EasternCarolinaCouncil

NEUSE RIVER COUNCIL OF GOVERNMENTS

(d/b/a Eastern Carolina Council)



Carteret, Craven, Duplin, Greene, Jones,

Lenoir, Onslow, Pamlico, and Wayne Counties

2026 Annual Update to the 2023-27 Comprehensive Economic Development Strategy (CEDS)

Supported by the Economic Development Administration

Summary Background

Eastern Carolina Council (ECC), legally the Neuse River Council of Governments, serves as the Economic Development District for North Carolina's nine-county Eastern Carolina region. Headquartered in New Bern and established in 1967, ECC connects local governments with regional partners and state and federal resources. The region includes 62 incorporated municipalities and approximately 652,000 residents based on the 2020 Census.

This annual update reports progress from October 1, 2025 through September 30, 2026 under the 2023–2027 Comprehensive Economic Development Strategy (CEDS). During the year, ECC advanced digital inclusion implementation, aquaculture infrastructure grant administration, substance use recovery planning, flood resilience assistance, and local grant development capacity. ECC also addressed organizational stability and partnerships needed to sustain regional services.

CEDS priority areas

1. Cultivate and champion regional collaboration and partnership.

2. Develop critical infrastructure to grow economic opportunities and support disaster resiliency.

3. Grow and support skilled workforce and enhance educational attainment.

4. Create healthy and connected communities and improve quality of life.

Maintaining the regional strategy

ECC surveyed regional stakeholders in October 2026 to obtain feedback on economic development needs and priorities. On November 12, 2026, the Executive Committee approved the resolution for the 2026 CEDS Annual Update. That action carried the existing priorities and implementation recommendations into the current reporting year. Economic development and CEDS updates continued to appear on Board consent agendas throughout 2026.

The prior International Economic Development Council **(**IEDC) work on military retention, workforce housing, talent attraction, and town center development remains a strategic foundation. The September 25, 2025 town center workshop occurred before this reporting period and is not counted as a new 2026 accomplishment. The four CEDS priorities remain the organizing framework for the following evaluation and proposed next year goals.

Highlights of Economic Development Activities

Aquaculture Hub and EDA grant administration

ECC continued serving as EDA grant manager for the North Carolina Coastal Federation's (NCCF) Aquaculture Shellfish Mariculture Hub in Carteret County, project 04-01007877. ECC attended the May 4, 2026 groundbreaking. The proposed working waterfront facility will provide shared water access, cold storage, equipment, processing space, and logistics support for shellfish growers.

By September, EDA had accepted the proposed bid documents, found the site certificate legally sufficient, and confirmed that the award conditions required before advertisement were satisfied. EDA authorized the Federation to advertise for construction bids. Advancement to bidding is the reporting-year milestone; facility completion, business income gains, and job creation are future outcomes.

Regional digital inclusion implementation

ECC's Regional Digital Inclusion Plan was presented to the Board on January 8, 2026 following development of a draft in December 2025. The plan addresses infrastructure gaps, affordability, access to devices, digital skills, and cybersecurity concerns. ECC coordinated county-directed implementation funding of $7,500 per county, totaling $67,500 across the nine-county region.

Implementation partnerships included East Carolina University's (ECU) Link and Learn program in Carteret, Craven, and Duplin counties and Eastern Carolina Workforce Development (ECWD) in Lenoir, Onslow, Pamlico, and Wayne counties. Greene and Jones counties used existing local programs. The implementation phase concluded August 31, 2026, with locally selected activities supporting digital literacy, connectivity, and access to online education, employment, telehealth, and government services. This progress represents local implementation rather than a quantified increase in broadband infrastructure or employment.

SCRC funding and grant development capacity

ECC received a $23,926 Southeast Crescent Regional Commission (SCRC) capacity award for Federal Fiscal Year 2025–2026. The award supports regional technical assistance involving grant writing, water and sewer, broadband, transportation, and workforce development. ECC delivered a grant-writing workshop with Rulo Strategies on September 29–30, 2026, helping local government and nonprofit partners develop funding opportunities and project concepts.

The saved participant evaluation records 12 responses: three county governments, two municipal governments, and seven nonprofit respondents. All 12 rated the workshop excellent; 11 rated the content extremely useful and one somewhat useful. Seven intended to apply for grants within three to six months and five were unsure. These intentions identify a follow-up opportunity; they do not represent submitted applications or awarded funds.

Regional Collaboration and Resilience Activities

Substance use asset mapping and regional coordination

ECC worked with Recovery Alliance Initiative (RAI), JG Research and Evaluations, transit providers, local governments, and recovery partners to assess substance use service assets and barriers. A December 4, 2025 meeting in Kinston established a transportation task force. On January 29, 2026, partners met at the Onslow County Health Department to discuss transit coordination and funding pathways. Regional mobility management was explored as a potential service to address gaps and duplication.

On March 18, 2026, RAI presented the completed regional asset map, capacity assessment, geospatial access review, and planning findings to representatives from Craven, Jones, Lenoir, and Pamlico counties. RAI presented the work to the ECC Executive Committee on April 9. The work connected transportation, housing, workforce participation, and access to care with healthy communities and regional economic resilience.

