



# Eastern Carolina Council

**NEUSE RIVER COUNCIL OF GOVERNMENTS**

**(d/b/a Eastern Carolina Council)**



Serving: Carteret, Craven, Duplin, Greene, Jones,  
Lenoir, Onslow, Pamlico, and Wayne Counties

## **2023-27 Comprehensive Economic Development Strategy**

**Supported by the Economic Development Administration**

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# Eastern Carolina Council's Member Governments

## **Carteret County**

Town of Atlantic Beach  
Town of Beaufort  
Town of Bogue  
Town of Cape Carteret  
Town of Cedar Point  
Town of Emerald Isle  
Town of Indian Beach  
City of Morehead City  
Town of Newport  
Town of Pine Knoll Shores

## **Craven County**

Town of Bridgeton  
Town of Cove City  
Town of Dover  
City of Havelock  
Town of River Bend  
Town of Trent Woods  
Town of Vanceboro

## **Duplin County**

Town of Beulaville  
Town of Calypso  
Town of Faison  
Town of Greenevers  
Town of Kenansville  
Town of Magnolia  
Town of Rose Hill  
Town of Teachey  
Town of Wallace  
Town of Warsaw

## **Greene County**

Town of Hookerton  
Town of Snow Hill  
Town of Walstonburg

## **Jones County**

Town of Maysville  
Town of Pollocksville  
Town of Trenton

## **Lenoir County**

Town of Pink Hill

## **Onslow County**

Town of Holly Ridge  
Town of North Topsail Beach  
Town of Richlands  
Town of Surf City

## **Pamlico County**

Town of Alliance  
Town of Arapahoe  
Town of Bayboro  
Town of Grantsboro  
Town of Mesic  
Town of Minnesott Beach  
Town of Oriental

## **Wayne County**

Town of Fremont  
Town of Mt. Olive  
Town of Pikeville  
Town of Seven Springs  
Village of Walnut Creek

# Introduction

## Authority

The Neuse River Council of Governments (d/b/a Eastern Carolian Council, or ECC) is the Economic Development District (EDD) for the nine-county Eastern Carolina region of North Carolina, as designated by the U.S. Department of Commerce/Economic Development Administration (EDA). ECC was established in 1967 under NC General Statute 160A-47. It is headquartered in New Bern, North Carolina.

## Who is ECC?

Since its inception in 1967, Eastern Carolina Council (ECC) has been a unifying entity for local governments in central eastern North Carolina. ECC is one of sixteen councils of government, or multi-county planning and development regions in the State. Councils of Government are governed by local public and private sector appointments and are forums where local officials determine priorities for the region. First established as the Neuse River Council of Governments in 1967, the Board of Directors elected to change the name to Eastern Carolina Council in 1999.

ECC provides the organizational framework for local stakeholders to meet and address mutual goals, objectives, and region-wide challenges. In many cases, opportunities, issues, and concerns do not have jurisdictional boundaries. ECC members receive many benefits including:

- A regional forum addressing issues and developing a cooperative effort to address challenges and opportunities to improve the quality of life for all of the region's citizens.
- The ability to work through a single agency to enable more effective utilization and administration of federal, state, and local grant and/or private funds.
- An opportunity to avoid duplication of efforts and ensure better coordination of services.
- Promotion of cooperation between the public and private sectors.
- The provision of technical assistance and advice from qualified staff including aging, planning & development, and workforce development services.

Through the guidance of a regional council of governments, counties and municipalities can cross their political jurisdictions and create ongoing partnerships for cooperation and coordination.

## ECC Departments / Services

ECC's Planning and Economic Development provides professional planning, economic, and community development services to member governments and partners at the local and regional levels. ECC is the lead planning agency for two Rural Transportation Planning Organizations (RPOs) – the Eastern Carolina RPO and the Down East RPO – and these are housed within this department. The planning work is supported by grants and contracts for specific regional and local initiatives.

The Area Agency on Aging, a service of ECC, plans and administers a variety of federal, state, and local programs and services primarily targeted at supporting aging adults and their caregivers.

## What is a CEDS?

The primary purpose of the Comprehensive Economic Development Strategy (CEDS) is to provide a comprehensive, performance-based strategy to strengthen the region. The process includes an analysis of the region's economy, established plans, area challenges & opportunities, with strategies and tactics for moving the region forward.

Every 5 years, ECC fully updates this strategic plan for the region. The CEDS is a locally based, regionally driven economic development process and document that engages community leaders, private sector partners, and other stakeholders in planning and acting for the future. The process is designed to identify locally grown strategies that will guide regional economic development, encourage partnerships and collaboration, and improve economic outcomes and overall quality of life in the region. Included in this plan is a summary of the economic conditions of the region, an analysis of regional strengths, weaknesses, opportunities, and threats (commonly known as a "SWOT" analysis), an action plan, and an evaluation framework to monitor performance and the CEDS' impact on the regional economy. Economic resilience — or the ability to prevent, withstand, and quickly recover from major disruptions to the economic base — is also a key component of the CEDS.

## Summary Background

The Neuse River region was designated a Council of Government by the North Carolina legislature in 1967, when the Neuse River Council of Governments (d/b/a Eastern Carolina Council, or ECC) was established as one of 16 councils of government regions in the state.

ECC is located in central eastern North Carolina and is comprised of nine counties (Carteret, Craven, Duplin, Greene, Jones, Lenoir, Onslow, Pamlico, and Wayne) and 62 incorporated municipalities. ECC's region – Region P – has a land mass of 5,710 square miles and a population of over 652,000 (US Census, 2020) in the region's nine counties. ECC's region (the region) is very diverse, ranging from coastal communities with tourism-based, small manufacturing and service-based economies to rural areas with agriculture-based economies.

The Eastern Carolina region is centrally located in eastern North Carolina, making the entire eastern seaboard within a one-day drive.

The main east-west corridor is US-70 (future I-42). The main north-south corridor is US-17. US-70 is a vital transportation corridor for eastern North Carolina that stretches from I-40 near Raleigh in Johnston County to the Atlantic Ocean in Carteret County. Within North Carolina, I-42/US-70 provides a direct connection between Raleigh-Clayton, Goldsboro, Kinston, New Bern, and Morehead City. Recent improvements have enhanced these corridors, and additional improvements are planned. Future enhancements to US-70 (future I-42) will be important to the military, logistics (particularly the Port of Morehead City), tourism, manufacturing, and agriculture sectors.

The I-42/US-70 corridor is identified as a Strategic Transportation Corridor (STC) within the North Carolina Transportation Network3 (NCTN) [March 4, 2015]. The purpose of the NC Transportation

Network (NCTN) is to preserve and maximize mobility and connectivity on a core network of multimodal transportation corridors, promoting environmental stewardship and economic prosperity. The I-42/US-70 corridor provides connections to five major activity centers: the Research Triangle Park in Raleigh-Durham, Seymour Johnson Air Force Base in Goldsboro, the Global TransPark in Kinston, Marine Corps Air Station Cherry Point in Havelock, and the Port of Morehead City.

Other major transportation routes that serve the region well include I-795, US-13, US-117, and US-258.

The region has a relatively flat to gently sloping topography. Elevations range from sea level on the coast to about 190 feet in the southwestern part of Wayne County. The Neuse River is the primary watershed of the region, and parts of the region are also in the Tar-Pamlico and Cape Fear River Basins. Land use is primarily a rural mix of farmland, open space, and forestry with suburban, and urban residential areas in small towns and cities with commercial and industrial development throughout.

The 62 municipal governments across the region vary in size, the smallest of which Seven Springs (population: 44) and the largest of which is Jacksonville (population: 72,723, as of the 2020 Census). The region-wide population is over 652,000. Most of the region is suburban and rural, however certain areas are experiencing modest population growth. Carteret and Onslow counties are seeing residential growth with their proximity to military assets and coastal amenities, as well as Onslow's proximity to the Wilmington Metropolitan Statistical Area.

The Port of Morehead City, a breakbulk and bulk facility, is one of the deepest on the United States East Coast, and it is just four miles from the Atlantic Ocean. It is also within 700 miles of more than 70% of the U.S. industrial base. Interstates 95 and 40 are easily accessed via U.S. Highways 70 and 17. The Port of North Carolina at Wilmington is about 50 miles from the region, and the Port of Virginia in Norfolk, VA is within 150 miles of the region.

## **Economy**

The Eastern Carolina region, like much of the United States and North Carolina, is attempting to transition to a knowledge and technology-based economy and is dealing with the impacts of the COVID pandemic. Changes in the marketplace – driven by both technology and globalization – demand a greater capacity to innovate. To support that innovation, the region requires an appropriately skilled workforce and an expanded and modernized infrastructure, including transportation, utilities, and broadband. Although the region's economy has made progress, the regional economy still lags materially behind the State of North Carolina as a whole, and the U.S.

Three Metropolitan Statistical Areas (MSA's) – Jacksonville in Onslow County, Goldsboro in Wayne County, and New Bern in Craven County – serve as economic centers for the region. The region also contains two Micropolitan Statistical Areas (MiSA's) – Kinston in Lenoir County and Morehead City in Carteret County.

Additionally, four military bases – the Marine Corps Air Station Cherry Point in Craven County (including the Fleet Readiness Center), the Marine Corps Camp Lejeune in Onslow County, the

Marine Corps Air Station New River in Onslow County, and the Seymour Johnson Air Force Base in Wayne County are major economic influences in the region.

Although the military is a huge economic asset to the region, it is a double-edged sword for the regional economy. When deployments are down, local businesses thrive because service members and their families purchase more local goods and services. When deployments are up, local businesses suffer a decline in business. The region has been and continues to be subject to Base Realignment and Closure (BRAC) decisions in Congress. The closure or reduction in force at any of the four major Department of Defense installations in the region would have devastating consequences for the regional economy. The Fleet Readiness Center East, a repair depot at the Marine Corps Air Station in Havelock, is one of the largest civilian employers east of Interstate 95. These military facilities are major economic engines pumping billions of dollars into the local economy and supporting tens of thousands of military and civilian personnel throughout the entire region. Civilian employment at these installations provides some of the highest wage employment in what is otherwise a low-wage region of North Carolina.

Traditional manufacturing continues to play an important role in the region's economy, and several counties in the Region have had some success attracting advanced manufacturers.

