NORTH CAROLINA
DEPARTMENT *of* **COMMERCE**

Roy Cooper
GOVERNOR

Machelle Baker Sanders
SECRETARY

2025 North Carolina Development Tier Designations

Since 2007, North Carolina has used a three-level system for designating County Development Tiers. The designations, which are mandated by state law, determine a variety of state funding opportunities to assist in economic development. This report documents the process for calculating tiers and lists counties that have changed tiers since 2024. A statewide county tier map and tier calculations are included for reference.

It's worth noting that, while the impacts of Hurricane Helene continue to affect counties across western North Carolina, those impacts are not well-captured in this year's edition of the County Development Tiers. As noted in the timelines below, the county unemployment rates are the only factor that account for Helene-related impacts to any degree for this years' Tiers. These unemployment rates are calculated as average annual rates, which this year include data from November 2023 through October 2024.

How Tier Rankings Are Calculated

The Development Tier Designation statute ([§143B-437.08](#)) provides specific guidelines for calculating annual tier rankings. This process assigns each county to a designation of Tier One (most distressed), Tier Two, or Tier Three (least distressed). Assuming no ties in rankings, the statute requires **40 Tier One, 40 Tier Two, and 20 Tier Three** counties each year. In the event of a tie for the final position as a Tier One or Tier Two county, both counties will be placed in the lower tier.

Tier Rankings use Four Factors

- *Average unemployment rate* for the most recent twelve months for which data are available (November 2023 – October 2024, NC Dept. of Commerce, LAUS)
- *Median household income* for the most recent twelve months for which data are available (2022, U.S. Census, Small Area Income & Poverty Estimates)
- *Percentage growth in population* for the most recent 36 months for which data are available (July 2020 – July 2023, NC Office of State Budget & Management)
- *Adjusted property tax base per capita* for the most recent taxable year (FY 2024-25, NC Dept. of Public Instruction)

Each county is ranked from 1 to 100 on each variable, making the highest possible *County Rank Sum* 400, and the lowest 4. After calculating the *County Rank Sum*, counties are then ranked

from most distressed (1) to least distressed (100) in order to determine their *Economic Distress Rank*. Note that the 2018 Appropriations Act (S.L. 2018-5, Section 15.2.(a)) eliminated several "adjustment factors" that will no longer be used to calculate the final tier ranks, adjustments that previously factored small population sizes and poverty rates into the calculations. In addition, §143B-437.07.(d) calls for the Department of Commerce to publish the state performance statistic for each of the four factors, alongside the county values. Any county underperforming the state average on any of the four factors may request assistance from the Department to improve their performance on the given factor. A ranked list of each county's performance by indicator, as well as the statewide value, is provided at the end of this document. For comparison, counties may also wish to access historical tier designations. For assistance, please contact David Rhoades at drhoades@nccommerce.com.

County Tier Changes in 2025

Eighteen counties will change tiers in 2025. Counties moving to a **less distressed** tier include Cherokee, Chowan, Duplin, Gates, Granville, Haywood, Jones, Onslow, and Pasquotank. Counties moving to a **more distressed** tier include Alexander, Caldwell, Camden, Cleveland, Davie, McDowell, Montgomery, Randolph, and Surry. Brief explanations for each county's tier change are provided below.

Alexander County

For 2025, Alexander County is shifting from Tier Two to Tier One. The county's economic distress rank weakened to #39 (from #46 in 2024). Despite the county median household income rank improving 27 positions, its unemployment rate rank declined by 23 positions and its adjusted property tax base per capita rank declined 18 positions.

Caldwell County

For 2025, Caldwell County is shifting from Tier Two to Tier One. The county's economic distress rank weakened to #33 (from #41 in 2024). Despite the county median household income rank improving 12 positions, its unemployment rate rank declined by 12 positions and its population growth rank declined 7 positions.

Camden County

For 2025, Camden County is shifting from Tier Three to Tier Two. The county's economic distress rank weakened to #79 (from #82 in 2024). Despite the county unemployment rate rank improving 27 positions, its population growth rank declined by 21 positions and its adjusted property tax base per capita rank declined 14 positions.

Cherokee County

For 2025, Cherokee County is shifting from Tier One to Tier Two. The county's economic distress rank improved to #46 (from #32 in 2024). The county population growth rank improved 31 positions, its adjusted property tax base per capita rank improved by 10 positions, and its median household income rank improved 9 positions.

