



Western NC SelectSite Readiness Program

Executive Report

December 2025





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A NOTE FROM LEADERSHIP

Thank you for your partnership

For half a century, GLS has been trusted with clients' confidential expansion plans and has extensive experience in advising on the optimal locations for new production facilities. GLS assists industry pioneers in making strategic location decisions, focusing on long-term capital investment optimization, risk minimization, and cost reduction. Our strategic approach to corporate site selection also aids economic development organizations in attracting investments that create lasting impact.

For the SelectSite program, we were honored to partner with local Western North Carolina firms, ECS and Ardurra, to deliver comprehensive evaluations and actionable insights to the Economic Development Partnership of North Carolina (EDPNC) and participating stakeholders. This collaboration reflects our shared commitment to strengthening regional competitiveness and fostering economic resilience.

We look forward to seeing these sites advance along their readiness pathways, unlocking new opportunities for businesses and communities alike. Together, we are building a foundation for growth that will benefit Western North Carolina for years to come.



DIDI CALDWELL
President + CEO



SARAH WHITE
Principal + VP of Site Selection

THE GOAL

— **Focus on assessing site investment readiness to identify the next steps for enhancing competitiveness of sites in Western NC.**

- Leverage site selection methodology
- Provide actionable results and improvement opportunities
- Enhance sites towards site certification or readiness



Scope of Work

PHASE 01

Project Alignment

Activities

1. Alignment Meeting
2. GLS develops Request for Information (RFI) which will cover site information, utilities, logistics, etc.
3. GLS develops Site Shepherd models for evaluating sites

Deliverables:

- Alignment of stakeholders
- Program tool development

Completed

PHASE 02

Site Verification + Desktop Evaluation

Activities:

1. GLS issues RFI via Lasso
2. GLS conducts webinar for participants to include Program and Lasso Overviews
3. RFIs submitted to GLS
4. Evaluation of sites and desktop environmental analysis
5. Milestone Meeting via web conference with EDPNC

Deliverables:

- Identification of sites
- Recommendation of up to 10 sites to put in next phase

Completed

PHASE 03

Site Readiness Journey Reports + Benchmarking

Activities:

1. Field Site visits (up to 10)
2. Updated site information in models
3. Mid-phase adjustment to narrow down to 5 sites
4. Develop Site Readiness Journey Reports which will include strengths / weaknesses and cost and schedule to fill readiness gaps for 3-5 sites
5. Milestone Meeting via web conference with EDPNC
6. Community webinar on how to read the individual reports

Deliverables:

1. Recommendation of up to 5 SelectSites
2. Site Readiness Journey Reports outlining next steps for continuing readiness for up to 5 sites

Completed

Program Schedule

TIMELINE

The program kicked off in early September with community reports delivered the week of 12/15. The GLS team had weekly calls with the core EDPNC team and multiple milestone meetings with the larger EDPNC board.

Activity	09/01	09/08	09/15	09/22	09/29	10/06	10/13	10/20	10/27	11/03	11/10	11/17	11/24	12/01	12/08
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Phase 01 - Project Alignment															
Alignment Meeting															
Develop program tools															
Phase 02 - Site Verification + Desktop Evaluation															
Webinar for participants															
GLS Issues RFI															
RFIs due to GLS															
Evaluations and scoring of sites															
Prioritized recommendations and report development															
Phase 02 Milestone Meeting															
Phase 03 - Site Readiness Journey Reports															
Prepare for site visits															
Site Visits – up to 10 sites in 1 week															
Mid-Phase Adjustment (down select to shortlist)															
Mid-Phase Adjustment (down select to shortlist)															
Prioritized recommendations and report development															
Phase 03 Milestone Meeting															
Community webinar on how to read reports															

- Face-to-Face
- Web Conference

Submitted Sites

There were 18 sites submitted across the 25-county search region.



#	Site Name	County
1	Alexander County 1 Rail Site	Alexander
2	Alexander Railroad Site	Alexander
3	Ashe County Industrial Park	Ashe
4	Burke Business Park	Burke
5	Drexel Business Park	Burke
6	Great Meadows	Burke
7	Evergreen Industrial Park	Caldwell
8	Lower Cedar Valley	Caldwell
9	Pleasant Hill Road	Caldwell
10	Foothills Regional Airport	Caldwell
11	Southeast Catawba County Business Park	Catawba
12	Farmville Road	Cleveland
13	Beaverdam Industrial Site	Haywood
14	Brown Property	Henderson
15	Project Shift	Jackson
16	US Hwy 221 Site A	McDowell
17	Mitchell Business Park	Mitchell
18	ECMD	Wilkes

Phase 02 Evaluation

SITE VERIFICATION + DESKTOP

GLS conducted a preliminary evaluation of proposed sites to identify those with the greatest potential for industrial development. This assessment uses multiple lenses—including results from the labor- and capital-intensive models, market attractiveness, portfolio diversity, site improvements, and projected return on investment—to provide a comparative view of each location's readiness and competitiveness at this early stage. These findings are based on desktop research and RFI responses and are intended to guide prioritization for the next phase. As the process advances, these evaluations will be validated through on-site reviews and stakeholder engagement to ensure alignment with industrial development objectives and long-term economic impact.