Onslow and Carteret counties are experiencing growth, in part due to their proximity to military assets, as well as the popularity and benefits of coastal living. Other counties appear to have stagnant growth or population decline, although the COVID-19 pandemic likely impacted the completeness and accuracy of the 2020 Census. Many rural communities of the region are experiencing population decline, due to the "graying" of the population.

Within the region, the largest employers in 2021 (1000+) include Boards of Education, Hospitals and Medical Centers, Department of Defense, poultry / pork / produce processing, NC Department of Health and Human Services, local governments, and Wal-Mart. Also included is an appliance manufacturer. The region's disproportionate reliance on public sector, low-wage manufacturing, and retail employment poses a huge challenge to the region's residents and local governments.

The counties of the region remain quite distinct from one another. The non-coastal counties (including Wayne, Lenoir, Jones, Greene, and Duplin) generally rely on traditional agricultural and manufacturing economies (plus the Seymour Johnson Air Force Base in Wayne). The coastal counties (including Onslow, Carteret, Craven, and Pamlico) have abundant water resources that support tourism, retirement, and second home development, as well as a huge impact from the Marine Corps facilities at Camp Lejeune/New River and MCAS Cherry Point/FRC East.

The following pages contain data tables that further explain the dynamics of the region.

## Eastern Carolina Council Region

<b>Population by Age, 2020</b>	<b>Value</b>	<b>Pct. of Total</b>	<b>U.S.</b>	<b>Pct. of Total</b>
Total	652,181	100%	326,569,308	100%
Preschool (0 to 4)	43,277	6.60%	19,650,192	6.00%
School Age (5 to 17)	103,294	15.80%	53,646,546	16.40%
College Age (18 to 24)	84,686	13.00%	30,435,736	9.30%
Young Adult (25 to 44)	163,524	25.10%	86,831,842	26.60%
Adult (45 to 64)	150,334	23.10%	83,642,175	25.60%
Older Adult (65 plus)	107,066	16.40%	52,362,817	16.00%

Source: U.S. Census Bureau, American Community Survey, latest 5-Year Estimates

<b>Educational Attainment, 2020</b>	<b>Value</b>	<b>Pct. of Total</b>	<b>U.S.</b>	<b>Pct. of Total</b>
Total Population 25 and Older	420,924	100%	222,836,834	100%
Less Than 9th Grade	19,513	4.60%	10,923,030	4.90%
9th to 12th, No Diploma	34,182	8.10%	14,639,650	6.60%
High School Graduate (incl. equiv.)	122,582	29.10%	59,421,419	26.70%
Some College, No Degree	106,304	25.30%	45,242,162	20.30%
Associate Degree	48,297	11.50%	19,254,254	8.60%
Bachelor's Degree	59,629	14.20%	45,034,610	20.20%
Graduate or Professional Degree	30,417	7.20%	28,321,709	12.70%

Source: U.S. Census Bureau, American Community Survey, latest 5-Year Estimates

<b>Resident Occupations, 2020</b>	<b>Value</b>	<b>Pct. of Total</b>	<b>U.S.</b>	<b>Pct. of Total</b>
Employed civilian pop. 16 years and over	254,588	100%	155,888,980	100%
Management, professional, and related	78,984	31.00%	61,526,906	39.50%
Service	50,850	20.00%	27,095,654	17.40%
Sales and office	51,646	20.30%	33,247,878	21.30%
Farming, fishing, and forestry	4,533	1.80%	1,001,279	0.60%
Construction, extraction, and maintenance	27,589	10.80%	12,619,157	8.10%
Production, transportation, and material moving	40,986	16.10%	20,398,106	13.10%

Source: U.S. Census Bureau, American Community Survey, latest 5-Year Estimates



## County Tier Ranking

The North Carolina Department of Commerce annually ranks the state’s 100 counties based on economic well-being and assigns each a Tier designation. This Tier system is incorporated into various state programs to encourage economic activity in the less prosperous areas of the state.

The 40 most distressed counties are designated as Tier 1, the next 40 as Tier 2 and the 20 least distressed as Tier 3. Six of the nine counties in the region are Tier 1 – some of the most distressed counties in North Carolina.

County Tiers are calculated using four factors:

- Average unemployment rate
- Median household income
- Percentage growth in population
- Adjusted property tax base per capita

<b>County</b>	<b>2023 Tier Ranking</b> (from NC Commerce memo published November 30, 2022)	<b>Economic Distress Rank</b> (out of 100 NC counties, #1 being the most distressed)	<b>Unemployment</b> (12-month average, Oct. 21 – Sept. 22)	<b>Median Household Income</b> (2020 income)
Carteret	3	82	3.25%	\$63,475
Craven	2	54	3.58%	\$53,960
Duplin	1	32	3.51%	\$49,755
Greene	1	22	3.20%	\$47,605
Jones	1	31	3.24%	\$44,972
Lenoir	1	13	3.81%	\$40,586
Onslow	1	40	4.09%	\$52,885
Pamlico	2	56	3.48%	\$50,481
Wayne	1	27	3.94%	\$52,906
NC Avg.			3.69%	\$59,616
US Avg.			3.5% (Sept. 2022)	\$67,521

## Carteret County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	68,541	39	Covered Employment	23,504	40
Growth (%) since 2010 Census	3.1%	44	Avg Wage per Job	\$40,500	74
Households (2020)	30,060	36	Manufacturing - % All Jobs in County	4.0%	82
Labor Force (persons) (Ann. Avg. 2021)	31,149	39	Avg Wage per Job	\$43,657	80
Unemployment Rate (Ann. Avg. 2021)	4.1	85	Transportation & Warehousing - % All Jobs in County	1.4%	65
Per Capita Personal Income (2021)	\$60,741	9	Avg Wage per Job	\$46,187	85
Median Household Income (2020)	\$63,475	17	Health Care, Social Assist. - % All Jobs in County	9.3%	57
Poverty Rate (2020)	9.3	94	Avg Wage per Job	\$54,004	22
High School Diploma or More - % of Adults 25+ (2020)	92.1%	7	Finance and Insurance - % All Jobs in County	2.1%	25
Bachelor's Degree or More - % of Adults 25+ (2020)	28.5%	23	Avg Wage per Job	\$79,812	15

StatsAmerica is a service of the [Indiana Business Research Center](#) at Indiana University's Kelley School of Business. This initiative is funded in part by the U.S. Commerce Department's [Economic Development Administration](#).

## Carteret County – Top Employers

Company Name	Industry	Employment Range
Carteret County Board of Education	Educational Services	1000+
Carteret County General	Health Care and Social Assistance	1000+
Carteret County Government	Public Administration	500-999
Wal-Mart Associates Inc.	Retail Trade	250-499
Lowes Home Centers Inc	Retail Trade	250-499
Carteret Community College	Educational Services	250-499
Food Lion	Retail Trade	100-249
Bally Refrigerated Boxes Inc	Manufacturing	100-249
Lowes Foods LLC	Retail Trade	100-249
McDonald's	Accommodation and Food Services	100-249
Town Of Morehead City Human Resources	Public Administration	100-249
Veneer Technologies Inc	Manufacturing	100-249
State Of NC Dept of Environment & N	Public Administration	100-249
Broad Creek Holdings Inc	Accommodation and Food Services	100-249
Adams Keegan Inc	Health Care and Social Assistance	100-249
Parker Offshore LLC	Manufacturing	100-249
Town Of Emerald Isle	Public Administration	100-249
Ascend Beaufort Hotel	Accommodation and Food Services	100-249
Southeast Employee Leasing Service	Manufacturing	100-249
Carolinas Center For Surgery	Health Care and Social Assistance	100-249
GMRI Inc	Accommodation and Food Services	100-249
Bojangles Famous Chicken & Biscuits	Accommodation and Food Services	100-249
Waste Industries LLC	Administrative and Support and Waste Management and Remediation Services	100-249
Dept Of Public Safety	Public Administration	100-249
Chick-Fil-A At Morehead City Fsu	Accommodation and Food Services	50-99

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEWLargestEmployers.aspx>)

## Craven County

People & Income Overview (By Place of Residence)	Value	Rank in State	Industry Overview, 2021 (By Place of Work)	Value	Rank in State
Population (2021)	100,674	28	Covered Employment	39,212	24
Growth (%) since 2010 Census	-2.7%	60	Avg Wage per Job	\$49,116	15
Households (2020)	41,002	27	Manufacturing - % All Jobs in County	10.3%	59
Labor Force (persons) (Ann. Avg. 2021)	40,693	30	Avg Wage per Job	\$57,765	32
Unemployment Rate (Ann. Avg. 2021)	4.7	50	Transportation & Warehousing - % All Jobs in County	2.6%	46
Per Capita Personal Income (2021)	\$54,135	22	Avg Wage per Job	\$53,384	33
Median Household Income (2020)	\$53,960	37	Health Care, Social Assist. - % All Jobs in County	17.2%	11
Poverty Rate (2020)	13.2	66	Avg Wage per Job	\$52,279	27
High School Diploma or More - % of Adults 25+ (2020)	88.9%	27	Finance and Insurance - % All Jobs in County	1.6%	54
Bachelor's Degree or More - % of Adults 25+ (2020)	25.0%	30	Avg Wage per Job	\$78,859	17

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## Craven County – Top Employers

Company Name	Industry	Employment Range
Defense Ex Army Navy & Air Force	Public Administration	1000+
Carolina East Medical Center	Health Care and Social Assistance	1000+
Craven County Board of Education	Educational Services	1000+
Boscsh Home Appliances Corporation	Manufacturing	1000+
Moen Incorporated	Manufacturing	500-999
Wal-Mart Associates Inc.	Retail Trade	500-999
Craven County	Public Administration	500-999
Craven Community College	Educational Services	500-999
Marine Corps Exchange Service	Retail Trade	500-999
City Of New Bern	Public Administration	250-499
Coastal Carolina Health Care,	Health Care and Social Assistance	250-499
Dept Of Public Safety	Public Administration	250-499
Harris Teeter	Retail Trade	250-499
International Paper Company	Manufacturing	250-499
McDonald's	Accommodation and Food Services	250-499
Food Lion	Retail Trade	250-499
Rha Health Services LLC	Health Care and Social Assistance	250-499
Holden Temporaries , Inc.	Administrative and Support and Waste Management and Remediation Services	250-499
Publix North Carolina Employee Serv	Retail Trade	250-499
Executive Personnel Group LLC	Administrative and Support and Waste Management and Remediation Services	100-249
Tracker Marine LLC	Manufacturing	100-249
Lowes Home Centers Inc	Retail Trade	100-249
Piedmont Airlines Inc	Transportation and Warehousing	100-249
Bojangles Famous Chicken & Biscuits	Accommodation and Food Services	100-249
Trader Construction Co (A Corp)	Construction	100-249