Chowan County
For 2025, Chowan County is shifting from Tier One to Tier Two. The county's economic distress rank improved to #41 (from #37 in 2024). Despite the county population growth rank declining 14 positions, its adjusted property tax base per capita rank improved by 13 positions and its median household income rank improved 10 positions.

Cleveland County
For 2025, Cleveland County is shifting from Tier Two to Tier One. The county's economic distress rank weakened to #38 (from #43 in 2024). Despite the county adjusted property tax base per capita rank improving 9 positions, its population growth rank declined by 16 positions and its median household income rank declined 8 positions.

Davie County
For 2025, Davie County is shifting from Tier Three to Tier Two. The county's economic distress rank weakened to #74 (from #81 in 2024). The main factor in Davie's shift to Tier Two is a 13 position drop in median household income rank.

Duplin County
For 2025, Duplin County is shifting from Tier One to Tier Two. The county's economic distress rank improved to #41 (from #29 in 2024). The county population growth rank improved 19 positions and its unemployment rate rank improved by 18 positions.

Gates County
For 2025, Gates County is shifting from Tier One to Tier Two. The county's economic distress rank improved to #48 (from #38 in 2024). The county unemployment rate rank improved 14 positions and its adjusted property tax base per capita rank improved by 8 positions.

Granville County
For 2025, Granville County is shifting from Tier Two to Tier Three. The county's economic distress rank improved to #81 (from #73 in 2024). The county adjusted property tax base per capita rank improved 14 positions and its median household income rank improved by 8 positions.

Haywood County
For 2025, Haywood County is shifting from Tier Two to Tier Three. The county's economic distress rank improved to #83 (from #78 in 2024). Despite the county unemployment rate rank declining 13 positions, its median household income rank improved by 21 positions.

Jones County
For 2025, Jones County is shifting from Tier One to Tier Two. The county's economic distress rank improved to #58 (from #33 in 2024). The county unemployment rate rank improved 25 positions, its population growth rank improved by 20 positions, and its median household income rank improved by 17 positions.

McDowell County

For 2025, McDowell County is shifting from Tier Two to Tier One. The county's economic distress rank weakened to #31 (from #47 in 2024). The county adjusted property tax base per capita rank declined 16 positions and its unemployment rate rank declined by 9 positions.

Montgomery County

For 2025, Montgomery County is shifting from Tier Two to Tier One. The county's economic distress rank weakened to #40 (from #47 in 2024). The main factor in the county's shift to Tier One is a 10 position drop in median household income rank.

Onslow County

For 2025, Onslow County is shifting from Tier One to Tier Two. The county's economic distress rank improved to #47 (from #38 in 2024). The main factor in the county's shift to Tier Two is a 16 position improvement in adjusted property tax base per capita rank.

Pasquotank County

For 2025, Pasquotank County is shifting from Tier One to Tier Two. The county's economic distress rank improved to #41 (from #31 in 2024). The county adjusted property tax base per capita rank improved 14 positions, its unemployment rate rank improved by 13 positions, and its median household income rank improved by 11 positions.

Randolph County

For 2025, Randolph County is shifting from Tier Two to Tier One. The county's economic distress rank weakened to #29 (from #44 in 2024). The county median household income rank declined 14 positions and its adjusted property tax base per capita rank declined by 11 positions.

