

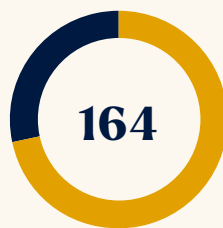
Q4 2025

# NORTH CAROLINA ECONOMIC DEVELOPMENT ACTIVITY REPORT

The North Carolina Economic Activity Report (NC EDAR) is a comprehensive list of announced commercial investments through relocations, expansions, or new facilities within traded sectors. Projects listed include those supported by the Economic Development Partnership of North Carolina as well as projects led solely by partners in local communities. This report does not include investments made in retail, recreation, hospitality, infrastructure, utilities, or the public sector. Confidential jobs and investment are not included in this report. For questions or additional details on the NC EDAR, contact Victoria Suda at [victoria.suda@edpnc.com](mailto:victoria.suda@edpnc.com)

Through Q4, North Carolina reported 164 new economic development projects, announcing 35,182 new jobs and \$27.1 billion in capital investment. Of these projects, 36 were foreign direct investment, representing 16 different countries and 3,153 jobs and \$3.3 billion in investment.

## REPORTED PROJECTS



- 108 New Operations
- 56 Expansions

## ANNOUNCED JOBS



- 31,269 jobs announced by new operations
- 3,913 jobs announced by expansions

## ANNOUNCED INVESTMENT



- \$23 billion announced by new projects
- \$4.1 billion announced by expansions

## PROJECTS BY SECTOR

| Sector                                   | Projects Announced | New Jobs      | Capital Investment |
|--|--------------------|---------------|--------------------|
| Food, Beverage & Agriculture             | 17                 | 634           | \$990.9M           |
| Energy                                   | 15                 | 1,762         | \$773M             |
| Automotive/Motor Vehicles                | 14                 | 1,827         | \$476.5M           |
| Chemicals, Plastics & Rubber             | 12                 | 870           | \$205.5M           |
| Construction Materials                   | 12                 | 700           | \$260.2M           |
| Business & Financial Services            | 11                 | 3,303         | \$108.7M           |
| Biotech, Pharmaceuticals & Life Sciences | 10                 | 1,293         | \$3.8B             |
| Information Technology                   | 10                 | 3,764         | \$11.3B            |
| Aerospace/Aviation                       | 7                  | 15,155        | \$5.6B             |
| Furniture & Home Furnishings             | 7                  | 300           | \$70.0M            |
| Computers & Electronics                  | 6                  | 1,124         | \$1.1B             |
| Medical Equipment                        | 4                  | 323           | \$36.6M            |
| Apparel & Sporting Goods, Textiles       | 8                  | 590           | \$68.4M            |
| Transportation & Logistics               | 4                  | 630           | \$47.4M            |
| Military/Defense                         | 2                  | 45            | \$1.2M             |
| Boating & Marine                         | 1                  | 23            | \$2.3M             |
| Other                                    | 24                 | 2,839         | \$2.1B             |
| <b>Total</b>                             | <b>164</b>         | <b>35,182</b> | <b>\$27.1B</b>     |

## LARGEST PROJECTS BY JOBS ANNOUNCED Q4 2025

| Company                   | Announced Jobs | Sector                        |
|---------------------------|----------------|-------------------------------|
| JetZero                   | 14,564         | Aerospace                     |
| Jabil, Inc                | 2,004          | Information Technology        |
| Scout Motors              | 1200           | Automotive/Motor Vehicles     |
| Aspida Financial Services | 1,000          | Business & Financial Services |
| Vulcan Elements           | 1,000          | Other                         |

## LARGEST PROJECTS BY CAPITAL INVESTMENT ANNOUNCED Q4 2025

| Company                 | Announced Investment | Sector                                   |
|-------------------------|----------------------|--|
| Amazon Web Services     | \$10B                | Information Technology                   |
| JetZero                 | \$4.7B               | Aerospace                                |
| Biogen                  | \$2B                 | Biotech, Pharmaceuticals & Life Sciences |
| Compass Data Centers    | \$1B                 | Information Technology                   |
| Enovum Data Center Corp | \$1B                 | Computers & Electronics                  |

## FOREIGN DIRECT INVESTMENT (FDI)

In Q4, 21 FDI projects from 16 different countries announced 3,153 jobs and \$3.3 billion in investment in North Carolina.



| Company                   | Toromont                | MST Rebar Inc.                | Indo Count Industries Limited      | Pelsan Tekstil A.S.          | Ahold Delhaize               |
|---------------------------|-------------------------|-------------------------------|------------------------------------|------------------------------|------------------------------|
| <b>Jobs Created</b>       | 326                     | 245                           | 232                                | 216                          | 165                          |
| <b>Capital Investment</b> | \$56M                   | \$39M                         | \$14.4M                            | \$82.6M                      | \$860M                       |
| <b>Parent Country</b>     | Canada                  | Canada                        | India                              | Turkey                       | Netherlands                  |
| <b>Sector</b>             | Computers & Electronics | Chemicals, Plastics, & Rubber | Textiles, Apparel & Sporting Goods | Chemicals, Plastics & Rubber | Food, Beverage & Agriculture |

## TOTAL NUMBER OF JOBS AND INVESTMENT BY PROSPERITY ZONE Q4 2025

