches of the military. The Administrative Building as part of the Spirit AeroSystems Center of Excellence Complex served as the command center. The air operations during the disaster relief efforts were based at the NC GTP since the 11,500-foot runway is capable of handling any type of aircraft. FEMA set up its operation at the airport and housed a longer-term recovery office at the NC GTP.

Spirit AeroSystems is continuing to utilize an Antonov-124 aircraft to accommodate the demand for transporting the Airbus 350 center fuselage section being constructed at the NC GTP. For fiscal year 2017, Spirit utilized the Antonov-124 seventy-three times and generated over \$132,000 in revenue for the NC GTP.

The NC GTP is partnering to host an annual Manufacturing Day featuring the NC TransPark with Lenoir County Manufacturers Association and surrounding Economic Developers. The NC GTP hosted its first Manufacturing day encompassing the reach of over 650 children from five counties (Craven, Greene, Lenoir, Jones, and Wayne) and over 60 manufacturing and industry partners to promote career awareness and their viability in eastern North Carolina.



The State Division of Aviation issued an Airfield Lighting Rehab and Improvement and Electrical Vault Relocation grant. As a result, the NC GTP awarded a contract in November to Cedar Peaks Enterprise, Inc. to complete the rehabilitation and upgrades to the airfield lighting system for relocating and updating the electrical vault. Some of the sections of the airfield lighting system date back to the original airfield construction in World War II. The FAA completed the replacement of the approach lighting system. The approach lighting system is a safety feature necessary for guiding aircraft during poor weather and low visibility. In addition to the electrical project, the Division of Aviation awarded an \$8 million pavement rehabilitation grant that will concentrate on the runway and critical apron areas.

The NC GTP hosted multiple Military training exercises, the largest of those being conducted by the United States Marine Corp for several different occasions.



The NC GTP was provided with revenue and publicized support of our Armed Forces. This effort has gained a lot of interest for the NC GTP from multiple military units outside the state and gives the military a benefit of real world locations for their training. The NC GTP is slated to host a 2-week training exercise in FY 2018 for approximately 1,000 Marines. In addition to the ground training exercises, the NC GTP continues to support the military aviation training missions and has assisted in facilitating over 10,000 documented operations annually. This consists of all branches of the military and almost every type of aircraft in the military fleet.

The NC GTP successfully completed its annual Federal Aviation Administration Part 139 inspection of the airfield. Additionally, the NC GTP is working with federal and state officials to continue raising support and awareness for the Air Traffic Control Tower program. This program is vital to Kinston Regional Jetport's operations and industry recruitment for the NC GTP.

The NC GTP recently named Mr. Allen Thomas as the Executive Director. He is a native of eastern North Carolina, possesses extensive experience in business development, and is the former mayor of the City of Greenville. The NC GTP is excited about this new leadership and his vision for the future growth of the Park.

## **FINANCE AND ADMINISTRATION**

The North Carolina Global TransPark continues to make more efficient uses of its financial and administrative practices. The NC GTP's unrestricted net position (funds that can be used for future needs) increased 12% as a result of an overall reduction in expenses. Revenues have increased by comparison to this time last year. This is a direct result of an increase in investment earnings as a result of increased savings and improved investments. Utility costs continue to be reduced; they are down 25% from the prior year.

The NC GTP will continue to work diligently towards reducing debt and operating expenses while increasing revenues by creating jobs, promoting economic development, and serving as an asset for Lenoir County, eastern North Carolina and the state of North Carolina.

### **Annual Audit Report**

The annual audit was completed in December 2017 and the final Audit Letter was received on January 30, 2018. The results of the audit disclosed no deficiencies in internal control over financial reporting and did not reveal any instances of non-compliance or other matters that are required to be reported under *Government Auditing Standards*.

A copy of the audit is attached to this report.

## **BUSINESS DEVELOPMENT**

### **Marketing**

The NC GTP as part of its overall marketing effort established new partnerships and continued to foster existing relationships with Lenoir, Wayne, Craven, Greene, and Jones Counties economic development and manufacturers' organizations. These marketing efforts were extended to the regional NC East Alliance, NC Southeast and the North Carolina Economic Development

Partnership. The NC GTP will rely on these partners to help expand the sales capacity and reach a wider audience for economic development within the targeted industry clusters. The NC GTP submitted request for information proposals for establishing relationships with 17 new potential industries and future expansions.

## **Foreign Trade Zone**

The NC GTP is a Magnet Site in Foreign Trade Zone (FTZ) #214. FTZ #214 continues to be an economic driver for the state economy within the 2016 calendar year, with \$250 million-\$500 million in goods shipped into the Zone. The zone also had between \$176 million to \$355 million in total shipments during the same time frame.

Foreign Trade Zone #214 is located at the NC GTP and offers individuals and businesses within 22-counties the opportunity to import foreign goods into a duty-free zone. The N.C. Department of Transportation (NCDOT) oversees FTZ #214. The FTZ program allows U.S.-based companies to defer, reduce, or even eliminate customs duties on products admitted to the zone, providing important benefits to businesses and industries. Some of the benefits include:

- Customs duties and federal excise tax deferred on imports;
- Foreign goods and domestic goods held for export are exempt from local inventory taxes;
- Streamlined customs procedures ("weekly entry" or "direct delivery") that lower total entry fees;
- Duty/tax deferral, reduction or elimination;
- Transfers between zones with no duties;
- Reduced paperwork; and
- Destruction of damaged or substandard goods without paying duties on finished, manufactured product containing those components.

Foreign Trade Zone Utilization					
FTZ	Location	# of Users	Merchandise Received (in millions)	Total Shipments (in millions)	Employees
57	Mecklenburg County	1	\$100-250 mil	\$100-250 mil	501-750
93	Raleigh-Durham	5	\$250-500 mil	\$181-365 mil	2,501-3,000
214	SE North Carolina(NCGTP)	3	\$250-500 mil	\$176-355 mil	2,001-2,500
230	Piedmont Triad	9	\$1,000-5,000 mil	\$1,031-5,075 mil	2,501-3,000

*Source: 2016 Annual Report of the Foreign Trade Zone Board, Appendix D*

**Table 1 contains FTZ utilization data from the four active North Carolina FTZ's.**

## PRIVATE SECTOR EMPLOYMENT

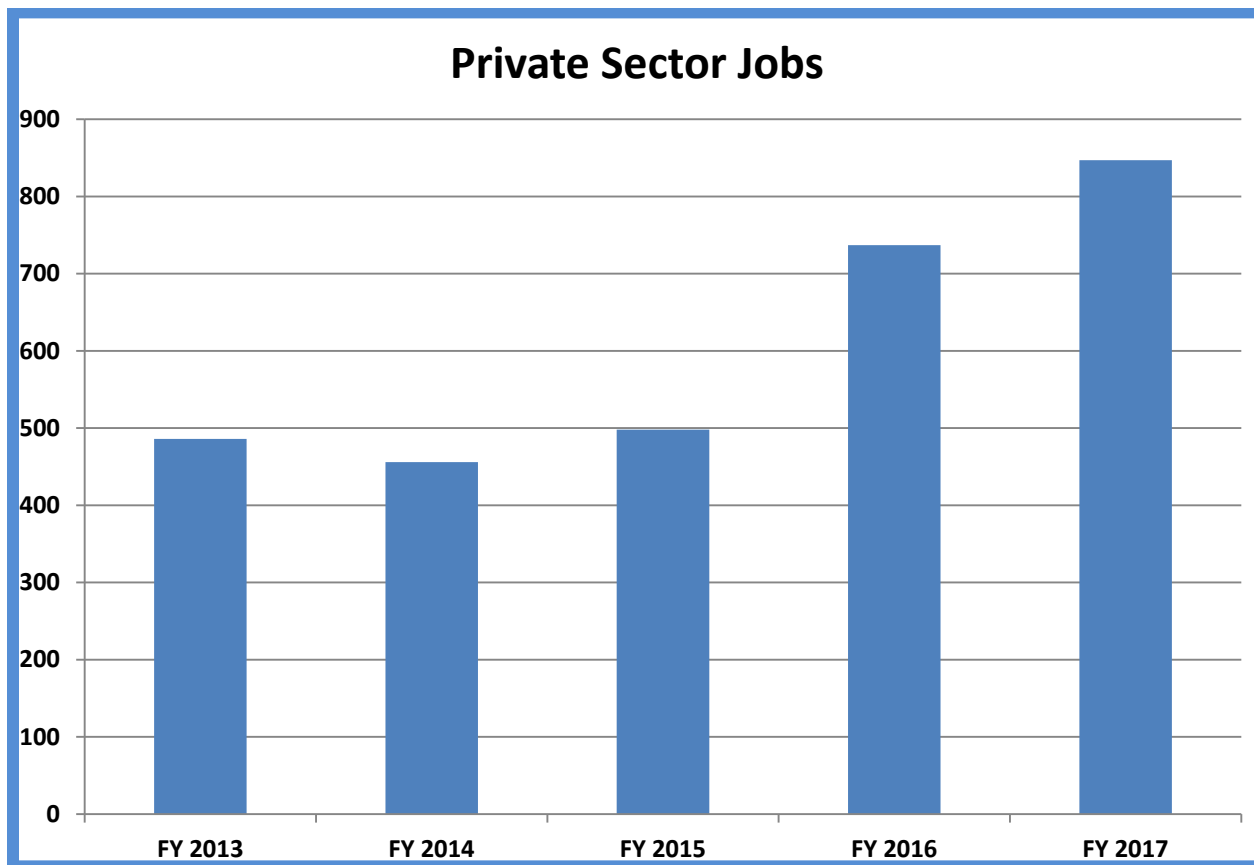
The private sector employment reported in Table 2 (below) reflects an overall increase of 110 jobs from the FY 2016 report. This is an overall increase of 349 direct jobs in the last 2 fiscal years. This number does not reflect contract employees at the park. The majority of these jobs are a result of the Spirit AeroSystems expansion. This indicates a 15% increase of jobs over the 2016 numbers and 35% increase in total payroll. The comparison in Table 6 is based on the statistics provided by the NC Department of Commerce and our tenant survey shown in Table 2. The average salary for the State is \$52,513; \$34,970 for eastern NC; \$37,648 for Lenoir County and \$48,623 for the NC GTP. Table 6 shows that the average salary at the NC GTP is approximately 7.4% lower than the State average, 34% above Eastern NC average and 29% above the Lenoir County average.