These evaluation factor categories included:

- **Labor Model Score** – overall results from GLS labor-intensive project site selection simulation model.
- **Capital Model Scores** – overall results from GLS capital-intensive project site selection simulation model.
- **Market Attractiveness** – GLS review of overall attractiveness of property for industrial users, considering factors such as proximity to major transportation routes, access to utilities, surrounding land use compatibility, potential for future expansion, and future status of the site (after improvements).
- **Portfolio Diversity** – site has differentiating attributes such as rail service, larger acreage, proximity interstate or highway, large utility capacity compared to typical sites in the region, providing more diversity to Western NC's property portfolio.
- **Site Improvements** – indicates the estimated level of investment required to bring the site to full readiness, with higher scores indicating a greater need for improvements. At this stage, the evaluation is based on potential improvement requirements rather than precise cost estimates, which have not yet been defined.
- **Potential Return on Investment** – preliminary gauge of potential impact of SelectSite.

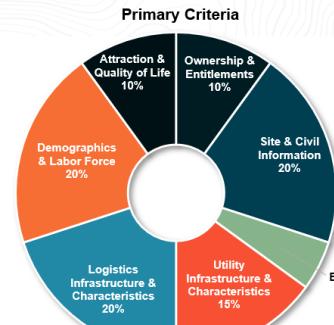
Site Selection Models

SITE VERIFICATION + DESKTOP

As part of the scoring, GLS developed labor- and capital-intensive site selection models that simulate industrial projects. These model results were incorporated with the other evaluation factors listed on the prior page.

	Labor Intensive	Capital Intensive
Capital Investment	\$50 - \$100 MM+	\$250 - \$500 MM+
Site		
Acreage	10+ acres	50+ acres
Square Footage		
Transportation		
Requires rail?	Not required	Preferred
Requires proximity to interstate/4-lane highway?	Required	Required
Requires proximity to port?	Not required	Preferred
Requires proximity to customers?	Yes	Yes
Requires proximity to suppliers?	Yes	Yes
Utilities		
Electricity	3 MW @ 75%	50 MW @ 75%
Natural Gas	10 MCF/hour	150 MCF/hour
Water	30,000 GPD	1.0 MGD
Wastewater	30,000 GPD	800,000 GPD
Workforce		
Total Employment	150-300+	50+
Cost Location Drivers		
Utilities	Yes	Yes
Logistics	Yes	Yes
Labor	Yes	Yes

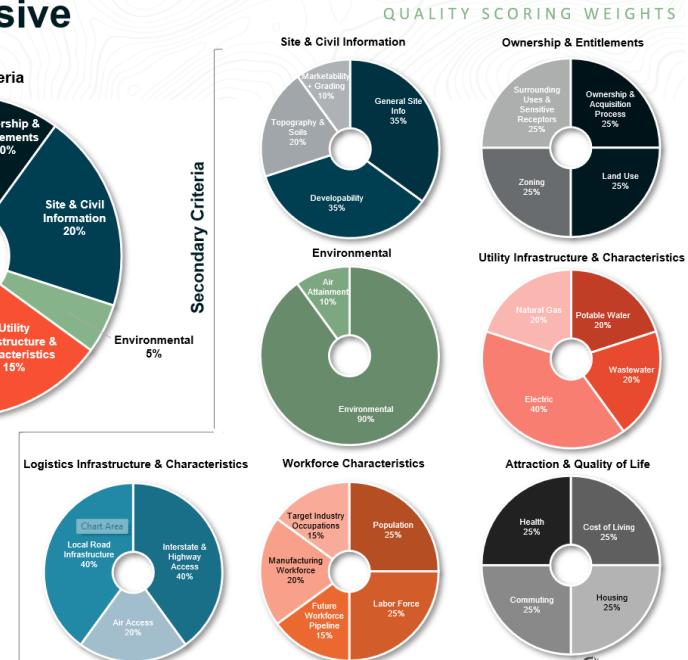
Labor-Intensive



A conditional analysis is used to assess various components of a site and location.

The Labor-Intensive Model was built specific to the attraction criteria important to a representative project considered to be more labor intensive in nature.

Each primary criteria is comprised of a set of secondary criteria, which are further delineated into tertiary criteria. Primary criteria and weights are shown here with secondary criteria weights to the right.

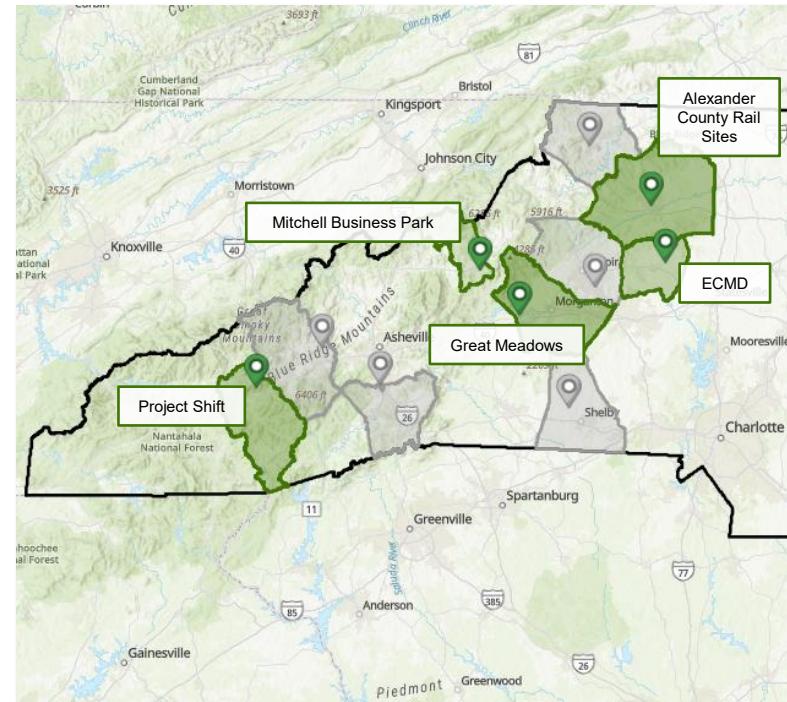


Phase 03 Evaluation

The GLS, ECS, and Ardurra teams conducted site visits for 10 sites across 10 different counties. The site visits included the economic development teams, utility providers, planning representatives, and other stakeholders. During the visits, the GLS team validated information from the Request for Information, filled information gaps, and toured the prospective properties.

