



**NORTH CAROLINA**  
**TEXTILE & NONWOVENS INDUSTRIES**

# NORTH CAROLINA

## THRIVE WITH US

The nation's only college devoted entirely to textiles. 25,000+ STEM graduates per year. Largest nonwovens workforce in the nation. North Carolina is where a rich textile tradition meets a thriving, high-tech hub to create an unparalleled environment for both textile and nonwovens companies. The state boasts the largest concentration of nonwovens companies, users and suppliers in the nation and is highly specialized in engineered fabrics. 30 percent of the top 40 largest nonwovens firms in the world operate in North Carolina, including Berry Global, Freudenberg Performance Materials, and Kimberly-Clark.

Textile and nonwovens companies choose North Carolina for its winning combination of location, world-class workforce, existing industry strength, and business-friendly environment. Top-tier university partnerships support the industry's continued success. Home to more than 10.5 million residents, our state is the ninth largest in population and ranks third for highest net migration rate in the U.S. With a designation by *Forbes* as "Best State for Business" three years in a row, more business and individuals are becoming part of our community every day. Thrive with us. Consider North Carolina for your next location decision.

## WHAT CAN EDPNC DO FOR YOU?

The Economic Development Partnership of North Carolina (EDPNC) proudly serves as North Carolina's statewide economic development organization. The EDPNC recruits new businesses to the state, supports the needs of existing businesses, and connects exporters with customers around the globe.

### We provide FREE assistance with:

- Real estate and site identification
- Incentive and tax benefit inquiries
- Regulatory navigation
- World-class workforce solutions
- Supplier and distribution connections
- Export services and global market expansion

For more information about North Carolina, contact the EDPNC at 919.447.7744 or [clientservices@edpnc.com](mailto:clientservices@edpnc.com).

## NORTH CAROLINA'S TEXTILE ADVANTAGE

**600+**  
TEXTILE MANUFACTURERS

North Carolina ranks first in the nation for total number of textile manufacturers, with over 600 manufacturing establishments operating in the state. An industry presence this big means there is never a shortage of skilled workers and valuable supply chain partners.

**#1**  
NONWOVENS WORKFORCE

More than 33,000 people work directly in North Carolina's textile manufacturing sector. This includes the largest nonwovens manufacturing workforce in the U.S. Thousands of North Carolinians work in occupations that have transferable skill sets for the industry.

**#1**  
TEXTILE EXPORTS

With over \$2 billion in textile exports in 2019, North Carolina leads the nation in total value of textile exports. The state's two deepwater seaports and two Class 1 rail carriers provide access to millions of suppliers and customers.

**#1**  
TEXTILE INSTITUTIONS

North Carolina State University's Wilson College of Textiles is recognized globally as a premier textile institution. The Nonwovens Institute at NC State leads the nation in nonwovens research and industry partnerships.

## NORTH CAROLINA'S TEXTILE & NONWOVENS INDUSTRY LEADERS



# NORTH CAROLINA'S TEXTILE AND NONWOVENS MARKETS

North Carolina's advanced textile landscape is highly diverse, with companies serving a wide variety of end users that have a strong presence in the state. Examples include:

## PRIMARY END USE: TRANSPORTATION VEHICLES



## PROXIMITY TO END USER

From the Wright Brother's first flight at Kitty Hawk to today's cutting-edge research, North Carolina continues its legacy as an aerospace leader. Dozens of top aerospace companies have major operations in the state, including Honda Aircraft Co., HAECO, Spirit AeroSystems and Raytheon Technologies. The state also enjoys a surging automotive sector. 26 of the top 100 global OEM automotive parts suppliers in North America have operations here.

## PRIMARY END USE: HOME & OFFICE FURNISHINGS



## PROXIMITY TO END USER

As the "Furniture Capital of the World," North Carolina's furniture manufacturing and distribution cluster employs over 36,000 people across 860 establishments. The state's concentration of furniture manufacturing activity is more than three times the national average. High Point, North Carolina hosts the biannual High Point Market, the largest furnishings industry trade show in the world.