PRIVATE SECTOR EMPLOYMENT AT GLOBAL TRANSPARK, 6/30/17*					
JOB CLASSIFICATIONS	NUMBER OF FULL TIME JOBS	AVERAGE SALARY	MEDIAN SALARY	TOTAL PAYROLL	
Provide general occupation/job classifications for permanent full-time jobs	Number of permanent full-time jobs in each classification as of 6/30/2017	Average salary of permanent full-time employees in each job classification	Median salary of permanent full-time employees in each job classification	Total payroll for all employees in each classification	
A & P Mechanic	18	\$86,973	\$37,856	\$758,622	
Avionics Technician	2	\$41,288	\$41,288	\$82,576	
Cass Auditor	0	\$0	\$0	\$0	
Chief Inspector	0	\$0	\$0	\$0	
Ground Maintenance	4	\$54,781	\$30,514	\$103,314	
Inspector	6	\$45,915	\$44,291	\$275,490	
Maintenance Manager	1	\$60,200	\$0	\$60,200	
Lead A & P Mechanic	10	\$101,171	\$44,138	\$468,939	
Maintenance Training	1	\$42,078	\$42,078	\$42,078	
Parts Clerk	4	\$76,378	\$34,320	\$145,934	
Parts Manager	1	\$71,698	\$71,698	\$71,698	
Purchasing Agent	3	\$114,242	\$44,242	\$184,242	
Records Planner	4	\$102,881	\$52,881	\$202,881	
Training Manager	1	\$60,715	\$60,715	\$60,715	
Warehouse Manager	6	\$99,210	\$180,349	\$400,439	
Production Worker	483	\$30,317	\$60,320	\$18,089,060	
Technician	0	\$0	\$0	\$0	
Engineer	0	\$0	\$0	\$0	
Salaried	122	\$59,071	\$66,600	\$8,307,176	
Executive	4	\$195,500	\$215,000	\$789,000	
Warehouse Assistant Manager	2	\$52,500	\$105,000	\$105,000	
Office Manager	2	\$67,500	\$70,000	\$135,000	
President / CEO	1	\$100,000	\$100,000	\$100,000	
Sales VP	1	\$100,000	\$100,000	\$100,000	
Warehouse Workers	23	\$26,686	\$27,040	\$613,778	
Administrative Workers	2	\$67,468	\$67,468	\$67,468	
Management	45	\$111,971	\$228,050	\$3,985,657	
Pilot	86	\$63,624	\$0	\$5,471,650	
Sales/Dispatch	15	\$37,520	\$0	\$562,800	
<b>TOTAL</b>	<b>847</b>	<b>\$ 1,869,685.84</b>	<b>\$ 1,723,848.00</b>	<b>\$ 41,183,717.00</b>	

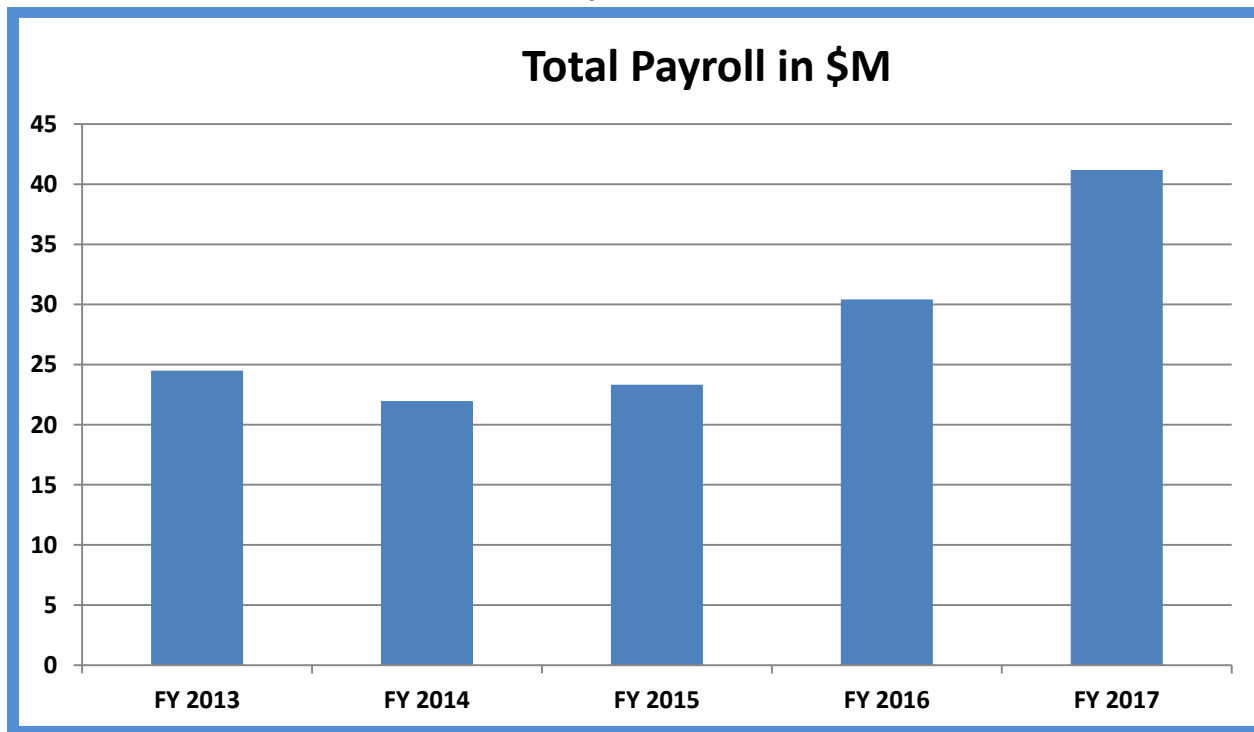
Table 2 – Source – NC GTP Annual Tenant Survey