Based on the information gathered during the visits, GLS updated the evaluation factors to recommend a list of up to five sites that appeared most promising for use of the SelectSite funds. These sites include (alphabetical order):

#	Site Name	County
1	Alexander County Rail Sites	Alexander
2	Great Meadows	Burke
3	Project Shift	Jackson
4	Mitchell Business Park	Mitchell
5	ECMD	Wilkes



Phase 03 Evaluation

SITE READINESS JOURNEY
REPORTS + BENCHMARKING

Drawing on insights from the site visits, GLS refined the evaluation criteria to identify up to five locations with the highest potential for strategic use of SelectSite funds. Expanding on the preliminary screening framework from Phase 02, GLS assessed many of the same factors while incorporating additional critical considerations for site advancement, producing an updated comparative analysis of each location's readiness and competitive position. These findings integrate all information collected to date, including on-site evaluations and stakeholder engagement, ensuring alignment with industrial development priorities and long-term economic impact goals.

These evaluation factor categories included:

- **Labor-Intensive Model Score** – overall results from GLS's labor-intensive project site selection simulation model informed scoring across several key factors, including site competitiveness, portfolio diversity, ownership, and ROI and support considerations.
- **Capital-Intensive Model Scores** – overall results from GLS capital-intensive project site selection simulation model informed scoring across several key factors, including site competitiveness, portfolio diversity, ownership, and ROI and support considerations.
- **Market Attractiveness** – GLS review of overall attractiveness of property for industrial users, considering factors such as proximity to major transportation routes, access to utilities, surrounding land use compatibility, potential for future expansion, and future status of the site (after improvements).
- **Site Competitiveness** – Leveraging information gathered throughout the assessment and the results from the site selection models, this category evaluated each site's competitiveness relative to other locations with similar characteristics or those likely to compete for the same industry end users.
- **Portfolio Diversity** – site has differentiating attributes such as rail service, larger acreage, proximity interstate or highway, large utility capacity compared to typical sites in the region, providing more diversity to Western NC's property portfolio.
- **ROI + Support** – Reflects the estimated level of investment required to bring each site to full readiness, with higher scores indicating a greater need for improvements. This assessment draws on data gathered and validated during the field visits, as well as each site's influence on the selection model outcomes. The category also considers the level of support needed to advance required improvements, the extent of economic development assistance required, and the steps necessary for the site to progress toward NC certification.
- **Hurricane Helene Impact** – each site was assessed for its overall exposure and impact from Hurricane Helene, relative to the other locations under consideration. This evaluation relied on the latest status updates and impact data available from the state's Hurricane Helene Damage and Needs Assessment.

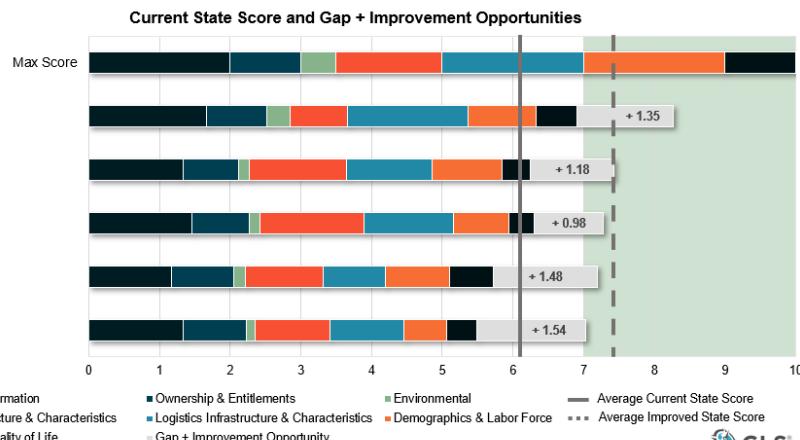
Deliverables

SITE READINESS JOURNEY REPORTS + BENCHMARKING

For the five sites that participated in site visits but did not receive the SelectSite designation, GLS will provide a high-level summary of findings and recommendations for continuing readiness of the properties to the participant.

GLS will provide the following to the five SelectSites:

- Site Readiness Journey Reports
 - Site Profiles
 - Strengths and weaknesses of properties in current state
 - Gap analysis to show how scores in the labor- and capital-intensive site selection simulation models can be improved
 - Gap analysis to outline outstanding items needed to participate in the NC Certified Site Program
 - Prioritized recommendations for continuing site readiness
 - Natural Resource and Phase 1 review
 - Geotechnical and Soil review
 - Development Plan with buildable area