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEWLargestEmployers.aspx>)

## Duplin County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	48,515	52	Covered Employment	18,453	45
Growth (%) since 2010 Census	-17.1%	94	Avg Wage per Job	\$41,175	64
Households (2020)	21,437	51	Manufacturing - % All Jobs in County	29.7%	7
Labor Force (persons) (Ann. Avg. 2021)	24,263	49	Avg Wage per Job	\$43,043	82
Unemployment Rate (Ann. Avg. 2021)	4.4	66	Transportation & Warehousing - % All Jobs in County	2.8%	41
Per Capita Personal Income (2021)	\$51,968	29	Avg Wage per Job	\$47,647	67
Median Household Income (2020)	\$49,755	57	Health Care, Social Assist. - % All Jobs in County	5.9%	70
Poverty Rate (2020)	18.3	24	Avg Wage per Job	\$37,834	65
High School Diploma or More - % of Adults 25+ (2020)	78.7%	95	Finance and Insurance - % All Jobs in County	1.0%	89
Bachelor's Degree or More - % of Adults 25+ (2020)	14.6%	85	Avg Wage per Job	\$49,476	83

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## Duplin County – Top Employers

Company Name	Industry	Employment Range
Butterball LLC	Manufacturing	1000+
Duplin County Schools	Educational Services	1000+
Smithfield Foods Inc	Management of Companies and Enterprises	1000+
House Of Raeford	Manufacturing	1000+
Murphy Family Ventures LLC	Agriculture, Forestry, Fishing and Hunting	500-999
County Of Duplin	Public Administration	500-999
Lear Corporation	Manufacturing	250-499
Vidant Medical Center	Health Care and Social Assistance	250-499
S2 Sanitation LLC	Administrative and Support and Waste Management and Remediation Services	250-499
Bay Valley Foods LLC	Manufacturing	250-499
Johnson Breeders Inc	Agriculture, Forestry, Fishing and Hunting	250-499
James Sprunt Technical College	Educational Services	100-249
Alisan Services LLC	Administrative and Support and Waste Management and Remediation Services	100-249
Wal-Mart Associates Inc.	Retail Trade	100-249
Precision Hydraulic Cylinders Inc	Manufacturing	100-249
Villari Bros Foods LLC	Manufacturing	100-249
Valley Proteins Inc	Manufacturing	100-249
Goshen Medical Center	Health Care and Social Assistance	100-249
Enviva Management Company LLC	Manufacturing	100-249
Fayette Janitorial Service LLC	Administrative and Support and Waste Management and Remediation Services	100-249
The Pork Company	Manufacturing	100-249
Cottle Strawberry Nursery Inc	Agriculture, Forestry, Fishing and Hunting	100-249
Bojangles Famous Chicken & Biscuits	Accommodation and Food Services	100-249
Weekend Dance Party Inc	Transportation and Warehousing	100-249

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEWLargestEmployers.aspx>)

## Greene County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	20,417	80	Covered Employment	4,459	85
Growth (%) since 2010 Census	-4.4%	69	Avg Wage per Job	\$39,692	82
Households (2020)	7,218	85	Manufacturing - % All Jobs in County	6.4%	71
Labor Force (persons) (Ann. Avg. 2021)	9,364	78	Avg Wage per Job	\$41,723	86
Unemployment Rate (Ann. Avg. 2021)	4.1	85	Transportation & Warehousing - % All Jobs in County	4.0%	25
Per Capita Personal Income (2021)	\$39,564	99	Avg Wage per Job	\$43,051	92
Median Household Income (2020)	\$47,605	68	Health Care, Social Assist. - % All Jobs in County	12.0%	39
Poverty Rate (2020)	21.3	11	Avg Wage per Job	\$36,065	69
High School Diploma or More - % of Adults 25+ (2020)	76.3%	100	Finance and Insurance - % All Jobs in County	0.9%	92
Bachelor's Degree or More - % of Adults 25+ (2020)	10.4%	100	Avg Wage per Job	\$51,542	75

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## Greene County – Top Employers

Company Name	Industry	Employment Range
Dept Of Public Safety	Public Administration	500-999
Greene County Public Schools	Educational Services	500-999
County Of Greene	Public Administration	100-249
Greene County Health Care, Inc	Health Care and Social Assistance	100-249
Ham Produce LLC	Wholesale Trade	50-99
Cd Snow Hill LLC	Manufacturing	50-99
Principle Long Term Care Inc	Health Care and Social Assistance	50-99
H & T Trucking Inc	Real Estate and Rental and Leasing	50-99
Ambleside Inc	Health Care and Social Assistance	50-99
Food Lion	Retail Trade	Below 50
Bojangles Famous Chicken & Biscuits	Accommodation and Food Services	Below 50
Moore's Fiberglass Inc	Manufacturing	Below 50
Assisted Care of the Carolinas	Health Care and Social Assistance	Below 50
& Drywall Contractors Inc	Construction	Below 50
Yamco LLC	Manufacturing	Below 50
Hwy 55 Burgers Shakes & Fries	Accommodation and Food Services	Below 50
Simply Natural Creamery	Manufacturing	Below 50
TJ's Home Care Services Inc	Health Care and Social Assistance	Below 50
1st Choice Care LLC	Health Care and Social Assistance	Below 50
Tile Restoration	Construction	Below 50
McDonald's	Accommodation and Food Services	Below 50
Rouse's Restaurant LLC	Accommodation and Food Services	Below 50
Cutter Creek Golf Club	Arts, Entertainment, and Recreation	Below 50
Ham Farms, Incorporated	Agriculture, Forestry, Fishing and Hunting	Below 50
Ark Welding LLC	Other Services (except Public Administration)	Below 50

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEWLargestEmployers.aspx>)

## Jones County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	9,255	97	Covered Employment	1,601	97
Growth (%) since 2010 Census	-8.8%	83	Avg Wage per Job	\$39,949	81
Households (2020)	4,069	96	Manufacturing - % All Jobs in County	1.8%	92
Labor Force (persons) (Ann. Avg. 2021)	4,155	96	Avg Wage per Job	\$46,746	70
Unemployment Rate (Ann. Avg. 2021)	4.2	75	Transportation & Warehousing - % All Jobs in County	1.4%	65
Per Capita Personal Income (2021)	\$50,245	35	Avg Wage per Job	\$53,143	34
Median Household Income (2020)	\$44,972	78	Health Care, Social Assist. - % All Jobs in County	0.0%	75
Poverty Rate (2020)	18.3	24	Avg Wage per Job	N/A	
High School Diploma or More - % of Adults 25+ (2020)	82.3%	80	Finance and Insurance - % All Jobs in County	0.9%	92
Bachelor's Degree or More - % of Adults 25+ (2020)	14.2%	88	Avg Wage per Job	\$46,613	91

StatsAmerica is a service of the [Indiana Business Research Center](#) at Indiana University's Kelley School of Business. This initiative is funded in part by the U.S. Commerce Department's [Economic Development Administration](#).

## Jones County – Top Employers

Company Name	Industry	Employment Range
Jones County Board of Education	Educational Services	100-249
County Of Jones	Public Administration	100-249
CarolinaEast Medical Center	Health Care and Social Assistance	50-99
Brookstone Living Center LLC	Health Care and Social Assistance	50-99
Zaxby's	Accommodation and Food Services	Below 50
3hc	Health Care and Social Assistance	Below 50
Tar Heel Health Care Services LLC	Health Care and Social Assistance	Below 50
Tru-fit Gyms	Arts, Entertainment, and Recreation	Below 50
Universal Mental Health Services In	Health Care and Social Assistance	Below 50
Green Recycling Solutions LLC	Wholesale Trade	Below 50
Hwy 55 Burgers Shakes & Fries	Accommodation and Food Services	Below 50
U S Postal Service	Transportation and Warehousing	Below 50
Piggly Wiggly	Retail Trade	Below 50
Blue Rock Structures Inc	Construction	Below 50
Smithfield Foods Inc	Agriculture, Forestry, Fishing and Hunting	Below 50
Zaccheus Legal Services	Professional, Scientific, and Technical Services	Below 50
Onslow Stoneworks Inc	Construction	Below 50
Subway	Accommodation and Food Services	Below 50
Zannis Center Plastic Surgery Pa	Health Care and Social Assistance	Below 50
Hardees	Accommodation and Food Services	Below 50
Crop Production Services Inc	Wholesale Trade	Below 50
Advanced Plastic Extrusion LLC	Manufacturing	Below 50
Driver Heating and Cooling Inc	Construction	Below 50
Anthony B Andrews Logging Inc	Agriculture, Forestry, Fishing and Hunting	Below 50
Magnolia Cottage Care LLC	Health Care and Social Assistance	Below 50

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEW/LargestEmployers.aspx>)

## Lenoir County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	54,706	48	Covered Employment	27,885	32
Growth (%) since 2010 Census	-8.0%	81	Avg Wage per Job	\$44,440	37
Households (2020)	23,494	44	Manufacturing - % All Jobs in County	28.2%	9
Labor Force (persons) (Ann. Avg. 2021)	26,890	47	Avg Wage per Job	\$47,120	67
Unemployment Rate (Ann. Avg. 2021)	5.0	37	Transportation & Warehousing - % All Jobs in County	4.0%	25
Per Capita Personal Income (2021)	\$50,363	34	Avg Wage per Job	\$61,735	8
Median Household Income (2020)	\$40,586	96	Health Care, Social Assist. - % All Jobs in County	9.8%	54
Poverty Rate (2020)	17.2	29	Avg Wage per Job	\$43,670	48
High School Diploma or More - % of Adults 25+ (2020)	81.1%	87	Finance and Insurance - % All Jobs in County	1.6%	54
Bachelor's Degree or More - % of Adults 25+ (2020)	15.5%	78	Avg Wage per Job	\$67,373	35