## **PRIVATE SECTOR CHARTS AND DATA**



**Table 3 – Source – NC GTP Annual Tenant Survey**



**Table 4 – Source – NC GTP Annual Tenant Survey**

## **PRIVATE SECTOR CHARTS AND DATA (CONT)**

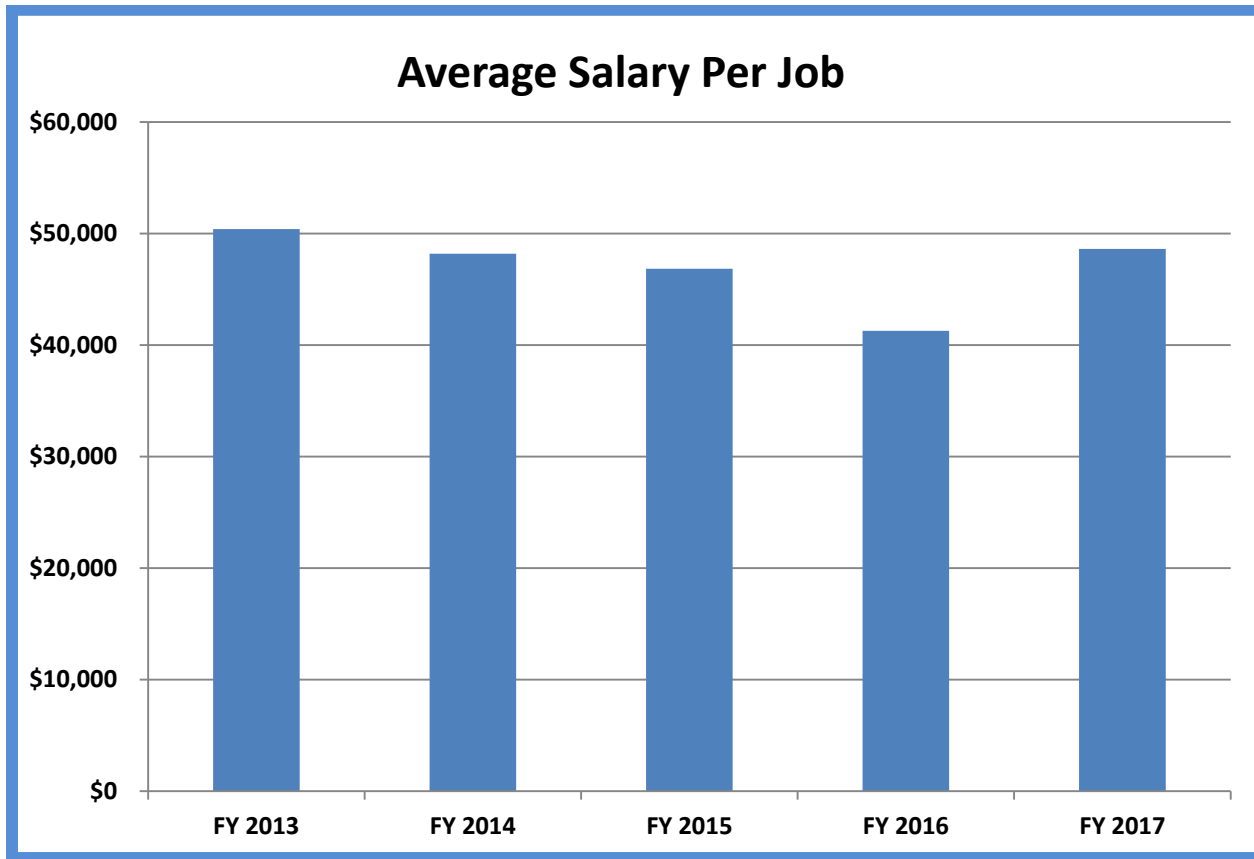


Table 5 – Source – NC GTP Annual Tenant Survey

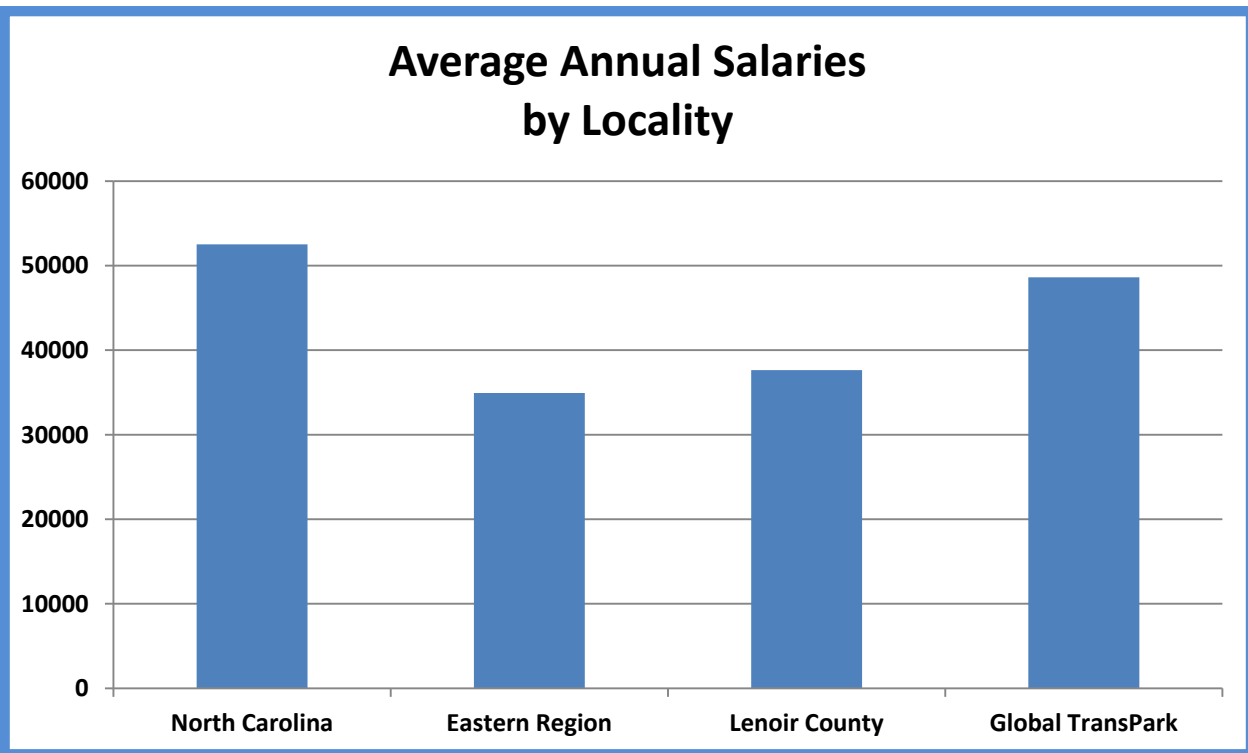


Table 6 – Source – Dept. Commerce/NC GTP Tenant Survey



3800 Highway 58 North  
Kinston, N.C. 28504  
252-523-1351  
[www.ncNC GTP.com](http://www.ncNC GTP.com)

# **Appendix G**

## **Asset Maintenance**

This page left intentionally blank

## Appendix G – Asset Maintenance

### Contents

Facilities Condition .....	G-2
Airfield .....	G-3
Airfield Renewal Recommendations .....	G-5
Vehicles and Equipment .....	G-6
Asset Inventories.....	G-6



## Facilities Condition

Many of the existing buildings within the NCGTP complex are at least 15 to 20 years old and in need of significant repair and refurbishment. Many building components, systems, and equipment (roofing, lighting, HVAC, etc.) have reached or exceeded their life expectancy, without the benefit of needed renewals. Building facades and interiors, particularly in the Spirit AeroSystems Composite Center of Excellence need to be improved and modernized as does the A/V technology. The terminal building, opened in 1978, has remained mostly unoccupied since commercial air service to Kinston ceased over 10 years ago. See following page for complete list of NCGTP buildings.

NCGTP also includes numerous interior roadways and parking areas. As for the buildings, the parking facilities are suffering from deferred maintenance, with immediate need for crack sealing of more than 200,000 square feet of asphalt concrete to protect its long-term integrity. Parking lot lighting is also in need of modernization.



**Figure G-1:** NCGTP parking areas in need of preventative maintenance.

## Airfield

Existing airfield assets include:

### Pavement

- Runway 05-23 – 11,500 feet x 150-feet runway – Asphalt
- Full Parallel Taxiway – Asphalt
- Main Apron – ~675,000 square feet – Asphalt
- Three miscellaneous - Concrete and Asphalt
- One main cargo apron - Concrete

### Lighting and NAVAIDS

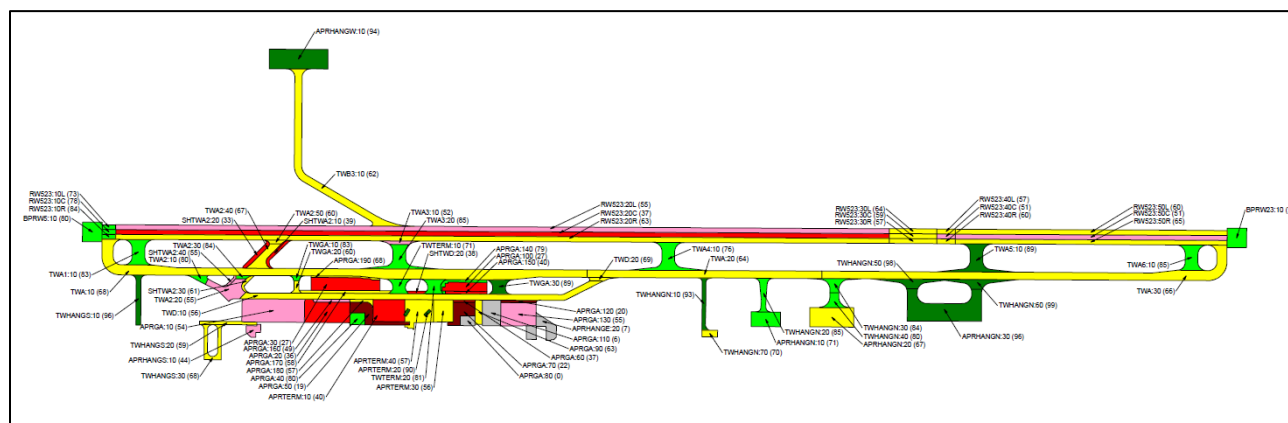
- Runway 05 Instrument Landing System (ILS) Glide Slope - The ILS is the standard navigation aid that utilizes fixed radio beams to provide aircraft final approach glide slope guidance in instrument landing conditions (low visibility).
- Runway 05 Instrument Landing System Localizer - The ILS is the standard navigation aid that utilizes fixed radio beams to provide aircraft final alignment with the runway centerline in instrument landing conditions (low visibility).
- Runway 05 Medium Approach Light System with Rail (MALSR) Approach Lighting - Approach lighting provides a reference in low visibility conditions to transition from the instrument phase of approach to its visual phase.
- Runway 23 - Runway End Identifier Lighting (REIL) – REILs provide guidance to aircraft to locate the end of the runway during landings.
- Runway Distance Remaining Signs – provide runway distance remaining information to aircraft during takeoff and landings.
- Runway Edge Lighting – High Intensity Runway Lighting defines the runway edge, threshold, and end lights as well as provides airfield signage and distance remaining markers.
- Runway 05 and Runway 23 Precision Approach Path Indicator - The Precision Approach Path Indicator (PAPI) system enables the pilot to intercept and hold to the proper glide slope, by visual means, during the last portion of the landing descent.
- Taxiway Edge Lighting - Medium Intensity Taxiway Lighting defines the taxiway edge.
- Airfield Signage Lighting – Airfield signage provides guidance to taxiway aircraft.