Site Example		
Parcel 1	Parcel 2	Parcel 3
1111-11-1111	1111-11-1111	1111-11-1111
I. Site Availability		
a. County and/or City Support Letter	X	X
b. Availability & Price Assurance	X	X
c. Property Deed	X	X
d. Boundary Survey	✓	X
e. ALTA Survey	✓	X
f. Title Search	✓	X
g. Tax Map	X	X
II. Site Characteristics		
a. Aerial Photo	✓	✓
b. Topo Survey	X	X
c. Phase I Environmental Site Assessment	X	X
d. Geotechnical Survey with Borings	X	X
e. Wetlands Determination	X	X
f. Wetlands Mitigation Plan	X	X
g. Watershed Area Information	✓	✓
III. Site Development		
a. Zoning Information	✓	✓
b. Items Impacting Developability	X	X
c. Development Plan w/ Buildable Acres	✓	✓
d. Development Cost Estimate	X	X
e. Rare or Endangered Plant and/or Animal Species Report	✓	✓
f. Archeological Report	✓	✓
g. 100-year Flood Plain Map	✓	✓
h. Certification of Fill Areas	X	X
i. Unique Qualifications	X	X
IX. Site Access and Infrastructure		
a. Road Access Letter	X	X
b. Water and Wastewater Letter	✓	✓
c. Electric Service Letter	✓	✓
d. Telecommunications Services Letter	✓	✓
e. Natural Gas Service Letter	✓	✓
f. Rail Access Letter	X	X



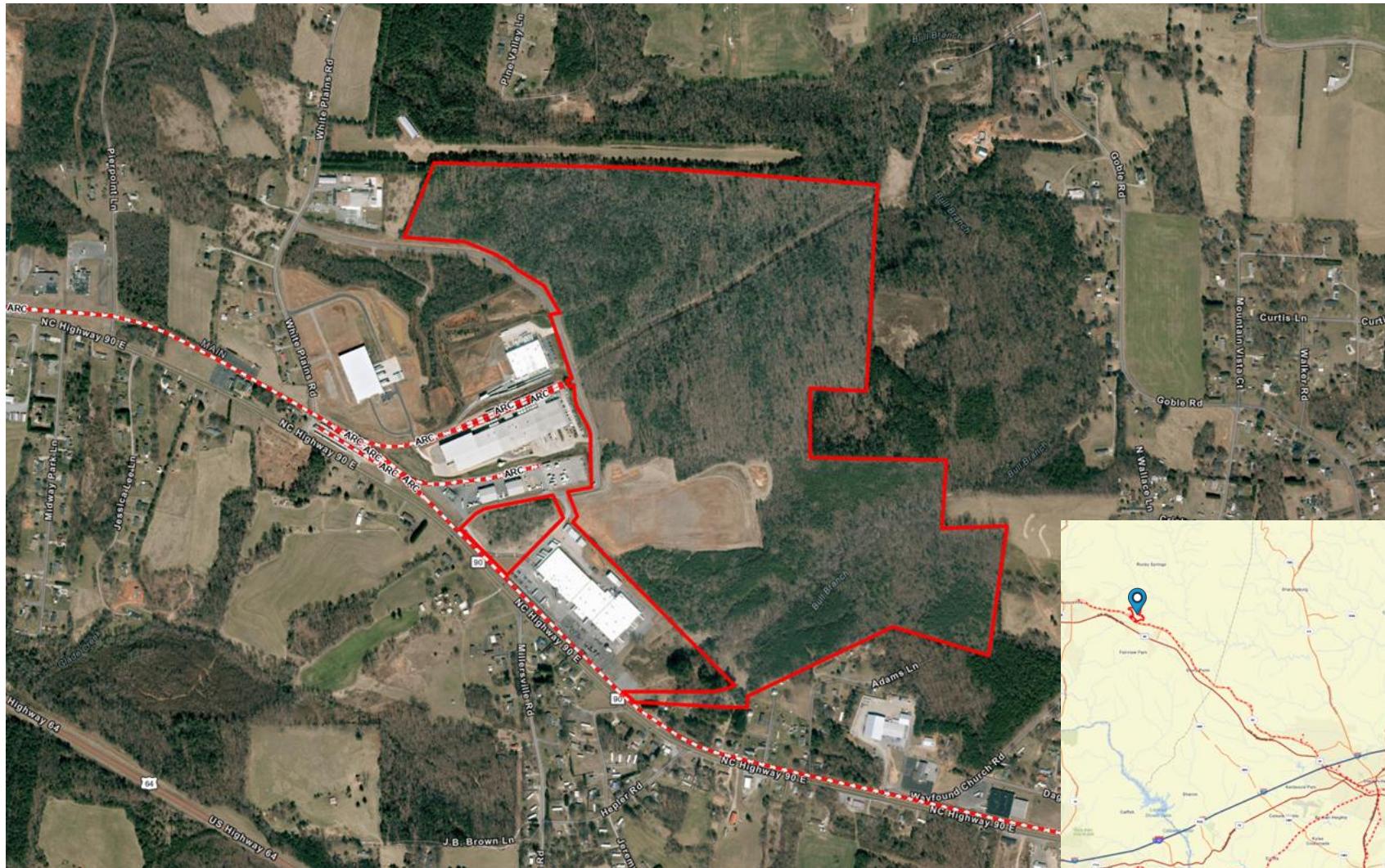
SITE PROFILE

Site Profiles for Shortlisted SelectSites

Disclaimer: All content analyzed in this report was provided to GLS and its partners by November 2025.