Surry County
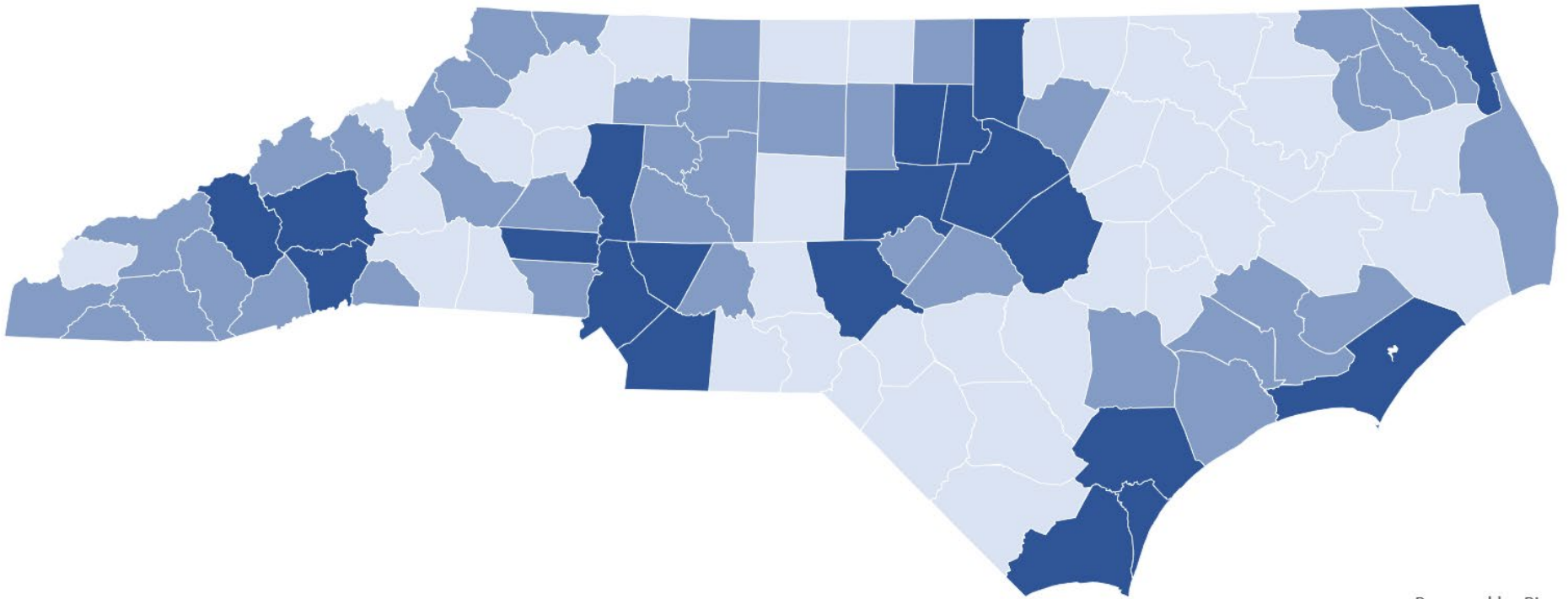
For 2025, Surry County is shifting from Tier Two to Tier One. The county's economic distress rank weakened to #34 (from #45 in 2024). The main factor in the county's shift to Tier One is a 30 position drop in median household income rank.