The NCDOT completed an evaluation of the pavement condition at NCGTP on February 2016. The pavement evaluations are divided into manageable sub-sections that are approximately 5,000 square feet in area. During the inspection, all the pavement is observed with distress types, severities and quantities recorded. The inspection data was entered into a pavement management system so a pavement maintenance and repair plan can be developed. Following FAA and ASTM standards, the Pavement Condition Index (PCI) is calculated and pavements are assigned a PCI Category.

**Table G-1: PCI Categories and Ranges**

PCI Range	PCI Category	Note
0 -10	Failed	Grant Eligible for Rehabilitation
11 – 25	Serious	Grant Eligible for Rehabilitation
26 – 40	Very Poor	Grant Eligible for Rehabilitation
41 – 55	Poor	Grant Eligible for Rehabilitation
56 – 70	Fair	Grant Eligible for Maintenance
71 – 85	Satisfactory	---
86 – 100	Good	---

Pavement sections with a PCI lower than 55 will be prioritized for major repair and rehabilitation (i.e. reconstruction, overlay, and certain surface treatments) and are eligible for state and federal funding from the NCDOT Division of Aviation. Pavements with a PCI between 55 and 75 will be considered for maintenance level repairs such as crack sealing, minor patching, and seal coating via the NCDOT - Division of Aviation's *Maintenance and Safety Preservation Program*.



**Figure G-2: Overall Assessment of NCGTP Airfield Pavement Condition (NCDOT, February 2016)**

Based on the NCDOT condition assessment, the area-weighted average PCI evaluation on the various parts of the NCGTP airfield range from satisfactory to poor:

- Runway: 54 (Poor) \* runway pavement improvements are underway
- Aprons: 54 (Poor)
- Taxiways: 69 (Fair)
- Blast Pads: 76 (Satisfactory)
- Shoulders: 42 (Poor)

In total, more than 5 million square feet of the NCGTP airfield are eligible for funding for preventative maintenance or major rehabilitation. NCGTP's largest asset, the 11,500 ft. runway, is undergoing \$8,000,000 of funded upgrades scheduled for completion in 2018. This includes selected pavement replacements of the runway and selected taxiway areas.

**Table G-2:** NCGTP Pavement Inventory by Funding Category

PCI Range	Maintenance Funding Category	Area (SF)
0 - 55	Major Rehab Funding	~1,288,379
55 - 75	DOA Preventative Funding	~3,186,991
75 - 100	Airport Preventative Funding	~866,302

## Airfield Renewal Recommendations

By inspection, the existing airfield assets at the NCGTP are in need of significant repair and maintenance. To sufficiently deal with these high capital cost, the NCGTP will implement a multi-year, robust capital plan that allows the airport to maintain its current facilities and provide for new improvements. Projects will be broken down into smaller units strategically prioritized for implementation as funding is available.



**Figure G-3:** Airfield pavement condition

Airfield repairs will be prioritized by:

1. Runway (underway, completion 2018)
2. Taxiway (underway, completion 2018)
3. Aprons

To effectively address the capital needs of its important airfield assets, the NCGTP will utilize available resources within the State of North Carolina to include:

- Grant funds from the NC Division of Aviation – the NC Division of Aviation manages the *Airport Improvement Program*. All major rehabilitation projects should be eligible at the NCGTP should be eligible for grant funding. The NCGTP should work to have a multi-year CIP funding plan with the NC Division of Aviation.
- Maintenance funds from the NC Division of Aviation - the NC Division of Aviation manages the *Maintenance and Safety Preservation Program* to improve the overall condition of the pavement and extend the life expectancy of the pavement.
- For Strategic Improvement Projects that improve capacity at the NCGTP, projects will be submitted to the Strategic Transportation Initiatives program for scoring / evaluation in competition for funding with all the other transportation projects within the NCDOT.

- **FAA Funding Managed by the NC Division of Aviation** – As a FAA block grant state, the NC Division of Aviation manages the eligible FAA funding for the NCGTP. The NCGTP should strategically complete for the FAA funds and be used to support the overall CIP.
- **Local Highway Division Resources** – the local division engineers have numerous maintenance and asphalt contracts that can be utilized by the NCGTP. Some landside projects and lawn mowing operations may be eligible under the Highway Division or may become a share responsibility.
- **Dedicated Annual Funding from the NC General Assembly via the NCDOT** – Within the annual budget of the NCGTP, the line item for maintenance and small projects should be requested. The line item amount should be for \$500k (minimum).

## Vehicles and Equipment

In addition to the repairs to fixed facility assets noted above, significant reinvestment in NCGTP equipment is required to support the ongoing operation and maintenance of the airfield and landside industrial complex.

**Table G-3.** NCGTP Equipment and Vehicles Proposed for Near-Term Replacement or Renewal

Equipment	#	Useful Life	Average Age	Original Purchase Cost	Remaining Useful Life	Replacement or Renewal Cost
Tractors	2	30-35 years	33 years	\$55,000	0	\$230,000
Cutters/Mowers	3	25-30 years	26 years	\$40,000	0	\$60,000
Airfield Sweeper (new)	1	n.a.	n.a.	n.a.	n.a.	\$300,000
Deicer (renewal)	1	15 years	17 years	\$190,000	0	\$50,000
Truck	2	20 years	20 years	\$43,000	0	\$90,000
Lift (new)	1	n.a.	n.a.	n.a.	n.a.	\$90,000
Fire truck (new)	1	n.a.	n.a.	n.a.	n.a.	990,000
Fire truck (renewal)	1	20 years	27 years	\$283,000	0	\$270,000
<b>Total, Near-Term Equipment Replacement or Renewal Need</b>						<b>\$2,080,000.00</b>

## Asset Inventories

Inventories of NCGTP depreciable assets are provided on the following pages, identifying original acquisition cost, year put into service, anticipated useful life, asset age, remaining useful life, calculated value of deferred renewal or replacement cost, and estimated cost of immediate renewal/replacement needs.