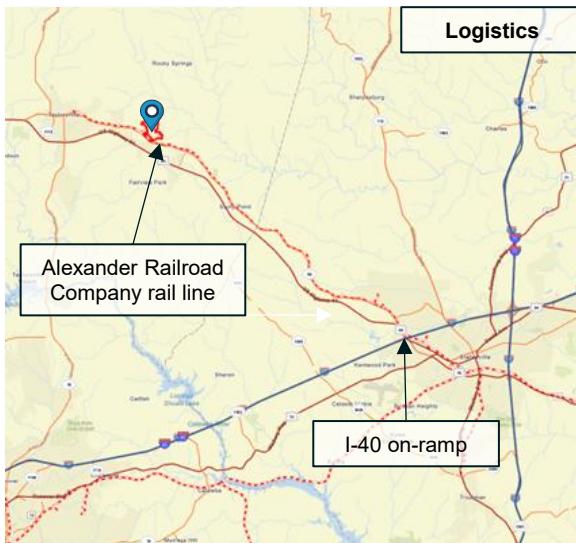
Alexander County Rail Sites

SITE AERIAL



Alexander County Rail Sites

S I T E P R O F I L E



Alexander County Rail Site - Site Profile

Site Name: Alexander County Rail Sites

Location: Hiddenite, Alexander County, North Carolina

Coordinates: (35.911781, -81.119359)

Total Acreage: +/- 207 acres, with +/- 92 acres contiguous and developable

Ownership: The southernmost parcel is publicly owned by Alexander County, while the two northern parcels are privately owned by the Alexander Railroad Company.

Zoning: All parcels are zoned Industrial ("I"); Rezoning is not required.

Interstate: 14.31-mile drive east to the I-40 on-ramp.

Highway: 0.85-mile drive south to the 4-lane highway US Hwy 64 entrance.

Rail: An existing Alexander Railroad Company line runs adjacent to the site. Providing on-site rail access would require a right-of-way crossing and a rail spur extension, along with anticipated signalization upgrades.

Electric: The site is located in a customer-choice area served by both Duke Energy and EnergyUnited. EnergyUnited currently has 12.5 kV distribution infrastructure near or adjacent to the property.

Natural Gas: The site is served by Enbridge Gas. A 4-inch line along Bab Industrial Drive, west of the property, currently supports nearby industrial customers.

Water: The site is served by EnergyUnited Water, with an existing 8-inch line along Bab Industrial Drive, west of the property. There is approximately 250,000 GPD of available capacity, without improvements.

Wastewater: The site is served by the Town of Taylorsville and is adjacent to an existing 8-inch water line along Industrial Park Drive. A nearby pump station was recently upgraded to provide 45,000 GPD to the park.

Improvement Opportunities

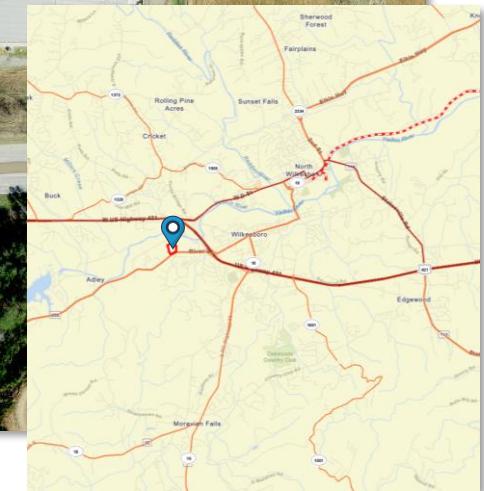
For the shortlisted sites in the Western NC SelectSite Program, GLS, ECS, and Ardurra provided improvement recommendations to advance towards site readiness and support industry recruitment. GLS has highlighted the key improvement opportunities for each site to guide actionable next steps, summarized below.

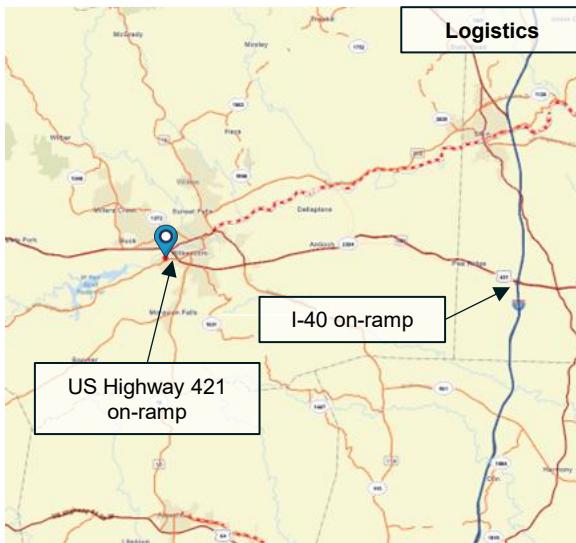
Alexander Country Rail Sites Recommendations:

- Continue discussions with ownership on Northern Site to ensure site availability and pricing
- Comprehensive Site Due Diligence
- Upgrade Water and Wastewater
- Wetlands Delineation and Mitigation Plan
- Grading + Site Preparation

Additionally, each community receives data on all potential improvements and their impact on a site's quality score within the two site selection models: labor-intensive and capital-intensive. The table to the right highlights a list of these opportunities.







ECMD - Site Profile

Site Name: ECMD

Location: Wilkesboro, Wilkes County, North Carolina

Coordinates: (36.140671, -81.187412)

Total Acreage: +/- 16 acres, with 15 acres contiguous and developable

Ownership: Privately owned by a single entity (ECMD) and currently listed for sale, with an asking price of \$1.63 M for the entire site. While no option agreement is in place at this time, the county has indicated that such an arrangement is feasible.

Zoning: M1 (Industrial); Rezoning is not required.

Interstate: 22.14-mile drive east to the I-40 on-ramp.

Highway: 0.93-mile drive east to the 4-lane highway US Hwy 421 entrance.

Rail: No rail service.

Electric: The site is served by Duke Energy, with an existing 12.5 kV distribution line running along River Street, south of the property. Two 100 kV substations are located approximately 1.5 miles from the site—one to the east and one to the west. Currently, 3–4 MW of capacity can be made available via the existing 12.5 kV distribution lines.