## PRIMARY END USE: MEDICAL/HYGIENE



## PROXIMITY TO END USER

North Carolina is one of the world's largest life sciences clusters and is home to nationally ranked hospital systems. The state boasts the #1 biological product manufacturing industry and #3 pharmaceutical industry in the U.S. by total employment. Duke University Hospital, Wake Forest Baptist Medical Center, the University of North Carolina Medical Center, and Carolinas Medical Center are among the nation's top hospitals.

“SHALAG IS LOOKING FORWARD TO BECOMING A SUCCESSFUL CORPORATE CITIZEN IN NORTH CAROLINA AND IN OXFORD. NORTH CAROLINA IS A RECOGNIZED CENTER FOR NONWOVEN MANUFACTURING AND R&D AND WE HAVE IDENTIFIED HERE A STRONG INFRASTRUCTURE TO SUPPORT OUR BUSINESS.

ILAN PICKMAN,  
CEO, SHALAG INDUSTRIES LTD

# PLENTIFUL & SKILLED WORKFORCE

**5.1M+**  
LABOR FORCE

Largely fueled by domestic in-migration, North Carolina has one of the largest labor forces in the U.S. From 2010-2019, North Carolina was among the top three states for net migration.

**25K+**  
STEM DEGREES

North Carolina's educational institutions awarded more than 25,000 Science, Technology, Engineering and Math degrees and certificates in 2018, ranking second for number of STEM grads in the Southeastern U.S.

**41K+**  
TEXTILE WORKERS

North Carolina has the third largest textile and apparel workforce in the U.S. Textile and apparel jobs are 2.3x more concentrated in North Carolina than in the nation.

**45K+**  
ENGINEERS

North Carolina's engineering workforce has grown 18% over the past five years, leading the nation for engineering job growth.

## LABOR SUPPLY FOR TOP TEXTILE OCCUPATIONS

North Carolina offers textile and nonwovens companies an abundant and affordable supply of labor. North Carolina's textile industry wages are **about 18% below the national average.**

Occupation	NC 2019 Jobs	NC Location Quotient	NC Median Annual Earnings	US Median Annual Earnings
Textile Machine Operators	14,068	5.91	\$26,837	\$28,853
Sewing Machine Operators	8,585	2.05	\$25,896	\$25,022
Production Workers	96,935	1.21	\$32,434	\$33,942
Supervisors of Production Workers	21,644	1.11	\$58,552	\$60,424
Inspectors, Testers, Sorters, Weighers	20,032	1.15	\$34,528	\$38,251
Industrial Machinery Mechanics	12,274	1.06	\$49,608	\$52,332



In the last five years, global textile companies have announced investments in North Carolina totaling over \$950 million. For example, in 2017 Fibertex Personal Care, a Danish nonwovens company, announced that it would invest \$115 million and create 145 jobs to build its first U.S. plant in Asheboro, NC.

# THE PERFECT CLIMATE FOR GROWING TALENT

North Carolina offers one of the nation's most renowned education systems, supplying companies a pipeline of skilled workers and unmatched access to textile and nonwovens R&D resources. In 2018, the state produced the most textile sciences & engineering grads in the U.S.

## UNIVERSITIES UNDERGRADUATE & GRADUATE DEGREES

Among North Carolina's 53 colleges and universities, there are three Tier 1 research universities – Duke University, UNC Chapel Hill and North Carolina State University. UNC Chapel Hill and Duke rank among the top 32 universities in the world for the most U.S. utility patents in 2018. The NC State Wilson College of Textiles is recognized globally as a premier textile institution, offering undergraduate and graduate degrees in fields like textile chemistry, engineering, design and management. The Wilson College of Textiles serves as a hub for R&D, a supplier of industry talent and an exceptional asset for industry partnerships throughout the state and world.