## Vehicles & Equipment

Asset	Class Descr.	Cap. Date	Acquis.val.	Asset Description	Asset Age (yrs)	Useful Life	Useful Life Rem'g	Deferred Renewal/ Replacement Cost	Renewal / Replacement
210000064	VEHICLES	9/1/1981	\$37,440.00	Ford Tractor	36.9	35	-2	\$37,440.00	
210000065	VEHICLES	7/10/1987	\$17,010.00	Tractor	31.0	30	-1	\$17,010.00	
210000024	VEHICLES	7/24/1987	\$7,875.00	Bush Hog	31.0	30	-1	\$7,875.00	
210000066	VEHICLES	10/3/1989	\$8,289.00	JD Lawn Tractor	28.8	30	1	\$0.00	
210000025	VEHICLES	9/28/1990	\$5,665.00	Mounted Sweeper	27.8	30	2	\$0.00	
210000067	VEHICLES	6/30/1991	\$121,299.00	Fire Truck	27.0	25	-2	\$121,299.00	
210000068	VEHICLES	6/30/1992	\$155,438.00	Fire Truck Refurb	26.0	25	-1	\$155,438.00	
210000122	EQUIPMENT	8/31/1992	\$8,286.00	Gearbox (4) Batwing	25.8	25	-1	\$8,286.00	
210000123	EQUIPMENT	11/20/1992	\$2,068.00	Rotary Cutter	25.6	25	-1	\$2,068.00	
210000124	EQUIPMENT	1/6/1993	\$17,300.00	Telescope, Slope Mower	25.5	25	0	\$17,300.00	
210000069	VEHICLES	1/6/1993	\$20,851.00	Tractor 4x4	25.5	25	0	\$20,851.00	
210000070	VEHICLES	4/7/1994	\$32,085.00	94 Chevy Suburban	24.2	25	1	\$0.00	
210000071	EQUIPMENT	6/30/1996	\$15,000.00	Fork Lift-Allis Chalmers	22.0	20	-2	\$15,000.00	
210000126	EQUIPMENT	6/30/1996	\$5,915.85	ARFF Vehicle Add	22.0	20	-2	\$5,915.85	
210000127	EQUIPMENT	6/30/1996	\$9,105.20	Maint Platform-GM	22.0	20	-2	\$9,105.20	
210000130	EQUIPMENT	6/30/1996	\$22,322.00	Mobile Generator-NAVAIR	22.0	20	-2	\$22,322.00	
210000131	EQUIPMENT	6/30/1996	\$8,137.00	Tug-PSI	22.0	20	-2	\$8,137.00	
210000072	VEHICLES	6/30/1996	\$10,843.00	Van-GMC	22.0	20	-2	\$10,843.00	
210000132	EQUIPMENT	6/30/1997	\$14,590.00	Buffalo Rescue System	21.0	20	-1	\$14,590.00	
210000133	EQUIPMENT	6/30/1997	\$4,079.00	Snow Blade Meyer ST-7-5	21.0	20	-1	\$4,079.00	
210000134	VEHICLES	6/30/1997	\$89,737.00	Tennant Sweeper 830	21.0	20	-1	\$89,737.00	
210000222	VEHICLES	6/30/1997	\$19,516.00	97 Ford Truck (Maint)	21.0	20	-1	\$19,516.00	
210000135	EQUIPMENT	6/30/1998	\$17,950.48	GIS System	20.0	20	0	\$17,950.48	
210000223	VEHICLES	6/30/1998	\$7,300.00	John Deere 2040 Diesel Tractor	20.0	20	0	\$7,300.00	
210000224	VEHICLES	6/30/1998	\$14,761.00	John Deere Tractor/Mower	20.0	20	0	\$14,761.00	
210000029	COMM EQUIP	5/1/1999	\$25,529.10	Sprint	19.2	20	1	\$0.00	
210000018	VEHICLES	9/29/1999	\$15,812.76	Toro Tractor	18.8	20	1	\$0.00	
210000225	VEHICLES	9/29/1999	\$23,116.11	99 Ford F150 Pickup	18.8	20	1	\$0.00	
210000140	EQUIPMENT	1/26/2000	\$17,306.07	CCAir Equipment (Airport)	18.4	20	2	\$0.00	
210000226	VEHICLES	4/28/2000	\$17,350.95	John Deere Tractor/Mower (ETC)	18.2	20	2	\$0.00	
210000143	EQUIPMENT	8/10/2000	\$5,231.58	Security system - ETC	17.9	20	2	\$0.00	
210000230	VEHICLES	9/1/2000	\$21,371.29	2000 Dodge Ram 2500 Maxiwagon-E	17.8	20	2	\$0.00	
210000160	COMM EQUIP	9/21/2000	\$43,284.04	Robotic Camera & Acc. (ETC)	17.8	20	2	\$0.00	
210000157	COMM EQUIP	10/27/2000	\$139,963.93	High tech equipment (Engineering) -	17.7	20	2	\$0.00	
210000158	COMM EQUIP	10/27/2000	\$75,947.74	High tech equipment (ETC)	17.7	20	2	\$0.00	
210000141	EQUIPMENT	11/22/2000	\$20,425.00	Mobile Belt Loader (Airport)	17.6	20	2	\$0.00	
210000142	EQUIPMENT	11/22/2000	\$15,025.00	Wollard Passenger Stair Unit (Airport)	17.6	20	2	\$0.00	
210000229	VEHICLES	11/30/2000	\$5,362.00	Terasco Backhoe Trailer	17.6	20	2	\$0.00	
210000228	VEHICLES	12/12/2000	\$71,176.88	Snow Removal Equipment-Poole (A	17.6	20	2	\$0.00	
210000227	VEHICLES	12/22/2000	\$57,034.00	New Holland Tractor	17.5	20	2	\$0.00	
210000032	COMM EQUIP	7/20/2001	\$7,346.53	Fiber Optic Installation	17.0	15	-2	\$7,346.53	
210000266	VEHICLES	11/6/2001	\$11,523.96	Snow Removal Equipment-Attache	16.7	15	-2	\$11,523.96	
210000120	VEHICLES	12/10/2001	\$186,603.00	Deicer Equipment (AIP-23)	16.6	15	-2	\$186,603.00	
210000034	EQUIPMENT	11/11/2002	\$6,819.33	Eiki LC-X986 Projection System ETC	15.6	15	-1	\$6,819.33	
210000033	COMM EQUIP	2/15/2003	\$168,374.33	Fiber Optic Installation - (ETC)	15.4	15	0	\$168,374.33	
210000234	EQUIPMENT	6/30/2003	\$74,993.40	Entrance Signage (AIP 23 - Airport)	15.0	15	0	\$74,993.40	
210000236	VEHICLES	4/30/2004	\$9,202.00	Woods 918ORD-2 Turf Batwing Mow	14.2	15	1	\$0.00	
210000144	EQUIPMENT	4/1/2005	\$17,535.50	TW2025 Boarding Ramp	13.3	15	2	\$0.00	
210000237	EQUIPMENT	6/30/2006	\$24,377.88	Runway Signage -State Block Grant	12.0	20	8	\$0.00	
210000238	VEHICLES	10/10/2006	\$15,515.00	Kubota F3680-F Front Mount Mower	11.7	10	-2	\$15,515.00	
210000163	COMM EQUIP	12/1/2006	\$4,222.00	Fiber Optic Installation - (LCC)	11.6	10	-2	\$4,222.00	
210000164	COMM EQUIP	12/1/2006	\$8,616.00	Fiber Optic Installation - ARFF Build	11.6	10	-2	\$8,616.00	
210000076	EQUIPMENT	6/30/2007	\$37,520.00	KCI BAR 2030 Aircraft Passenger Lo	11.0	10	-1	\$37,520.00	
210000232	VEHICLES	6/30/2008	\$9,800.00	Woods Batwing Cutter	10.0	10	0	\$9,800.00	
210000233	VEHICLES	6/30/2009	\$585,227.52	ARFF Vehicle (AIP-24)	9.0	10	1	\$0.00	
210000165	COMM EQUIP	8/30/2011	\$93,897.31	Fiber Optic Installation (2011 relocati	7.0	15	8	\$0.00	
210000344	EQUIPMENT	10/13/2011	\$12,119.63	2715 Bush Hog Cutter 15'	6.7	10	3	\$0.00	
210000345	VEHICLES	10/19/2011	\$15,711.68	John Deere 1435 Commercial Front	6.7	10	3	\$0.00	
210000343	EQUIPMENT	3/13/2012	\$8,856.00	XUV625I Gator John Deere	6.3	10	4	\$0.00	
210000354	EQUIPMENT	6/30/2013	\$40,875.01	Airport Gate/Arm Installation	5.0	10	5	\$0.00	
210000373	VEHICLES	4/28/2017	\$32,348.00	2017 Ford F250 White Pick-up	1.2	5	4	\$0.00	
210000374	VEHICLES	4/28/2017	\$32,348.00	2017 Ford F250 Pick-up	1.2	5	4	\$0.00	
210000375	VEHICLES	4/28/2017	\$9,760.74	John Deere Z960 M ZTRAK	1.2	15	14	\$0.00	
RENEWAL	EQUIPMENT			Genie Boom Lift (60'h w/5' jib)					\$92,997.00



Asset	Class Descr.	Cap. Date	Acquis.val.	Asset Description	Asset Age (yrs)	Useful Life	Useful Life Rem'g	Deferred Renewal/ Replacement Cost	Renewal / Replacement
RENEWAL	VEHICLES			John Deere 6130M w/Alamo MV-24 (tractor with ditch bank cutter)					\$159,000.00
RENEWAL	VEHICLES			135 HP Tractor					\$69,500.00
RENEWAL	EQUIPMENT			15' Bush Hog Mower					\$15,000.00
RENEWAL	EQUIPMENT			Kubota 72 in rear discharge deck for mowing airfield lights					\$23,000.00
RENEWAL	VEHICLES			Utility trailer					\$3,200.00
RENEWAL	EQUIPMENT			Ford F150 (x2)-					\$86,200.00
RENEWAL	EQUIPMENT			2HD 7.5' Snow Plow					\$3,200.00
RENEWAL	EQUIPMENT			John Deere Gator					\$10,000.00
RENEWAL	EQUIPMENT			Cyclone / Buffalo Turbine Blower					\$5,200.00
RENEWAL	EQUIPMENT			Bush Hog A-boom side mower					\$18,000.00
RENEWAL	EQUIPMENT			Sweeper Truck Repairs					\$27,500.00
RENEWAL	EQUIPMENT			Deicer Repairs					\$45,000.00
RENEWAL	EQUIPMENT			Airfield Sweeper					\$290,000.00
RENEWAL	EQUIPMENT			Fire Trucks - upgrade to FAA Part 139 (Class D) x 2					\$995,000.00
RENEWAL	EQUIPMENT			Fire Trucks - repair (2)					\$270,000.00
RENEWAL	COMM EQUIP			fiber optic					
RENEWAL	COMM EQUIP			AV Equipment Room 148 - upgrade					\$34,221.34
RENEWAL	COMM EQUIP			AV Equipment Room 152 - upgrade					\$47,283.69
RENEWAL	COMM EQUIP			10 workstations & monitors					\$21,420.00
RENEWAL	COMM EQUIP			Back up server					\$2,500.00
RENEWAL	COMM EQUIP			Wireless Solution CCOE					\$12,905.00
Total			\$2,640,391.80		17.7	19	1	\$1,158,157.08	\$2,231,127.03