Natural Gas: The site is served by Frontier Natural Gas. A 6-inch steel line (60 PSI) runs along River Street just south of the site, and a 4-inch line is located along Stokes Street to the west. The site can handle up to 150 MCF/h using the existing infrastructure, with no significant capacity limitations or bottlenecks in the surrounding area.

Water: The site is served by the Town of Wilkesboro and is close to several existing water lines within the park, including 16- and 12-inch lines along River Street and an 8-inch line along Stokes Street. The existing water treatment plant has a total rated capacity of 10 MGD and an average usage of 5 MGD, leaving approximately 4 MGD of available capacity.

Wastewater: The site is served by the Town of Wilkesboro. An existing 8-inch gravity sewer line runs along Stokes Street west of the site and connects to a 16-inch line that feeds directly to the treatment plant. The existing 8-inch infrastructure can accommodate a user of a few thousand gallons per day.

Improvement Opportunities

E C M D

For the shortlisted sites in the Western NC SelectSite Program, GLS, ECS, and Ardurra provided improvement recommendations to advance towards site readiness and support industry recruitment. GLS has highlighted the key improvement opportunities for each site to guide actionable next steps, summarized below.

ECMD Site Recommendations:

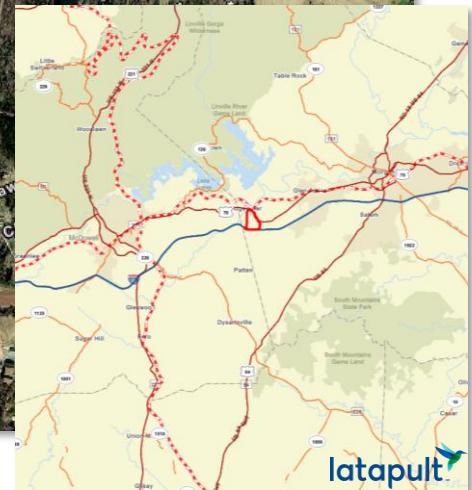
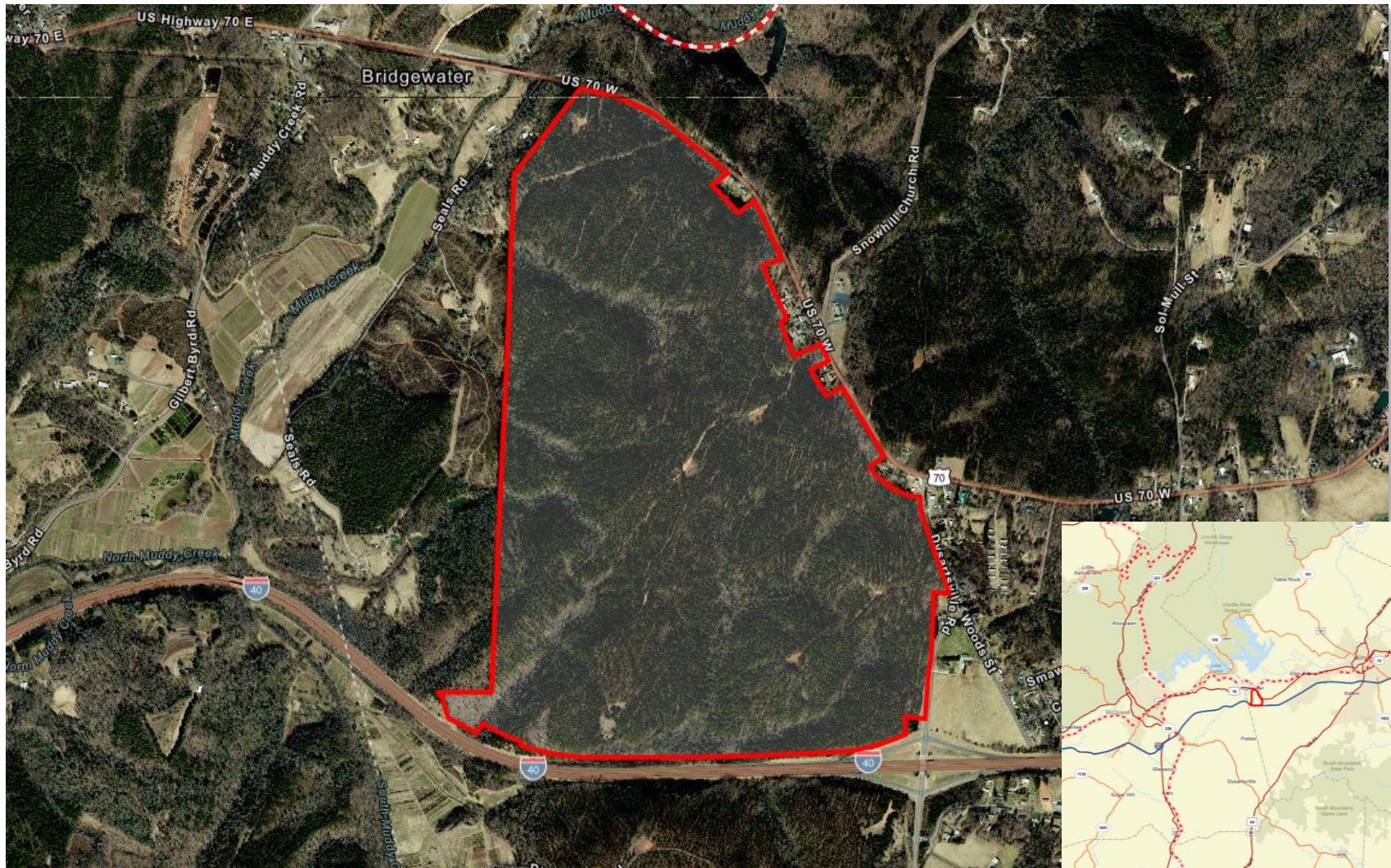
- Continue discussions with ownership on the site to ensure site availability and pricing
- Comprehensive Site Due Diligence
- Wetlands Delineation and Mitigation Plan
- Site Sewer Connectivity
- Graded Pad
- Additional Access to US Highway 64

Additionally, each community receives data on all potential improvements and their impact on a site's quality score within the two site selection models: labor-intensive and capital-intensive. The table to the right highlights a list of these opportunities.