## COMMUNITY COLLEGES VOCATIONAL DEGREES

The North Carolina Community College System (NCCCS) is the nation's third-largest community college system, pioneering the nation's most advanced vocational and technical programs. More than 680,000 students enroll at one of NCCCS's 58 campuses each year. The Textile Technology Center at Gaston Community College provides a variety of services for textile companies including sample production, product testing, and customized training. The Manufacturing Solutions Center, a division of Catawba Valley Community College, assists the textile industry to compete in global markets through training, testing, product development, and marketing services.



The NC State Wilson College of Textiles hosts two career fairs each year to connect employers with the largest pool of technically educated students. NC State produces more textile graduates per year than any other university in the country. Wilson College graduates enjoy successful careers at companies like DuPont, Unifi, Hanesbrands, VF Corp. and many more.

## NCWORKS CUSTOMIZED TRAINING PROGRAMS

NCWorks is a free job screening, recruiting and training program for new and expanding businesses. North Carolina's Customized Training program offers comprehensive training via our state's community colleges as well as customized curricula tailored to address the specific needs of the textile and nonwovens industry. In FY 2018-2019, the Customized Training program trained more than 38,000 employees from over 1,000 companies across the state, including Carolina Nonwovens and Unifi. Approximately 92% of the companies served were advanced manufacturers.

## INDUSTRY RESOURCES TARGETED INDUSTRY SUPPORT

North Carolina has numerous programs and research centers that support textile & nonwoven entrepreneurs and businesses. Examples include:

- **The Nonwovens Institute at NC State University (NWI)** is the world's first and only accredited academic program for the interdisciplinary study of engineered fabrics. NWI is an innovative global partnership between industry, government, and academia. It is the largest industry/university cooperative research center in the nation.
- **The Association of the Nonwoven Fabrics Industry (INDA)** serves hundreds of member companies in the nonwovens industry doing business globally by providing sourcing and business development services.
- **The Textile Protection and Comfort Center at NC State University (TPACC)** is a world leader in lab-based instrumented systems and has facilities devoted to analysis of heat and flame protection, chemical resistance, and comfort performance.
- **Zeis Textiles Extension at NC State University (ZTE)** provides training and certification in textiles and serves the industry's prototyping production needs for entrepreneurs as well as corporations.
- **Cotton Inc.**, headquartered in Cary, N.C., is the premier research and marketing company representing upland cotton.

# UNMATCHED BUSINESS ENVIRONMENT

**#1**  
BEST STATE FOR BUSINESS  
- Forbes (2019)

**#2**  
TOP STATE BUSINESS CLIMATE  
- Site Selection (2019)

**#3**  
BEST STATE FOR BUSINESS  
- CNBC (2019)

**#3**  
COMPETITIVE LABOR ENVIRONMENT  
- Area Development (2019)

## LOW COST OF LIVING

The cost of living in North Carolina is well below that of other states with strong textile and nonwovens manufacturing clusters.



Source: C2ER State Cost of Living Index

## LOW BUILDING COSTS

Average construction costs in North Carolina's metropolitan areas are up to 16% below the national average.

## AAA BOND RATING

North Carolina is one of only four states to earn Standard & Poor's highest rating for over 55 consecutive years.

## UNPARALLELED INNOVATION

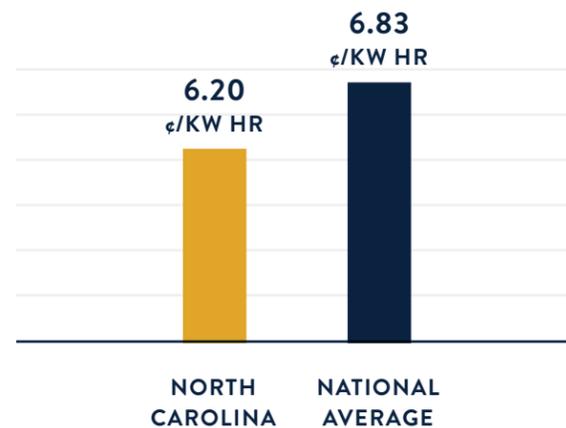
North Carolina businesses lead the nation in innovation with 70% patent growth over the past 10 years.