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## Lenoir – Top Employers

Company Name	Industry	Employment Range
Sanderson Farms Inc	Manufacturing	1000+
State Of Nc Dept of Health & Human	Health Care and Social Assistance	1000+
Lenoir County Schools	Educational Services	1000+
Smithfield Foods Inc	Manufacturing	1000+
Lenoir Memorial Hospital, Inc	Health Care and Social Assistance	500-999
Aristofraft/Decora/Schrock	Manufacturing	500-999
West Pharmaceutical Services Inc	Manufacturing	500-999
Electrolux Home Products Inc	Manufacturing	500-999
County Administration	Public Administration	250-499
Fly Exclusive	Transportation and Warehousing	250-499
City Of Kinston	Public Administration	250-499
Lenoir Community College	Educational Services	250-499
Associated Materials LLC		
Ultracraft	Manufacturing	250-499
Spirit Aerosystems Holdings (Spr)	Manufacturing	250-499
Crown Lift Trucks	Manufacturing	250-499
RHA Health Services LLC	Health Care and Social Assistance	250-499
Personnel Outsource Solutions Inc	Administrative and Support and Waste Management and Remediation Services	250-499
Sandersons Farms Inc (Production Di	Manufacturing	250-499
Pactiv LLC	Manufacturing	250-499
Wal-Mart Associates Inc.	Retail Trade	250-499
Affordable Care LLC	Professional, Scientific, and Technical Services	250-499
Principle Long Term Care Inc	Management of Companies and Enterprises	100-249
Moen Incorporated	Transportation and Warehousing	100-249
Universal Protection Service LLC	Administrative and Support and Waste Management and Remediation Services	100-249
Food Lion	Retail Trade	100-249

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEWLargestEmployers.aspx>)

## Onslow County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	206,160	13	Covered Employment	50,410	18
Growth (%) since 2010 Census	16.0%	15	Avg Wage per Job	\$40,679	70
Households (2020)	66,131	16	Manufacturing - % All Jobs in County	1.7%	93
Labor Force (persons) (Ann. Avg. 2021)	65,070	19	Avg Wage per Job	\$42,131	84
Unemployment Rate (Ann. Avg. 2021)	5.1	35	Transportation & Warehousing - % All Jobs in County	2.2%	54
Per Capita Personal Income (2021)	\$50,869	31	Avg Wage per Job	\$52,497	37
Median Household Income (2020)	\$52,885	45	Health Care, Social Assist. - % All Jobs in County	12.0%	39
Poverty Rate (2020)	12.5	72	Avg Wage per Job	\$51,790	28
High School Diploma or More - % of Adults 25+ (2020)	92.3%	6	Finance and Insurance - % All Jobs in County	1.8%	39
Bachelor's Degree or More - % of Adults 25+ (2020)	23.6%	36	Avg Wage per Job	\$67,368	36

StatsAmerica is a service of the [Indiana Business Research Center](#) at Indiana University's Kelley School of Business. This initiative is funded in part by the U.S. Commerce Department's [Economic Development Administration](#).

## Onslow County – Top Employers

Company Name	Industry	Employment Range
Defense Ex Army Navy & Air Force	Public Administration	1000+
Onslow County Board of Education	Educational Services	1000+
Marine Corps Exchange Service	Retail Trade	1000+
Wal-Mart Associates Inc.	Retail Trade	1000+
County Of Onslow	Public Administration	1000+
Onslow Memorial Hospital	Health Care and Social Assistance	500-999
City Of Jacksonville	Public Administration	500-999
Coastal Carolina Community College	Educational Services	500-999
Food Lion	Retail Trade	500-999
Concentrix Cvg Customer Management	Administrative and Support and Waste Management and Remediation Services	500-999
Coastal Enterprises of Jacksonville	Administrative and Support and Waste Management and Remediation Services	250-499
Results Customer Solutions LLC	Professional, Scientific, and Technical Services	250-499
Lowes Home Centers Inc	Retail Trade	250-499
The Wood Company (A Corp)	Accommodation and Food Services	250-499
Taco Bell	Accommodation and Food Services	250-499
Dominos	Accommodation and Food Services	250-499
McDonald's	Accommodation and Food Services	250-499
U S Postal Service	Transportation and Warehousing	250-499
Gfs	Accommodation and Food Services	100-249
Marine Federal Credit Union	Management of Companies and Enterprises	100-249
Yorktown Systems Group Inc	Professional, Scientific, and Technical Services	100-249
Principle Long Term Care Inc	Health Care and Social Assistance	100-249
Gmri Inc	Accommodation and Food Services	100-249
Contactus LLC	Administrative and Support and Waste Management and Remediation Services	100-249
Brynn Marr Hospital	Health Care and Social Assistance	100-249

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEWLargestEmployers.aspx>)

## Pamlico County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	12,344	91	Covered Employment	3,469	88
Growth (%) since 2010 Census	-6.1%	75	Avg Wage per Job	\$33,400	100
Households (2020)	5,506	91	Manufacturing - % All Jobs in County	5.8%	74
Labor Force (persons) (Ann. Avg. 2021)	5,296	90	Avg Wage per Job	\$31,143	92
Unemployment Rate (Ann. Avg. 2021)	4.3	70	Transportation & Warehousing - % All Jobs in County	1.8%	61
Per Capita Personal Income (2021)	\$53,355	24	Avg Wage per Job	\$43,387	91
Median Household Income (2020)	\$50,481	51	Health Care, Social Assist. - % All Jobs in County	0.0%	75
Poverty Rate (2020)	14.7	49	Avg Wage per Job	\$0	75
High School Diploma or More - % of Adults 25+ (2020)	88.7%	33	Finance and Insurance - % All Jobs in County	1.0%	89
Bachelor's Degree or More - % of Adults 25+ (2020)	21.5%	45	Avg Wage per Job	\$50,192	80

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## Pamlico County – Top Employers

Company Name	Industry	Employment Range
The Capital Area Young Men's Christian Association	Arts, Entertainment, and Recreation	250-499
Pamlico County Schools	Educational Services	100-249
County of Pamlico	Public Administration	100-249
Dept Of Public Safety	Public Administration	100-249
Home Life Care Inc	Health Care and Social Assistance	100-249
Pamlico Community College	Educational Services	100-249
Wal-Mart Associates Inc.	Retail Trade	100-249
Food Lion	Retail Trade	100-249
Principle Long Term Care Inc	Health Care and Social Assistance	50-99
Arapahoe Charter School	Educational Services	50-99
Quality Marine Services Inc	Construction	50-99
Last Chance Nc L LLC	Accommodation and Food Services	Below 50
Scott Plumbing & Heating Inc	Construction	Below 50
Fulcher's Seafood Llc	Manufacturing	Below 50
Pamlico Packing Co Inc	Manufacturing	Below 50
Trinity Adult and Senior Services L	Health Care and Social Assistance	Below 50
River Dunes Harbor Club	Arts, Entertainment, and Recreation	Below 50
Eastern Carolina Home Healthcare In	Health Care and Social Assistance	Below 50
Pamlico Home Builders & Supplies	Retail Trade	Below 50
Pamlico Christian Academy Inc	Educational Services	Below 50
Pathways Behavioral Health Services	Health Care and Social Assistance	Below 50
Styron Crab Co Inc	Manufacturing	Below 50
Innovative Laminations Co Inc	Manufacturing	Below 50
Food Lion	Retail Trade	Below 50
Bojangles Famous Chicken & Biscuits	Accommodation and Food Services	Below 50

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEWLargestEmployers.aspx>)

## Wayne County

<b>People &amp; Income Overview (By Place of Residence)</b>	<b>Value</b>	<b>Rank in State</b>	<b>Industry Overview, 2021 (By Place of Work)</b>	<b>Value</b>	<b>Rank in State</b>
Population (2021)	116,835	24	Covered Employment	40,345	22
Growth (%) since 2010 Census	-4.7%	70	Avg Wage per Job	\$43,583	41
Households (2020)	48,198	24	Manufacturing - % All Jobs in County	13.1%	48
Labor Force (persons) (Ann. Avg. 2021)	50,451	25	Avg Wage per Job	\$52,819	47
Unemployment Rate (Ann. Avg. 2021)	5.0	37	Transportation & Warehousing - % All Jobs in County	3.6%	30
Per Capita Personal Income (2021)	\$49,881	37	Avg Wage per Job	\$52,919	35
Median Household Income (2020)	\$52,906	44	Health Care, Social Assist. - % All Jobs in County	13.5%	28
Poverty Rate (2020)	14.9	46	Avg Wage per Job	\$46,332	43
High School Diploma or More - % of Adults 25+ (2020)	85.5%	58	Finance and Insurance - % All Jobs in County	2.3%	18
Bachelor's Degree or More - % of Adults 25+ (2020)	19.8%	56	Avg Wage per Job	\$63,278	46

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## Wayne County – Top Employers, 2021

Company Name	Industry	Employment Range
Wayne County Public Schools	Educational Services	1000+
State Of Nc Dept of Health & Human	Health Care and Social Assistance	1000+
Wayne UNC Health Care	Health Care and Social Assistance	1000+
Wal-Mart Associates Inc.	Retail Trade	1000+
Mount Olive Pickle Company Inc	Manufacturing	1000+
County of Wayne	Public Administration	500-999
Case Farms Processing Inc	Manufacturing	500-999
Defense Ex Army Navy & Air Force	Public Administration	500-999
Georgia-Pacific LLC	Manufacturing	500-999
Wayne Community College	Educational Services	500-999
City Of Goldsboro	Public Administration	500-999
Goerlich's Inc	Manufacturing	250-499
Cheney Brothers Inc	Transportation and Warehousing	250-499
Butterball LLC	Agriculture, Forestry, Fishing and Hunting	250-499
Waukesha Electric Systems	Manufacturing	250-499
Dept Of Public Safety	Public Administration	250-499
Mount Olive College Inc	Educational Services	250-499
Food Lion	Retail Trade	250-499
Gruma Corporation	Manufacturing	250-499
T A Loving Company (A Corp)	Construction	250-499
McDonald's	Accommodation and Food Services	250-499
Southco Distributing Co	Wholesale Trade	100-249
Franklin Baking Company LLC	Manufacturing	100-249
Building Materials Manufacturing Co	Manufacturing	100-249
Deacon Jones Auto Group	Retail Trade	100-249

(NC Department of Commerce, 2021, <https://d4.nccommerce.com/QCEW/LargestEmployers.aspx>)

# SWOT Analysis – Strengths, Weaknesses, Opportunities, and Threats

The SWOT analysis identifies internal and external factors that are favorable and unfavorable to achieving the objectives of the economic development strategy. The identification of SWOTs informs the application of strategies to convert weaknesses or threats into strengths and opportunities. A description of SWOT categories is as follows:

- **Strengths** are a region’s relative competitive advantages and are often internal in nature.
- **Weaknesses** are a region’s relative competitive disadvantages and are often internal in nature.
- **Opportunities** are chances or occasions for regional improvements or progress, often external in nature.
- **Threats** are chances or occasions for negative impacts and regional decline, often external in nature.