## Buildings

Asset	Class Descr.	Cap. Date	Acquis.val.	Asset Description	Asset Age (yrs)	Useful Life	Useful Life Rem'g	Deferred Renewal/ Replacement Cost	Renewal / Replacement
210000019	BUILDINGS	7/1/1978	\$1,926,856.00	Terminal Bldg	40.0	50	10	\$0.00	
210000079	BUILDINGS	7/1/1988	\$282,147.00	GAT Bldg	30.0	50	20	\$0.00	
210000083	BUILDINGS	5/1/1992	\$4,944.00	Terminal Improvement	26.2	50	24	\$0.00	
210000084	BUILDINGS	8/30/1992	\$144,497.00	Airport Master	28.0				
210000085	BUILDINGS	12/22/1992	\$9,000.00	Terminal Bldg	25.5	25	-1	\$9,000.00	
210000089	BUILDINGS	6/30/1996	\$13,253.52	AERO Overhead Door (Old Fire Stati	22.0	20	-2	\$13,253.52	
210000090	BUILDINGS	6/30/1996	\$1,283,231.94	Terminal Renovation	22.0	40	18	\$0.00	
210000091	BUILDINGS	6/30/1997	\$3,352.00	AERO Overhead Door (Old Fire Stati	21.0	20	-1	\$3,352.00	
210000092	BUILDINGS	6/30/1997	\$80,693.00	Fuel Farm Improvement	21.0	20	-1	\$80,693.00	
210000095	BUILDINGS	6/30/1998	\$51,613.00	Fuel Farm Improvement	20.0	20	0	\$51,613.00	
210000097	BUILDINGS	3/21/2000	\$4,682,559.74	ETC Building	18.3	30	12	\$0.00	
210000098	BUILDINGS	3/21/2000	\$100,706.41	ETC Bldg-GTE tech upfit wiring	18.3	30	12	\$0.00	
210000099	BUILDINGS	6/30/2001	\$48,168.00	ETC Building	17.0	30	13	\$0.00	
210000100	BUILDINGS	6/30/2001	\$3,922.40	ETC Building - Project	17.0	30	13	\$0.00	
210000101	BUILDINGS	6/30/2001	\$197,685.40	Terminal Renovation	17.0	30	13	\$0.00	
210000102	BUILDINGS	6/30/2001	\$1,042,328.34	FBO Hangar #2	17.0	30	13	\$0.00	
210000103	BUILDINGS	6/30/2001	\$475,908.21	FBO Hangar #2A	17.0	30	13	\$0.00	
210000106	BUILDINGS	12/17/2001	\$831,522.12	Administration Building	16.5	30	13	\$0.00	
210000108	BUILDINGS	1/1/2002	\$36,581.11	FBO Hangar #2A	16.5	30	13	\$0.00	
210000105	BUILDINGS	4/4/2002	\$3,285,408.46	Cargo Building	16.2	30	14	\$0.00	
210000107	BUILDINGS	5/1/2002	\$294,832.23	T-Hanger Building	16.2	30	14	\$0.00	
210000104	BUILDINGS	6/30/2002	\$113,044.81	ETC Building	16.0	30	14	\$0.00	
210000109	BUILDINGS	6/30/2002	\$16,811.50	Terminal Renovation	16.0	30	14	\$0.00	
210000110	BUILDINGS	6/30/2002	\$25,900.00	Kinston Avionics Building	16.0	15	-1	\$25,900.00	
210000111	BUILDINGS	9/30/2002	\$54,821.25	AERO Renovation (Old Fire Station)	15.8	30	14	\$0.00	
210000113	BUILDINGS	6/30/2003	\$3,796.50	Cargo Building	15.0	30	15	\$0.00	
210000114	BUILDINGS	6/30/2003	\$4,556.25	Administration Building	15.0	30	15	\$0.00	
210000115	BUILDINGS	6/30/2003	\$1,480.50	T-Hanger Building	15.0	30	15	\$0.00	
210000116	BUILDINGS	6/30/2006	\$4,206,352.85	GTP-1 (120,000 sf warehouse)	12.0	30	18	\$0.00	
210000117	BUILDINGS	6/30/2006	\$1,532,476.64	GTP-3 (Workhorse Bldg)	12.0	30	18	\$0.00	
210000118	BUILDINGS	6/30/2006	\$2,412,844.12	GTP-2 (New ARFF Bldg)	12.0	30	18	\$0.00	
210000119	BUILDINGS	6/30/2006	\$136,143.00	Admin Bldg Renovation (EM)	12.0	30	18	\$0.00	
210000215	BUILDINGS	6/30/2007	\$500,796.62	Segrave Expansion	11.0	30	19	\$0.00	
210000216	BUILDINGS	6/30/2008	\$272,679.57	Segrave Aviation Office Addition	10.0	30	20	\$0.00	
210000217	BUILDINGS	6/30/2008	\$94,323.29	GAT Renovations 2008	10.0	30	20	\$0.00	
210000218	BUILDINGS	6/30/2008	\$1,522,924.20	GTP-4 (Hangar)	10.0	30	20	\$0.00	
210000219	BUILDINGS	6/30/2008	\$1,853,231.47	GTP-5 (SIS Building)	10.0	30	20	\$0.00	
210000220	BUILDINGS	6/30/2009	\$200,274.21	GTP-1 Upfit	9.0	45	36	\$0.00	
210000221	BUILDINGS	6/30/2009	\$407,136.52	Terminal Renovations - HVAC (AIP-2	9.0	30	21	\$0.00	
210000254	BUILDINGS	6/30/2010	\$144,351.70	GTP-2 Upfit	8.0	30	22	\$0.00	
210000260	BUILDINGS	6/30/2010	\$846,760.90	Terminal Building Upfit (AIP-25 HVAC	8.0	30	22	\$0.00	
210000261	BUILDINGS	6/30/2010	\$240,505.45	Training Center Building High Bay Up	8.0	30	22	\$0.00	
210000262	BUILDINGS	6/30/2011	\$233,870.90	Terminal Building Renovation (AIP-2	7.0	20	13	\$0.00	
210000263	BUILDINGS	6/30/2011	\$52,079.00	Rehab of ARFF Facility bay doors	7.0	20	13	\$0.00	
210000350	BUILDINGS	6/30/2011	\$456,170.77	GTP-7 Facility	7.0	40	33	\$0.00	
210000347	BUILDINGS	6/30/2012	\$3,703,796.24	GTP-7 Facility	6.0	30	24	\$0.00	
210000348	BUILDINGS	6/30/2012	\$1,089,440.73	GTP-1 Phase I	6.0	45	39	\$0.00	
210000361	BUILDINGS	1/31/2014	\$3,343,169.65	GTP-1 Phases II & III - NewReplacer	4.4	40	36	\$0.00	
210000363	BUILDINGS	6/30/2014	\$0.00	Professional Services - Sprint AutoClave		0	0	\$0.00	
RENEWAL	BUILDINGS			roof repairs - reseal/repaint					\$470,000.00
RENEWAL	BUILDINGS			rezone HVAC					\$75,000.00
RENEWAL	BUILDINGS			replace HVAC controls					\$92,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$65,000.00
RENEWAL	BUILDINGS			parking lot lights (11) replace fixtures					\$140,000.00
RENEWAL	BUILDINGS			Automatic door repairs/replacement					\$78,000.00
RENEWAL	BUILDINGS			Bathrooms					\$30,000.00
RENEWAL	BUILDINGS			Electrical					\$75,000.00

Asset	Class Descr.	Cap. Date	Acquis.val.	Asset Description	Asset Age (yrs)	Useful Life	Useful Life Rem'g	Deferred Renewal/ Replacement Cost	Renewal / Replacement
RENEWAL	BUILDINGS			General repairs					\$50,000.00
RENEWAL	BUILDINGS			New Interior Construction					\$280,000.00
RENEWAL	BUILDINGS			Generator repairs					\$17,500.00
RENEWAL	BUILDINGS			Lower interior ceiling					\$300,000.00
RENEWAL	BUILDINGS			IT Upgrades					\$75,000.00
RENEWAL	BUILDINGS			roof repairs					\$45,000.00
RENEWAL	BUILDINGS			HVAC repairs					\$75,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$31,000.00
RENEWAL	BUILDINGS			roof repairs - reseal					\$580,000.00
RENEWAL	BUILDINGS			HVAC					\$152,000.00
RENEWAL	BUILDINGS			flooring replace carpet with tile					\$250,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$75,000.00
RENEWAL	BUILDINGS			roof repairs					\$275,000.00
RENEWAL	BUILDINGS			parking lot lights (3) install					\$20,000.00
RENEWAL	BUILDINGS			roof repairs - reseal					\$78,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$31,000.00
RENEWAL	BUILDINGS			add self-serve gas					\$73,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$75,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$42,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$45,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$33,000.00
RENEWAL	BUILDINGS			upgrade interior lighting					\$70,000.00
RENEWAL	BUILDINGS			Loading Docks (8)					\$95,000.00
<b>Total</b>			<b>\$38,248,948.52</b>		<b>15.2</b>	<b>30</b>	<b>16</b>	<b>\$163,811.52</b>	<b>\$3,792,500.00</b>