2025 County Development Tiers

Powered by Bing
© GeoNames, TomTom

2025 Tiers

1   3

2025 COUNTY DEVELOPMENT TIER RANKINGS (§ 143B-437.08)

NEW TIER	COUNTY	Adjusted Property Tax Base Per Capita FY 2024-2025 Value	Rank	Population Growth July 2020-July 2023 % Change	Rank	Median Household Income 2022 Income	Rank	Unemployment 12 Mth Avg Nov 23-Oct 24 Rate	Rank	County Rank Sum	ECONOMIC DISTRESS RANK (#1 = most distressed)	2025 TIERS
	ALAMANCE	$86,190	5	5.08%	83	$61,034	61	3.56%	56	205	52	2
⬇	ALEXANDER	$84,057	4	0.33%	29	$67,717	79	3.52%	61	173	39	1
	ALLEGHANY	$204,980	85	5.35%	85	$49,524	18	4.30%	24	212	54	2
	ANSON	$109,422	31	-3.82%	5	$48,284	16	4.13%	29	81	12	1
	ASHE	$164,826	69	0.51%	33	$54,379	38	3.00%	98	238	65	2
	AVERY	$441,425	99	1.49%	48	$53,894	34	3.43%	69	250	68	2
	BEAUFORT	$172,268	70	-1.18%	17	$54,415	39	4.00%	34	160	31	1
	BERTIE	$97,297	19	-5.20%	2	$44,434	5	4.75%	14	40	4	1
	BLADEN	$126,893	48	-1.17%	18	$46,002	10	4.41%	21	97	14	1
	BRUNSWICK	$204,241	84	15.63%	100	$73,536	85	4.35%	22	291	82	3
	BUNCOMBE	$216,322	87	2.67%	63	$67,906	81	3.38%	72	303	86	3
	BURKE	$90,203	8	2.31%	58	$60,629	58	3.47%	66	190	44	2
	CABARRUS	$163,567	68	6.72%	91	$79,649	91	3.49%	65	315	89	3
⬇	CALDWELL	$114,690	37	1.32%	45	$53,586	32	3.65%	49	163	33	1
⬇	CAMDEN	$117,900	43	3.22%	68	$82,620	95	3.23%	83	289	79	2
	CARTERET	$329,588	98	3.30%	71	$67,806	80	3.32%	77	326	92	3
	CASWELL	$86,306	6	0.50%	31	$54,215	37	3.81%	41	115	20	1
	CATAWBA	$124,913	45	3.13%	67	$63,934	74	3.55%	58	244	67	2
	CHATHAM	$218,876	88	6.27%	90	$84,516	97	3.13%	95	370	99	3
⬆	CHEROKEE	$173,160	71	3.24%	69	$51,607	26	4.05%	31	197	46	2
⬆	CHOWAN	$155,402	66	0.19%	26	$55,818	45	3.70%	47	184	41	2
	CLAY	$221,226	89	5.36%	86	$57,698	49	3.74%	42	266	70	2
⬇	CLEVELAND	$131,599	51	1.05%	41	$53,170	29	3.61%	51	172	38	1
	COLUMBUS	$95,837	16	-0.23%	22	$45,379	8	4.34%	23	69	11	1
	CRAVEN	$102,941	26	2.18%	55	$63,076	70	3.55%	59	210	53	2
	CUMBERLAND	$95,754	15	0.39%	30	$58,013	51	4.86%	11	107	19	1
	CURRITUCK	$317,894	95	10.47%	97	$76,217	88	2.99%	99	379	100	3
	DARE	$596,320	100	2.34%	59	$82,052	94	3.95%	36	289	79	2
	DAVIDSON	$117,720	42	3.95%	79	$63,590	72	3.62%	50	243	66	2
⬇	DAVIE	$138,350	56	3.34%	72	$63,436	71	3.29%	80	279	74	2
⬆	DUPLIN	$118,740	44	1.26%	42	$51,270	23	3.34%	75	184	41	2
	DURHAM	$197,471	83	3.29%	70	$79,524	90	3.21%	86	329	93	3
	EDGECOMBE	$78,238	1	-0.70%	20	$48,770	17	5.67%	2	40	4	1
	FORSYTH	$135,286	55	2.36%	60	$62,992	69	3.71%	46	230	63	2
	FRANKLIN	$128,242	49	12.51%	99	$72,415	83	3.60%	53	284	77	2
	GASTON	$93,522	13	5.02%	82	$65,430	77	3.60%	52	224	62	2
⬆	GATES	$110,515	33	-1.35%	16	$66,561	78	3.34%	74	201	48	2
	GRAHAM	$152,544	65	-0.25%	21	$50,301	22	4.48%	19	127	23	1
⬆	GRANVILLE	$129,003	50	2.80%	65	$74,120	87	3.20%	88	290	81	3
	GREENE	$83,418	3	-1.60%	15	$49,992	21	2.96%	100	139	27	1
	GUILFORD	$138,585	57	1.45%	47	$63,822	73	4.21%	26	203	51	2
	HALIFAX	$102,077	25	-3.48%	7	$44,804	7	5.18%	7	46	6	1
	HARNETT	$105,296	28	5.54%	87	$65,242	75	4.11%	30	220	60	2
⬆	HAYWOOD	$192,322	81	2.68%	64	$62,374	68	3.31%	79	292	83	3
	HENDERSON	$146,480	61	3.40%	73	$65,252	76	3.17%	91	301	85	3
	HERTFORD	$101,447	22	-5.80%	1	$43,871	3	4.98%	9	35	3	1
	HOKE	$91,621	11	4.86%	81	$60,903	60	4.56%	18	170	36	1
	HYDE	$327,238	97	-3.87%	4	$48,068	14	5.29%	6	121	21	1
	IREDELL	$146,750	62	7.32%	93	$73,446	84	3.44%	68	307	88	3
	JACKSON	$300,995	94	3.42%	74	$58,491	54	3.72%	45	267	72	2