## Stakeholder Participation

Determining the strengths, weaknesses, opportunities, and threats of the region in order to better understand “where we are” and “where are we going” is vital to regional economic development. Through a largely open-ended, online survey, the ECC focused on collecting data from a broad spectrum of stakeholders throughout the region to assist with the SWOT Analysis.

The timetable for development of the Comprehensive Economic Development Strategy (CEDS) was truncated, due to ECC’s leadership transitions. In September 2022, ECC requested participation from the community in the development of the Comprehensive Economic Development Strategy (CEDS) update via an online survey.

In October 2022, ECC staff hosted economic developers, planners, and workforce development officials from the region to assist with a Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis to help support the development of the 5-year Comprehensive Economic Development Strategy (CEDS) plan for our region. ECC also hosted a meeting of city and county managers from the region, at which time, ECC received feedback from the managers about our Comprehensive Economic Development Strategy (CEDS) plan efforts.

The results helped to guide identify regional priorities for economic and community development, and ultimately determine the direction of the Action Plan.

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Threats</b>
Military presence, assets, talent (including MCBC Lejune, MCAC Cherry Point, MCAS New River, FRC-East, Seymour Johnson AFB)	Infrastructure - Aging and inadequate water, wastewater, and stormwater infrastructure; lack of broadband / internet access	Global marketplace	Natural and Man-Made disasters, including flooding, extreme weather, climate change
Manufacturing base	Transportation, particularly lack of interstate and rail access	Destination for remote work	Economic impacts from COVID-19
Agricultural / fishing assets	Employment growth / career opportunities	Educational and workforce development enhancements	Inflation, rising costs of goods, utilities, and services; economic downturn
Natural environment, resources	Substance abuse and crime	Further development of Global TransPark	Lack of regional diversification
Tourism assets, including History, Heritage, and Culture	Sufficient workforce talent	Expansion and upgraded connections for the NC Port in Morehead City	Regional Unity
Geographic location (mild climate, proximity to ocean, central location on East coast, proximity to Triangle)	Poor health outcomes	Plans for I-42 development	Healthcare affordability
NC Port at Morehead City	Lack of workforce housing / affordable housing and housing choices	Regional cooperation, partnerships	Racism
Global TransPark	Support for small businesses	Infrastructure investments / expansion of regional water and sewer services/ Use of ARP funds / New and expanded grant programs	Population decline
Water access / Intercoastal Waterway	Lack of sufficient, affordable childcare	Expansion / diversification of military assets, NC Aerospace Corridor	Migration of population to urban areas
Coastal, small town, rural lifestyle	Lack of Class A office space	Tourism	Aging population
Retiree amenities	Resources for entrepreneurs	Retirees	Struggling, vacant downtowns / Main Streets
Industry clusters	Access to capital for small businesses	Growing Hispanic population	Competition between neighbors, various communities
History, heritage, and culture	Seasonal tourist and second home economy	Available land	Substance Abuse
Diversity of economy	Lack of civic engagement	Potential for population growth and development	Mental health of population, due to COVID, stresses of modern life

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Threats</b>
Relatively inexpensive land	Public transit alternatives	Downtown and Main Street redevelopment	Rising inequality (income, access)
Cost of living	Lack of sufficient mental health resources	Green economy	Migration of younger, working-age population from the region to urban areas
Talent and experience of veterans and retirees	Reliance on septic systems	Expansion of health care industry, assets	Decline of rural healthcare facilities
Diversity of residents	Race relations	Strategic economic development programs	
Community Colleges	Lack of walkable, mixed-use communities	Visionary leaders and citizens	
K-12 schools	Limited access to four-year degree programs and research universities	Leveraging "the rural advantage"	
Airports		Airports	
Presence of foreign-owned firms		Follow-up to Eastern Carolina RISE (regionals Innovating for Strong Economies and Environment)	
Numerous community events		Encourage people who vacation in our region to stay and invest in the region	
Friendly people		Assist businesses with licensing, permitting, and regulations	
		Expansion and/or commercial applications related to research facilities (Duke University Marine Lab, NOAA Lab, UNC Institute for Marine Sciences, NCSU CMAST, state research farms)	
		Foreign direct investment	

## **SWOT Highlights – Strengths**

### **Strength: Military Presence, Assets, and Talent**

The region has four major military facilities. They include Marine Corps Base Camp Lejeune and New River Air Station in Jacksonville (Onslow County), Marine Corps Air Station (MCAS) Cherry Point in Havelock (Craven County) and Seymour Johnson Air Force Base in Goldsboro (Wayne County). There are also many important ancillary facilities, including outlying landing fields, firing and bombing ranges, and other training assets without which the major installations could not effectively operate. The Coast Guard has a large facility (Sector Command) at Atlantic Beach, a special missions training center at Jacksonville (aboard Camp Lejeune) and smaller stations at Emerald Isle and Hobucken.

One cannot overstate the importance of these military assets to the regional economy and to our national defense. According to the 2020 Military Economic Impact report produced by Marine Corps Installations East, the Marine Corps facilities in our region have 52,356 active-duty military personnel and generate an annual economic impact of \$6.607 billion. Seymour Johnson Air Force Base’s 2020 Economic Impact report shows that it contributed \$612 million to the local economy with approximately 4,550 active-duty military.

The Naval Aviation Depot in Havelock, Fleet Readiness Center—East (FRC-East), is a tenant of the MCAS Cherry Point. The FRC-East employs over 4,000 civilians and pays significantly above average wages for the area. It is one of the largest industrial facilities—and largest civilian employers—in North Carolina. It has the largest concentration of engineers east of Raleigh.

### **Strength: Manufacturing Base**

Basic manufacturing remains an important part of the regional economy. A review of the top ten manufacturers in each county includes Electrolux, Moen Incorporated, Bosch Home Appliances, Guilford Performance Textiles, Weyerhaeuser, Franklin Baking, Company, AAR Integrated Solutions, AP Emissions Technologies, Cooper Standard Automotive NC LLC, Georgia-Pacific LLC, Bally Refrigerated Boxes and Frank Door. In food processing / agribusiness, Butterball LLC, Smithfield Foods, House of Raeford, Bay Valley Foods, Sanderson Farms, Fulcher’s Seafood, and Mount Olive Pickle are representative of the industry. There are numerous large and small boatbuilding and marine-related manufacturing companies in the region, including Hatteras Yachts, Parker Marine, and Jarrett Bay Boatworks.

### **Strength: Agricultural Land / Fishing Assets**

Much of the region remains rural, providing ample space for farming, recreation, and development. Two major agricultural research stations are located in the region. With over 2,250 acres, Cherry Research Farm in Goldsboro is the largest experimental station in the region and houses the Center for Environmental Farming Systems. Since 1994, both the livestock and crops research programs at the Cherry Research Farm continues to expand. Funding from the North Carolina Department of Agriculture and Consumer Services, North Carolina State University, and North Carolina A&T State University supports the station. The Caswell Research Farm in Kinston has 1,259 acres and serves as a location for large plot research. It focuses particularly on long-term swine and dairy herd studies.

There are numerous aquaculture and mariculture activities operating or under development in the region. Many are on agricultural land or in public waterways. This sector has tremendous growth potential and may serve to replace jobs lost in traditional agriculture and commercial fishing, particularly as the global demand for seafood continues to increase.

**Strength: Natural Environment, Resources**

Eastern North Carolina is blessed with four mild seasons. It is located halfway between New York and Florida. There are a number of rivers that flow through the region, including the Neuse River, the New River, the Tar-Pamlico River, the Trent River, and the White Oak River. There are several sounds and other estuaries in the region's coastal counties, of which Pamlico Sound is the largest. The Atlantic Ocean, as well as coastal estuaries, rivers, and creeks, attract tourists, retirees, and investment. The health of the region's environment is vital to the economy of the region, particularly in the coastal counties.

**Strength: Tourism, including History, Heritage, Culture**

The region's history, heritage and culture are unique to the area and of interest to tourists and other visitors. Many municipalities in the region have historic districts, museums, and sites of historical interest for tourists to enjoy. Tryon Palace in New Bern (Craven County) and the North Carolina Aquarium in Pine Knoll Shores, the North Carolina Maritime Museum and Fort Macon (all in Carteret County) are among the most visited cultural destinations in the region.

**Strength: Geographic Location**

The Eastern Carolina region is centrally located in eastern North Carolina, making the entire eastern seaboard within a one-day drive. The main east-west corridor is US-70 (future I-42). The main north-south corridor is US-17. US-70 is a vital transportation corridor for eastern North Carolina that stretches from I-40 near Raleigh in Johnston County to the Atlantic Ocean in Carteret County. Within North Carolina, I-42/US-70 provides a direct connection between Raleigh-Clayton, Goldsboro, Kinston, New Bern, and Morehead City.

Eastern NC has a sub-tropical climate with short, mild winters. Coastal amenities add to the quality of life. Eastern NC is a one-of-a-kind location.

**Strength: NC Port at Morehead City**

The Port of Morehead City, a breakbulk and bulk facility, is one of the deepest on the United States East Coast, and it is just four miles from the Atlantic Ocean. It is also within 700 miles of more than 70% of the U.S. industrial base. Interstates 95 and 40 are easily accessed via U.S. Highways 70 and 17. Storage offerings include a dry-bulk facility with a 220,000-ton capacity warehouse and a 177,000-square-foot warehouse for housing commodities like rubber, paper, steel, and lumber. Altogether there are more than one million square feet of storage. The port handled 1.5 million tons of lumber, rubber, steel, grains, and other bulk cargo in the 2021-22 fiscal year ([https://www.carolinacoastonline.com/news\\_times/article\\_154a8742-09b1-11ed-831e-af9516d8b60e.html](https://www.carolinacoastonline.com/news_times/article_154a8742-09b1-11ed-831e-af9516d8b60e.html)).