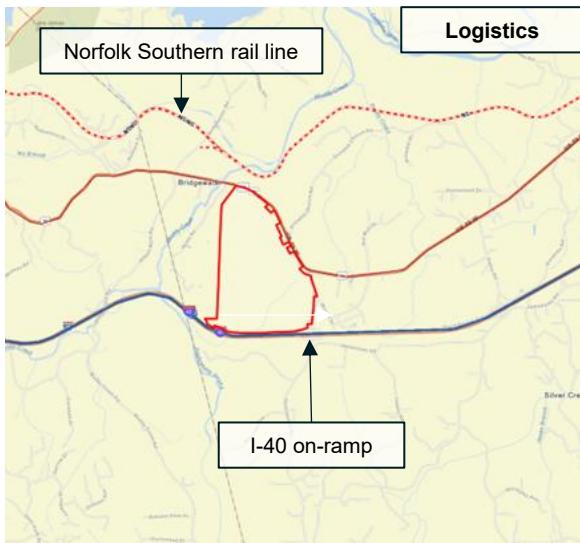
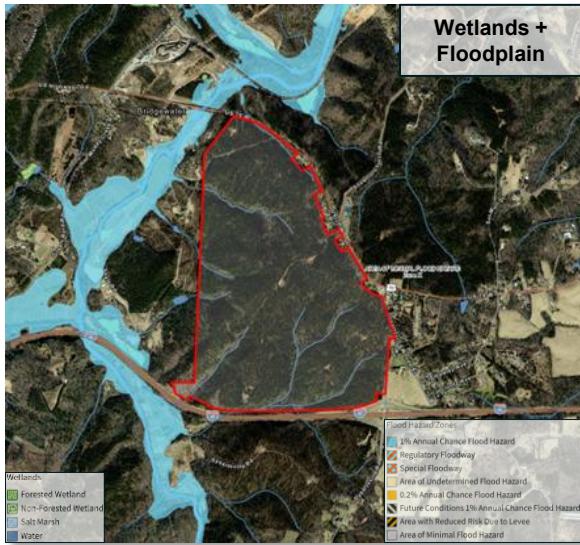
Great Meadows

SITE AERIAL



Great Meadows

S I T E P R O F I L E



Great Meadows - Site Profile

Site Name: Great Meadows

Location: Morganton, Burke County, North Carolina

Coordinates: (35.691941, -81.840719)

Total Acreage: +/- 570 acres, with +/- 110 acres contiguous and developable

Ownership: Privately owned by Great Meadows Inc. The property is under option by Burke Development Inc. and the McDowell Economic Development Association. The total asking price is \$35 million, and the county has secured funding to cover approximately 75% of this amount.

Zoning: Site has been rezoned to an Industrial Conditional District; no further rezoning is required.

Interstate: 0.29-mile drive south to the I-40 on-ramp.

Highway: The nearest 4-lane highway is I-40.

Rail: A Norfolk Southern rail line is located approximately 0.2 miles north of the site. Providing on-site rail access would require constructing a bridge over Highway 70 and addressing potential environmental impacts to streams on the property.

Electric: The site is served by Duke Energy. An existing 12.5 kV line is available for construction power or small load requirements. A 44 kV line runs along the northern boundary, and a 100 kV line is located 1–2 miles from the site.

Natural Gas: The site is served by Enbridge Gas. A 4-inch line along Bab Industrial Drive, west of the property, currently supports nearby industrial customers.

Water: The site is served by the City of Morganton. The city's water system has a total capacity of 18 MGD, currently using approximately 8.5 MGD with a maximum of 12 MGD.

Wastewater: The site is served by the City of Morganton. The city's wastewater system has a total capacity of 8.5 MGD, with current usage around 5 MGD, leaving approximately 3.5 MGD of available capacity.

Improvement Opportunities

For the shortlisted sites in the Western NC SelectSite Program, GLS, ECS, and Ardurra provided improvement recommendations to advance towards site readiness and support industry recruitment. GLS has highlighted the key improvement opportunities for each site to guide actionable next steps, summarized below.

Great Meadows Site Recommendations:

- Continue discussions with ownership on the site to ensure site availability and pricing
- Completion of Water and Sewer Infrastructure
- Natural Gas Service
- Rail Service
- NC Site Certification + Improving REDI Sites Designation
- Grading + Site Preparation

Additionally, each community receives data on all potential improvements and their impact on a site's quality score within the two site selection models: labor-intensive and capital-intensive. The table to the right highlights a list of these opportunities.