	County											
	JOHNSTON	$133,988	53	10.34%	96	$80,612	92	3.31%	78	319	90	3
⬆	JONES	$124,929	46	0.67%	35	$56,079	46	3.18%	90	217	58	2
	LEE	$109,958	32	5.92%	89	$58,244	53	4.15%	28	202	50	2
	LENOIR	$96,893	17	-1.72%	14	$46,410	12	3.58%	55	98	15	1
	LINCOLN	$134,997	54	8.58%	95	$78,615	89	3.17%	93	331	94	3
	MACON	$221,712	90	3.07%	66	$53,832	33	3.28%	81	270	73	2
	MADISON	$176,597	73	2.62%	62	$54,137	36	3.53%	60	231	64	2
	MARTIN	$106,668	29	-3.26%	8	$44,445	6	4.59%	16	59	10	1
⬇	MCDOWELL	$114,224	36	0.28%	27	$54,042	35	3.52%	62	160	31	1
	MECKLENBURG	$178,589	75	3.86%	78	$80,645	93	3.58%	54	300	84	3
	MITCHELL	$185,681	80	-0.95%	19	$53,555	31	3.88%	39	169	35	1
⬇	MONTGOMERY	$173,206	72	0.02%	25	$55,313	41	3.88%	40	178	40	1
	MOORE	$143,391	59	7.23%	92	$84,458	96	3.56%	57	304	87	3
	NASH	$114,819	38	2.52%	61	$55,406	42	4.71%	15	156	29	1
	NEW HANOVER	$240,029	92	5.54%	88	$70,995	82	3.17%	92	354	96	3
	NORTHAMPTON	$139,713	58	-3.88%	3	$51,550	25	4.43%	20	106	18	1
⬆	ONSLOW	$103,557	27	3.74%	77	$62,190	67	4.19%	27	198	47	2
	ORANGE	$183,870	78	1.37%	46	$87,780	98	3.00%	97	319	90	3
	PAMLICO	$193,070	82	3.51%	76	$59,845	57	3.46%	67	282	76	2
⬆	PASQUOTANK	$116,686	40	1.93%	53	$59,066	56	3.98%	35	184	41	2
	PENDER	$177,300	74	11.49%	98	$73,663	86	3.27%	82	340	95	3
	PERQUIMANS	$146,828	63	2.03%	54	$60,665	59	4.28%	25	201	48	2
	PERSON	$147,072	64	1.01%	40	$61,302	63	3.68%	48	215	56	2
	PITT	$111,431	34	2.19%	56	$57,319	48	4.04%	32	170	36	1
	POLK	$228,206	91	1.92%	52	$61,585	65	3.38%	71	279	74	2
⬇	RANDOLPH	$90,480	10	1.80%	51	$58,037	52	3.74%	43	156	29	1
	RICHMOND	$98,561	20	-2.05%	11	$44,383	4	4.81%	12	47	8	1
	ROBESON	$78,450	2	-0.09%	23	$39,931	1	5.18%	8	34	2	1
	ROCKINGHAM	$108,820	30	1.66%	50	$52,494	28	4.01%	33	141	28	1
	ROWAN	$99,980	21	3.50%	75	$61,105	62	3.50%	64	222	61	2
	RUTHERFORD	$125,558	47	0.58%	34	$53,485	30	4.87%	10	121	21	1
	SAMPSON	$101,675	23	1.30%	44	$52,248	27	3.73%	44	138	26	1
	SCOTLAND	$90,308	9	-1.90%	13	$45,996	9	6.40%	1	32	1	1
	STANLY	$116,943	41	4.55%	80	$58,642	55	3.22%	85	261	69	2
	STOKES	$116,644	39	2.26%	57	$56,259	47	3.35%	73	216	57	2
⬇	SURRY	$112,500	35	0.87%	39	$49,524	18	3.33%	76	168	34	1
	SWAIN	$183,953	79	-1.91%	12	$55,462	43	3.23%	84	218	59	2
	TRANSYLVANIA	$267,563	93	0.76%	37	$62,173	66	3.42%	70	266	70	2
	TYRRELL	$159,207	67	-2.57%	9	$42,514	2	4.78%	13	91	13	1
	UNION	$180,791	76	7.40%	94	$95,079	99	3.18%	89	358	98	3
	VANCE	$97,100	18	-2.54%	10	$49,961	20	5.34%	5	53	9	1
	WAKE	$214,585	86	5.26%	84	$97,099	100	3.21%	87	357	97	3
	WARREN	$183,278	77	0.86%	38	$47,170	13	5.59%	3	131	24	1
	WASHINGTON	$92,929	12	-3.49%	6	$46,072	11	4.57%	17	46	6	1
	WATAUGA	$319,717	96	1.29%	43	$57,888	50	3.12%	96	285	78	2
	WAYNE	$95,302	14	0.73%	36	$55,635	44	3.89%	38	132	25	1
	WILKES	$101,935	24	0.33%	28	$48,229	15	3.94%	37	104	16	1
	WILSON	$133,204	52	-0.08%	24	$51,535	24	5.45%	4	104	16	1
	YADKIN	$88,037	7	1.57%	49	$61,464	64	3.17%	94	214	55	2
	YANCEY	$143,756	60	0.50%	32	$54,455	40	3.51%	63	195	45	2
	NORTH CAROLINA	**$155,940**		**3.59%**		**$67,516**		**3.65%**				