**Strength: NC Global TransPark**

The North Carolina Global TransPark (GTP) is a 2,500 acre, multi-modal industrial/airport site in Eastern North Carolina. As an agency of the State of North Carolina, the GTP is considered a key



engine for driving the economy in our region. The park offers access to multi-modal transportation options: air, rail, highways, and North Carolina's two international ports. The GTP is part of an economic development initiative in eastern NC intended to spur transition in the region from an agricultural base to one of skilled labor and industrial manufacturing. Industries targeted by the GTP are aerospace, defense, and logistics sectors. The airport runway has been extended to 11,500 feet, making it one of the longest commercial runways in the state. The park is centrally located on the mid-Atlantic seaboard and among North Carolina's six military installations. In May 1996, the Global TransPark was designated as Foreign Trade Zone 214. The designation means companies can export and import products through the TransPark without many of the usual customs restrictions and tariffs. The Global TransPark features an on-site education and training center, along with available land and flexible industrial space to accommodate almost any requirement.

## **SWOT Highlights – Weaknesses**

### **Weakness: Infrastructure – Aging and Inadequate Water, Wastewater, and Stormwater Infrastructure**

Slow population, employment and wage growth have resulted in little or no revenue growth for many area governments. In combination with increased operating costs, regulatory requirements and unfunded mandates, many local governments are struggling to provide services and maintain the local infrastructure. Mandated reductions in water withdrawal from a major regional aquifer will increase water costs for many of these already poor communities. Wastewater is also an issue for towns with old systems and for developing areas with soil conditions that do not easily allow for septic tanks. Future requirements for stormwater runoff and other coastal habitat protection plans will also increase infrastructure costs for local governments. Many rural areas either do not yet have high-speed Internet access or if they do, the cost is unaffordable.

### **Weakness: Infrastructure – Lack of Broadband Infrastructure, Internet Access**

Broadband connectivity is also a driver of job creation and economic growth for businesses both small and large. Equitable access to high-speed broadband across the region will help to bring equitable access for economic prosperity across the region. Eastern NC is lags behind in broadband infrastructure, particularly in the rural areas.

### **Weakness: Transportation, Particularly a Lack of Interstate and Rail Access**

The lack of interstate highways and other limited access roads in the region is an obstacle to both business and tourism development. Only two counties in the region have direct interstate access – Duplin County (I-40) and Wayne County (I-795). There are only two public municipal transportation system in the region—in Goldsboro and Jacksonville. Every county has a public transit system, but their ridership is limited to the elderly and those needing transportation for medical or social services. Those who live here, including the aging population, are dependent upon personal vehicles. If the region's economy is to develop with industry, tourism and retirees, regional jet service to multiple U.S. locations must be expanded. Ongoing restructuring in the airline industry continues to impact the frequency and number of airlines providing air service in New Bern and Jacksonville.

**Weakness: Poor Health Outcomes / Substance Abuse**

The COVID-19 pandemic decreased healthcare access and increased the cost of the health care, particularly in rural areas. According to the National Institute for Children’s Health Quality, “Health is about more than health care. Social and economic factors, the physical environment, and behaviors, like diet and exercise, account for 80% of the factors that influence our overall health” (<https://www.nichq.org/insight/north-carolinas-strategy-address-social-determinants-health>).

Additionally, the COVID-19 pandemic has led to an increased number of people misusing drugs and dying from drug overdoses.

**Weakness: Sufficient Workforce Talent**

Many businesses in the region report that they are struggling to find qualified employees for a range of skilled, semiskilled, and unskilled positions, in part because of training, and in part because of livability factors like lack of affordable housing options.

**Weakness: Lack of Workforce Housing/ Affordable Housing and Housing Choices**

The lack of workforce / affordable housing has become a tremendous issue for many communities. Supply-chain issues related to the COVID-19 pandemic slowed development and increased demand, which raised housing prices. This issue was heightened in growing communities and in those with coastal amenities / a tourism focus. The workforce has been squeezed out of affordable housing options in many communities.

**SWOT Highlights – Opportunities****Opportunity: Global Marketplace**

Businesses in the region do not export products to world markets at rates equivalent to North Carolina or the nation. While US consumers are benefiting from low-cost imports, foreign markets present an opportunity for regional businesses to export unique US made products. The weak US dollar, combined with expanding foreign markets and growing world-wide wealth, are making US products attractive abroad. With the Global TransPark, the Craven Industrial Park Foreign Trade Zone #214 Magnet Site, and the Morehead City Port and Foreign Trade Zone, exporting from the region to global markets is a real opportunity. There are also opportunities to open other Foreign Trade Zone #214 Magnet Site within the region to capitalize on globalization.

**Opportunity: Destination for Remote Work**

According to a Pew Research Center article (<https://www.pewresearch.org/social-trends/2022/02/16/covid-19-pandemic-continues-to-reshape-work-in-america/>) roughly six-in-ten U.S. workers who say their jobs can mainly be done from home (59%) are working from home all or most of the time. The coastal amenities and relatively low cost of living helped make the region a destination for remote workers. This could be a great opportunity of the region if the trend continues.

**Opportunity: Educational and Workforce Development Enhancements**

According to many businesses in the region report that they are struggling to find qualified employees for a range of skilled, semiskilled, and unskilled positions, in part because of training, and in part because of livability factors like lack of affordable housing options. As our economy grows, the vast majority of new jobs require education beyond a high school diploma—but fewer

than half of North Carolinians ages 25-44 have a high-quality credentials or post-secondary degrees. There is a large need and opportunity to enhance educational and workforce development programs. The goal of myFuture NC (<https://www.myfuturenc.org/>) myFutureNC is to ensure that by 2030, 2 million North Carolinians have a high-quality credential or postsecondary degree.

#### **Opportunity: Further Development at the North Carolina Global TransPark**

The North Carolina Global TransPark (GTP) is a 2,500 acre, multi-modal industrial/airport site in Eastern North Carolina. As an agency of the State of North Carolina, the GTP is considered a key engine for driving the economy in our region. The park offers access to multi-modal transportation options: air, rail, highways, and North Carolina's two international ports. The GTP is part of an economic development initiative in eastern NC intended to spur transition in the region from an agricultural base to one of skilled labor and industrial manufacturing. Industries targeted by the GTP are aerospace, defense, and logistics sectors. The airport runway has been extended to 11,500 feet, making it one of the longest commercial runways in the state. The park is centrally located on the mid-Atlantic seaboard and among North Carolina's six military installations. In May 1996, the Global TransPark was designated as Foreign Trade Zone 214. The designation means companies can export and import products through the TransPark without many of the usual customs restrictions and tariffs. The Global TransPark features an on-site education and training center, along with available land and flexible industrial space to accommodate almost any requirement.

The Global TransPark has been the beneficiary of ongoing, steady local, state, and federal roadway investments in Eastern North Carolina. Additionally, bringing rail transportation into the Global TransPark has been part of the park's Master Plan for many years. The rail spur was completed in 2015, providing rail with direct access to North Carolina ports. A spur line allows future "trunks" to current and future Global TransPark tenants.

#### **Opportunity: NC Aerospace Corridor**

A collaborative effort between Craven, Lenoir, and Wayne Counties has forged the North Carolina Aerospace Corridor, which showcases the vast aerospace and aviation assets that could form the basis of new job creation and business attraction. This provides an opportunity for growth in the corridor, promoting the region's common assets. [www.ncaerospacecorridor.com](http://www.ncaerospacecorridor.com) provides information on workforce, education, transportation, military, and the existing companies that make up this arena.

#### **Opportunity: NC Port at Morehead City**

With the volume of international trade expected to double by 2020, having a port facility in the region presents a real opportunity for economic growth. The 45-foot-deep channel at the Port of Morehead City makes it one of the deepest ports on the U.S. East Coast. Only four miles from the ocean, the port handles breakbulk and bulk cargo with access to Interstates 95 and 40 via U.S. Highways 70 and 17, and daily rail service from Norfolk Southern. Across the Newport River from the port is Radio Island, a 154-acre site perfectly suited for a port industrial development, conveniently supplied with municipal water and sewer.

### **Opportunity: Plans for I-42 Development**

The main east-west corridor is US-70 (future I-42). US-70 (future I-42) is a vital transportation corridor for eastern North Carolina that stretches from I-40 near Raleigh in Johnston County to the Atlantic Ocean in Carteret County. Within North Carolina, I-42/US-70 provides a direct connection between Raleigh-Clayton, Goldsboro, Kinston, New Bern, and Morehead City. Recent improvements have enhanced these corridors, and additional improvements are planned. Future enhancements to US-70 (future I-42) will be important to the military, logistics (particularly the Port of Morehead City), tourism, manufacturing, and agriculture sectors.

The I-42/US-70 corridor is identified as a Strategic Transportation Corridor (STC) within the North Carolina Transportation Network (NCTN) [March 4, 2015]. The purpose of the NC Transportation Network (NCTN) is to preserve and maximize mobility and connectivity on a core network of multimodal transportation corridors, promoting environmental stewardship and economic prosperity. The I-42/US-70 corridor provides connections to five major activity centers: the Research Triangle Park in Raleigh-Durham, Seymour Johnson Air Force Base in Goldsboro, the Global TransPark in Kinston, Marine Corps Air Station Cherry Point in Havelock, and the Port of Morehead City.

### **Opportunity: Regional Cooperation, Partnerships**

ECC is located in central eastern North Carolina and is comprised of nine counties (Carteret, Craven, Duplin, Greene, Jones, Lenoir, Onslow, Pamlico, and Wayne) and 62 incorporated municipalities. There is a tremendous opportunity for these local governments and other stakeholder groups to collaborate and partner on issues of regional importance and common interests. By leveraging the strengths and capabilities of various stakeholders, the region can become more prosperous, resilient, and cohesive.

### **Opportunity: Tourism**

Tourism is recognized as one of the growth industries in North Carolina. The region is blessed with many natural resources that are attractive to tourists and others seeking outdoor recreational opportunities. Traditional tourism, eco-tourism, agri-tourism, and historic / cultural / heritage tourism all present economic growth opportunities for the region. In particular, the Carteret County, known as the “Crystal Coast,” is considered by many to have some of the finest beaches and water quality in the State of North Carolina, thereby attracting hundreds of thousands of visitors annually. Carteret County municipalities, including Beaufort, Morehead City and the beach communities of Atlantic Beach, Pine Knoll Shores, Indian Beach and Emerald Isle, offer world-class fishing, numerous sightseeing amenities and attractions and a very favorable climate that brings people to the region throughout the year.