## Landing Field and Grounds

Asset	Class Descr.	Cap. Date	Acquis.val.	Asset Description	Asset Age (yrs)	Useful Life	Useful Life Rem'g	Deferred Renewal/ Replacement Cost	Renewal / Replacement
210000055	LANDING FIELD	4/1/1979	\$884,173.00	Airside Paving & Improvements	39.3	40	1	\$0.00	
210000059	LANDING FIELD	7/1/1981	\$128,324.00	Fencing	37.0	35	-2	\$128,324.00	
210000080	LANDING FIELD	8/30/1984	\$311,521.00	Airside Paving	34.0	35	1	\$0.00	
210000063	LANDING FIELD	1/1/1988	\$2,598,121.00	R/W Extension	30.5	45	14	\$0.00	
210000173	LANDING FIELD	8/30/1988	\$1,706,714.00	R/W Grooving	30.0	40	10	\$0.00	
210000180	LANDING FIELD	7/10/1990	\$80,515.00	Lighting & Paving	28.0	40	12	\$0.00	
210000185	LANDING FIELD	12/31/1994	\$121,975.75	Fencing-AIP-11	23.5	25	1	\$0.00	
210000186	LANDING FIELD	12/31/1994	\$25,424.88	NFLIPAD-AIP-11	23.5	25	1	\$0.00	
210000191	LANDING FIELD	6/30/1996	\$500,185.74	Apron/Access Rd Rehab/T-Hangar E	22.0	20	-2	\$500,185.74	
210000192	LANDING FIELD	6/30/1996	\$9,177.72	Environmental Study	22.0	20	-2	\$9,177.72	
210000193	LANDING FIELD	6/30/1996	\$267,785.80	T-Hangar Taxilanes	22.0	20	-2	\$267,785.80	
210000194	LANDING FIELD	6/30/1997	\$4,998.00	Environmental Cleanup	21.0	20	-1	\$4,998.00	
210000195	LANDING FIELD	6/30/1998	\$202,219.00	AIP-13 Apron Access Rd	20.0	20	0	\$202,219.00	
210000196	LANDING FIELD	6/30/1998	\$2,180,280.00	Milicon Hardstand & Connector Taxi	20.0	20	0	\$2,180,280.00	
210000197	LANDING FIELD	6/30/1998	\$2,543,385.00	Milicon Overlay	20.0	20	0	\$2,543,385.00	
210000198	LANDING FIELD	12/31/1998	\$54,195.56	Apron Access Rd	19.5	20	0	\$0.00	
210000199	LANDING FIELD	7/1/1999	\$585,725.37	Runway Extension (AIP 13/15)	19.0	30	11	\$0.00	
210000202	LANDING FIELD	7/1/1999	\$111,880.73	Localizer-Tsf ffm eq (AIP-13/15)	19.0	30	11	\$0.00	
210000203	LANDING FIELD	11/30/1999	\$94,780.73	Fuel Tanks	18.6	20	1	\$0.00	
210000200	LANDING FIELD	6/30/2000	\$4,510,016.03	Runway Extension (AIP 16/17-ARFF	18.0	30	12	\$0.00	
210000201	LANDING FIELD	6/30/2000	\$163,309.91	Runway Extension (AIP19-ARFF eq)	18.0	30	12	\$0.00	
210000077	LANDING FIELD	6/30/2002	\$4,863,664.00	Runway Extension (AIP 18-Cargo Ap	16.0	30	14	\$0.00	
210000204	LANDING FIELD	6/30/2002	\$933,993.25	Runway Extension (AIP 16-ARFF Fa	16.0	30	14	\$0.00	
210000206	LANDING FIELD	6/30/2003	\$95,226.79	Runway Extension (GTP 23)	15.0	30	15	\$0.00	
210000207	LANDING FIELD	6/30/2003	\$749,228.39	Runway Extension (AIP 23-Cargo Ac	15.0	30	15	\$0.00	
210000208	LANDING FIELD	6/30/2003	\$1,305,943.42	Runway Extension (GTP 22-Land/Lig	15.0	30	15	\$0.00	
210000209	LANDING FIELD	6/30/2003	\$679,615.58	Runway Extension (GTP 21)	15.0	30	15	\$0.00	
210000210	LANDING FIELD	6/30/2003	\$9,190,852.29	Runway Extension (AIP 21-Paving/Li	15.0	30	15	\$0.00	
210000211	LANDING FIELD	6/30/2003	\$2,107,913.15	Runway Extension (AIP 18-Cargo Ap	15.0	30	15	\$0.00	
210000212	LANDING FIELD	6/30/2003	\$157,188.37	Runway Extension (GTP 18)	15.0	30	15	\$0.00	
210000205	PARKING	6/30/2003	\$95,578.00	Administration Building Parking Lo	15.0	30	15	\$0.00	
210000213	LANDING FIELD	6/30/2004	\$634,159.10	Runway Extension (AIP 20-GA apron	14.0	30	16	\$0.00	
210000239	LANDING FIELD	6/30/2004	\$38,923.00	Runway Extension (AIP 23-ILS Desig	14.0	30	16	\$0.00	
210000240	LANDING FIELD	6/30/2004	\$37,000.00	Runway Extension (GTP 24B-Mewbo	14.0	30	16	\$0.00	
210000241	LANDING FIELD	6/30/2004	\$12,003.31	Runway Extension (GTP 26 - Aero A	14.0	30	16	\$0.00	
210000242	LANDING FIELD	6/30/2004	\$55,422.97	Runway Extension (GTP 16G - Envir	14.0	30	16	\$0.00	
210000245	LANDING FIELD	7/31/2004	\$707.40	Runway Extension (AIP 21-Paving/Li	13.9	30	16	\$0.00	
210000247	LANDING FIELD	7/31/2004	\$12,205.85	Runway Extension (GTP 23)	13.9	30	16	\$0.00	
210000246	LANDING FIELD	8/27/2004	\$2,929.20	Runway Extension (GTP 21)	13.8	30	16	\$0.00	
210000248	LANDING FIELD	2/28/2005	\$300,865.66	Runway Extension (GTP 26 - Aero A	13.3	30	17	\$0.00	
210000244	PARKING	6/30/2005	\$31,500.00	Airport Terminal I Parking Lot Refurb	13.0	30	17	\$0.00	
210000214	LANDING FIELD	6/30/2006	\$854,798.85	Runway Extension (GTP 16G-Enviro	12.0	30	18	\$0.00	
210000243	LANDING FIELD	6/30/2007	\$60,738.56	ALP Update (LPA General Services)	11.0	10	-1	\$60,738.56	
210000249	LANDING FIELD	6/30/2009	\$227,590.28	Runway Extension (GTP 16G - Envir	9.0	30	21	\$0.00	
210000250	LANDING FIELD	6/30/2009	\$2,264,174.16	Runway Extension (GTP 16G-Enviro	9.0	30	21	\$0.00	
210000251	LANDING FIELD	6/30/2009	\$118,639.02	Runway Extension (GTP 24A-ILS)	9.0	30	21	\$0.00	
210000252	LANDING FIELD	6/30/2009	\$44,230.86	Runway Extension (Proj 26 Block Gr	9.0	30	21	\$0.00	
210000253	LANDING FIELD	6/30/2010	\$188,350.32	Runway Extension (AIP 26 Fencing)	8.0	30	22	\$0.00	
210000255	LANDING FIELD	6/30/2011	\$333,513.70	AIP-27 (Transverse Taxiway)	7.0	30	23	\$0.00	
210000256	LANDING FIELD	6/30/2011	\$420,328.24	AIP-28 (GA Apron Paving/Fencing)	7.0	30	23	\$0.00	
210000257	LANDING FIELD	6/30/2011	\$39,242.10	Project 28G NCDCA Grant	7.0	30	23	\$0.00	
210000258	LANDING FIELD	6/30/2011	\$1,757,387.06	Project 16G - Environmental	7.0	30	23	\$0.00	
210000259	LANDING FIELD	6/30/2011	\$3,562,197.98	Project 4G - South Cargo Apron	7.0	30	23	\$0.00	
210000352	LANDING FIELD	6/30/2012	\$259,546.36	Airfield Signage / ALP	6.0	10	4	\$0.00	
RENEWAL	PARKING			parking lot lights (7) replace fixtures					\$26,000.00
RENEWAL	PARKING			parking lot lights (2) install					\$17,000.00
RENEWAL	LANDING FIELD			airfield fencing - new gate electronics					\$100,000.00
RENEWAL	PARKING			reseal					\$75,000.00
RENEWAL	PARKING			Reconstruct lot					\$35,000.00
RENEWAL	PARKING			reseal					\$40,000.00
RENEWAL	PARKING			reseal					\$65,000.00
RENEWAL	PARKING			Reconstruct lot					\$145,000.00
Total			\$48,500,167.44		16.7	28	12	\$5,897,093.82	\$503,000.00

This page intentionally left blank

# **Appendix H**

## **Supportive Transportation Projects**



This page left intentionally blank

## Appendix H – Supportive Transportation Projects

### Contents

Highway Projects Programmed in STIP.....	H-2
Locally Planned Highway Projects.....	H-3
Rail Projects.....	H-3

## Highway Projects Programmed in STIP

There are several projects listed in the 2018-2027 NCDOT State Transportation Improvement Program (STIP) that are located in the general vicinity of the study area. Completion of these projects will further improve highway access to the NCGTP.