## RIGHT TO WORK STATE

North Carolina is one of 27 right to work states.

## LOW ELECTRICITY COSTS

NC's industrial electricity costs are about 10% below the national average.



Source: Energy Information Administration

# GO BIG. SPEND LESS.

**2.5%**  
CORPORATE INCOME TAX

North Carolina has the lowest rate among the 44 states that levy this tax. NC uses single sales factor apportionment.

**4.75%**  
STATE SALES & USE TAX

Counties levy an additional 2-2.75%. Sales tax exemptions are available for manufacturers, large fulfillment centers, and data centers.

**5.25%**  
PERSONAL INCOME TAX

The standard deduction is \$10,750 for single taxpayers and married couples filing separately, \$21,500 for married couples, and \$16,125 for heads of households.

**NONE**  
STATE PROPERTY TAX

There is no state-level property tax. Real and personal property taxes vary by local government. In 2019, N.C. had the 6th lowest commercial and 10th lowest industrial effective property tax rates in the U.S.

## INCENTIVES

Targeted, performance-based incentive programs complement North Carolina's competitive cost structure. The Economic Development Partnership of North Carolina (EDPNC) helps companies navigate the incentive process.

### JOB DEVELOPMENT INVESTMENT GRANT (JDIG)

JDIG is a performance-based, discretionary incentive program that provides cash grants to new and expanding businesses to help offset the cost of locating or expanding a facility in North Carolina. Companies can qualify for a JDIG based on the project location, number of jobs, and average wage. The grant amount is based on a percentage of the personal income tax withholdings associated with new jobs.

### ONE NORTH CAROLINA FUND (ONE NC)

One NC is a discretionary cash-grant program that allows the Governor to respond quickly to competitive job-creation projects. Awards are based on the number of jobs, level of investment, project location, economic impact, and importance of the project to the region. Awards may be used in new or existing buildings for installation or purchase of equipment, structural repairs and/or renovations, construction and/or improvements to utility lines.

### PUBLIC INFRASTRUCTURE & TRANSPORTATION PROGRAMS

NC offers a number of programs to fund public infrastructure development, including the Community Development Block Grant Economic Development Program, Utility Account, Rural Division's Economic Infrastructure Program, NCDOT's Rail Industrial Access Program, NC Railroad Company's NCRRI Invests program, and the NC Department of Commerce's Joint Economic Development Program with the NCDOT.

### BUILDING REUSE PROGRAMS

North Carolina offers two different programs that provide grants to renovate and upfit vacant industrial and commercial buildings including:

- Community Development Block Grant Building Reuse Program
- Rural Division's Building Reuse Program

### OTHER INCENTIVE PROGRAMS

- NCWorks Customized Training Program
- Foreign Trade Zones
- NC Biotech Center Economic Development Award
- Recycling Business Development Award Grants
- Golden LEAF Foundation Grants
- Building Demolition Programs

# MARKET ACCESS & TRANSPORTATION

North Carolina's robust transportation infrastructure connects companies to domestic and international markets. Ten airports offer commercial services, including four international airports that connect North Carolina to major cities in the U.S. and abroad. North Carolina also has the second-largest state-owned highway system and major controlled-access arteries such as I-95 (running the length of the East Coast), I-85, and I-40 (running from North Carolina to California). Two deepwater seaports and an integrated rail system ensure that North Carolina companies can easily reach suppliers and customers.

## ROADS

### Second-largest state-owned highway system

North Carolina's highways stretch for more than 80,000 miles (129,000 km). The state's central East Coast location offers easy access to the country's most important transportation corridors.