### **Opportunity: Retirees**

With an estimated 10,000 baby boomers turning 50 every day, eastern North Carolina’s mild climate, scenic beauty, recreational opportunities, and location halfway between Florida and the Northeast are assets appealing to potential retirees. This segment of the population born between 1946 and 1964 comprises approximately 33% of the US population, and they own 70% of US assets and control 50% of all discretionary income.

Retirees bring incomes, spending, tax revenues and assets into a community. The primary economic beneficiaries of retirees are real estate, recreation / entertainment, healthcare,

insurance, commercial / retail establishments, and financial services. It is estimated that 100 retirees have an economic impact 3.5 times greater than 100 manufacturing employees and do not require economic incentives. In addition, they bring benefits such as volunteerism, charitable giving, skills and diversity without impacting the school system and law enforcement. Most retirees visited a place several times or served locally in the military before retiring, which makes tourism and military relations important parallel strategies. Most people who relocate to retire are healthier and wealthier than those who do not relocate. On the negative side, community services to the very old may increase social and healthcare costs to communities.

### **Opportunity: Growing Hispanic Population**

The Region's vision to strengthen its foundation of manufacturing and agricultural assets is supported by a growing Hispanic population. Many businesses, including basic manufacturing and agricultural production, have experienced challenges finding workers. The growing Hispanic population, a much-valued labor asset, has allowed area business to stay competitive. Hispanics work in many regional firms but are concentrated in the construction, food processing, agriculture and fishing industries. Duplin (22.2%), Greene (14.4%), Onslow (13.4%), and Wayne (12.7%) counties had some of the fastest growing Hispanic populations in 2021. (<https://www.ncdemography.org/2021/10/18/north-carolinas-hispanic-community-2021-snapshot/>)

### **SWOT Highlights – Threats**

#### **Threat: Natural and Manmade Disasters**

Although the region's environment is an attraction for visitation, retirement, and development, it also presents several threats. For example, hurricanes and other potential disasters make the area unattractive to some potential residents and businesses. Moreover, as multiple 500-year storm events are now occurring every decade, the consensus among economic development professionals is that the need for resilient recovery is the new normal. The economic resiliency of a region is linked to its ability to prevent, withstand, and quickly recover from major disruptions. Communities that want to create or sustain economic growth must do more than just rebuild the way they were before the disaster occurred, they must rebuild with resilient strategies in mind in order to better prepare for the next storm, flood, fire, drought, etc. that may affect them.

Area beaches are also prone to erosion from storms, currents, and natural shifts, which for many communities have been remedied by Federal and State funds allocated for beach nourishment. As federal and state budgets get tighter, there is the threat of funding losses, shifting the cost to local governments. Beach erosion affects not only residents but the area's attractiveness for tourism and retirees. Continuous dredging of local inlets has also been deemed costly and in some cases prohibitive by the Army Corps of Engineers, again affecting residents, tourists, and retirees. Additionally, sea level rise will adversely impact the economy of coastal communities, and riverine flooding can significantly impact inland counties. The cost of flood insurance and other property and casualty insurance is rising, making owning coastal and other waterfront property less attractive.

**Threat: Economic Impacts from COVID-19**

According to the World Bank, “The COVID-19 pandemic sent shock waves through the world economy and triggered the largest global economic crisis in more than a century. The crisis led to a dramatic increase in inequality within and across countries. Preliminary evidence suggests that the recovery from the crisis will be as uneven as its initial economic impacts, with emerging economies and economically disadvantaged groups needing much more time to recover pandemic-induced losses of income and livelihoods.” (<https://www.worldbank.org/en/publication/wdr2022/brief/chapter-1-introduction-the-economic-impacts-of-the-covid-19-crisis>)

**Threat: Inflation, Rising Costs of Goods, Utilities, and Services**

The congressional Joint Economic Committee has released its State Inflation Tracker report. According to the report, overall prices increased by 10.5% from Jan. 2021 to April 2022. The inflation is estimated to “cost the average American household \$569 in April 2022 alone,” and the inflation that has already occurred will cost the average household \$6,829 over the next year – and that is if prices stop climbing altogether. (As reported by the John Locke Foundation, <https://www.johnlocke.org/inflation-by-state-where-does-nc-rank/>). As a result, inflation is a top concern for many residents of the region.

**Threat: Lack of Regional Diversification**

The lack of economic diversification threatens local governments and the region as a whole. The greatest of these threats comes from a large military presence in the Cities of Jacksonville, Havelock, and Goldsboro. Base Realignment and Closure actions are a recurring concern. Large deployments from the bases have had and will continue to have a substantial impact on these military-dependent communities. With instability in the Middle East and Asia and constantly changing political winds, more deployments are likely in the near future. The economic vitality of many other communities in the region is dependent on one or two large industries the loss of which would have devastating consequences.

**Threat: Regional Unity**

Many young people who leave the region to further their education or find employment do not return, reducing the number of indigenous residents to replace previous generations. At the same time, retirees, and owners of second homes are moving to the area. Add to this the increasing number of Hispanic workers and the demography of many communities is changing considerably. As new residents move into positions of leadership, tension between indigenous people and transplants can be disruptive.

There is also a growing disparity between affluent coastal communities and inland rural areas that continue to lose population and economic wellbeing. This often impacts tier designations of predominantly poor counties and impacts their ability to access economic and social development grants to meet the needs of the majority of the population. Regional projects that require collaboration will likely suffer unless area residents and governments can work across jurisdictional boundaries and through regional economic disparities.

**Threat: Healthcare Affordability**

North Carolina has been found to be one of the most expensive states for healthcare (<https://www.wral.com/study-north-carolina-one-of-the-worst-most-expensive-states-for-health-care/19805694/>). The inflationary impacts of the COVID-19 pandemic and resulting supply-chain issues have exacerbated that fact.

# Strategic Direction – Vision and Priority Areas

Through analysis and stakeholder participation, ECC has determined goals and priorities for the next five years. This collaborative, region-wide plan addresses our weaknesses and utilizes our strengths to overcome previously identified challenges. Our regional vision includes the following vision and priority areas.

## Vision Statement

The Comprehensive Economic Development Strategy (CEDS) vision describes ECC’s ideal economic development future for the region. The vision guides ECC’s work and the content of the CEDS Strategic Priorities.

*Eastern Carolina is a growing, diversified, collaborative, and resilient region with a range of employment opportunities that provide high quality jobs, lifelong learning, sustainable natural resources, and integrated infrastructure. Advanced manufacturing contributes to economic well-being, while agriculture, fishing, and forestry remain crucial drivers. The region’s military economic impact continues to grow, while tourism and recreation flourish through utilization of key natural and historic attractions and the success of small businesses.*

## Priority Areas

Priority areas for the ECC region include:

PRIORITIES	
Priority Area 1	Cultivate and champion regional collaboration and partnership
Priority Area 2	Develop critical infrastructure to grow economic opportunities and support disaster resiliency
Priority Area 3	Grow and support skilled workforce and enhance educational attainment
Priority Area 4	Create healthy and connected communities and improve quality of life

## Why Strategic Priorities?

The CEDS is our region’s primary source of a collective economic vision, so it is important for it to be accessible and useful. Flexible guiding strategies are more useful than specific, prescriptive actions because practitioners need the flexibility to shape the specifics of economic development initiatives to guidance from their elected officials. Rather than a detailed, step-by-step action plan, this section provides a flexible framework for our region’s economic developers. The approaches listed in this section provide general direction, but how economic developers choose to execute these approaches should be based on the assets and strengths they bring and the specific needs of their communities.

The 2023-2028 Strategic Priorities section also offers a different method for measuring progress. Rather than judging the CEDS based on actions completed, the region should track and quantify key indicators that can demonstrate whether ECC is making progress on its strategic priorities.



## Using Strategic Priorities

Each Priority Area contains several ideas for approaches and implementation. These options are a jumping off point rather than a checklist. It is not expected that economic developers will pursue all the ideas captured in this CEDS. Instead, economic developers and their partners should work together during annual convenings organized by ECC to identify which approaches they want to pursue based on the assets and strengths they are able to contribute. Working groups composed of practitioners from across the region will form around these identified opportunities to make progress on the CEDS strategic priorities.

### **Priority Area 1:** Cultivate and champion regional collaboration and partnership

**Description:** A regional economic development strategy is most effective when it considers and incorporates the interests and strengths of all jurisdictions in the region. By leveraging the strengths and capabilities of each county towards a wider economic strategy, the region can become more prosperous, resilient, and cohesive.

**ECC's Role:** As a regional coordinating body, ECC is well positioned to facilitate collaboration. Over the next five years, ECC will foster cross-regional relationships and seek to align efforts around regionally significant projects.

#### **Approaches:**

- Develop a stronger CEDS Committee that is representative of the region.
- Build relationships and collaboration through project-based regional initiatives.
- Integrate the priorities captured in the CEDS into existing local and regional-scale initiatives.
- Increase representation of currently underrepresented voices.

#### **Implementation Ideas:**

- Formalize an ECC CEDS Committee to meet quarterly.
- Convene economic development practitioners from across the region semi-annually to brainstorm, revise, and prioritize a list of regionally significant projects.
- Deliver an annual CEDS overview and update to elected officials and local economic development boards.
- Seek out new partnerships with workforce development, education, industry, and small business stakeholders.
- Seek out new partners that can communicate the perspectives of underrepresented communities.

#### **Key Partners:**

- Economic development staff across the region
- ECC Board
- Local government managers

- Eastern Carolina Workforce Development Board

**Priority Area 2:** Develop critical infrastructure to grow economic opportunities and support disaster resiliency

**Description:** Large infrastructure projects, particularly those of regional significance, often exceed the capacity and technical expertise of local municipalities. Further, they often involve multiple partners, public-private partnerships, complex regulatory systems, and strategic stakeholder engagement. In order to effectively achieve needed infrastructure improvements in the region, technical support will be required.

**ECC's Role:** ECC is uniquely positioned to support regional infrastructure projects. Over the next five years, ECC will provide technical assistance and connect specific projects with other resources (e.g., regional efforts, University-based programs, state and federal agency partners, etc.).

**Approaches:**

- Identify and prioritize projects of regional importance that will (1) improve quality of place for residents and (2) increase diversity and redundancy in the region's infrastructure (particularly critical infrastructure related to transportation, energy, communications, and fuel).
- Coordinate regional efforts to expand broadband availability in areas with the least access.
- Promote available services and funding sources that can be accessed via ECC to support infrastructure development.
- Increase the capacity and resources available to support grant writing and technical project development for infrastructure projects.