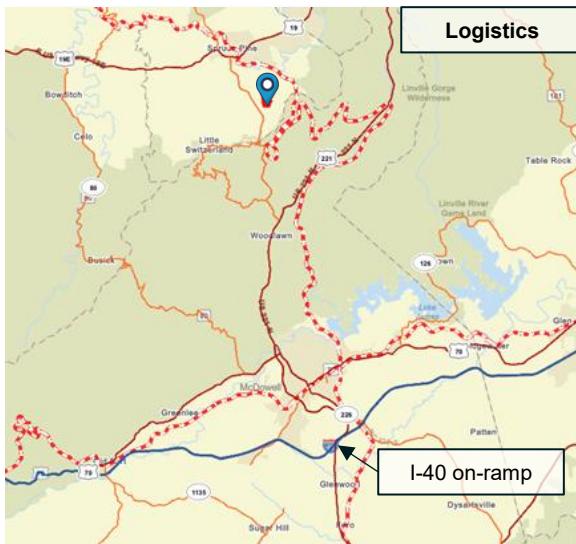
Mitchell Business Park

SITE AERIAL



Mitchell Business Park

S I T E P R O F I L E



Mitchell Business Park - Site Profile

Site Name: Mitchell Business Park

Location: Spruce Pine, Mitchell County, North Carolina

Coordinates: (35.879693, -82.040665)

Total Acreage: +/- 82, with +/- 48 contiguous and developable

Ownership: Privately owned by Whoretown Properties LLC. The property is under option by Mitchell County Economic Development Commission for 5 years. The asking price is \$3.6 million.

Zoning: Site does not have zoning; no further rezoning is required, as this does not restrict industrial projects.

Interstate: 21.34-mile drive south to the I-40 on-ramp.

Highway: 4.58-mile drive north to the 4-lane highway US Hwy 19 entrance.

Rail: No rail service.

Electric: The site is served by French Broad Electric Membership Corporation. An existing 25 kV distribution line at the property, with an additional 12.5 kV line along Halltown Road. The nearest substation is approximately 0.6 miles from the site.

Natural Gas: The site is served by Piedmont Natural Gas. An existing 4-inch plastic line runs on-site, providing service up to 60 MCF/h.

Water: The site is served by the Town of Spruce Pine. The town's water system has a total capacity of 1.6 MGD, with approximately 547,000 GPD currently available. In addition, adjacent wells in the area can provide up to 230,000 GPD. A 6-inch water line already exists on the property.

Wastewater: The site is served by the Town of Spruce Pine, whose water system has a total capacity of 2 MGD, with 1.25 MGD currently available.

Improvement Opportunities

MITCHELL BUSINESS PARK

For the shortlisted sites in the Western NC SelectSite Program, GLS, ECS, and Ardurra provided improvement recommendations to advance towards site readiness and support industry recruitment. GLS has highlighted the key improvement opportunities for each site to guide actionable next steps, summarized below.

Mitchell Business Park Site Recommendations:

- Comprehensive Site Due Diligence
- Wetlands Delineation and Mitigation Plan
- Sewer Infrastructure Extension
- Grading + Site Preparation
- Enhance Local Road Infrastructure

Additionally, each community receives data on all potential improvements and their impact on a site's quality score within the two site selection models: labor-intensive and capital-intensive. The table to the right highlights a list of these opportunities.



Project Shift

SITE AERIAL



Project Shift

SITE PROFILE



Project Shift - Site Profile

Site Name: Project Shift

Location: Sylva, Jackson County, North Carolina

Coordinates: (35.403754, -83.166397)

Total Acreage: +/- 42, with +/- 14 contiguous and developable.

Ownership: Publicly owned by Jackson County.

Zoning: Site does not have zoning; no further rezoning is required, as this does not restrict industrial projects.

Interstate: 20.75-mile drive north to the I-40 on-ramp.

Highway: 1.52-mile drive south to the 4-lane highway US Hwy 74 entrance.

Rail: A Blue Ridge Southern rail line and rail spur is located on-site with service provided by WATCO. Providing on-site access would require improvements. Further design and engineering analysis are needed to determine the scope of improvements as well as the associated costs and timeline for revitalizing or replacing the existing rail spurs.

Electric: The site is served by Duke Energy. Existing on-site 12.47 kV distribution lines currently support up to 3 MW and could be expanded to approximately 5–8 MW with minor system upgrades. The nearest 66 kV transmission line is located about 3.4 miles from the site.

Natural Gas: Enbridge Gas currently operates a medium-pressure 6-inch steel main at the intersection of Steeple Road and Skyland Drive.

Water: The site is served by the Tuckasegee Water and Sewer Authority, with a 10-inch water main located along Addie Mine Road east of the property. The treatment plant has a permitted capacity of 1.5 MGD and is currently operating at approximately 1.1 MGD, leaving an estimated 400,000 GPD of available capacity.

Wastewater: Wastewater service is provided by the Tuckasegee Water and Sewer Authority via an 8-inch line at the site's southeast corner. The line ties into a pump station capable of handling up to 500,000 GPD.



Improvement Opportunities

For the shortlisted sites in the Western NC SelectSite Program, GLS, ECS, and Ardurra provided improvement recommendations to advance towards site readiness and support industry recruitment. GLS has highlighted the key improvement opportunities for each site to guide actionable next steps, summarized below.

Project Shift Site Recommendations:

- Comprehensive Site Due Diligence
- Wetlands Mitigation Plan
- ALTA Survey
- Natural Gas Service
- Floodplain Mitigation and Site Elevation
- Site Access Improvements
- Site Cleanup and Grading

Additionally, each community receives data on all potential improvements and their impact on a site's quality score within the two site selection models: labor-intensive and capital-intensive. The table to the right highlights a list of these opportunities.



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MATCHING

COMPANIES AND

COMMUNITIES FOR

LONG-TERM,

SUSTAINABLE

SUCCESS

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