Defense is the 2nd largest sector of North Carolina’s economy - $66 Billion

$7.1B in federal Prime contracts executed in North Carolina in FY 19, $4.6B of which in DoD Prime contracts...billions more in supply chain and sub activity.

Workforce: 19,000 service members in North Carolina transition to the civilian workforce every year

The statewide Community College System serves all of NC’s 100 counties with a focus on workforce development and sustainment.

NC has the 3rd highest active duty presence, home to 6 major Army, Marine, Air Force and Coast Guard bases, and over 100 NCNG and Reserve facilities.

N.C. University System

- 197 colleges and universities in North Carolina
- Duke, N.C. State University and UNC Chapel Hill together perform $2.8 billion in research annually. Add in RTI and NC Central, this jumps to $3.5 billion/year in research.
- North Carolina is the #1 State for share of Industry-sponsored academic research,
- The Laboratory for Analytic Science (LAS) at N.C. State, founded in 2013 by the NSA
- Duke’s Human and Autonomy Lab (HAL)
- N.C. State’s Wilson College of Textiles
- The Advanced Self Powered Systems of Sensors and Technologies Center (ASSIST), an NSF Nanosystems Engineering Research Center at N.C. State
AGENCIES ASSISTING THE DEFENSE INDUSTRY

Economic Development Partnership of NC
EDPNC’s mission is to improve the economic well-being and quality of life for all North Carolinians. We do this by collaborating with partners in new business recruitment, existing employer support, international trade and export assistance, small business start-up counseling, and tourism promotion. (www.edpnc.com)

NCMBC – NC Military Business Center
NCMBC assists N.C. businesses (a large majority of which are defense contractors) by helping them understand, navigate, identify and pursue opportunities in the Federal sector. (www.ncmcb.us)

DEFTECH – NC Defense Technology Transition Office
DEFTECH, a component of NCMBC, provides a liaison between the North Carolina Innovation Ecosystem (private businesses, our university system, public/private partnerships, investors, and the military bases in N.C.) and the Departments of Defense (DoD) and Homeland Security (HLS). (www.deftech.nc.gov)

DANC - Defense Alliance of NC
The Alliance combines the leadership of military officers and industry executives, a large and active membership base, and an impressive set of standing forums and events to support N.C.’s government, military, business, and academic communities. (www.defensealliancenc.org)

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NORTH CAROLINA INDUSTRY CLUSTERS

Aerospace
- With 13% employment growth from 2015-2019, N.C.’s aerospace manufacturing sector has grown 3x the national average.
- Over 400 establishments make up N.C.’s aerospace supply chain, including engineering, manufacturing, MRO, and other support services.

Example Companies: GE Aviation, HondaJet, HAECO and SpiritAeroSystems

Information Technology
- In 2019, CBRE ranked Raleigh-Durham and Charlotte among the top tech talent markets in the U.S. N.C. produces more than 25,000 STEM grads annually.
- N.C. is home to the NCSU/NSA Laboratory for Analytical Science & the NC Regional Internet of Things (NCRiOT).

Example Companies: IMB, SAS, ABB, Wolfspeed, CISCO, and Red Hat

Life Sciences
- N.C. is among the world’s most mature life sciences clusters. Over 730 bioscience companies employ more than 66,000 highly skilled people across the state.
- Extensive human performance ecosystem consisting of academic, private, and public-private entities covering physiological, psychological, cognitive, human powered sensors, and human machine interface systems.

Example Companies: Biogen, Pfizer, LabCorp and Novo Nordisk

Textiles & Nonwovens
- N.C. leads the nation for total number of textile manufacturers, with over 600 manufacturing establishments operating in the state.
- The Nonwovens Institute at N.C. State leads the nation in nonwovens research.

Example Companies: Berry Global, Jacob Holm, Freudenberg and Avgol Nonwovens

Materials
- N.C.’s plastics and chemicals industry employs over 101,000 people across 2,605 establishments.
- The state is a regional hub for this cluster, ranking first in the Southeast U.S. for total industry employment.

Example Companies: BASF, DuPont, DAK Americas and Georgia-Pacific

Automotive Manufacturing
- 26 of the top 100 global OEM suppliers in North America have operations in N.C.
- More than 29,000 people work directly in N.C.’s automotive manufacturing cluster.

Example Companies: GF Linamar, GKN Driveline, Eaton, and Daimler