**Implementation Ideas:**

- Work with regional partners annually to ensure infrastructure projects support resilience and are coordinated across the region.
- Increase collaboration around broadband development by convening regional economic development practitioners to discuss efforts and share resources.
- Share information about current funding opportunities for local jurisdictions that includes grant deadlines, eligibility information, and connections to current and planned projects.
- Assist with preparation of funding applications and provide technical assistance on infrastructure project development.

**Key Partners:**

- Economic development staff across the region
- Local government managers
- Various state agencies
- Various federal agencies

- Various regional advocacy groups
- NC Rural Water Association

**Priority Area 3:** Grow and support skilled workforce and enhance educational attainment

**Description:** Many businesses in the region report that they are struggling to find qualified employees for a range of skilled, semiskilled, and unskilled positions, in part because of training, and in part because of livability factors like lack of affordable housing options. There is also an ongoing need to support existing workforce training efforts and to coordinate and align the efforts of workforce, economic development, and educational partners in the region.

**ECC's Role:** ECC will help link education, training, apprenticeships, and career planning to the employment needs of existing and emerging business sectors.

**Approaches:**

- Support deliberate coordination between businesses, the Eastern Carolina Workforce Development Board, economic developers, and educational institutions to help identify and provide for current employer needs.
- Educate the region's youth about the opportunities in the region.
- Attract and retain younger talent.

**Implementation Ideas:**

- Partner with the Eastern Carolina Workforce Development Board and other partners to develop a collaborative vision and a coordinated plan to develop the workforce.
- Partner with the Eastern Carolina Workforce Development Board and other partners to increase participation of local businesses in apprenticeships, internships and On-The-Job-Training programs, in order to build pathways to employment for persons entering the workforce.

**Key Partners:**

- Economic Development staff
- Eastern Carolian Workforce Development Board
- K-12 & higher education representatives
- myFutureNC staff

**Priority Area 4:** Create healthy and connected communities and improve quality of life

**Description:** Some of the contributing factors in attracting and retaining the needed talent pool involves livability factors like lack of affordable housing options, access to quality healthcare, recreation amenities, etc. Additionally, rural communities have unique economic strengths and challenges. A lack of basic services can make rural areas

less attractive to prospective residents and employers. Therefore, ensuring equitable access to basic services for residents and businesses in rural areas is a critical strategic opportunity.

**ECC's Role:** ECC will advocate for policies and support initiatives that will help enhance workers' quality of life. As a regional body that can work with counties that cover unincorporated areas and smaller towns, ECC can play an important role in directing resources towards rural areas. ECC will advocate for high quality service provision to rural areas and support projects that enhance economic opportunity and resilience in rural communities.

**Approaches:**

- Attract and retain younger talent by promoting the region's livability and access to exceptional nature and outdoor recreation opportunities.
- Investigate and support policies and projects that will increase the availability of affordable housing, affordable transportation options, the quality and accessibility of recreation, access to broadband, access to healthcare, and other factors that enhance quality of life.
- Prioritize strategies that support the growth of tourism and value-added natural resource industries (including ecotourism, marine-related activities, sustainable farming, and local food and beverage production) to enhance economic opportunities in rural areas. (Quality of the natural environment is vital to tourism, second homes, remote work, etc.)
- Support efforts to increase health care and telehealth care access.

**Implementation Ideas:**

- Encourage practitioners to participate in discussions at the local and county levels related to affordable housing, transportation, recreation, and healthcare access – ask to have representation for economic development practitioners and business representatives on committees and working groups.
- Work with municipalities to identify and secure funding for downtown revitalization projects.
- Work with health care providers and public health officials to understand rural patients' needs and lend support to projects aimed at meeting these needs.

**Key Partners:**

- Local and county planning staff
- Tourism boards, chambers of commerce
- Local and county recreation staff
- Health care agencies

## Economic Resilience

Economic resilience is defined as the ability of an economy to withstand, recover, or avoid the effects of any type of shock or disruption, such as an economic downturn or a natural disaster. Planning for resilience includes a multi-phased approach that anticipates risk, evaluates the potential impact on key assets, and develops a response. In the context of economic development, economic resilience becomes inclusive of three primary attributes: the ability to recover quickly, the ability to withstand, and the ability to avoid a shock. Often, the shocks/disruptions to the economic base of regions are manifested in three ways:

- Downturn or other significant events in the national or international economy which impact demand for locally produced goods and consumer spending
- Downturns in specific industries that constitute a critical component of the region's economic activity
- Other external shocks (a natural or man-made disaster like hurricanes or the COVID-19 pandemic, exit of a major employer, the impacts of climate change, etc.)

### How Can Our Regional Economy Become More Resilient?

Economic diversification is both a recovery strategy and a tool for communities to increase their resiliency for future disasters. Establishing economic resilience in a regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity. The Economic Development Administration provides guidance (<https://www.eda.gov/archives/2021/ceds/content/economic-resilience.htm>) on establishing regional economic resilience through a two-pronged approach.

**Steady-state** initiatives tend to be long-term efforts that seek to bolster the community or region's ability to withstand or avoid a shock. **Responsive initiatives** can include establishing capabilities for the economic development organization to be responsive to the region's recovery needs following an incident.

Eastern Carolina Council continues to bolster our regional communities through this two-pronged approach. ECC's **steady-state** current work and initiatives include:

- Creating and directing comprehensive planning efforts that include the integration and/or alignment of hazard mitigation plans, transportation plans, environmental plans, and other planning efforts;
- Supporting diversification initiatives, such as the developing of industries that build on the region's assets and that will provide stability during downturns;
- Supporting business retention and expansion programs;
- Supporting the creation of a region-wide workforce training program that will build a resilient workforce;
- Supporting and advocating for region-wide broadband networks; and
- Assisting communities in implementing safe development practices related to floodplain management, riparian buffers, etc. (There are dual benefits of reducing damage to the built environment and protecting the quality of the natural environment.)

Some examples of our **responsive** economic resilience initiatives include:

- Conducting region-wide resilience efforts;
- Establishing a process for regular communication, monitoring, and updating of business community needs and issues through our economic development planning department; and
- Strengthening coordination between economic development entities, support services, and key local, regional, state, and federal officials to address short, intermediate, and long-term recovery needs of specific business sectors;

A goal of CEDS is to identify where investment can be made to further diversify the region's economic base. Creating local value-chains and industries will result in stronger local economies and therefore, economically resilient regions.

Several of the region's major clusters are currently 'at risk' and may experience slower growth or outright losses compared to national trends. Collaboration with educational institutions is needed to provide the skilled workforce to meet the needs of existing and emerging clusters. Programs and service that can connect local firms to new market opportunities and help them pursue product or process innovations will be critical to the region's advanced manufacturing and value-added agricultural clusters.

### **Regions Innovating for Strong Economies and Environment (RISE) Program**

While this CEDS was under development, the North Carolina Office of Recovery and Resilience (NCORR) and the NC Rural Center were administering a concurrent regional planning process called Regions Innovating for Strong Economies and Environment Program (RISE). ECC staff had representation on the Eastern Carolina region's RISE planning team, which also consisted of NC Rural Center, NCORR, and Tetrattech (the RISE planning administrator for our region). The RISE planning process aimed to support resilience primarily in the storm-impacted regions of North Carolina, which included the nine Eastern Carolina Council counties.

The Eastern Carolina Stakeholders group of RISE (which stands for "Regions Innovating for Strong Economies and Environment") had its last meeting on December 5, 2022. The top five priorities presented in the draft report include:

- **Regional Resiliency Funding** – This proposal suggests a two-pronged effort to support the implementation of resilience projects throughout the Eastern Carolina Region. A "circuit rider program" would help establish grant application assistance. A corresponding funding support program could help raise potential funds for grants that require a local match through endowments and charitable donations.
- **Regional Drainage Capacity Assessment** – An assessment of the drainage capacity of regional watersheds would help mitigate the impacts of flooding and provide benefits to ecosystems throughout the Eastern Carolina Region. This assessment could be used to inform or prioritize mitigation projects in the future.

- **Beneficial Reuse of Acquired Properties** – Beneficial reuse of acquired parcels would allow communities to use open space for their benefit and improve their resilience to flooding, sea level rise, and storm surge. This project could also provide floodplain restoration, partially restoring the waterways in the region to their original condition prior to development.
- **Vegetated Swales in Urban Flooding Hotspots** – Installing vegetated swales in urban flooding hotspots could prevent storm surge and flood conditions from overwhelming critical infrastructure, while also preventing erosion and improving local water quality.
- **Regional Resilience Staff Position** – A regional resilience coordinator could work to secure funding for regional and local resilience initiatives, direct regional projects, support local projects, and serve as a critical link between local staff and counterparts at the state and national level who could direct resources to the region.

Once the Eastern Carolina Regions Innovating for Strong Economies and Environment Program (RISE) plan is finalized, ECC will work with regional partners to move the priorities forward.

## Evaluation Framework – How are we doing?

ECC will measure progress based on a series of indicators rather than actions completed.

### **Priority Area 1:** Cultivate and champion regional collaboration and partnership

#### **Indicators:**

- Collaboration: Presence of cross- and multi-jurisdictional development projects
- Equity and Inclusion: Representativeness of various working groups

### **Priority Area 2:** Develop critical infrastructure to grow economic opportunities and support disaster resiliency

#### **Indicators:**

- Number of new shovel ready sites and product
- Increase in federal project related investments
- Increase in infrastructure funding: Broadband, Natural Gas, Transportation, Utilities
- Amount of secured funds for infrastructure projects
- Increase in high-speed internet coverage
- Improvement of stormwater systems
- Removal of homes and businesses from flood-prone areas

### **Priority Area 3:** Grow and support skilled workforce and enhance educational attainment

#### **Indicators:**

- Improvement of access to and outcomes of basic early childhood, secondary, and post-secondary education systems
- Increase in retirees, baby boomers, and millennials in the region
- Increase in workforce investment strategies
- Increase in workforce participation



- Increase in a diversity of housing, transportation, entertainment, recreation, education, and cultural amenities

**Priority Area 4:** Create healthy and connected communities and improve quality of life

**Indicators:**

- Increase in healthy outcomes
- Decrease in metrics involving serious health issues, such as diabetes, heart disease, substance abuse, etc.
- Increase in placemaking activities
- Increase in tourism dollars spent
- Increase in policies designed to protect the region's natural resources