**Table H-1:** STIP Highway Project of Interest to NCGTP

Project No.	Description	Schedule	Impact to NCGTP
R-5703	C.F. Harvey Parkway (NC 148), construct multi-lane facility on new location between NC 58 to NC 11.	Under construction; scheduled for completion in FY 2020	Provides direct highway access to NC 11, allowing regional freight traffic access to Greenville and points north.
R-5815	Upgrade to interstate standards NC 11 between the proposed Greenville Southwest Bypass (under construction) to the C.F. Harvey Parkway Extension.	ROW- FY 2025 Let- FY 2027	Combined with R-5703, this project will increase freight connectivity to Greenville and points north.
R-5814	Widen to multi-lanes US 258 from Browntown Road (SR 1101) to the C.F. Harvey Parkway (SR 2010).	ROW- FY 2023 Let- FY 2025 to 2027	Widening US 258 provides greater regional connectivity to US 64 corridor and points north, including the Port of Virginia.
U-3618	Carey Road Extension (SR 1569); Construct multi-lanes on new location.	ROW- FY 2022 Let- FY 2024 to 2026	Provides alternate route for local traffic traveling west of Kinston.
R-2553C	Upgrade US 70 to freeway between existing freeway near Lagrange to existing freeway near Dover (includes Kinston Bypass)		Improvements to US 70 corridor allow greater freight access to the Port of Morehead City.

## Locally Planned Highway Projects

The *Kinston Comprehensive Transportation Plan* (March 2011) identifies local roadway projects that would increase connectivity to the park, including sections of a four-lane, median-divided facility that would essentially form a loop around the park.

**Table H-2:** Local Highway Projects of Interest to NCGTP

Facility	Description/Purpose
NC 58	Relocate to new location from NC 58 in northern Lenoir County to proposed US 70 Bypass. This project resembles the eastern leg of a loop around the NCGTP originally proposed in the NCGTP Master Plan. The new location would be constructed as a four-lane, median-divided facility with grade separated interchanges at existing NC 58, NC 148, NC 11/55, Tower Hill Road (SR 1810), existing US 70 and Proposed US 70 Bypass. Grade separations would be located at Taylor Heath Road (SR 1703), Tilghman Mill Road (SR 1742), Dunn Family Road (SR 1811), and two sections of rail line north of existing US 70.
GTP Northern Loop	From US 258 north of Institute Road (SR 1541) to NC 58 north of Dawson Station Road (SR 1575). Construct a four-lane, median-divided facility with full control of access on new location. This proposed 3.5 mile facility will have grade-separate interchanges at US 258 and existing NC 58.
GTP Internal Loop	From NC 58 to NC 148 (C.F. Harvey Parkway). Construct a five-lane facility on new location.
Spine Road (U-3341)	Construct a new five-lane facility with a center turn lane to serve as part of the NCGTP internal loop. (The project is not included in the 2018-2027 STIP.)
Pauls Path Road (SR 1001)	From Falling Creek Road (SR 1544) to US 258. Widen from existing two lanes to a four-lane facility. This 3.14 mile long project, in conjunction with the Carey Road Extension (STIP U-3618), will be part of a major east-west route for the city of Kinston. It will also serve the NCGTP from the west where it intersects with NC 148.
NC 58	Widen to a four-lane median-divided facility from the proposed NCGTP Northern Loop to the northern CTP planning boundary. Even with the proposed relocation of NC 58, the current NC 58 is operating over capacity.
US 258	From NC 148 (C.F. Harvey Parkway) to the proposed NCGTP Northern Loop, widen to a four-lane divided access controlled facility.
Airport Road (SR 1578)	From NC 148 (C.F. Harvey Parkway) to N. Heritage Street (SR 1570). Widen to a four-lane median-divided facility.

## Rail Projects

A proposed extension of Harvey Parkway (NC 148) from NC 58 to NC 11 is planned by NCDOT to increase road connectivity to GTP. Two designs were under consideration, Alternative 1 proposed the C.F. Harvey Parkway to connect to NC 11 at near Lemuel Dawson Road and Alternative 2 proposed the connection to connect to NC 11 at a more northerly intersection near Grainger Station Road. Based on an environmental assessment, Alternative 2 is preferred by NCDOT and most likely to be pursued. That roadway alignment is the basis for the proposed future CSX rail connection to NCGTP, since NCDOT will be purchasing right-of-way. Prior studies by NCDOT estimated the cost of this eight-mile rail connection at \$37 million.

To provide rail access to north side parcels, a conceptual alignment has also been developed by NCGTP for extension of the on-site rail spur to the north side of the runway, following an alignment parallel to the future NCGTP Spine Road. Construction of approximately 15,000 track feet of new spur track is roughly estimated to cost \$30 million.



# **Appendix I**

## **Airfield Constraints**



This page left intentionally blank

## Appendix I – Airfield Constraints

Federal and State grant assurances related to previously completed airfield improvement projects impose the following constraints on NCGTP use or disposition of the airfield and certain airside facilities:

- Any items that have received grant funding must remain operational and open to the public (i.e. terminal building, runway / taxiway pavement).
- Land owned by the airport especially near the runway cannot be sold but only leased and should be for aeronautical use.
- All airport leases should be leased at market value.
- The airport shall remain open to the general public.
- The airport shall maintain a safe airport and is required to complete all maintenance at the airport.

This page intentionally left blank

# Appendix J

## Utilities

This page left intentionally blank

## Appendix J – Utilities

### Contents

Water .....	J-2
Sewer.....	J-2
Power .....	J-3
Gas .....	J-3





## Water

### *Current Capacity at NCGTP: 10 MGD*

A main 16" waterline serves the park from the City of Kinston's distribution system with connecting six (6), eight (8), and 12 inch waterlines. A 30 MGD transmission line from the Neuse Regional Water and Sewer Authority (NRWASA) runs parallel to Hwy 58 that could be utilized by NCGTP in the future should the park require a larger volume of water. Currently the City of Kinston has a 3.09 MGD allotment from the NRWASA. The City also withdraws approximately 1.5 MGD from groundwater. Previously these wells withdrew up to 7 MGD before new State groundwater requirements caused a 75% reduction of groundwater withdrawal. These aquifers could be further examined, alongside the regulatory agencies involved to potentially withdraw more groundwater. The City's treatment plant is rated for a 15 MGD water production. It currently has a reserve capacity of approximately eight (8) MGD. The current capacity of 10 MGD stated above assumes the regional water authority would allocate the rest of the reserve capacity of the plant to NCGTP. The plant was designed with the capability to expand to 30 MGD in the future if the need arises.

### **Future Water Needs:**

- Discuss options with NRWASA and the City of Kinston for a larger allotment of water through the City of Kinston if future development requires greater water service.
- Conduct an evaluation with the regulatory agencies and the City of Kinston to determine if the City can withdraw a larger amount of water from the ground.
- If the demand for water encroaches upon the limits of production for the NRWASA water treatment plant, evaluate expansion of the plant to a 30 MGD facility.
- If future water demand for NCGTP exceeds the City's distribution system capacity, examine options for connecting into the 30 MGD transmission line along Hwy 58.



## Sewer

### *Current Capacity at NCGTP: 6.5 MGD*

The Northside Wastewater Treatment Plant owned by the City of Kinston currently serves NCGTP. It has a designed capacity of 11.85 MGD and a reserve capacity of 6.5 MGD. The main outfall sewer line for the park is 30 inches in diameter. Assuming the sewer was laid at a minimum slope, the capacity of this line would be approximately 4.5 MGD; however, it is likely the slope is greater than assumed and the actual capacity is much higher. Current average daily flow in this line is approximately 1 MGD. The northeast parcels of NCGTP currently do not have sewer on site. A preliminary engineering report previously conducted evaluated the possibility of Greene County providing service to these parcels.

### **Future Sewer Needs:**

- Update preliminary engineering report (previously prepared for Greens County) and cost estimate to serve the northern parcels so the project cost is known to serve these parcels with sewer capability.
- Further examine age, condition and capacity of the current sewer system, especially the main 30" interceptor prior to adding significant flows to the sewer system. CCTV inspection should be conducted to study pipe integrity and determine whether improvements need to be made to the sewer system.

- Build out sewer to northern parcels that are not currently being served.



## Power

*Current Reserve Capacity at NCGTP: 24 mVA*

The City of Kinston provides the majority of the power onsite to NCGTP. The City of Kinston has two substations located near the site. The Airport Road substation is 22.5 mVA and the Rouse Road substation is 30 mVA. Duke Energy also supplies power to parcels located outside the City of Kinston limits. Duke Energy has a 12.5 mVA substation near the site with minimal reserve capacity. Currently NCGTP has a reserve capacity of 24 mVA from the City of Kinston's power service. The Airport Road substation in the future has the capability of being upsized to 60 mVA via upsizing transformers at the substation.

### **Future Power Needs:**

- Evaluation of current power service, via City of Kinston and Duke Energy, to determine what additional improvements are needed if any to attract targeted industry.
- If additional capacity is needed, the City of Kinston substations should be built out since transmission capabilities are higher than service than service that is provided by the substations. The City of Kinston substations can be built to 60 mVA if future demand requires more service.
- Supply greater power service to parcels that are located outside the City of Kinston. Duke Power currently has limited reserve capacity to these sites that will limit future growth if additional capacity cannot be supplied. This additional service could be by either power supplier.



## Gas

GTP gas service is provided by Piedmont Natural Gas. Gas lines within the park consist of four (4) and eight (8) inch lines. All parcels within NCGTP have access to natural gas.

### **Future Gas Needs:**

- Determine what the limits of gas distribution are currently.
- Assess whether the current limits meet the current and future tenant needs.

This page intentionally left blank