Major controlled-access arteries include:

- I-95, running the length of the East Coast
- I-40, linking North Carolina to California
- I-85, stretching through the manufacturing heart of the Southeast

## PORTS

### Two deepwater seaports in-state with on-dock rail

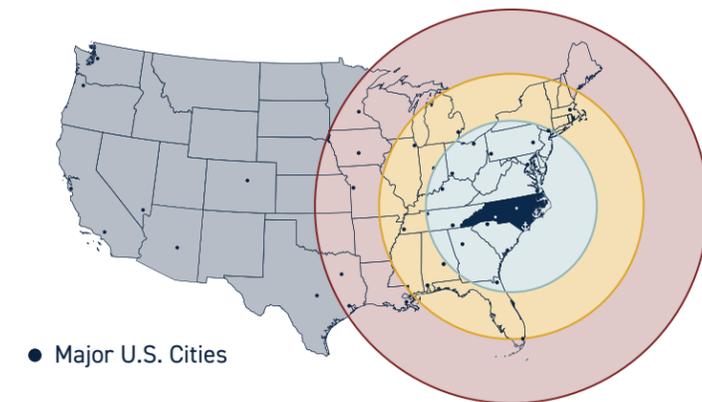
North Carolina's ports offer fast turn times and capacity for ships carrying up to 14,000 TEUs. An inland port in Charlotte provides easy market access. North Carolina companies also enjoy easy access to the Port of Norfolk and the Port of Charleston.

#### Port of Wilmington

- Container and general cargo operations
- Channel depth of 42 feet M.L.L.W.
- On-terminal cold storage facility and 1M sf of covered storage
- Next-day rail service to Charlotte inland port

#### Port of Morehead City

- General cargo and bulk handling facility
- Channel depth of 45 feet M.L.L.W.
- 1M sf of covered storage



**178 MILLION CUSTOMERS WITHIN A DAYS DRIVE**

Easily access other major U.S. markets



## AIR

### The world's 7th busiest airport is located in Charlotte

Ten airports offer commercial services, including four international airports that provide easy access to global markets. International airports include:

- Charlotte-Douglas International Airport (CLT), world's seventh-busiest airport
- Raleigh-Durham International Airport (RDU), fifth in passenger satisfaction among large North American Airports
- Wilmington International Airport (ILM), home to the ILM Business Park with easy access to highways, rail, and the Port of Wilmington
- Piedmont Triad International Airport (GSO), a premier air cargo center and home to the FedEx Mid-Atlantic Air Hub

## RAIL

### Two Class 1 Carriers

North Carolina has more than 3,200 miles (5,100km) of track. Two Class 1 carriers, CSX Transportation (CSX) and Norfolk Southern (NS), offer direct service to North American markets and to all major ports along the U.S. East Coast.

- Intermodal service hubs in Charlotte (NS, CSX) and Greensboro (NS). Another planned for Rocky Mount (CSX) in 2021.
- Direct intermodal service from Port of Wilmington to CSX terminal in Charlotte
- Major rail yards in Lexington (NS) and Hamlet (CSX)
- 19 regional railroads, including six that connect to both NS and CSX railroads



With fast turnaround times, North Carolina's two deepwater seaports offer easy access to domestic and international markets. The Port of Wilmington has one of the highest crane productivity rates on the U.S. East Coast and is significantly less congested than neighboring ports. With 40 crane moves per hour and an average of 32 minutes for a dual truck move, it's no wonder the Port of Wilmington ranks as the most productive port in North America.



**NORTH CAROLINA WAS CHOSEN FOR THE LOCATION, FOR THE UTILITY AND TRANSPORTATION ADVANTAGES, AND THE STATE CONTAINS AN EXCEPTIONAL WORKFORCE. IN ADDITION, WE CAN SERVICE OUR CUSTOMER BASE QUICKER AND PROVIDE MORE COST-EFFECTIVE TRANSPORTATION.**

**GERARDO MURAIRA,  
OPERATIONS DIRECTOR, NUTEC GROUP**





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ECONOMIC  
DEVELOPMENT  
PARTNERSHIP of  
**NORTH CAROLINA**