

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

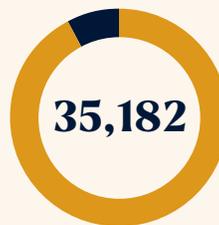
Through Q4, North Carolina reported 164 new economic development projects, announcing 35,182 new jobs and \$27.1 billion in capital investment. Of these projects, 36 were foreign direct investment, representing 16 different countries and 3,153 jobs and \$3.3 billion in investment.

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 and Agriculture	17	634	\$990.9M
Energy	15	1,762	\$773M
Automotive/Motor Vehicles	14	1,827	\$476.5M
Chemicals, Plastics and Rubber	12	870	\$205.5M
Construction Materials	12	700	\$260.2M
Business and 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 and Home Furnishings	7	300	\$70.0M
Computers and Electronics	6	1,124	\$1.1B
Medical Equipment	4	323	\$36.6M
Apparel and Sporting Goods, Textiles	8	590	\$68.4M
Transportation and Logistics	4	630	\$47.4M
Military/Defense	2	45	\$1.2M
Boating and Marine	1	23	\$2.3M
Other	24	2,839	\$2.1B
Total	164	35,182	\$27.1B

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 and 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 and 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	Millennium Print Group	Toromont	MST Rebar Inc.	Indo Count Industries Limited	Pelsan Tekstil A.S.
Jobs Created	641	326	245	232	216
Capital Investment	\$668.6M	\$56M	\$39M	\$14.4M	\$82.6M
Parent Country	Canada	India	Turkey	Canada	Portugal
Sector	Computer and Electronics	Textiles	Chemicals, Plastics, and Rubber	Textiles	Automotive

TOTAL NUMBER OF JOBS AND INVESTMENT BY PROSPERITY ZONE Q4 2025