COSSUP grant application

ECC applied to the Bureau of Justice Assistance (BJA) for approximately $1.6 million over three years through the Comprehensive Opioid, Stimulant, and Substance Use Program (COSSUP). The Executive Committee authorized the application on April 9, 2026. ECC submitted it before the May 11, 2026 deadline in partnership with RAI and with application assistance from Rulo Strategies. The proposed initiative would strengthen coordinated regional responses to substance use disorders. The application is reported as submitted, with funding dependent on an award decision.

Flood resilience and water quality planning

ECC pursued participation in the North Carolina Flood Resiliency Blueprint beginning in fall 2025. The November director's update described an invitation from North Carolina Department of Environmental Quality (NC DEQ) to assist local participation in river basin planning. During 2026, ECC advanced Blueprint work with Swansboro and Peletier. Peletier's kickoff occurred September 14, and Swansboro held a follow-up meeting September 28 to begin training and action planning. These activities support identification and prioritization of local flood mitigation needs.

ECC also managed grants for the North Carolina Coastal Federation's (NCCF) Coastal Leadership Institute and Newport Regional Wetland Master Plan. ECC submitted an initial quarterly report and reimbursement request for Section 205(j) water quality planning in August. These planning and administrative activities support watershed management and community resilience; they are distinct from completed physical mitigation projects.

Connecting communities with funding

ECC circulated monthly grant newsletters during July, August, and September to a listserv of more than 800 individuals and partners. ECC also provided CEDS alignment support for the Onslow Water and Sewer Authority's (ONWASA) Holly Ridge water tower proposal. The September project update reported that the proposal did not receive EDA funding.

Updated Economic Statistics

The statistical snapshot uses releases available by September 30, 2026. Monthly labor force estimates refer to August 2026; covered jobs and weekly wages refer to March and the first quarter of 2026. Annual private-sector wages use NC Commerce's 2026 program benchmark. Different reference periods reflect publication schedules rather than full-year 2026 estimates.

Labor force and unemployment

The nine counties had a combined civilian labor force of 255,154, including 245,765 employed residents and 9,389 unemployed residents. The calculated regional unemployment rate was 3.68%, compared with North Carolina's 3.6% and the national 4.3%. All figures are not seasonally adjusted. Each ECC county's rate was lower than in August 2025.

County	Labor force Aug 2026	Employed Aug 2026	Rate Aug 2026	Rate Aug 2025
Carteret	32,184	31,188	3.1%	3.7%
Craven	39,592	38,107	3.8%	4.2%
Duplin	22,785	22,038	3.3%	3.7%
Greene	8,396	8,119	3.3%	3.7%
Jones	3,697	3,558	3.8%	4.5%
Lenoir	23,943	23,019	3.9%	4.4%
Onslow	70,998	68,223	3.9%	4.4%
Pamlico	5,257	5,082	3.3%	3.9%
Wayne	48,302	46,431	3.9%	4.4%
ECC region	255,154	245,765	3.68%	—

Source: NC Department of Commerce, August 2026 County and Area Employment Figures, released September 30, 2026, tables on pages 2-3; US comparison from U.S. Bureau of Labor Statistics (BLS) Metropolitan Area Employment and Unemployment, September 30, 2026. Regional rate = sum of county unemployed ÷ sum of county civilian labor forces × 100, rather than an unweighted average of county rates. Estimates are preliminary and subject to revision.

Interpreting employment measures

Resident employment measures people where they live, including residents working outside their county. U.S. Bureau of Labor Statistics (BLS) covered employment measures jobs at establishments within the county under unemployment insurance and federal civilian coverage. The region's March 2026 covered employment totaled 218,986 jobs. These two measures have different coverage and dates and should not be compared as if they measured the same population. Active-duty military personnel are not part of the civilian labor force.

Wages Affordability and Economic Distress

County wages and employment

County	Covered jobs Mar 2026	Weekly wage Q1 2026	Annual private wage benchmark	2026 Tier
Carteret	24,874	$931	$44,153	3
Craven	39,508	$1,157	$50,998	2
Duplin	19,722	$921	$45,210	2
Greene	4,414	$972	$43,732	1
Jones	1,638	$1,087	$48,184	1
Lenoir	29,829	$999	$51,026	1
Onslow	54,676	$974	$43,455	2
Pamlico	3,429	$718	$33,069	2
Wayne	40,896	$970	$47,739	1
North Carolina	4,942,709	$1,515	$70,672	—

Sources: BLS Quarterly Census of Employment and Wages, first quarter 2026, released September 2, 2026, table 2 (preliminary). Annual private-sector wage benchmarks: NC Commerce 2026 County Average Wages, based on Q3 2024 - Q2 2025. These annualized wages are not household or per-capita income and are not the same measure as all-ownership quarterly wages. Tier designations: NC Commerce 2026 County Distress Rankings.

Average weekly wages in all nine counties were below the statewide $1,515 and national $1,654 levels. The annual private-sector benchmark ranged from $33,069 in Pamlico to $51,026 in Lenoir, below the statewide $70,672. This supports continued emphasis on skilled workforce pathways and higher-value economic activity. Four regional counties, Greene, Jones, Lenoir, and Wayne were Tier 1; four were Tier 2; Carteret was Tier 3. Tier 1 identifies the state's most economically distressed group.

Affordability and price levels

U.S. Bureau of Economic Analysis **(**BEA) latest all-items Regional Price Parity for North Carolina was 94.326 for 2024, released in February 2026 (US = 100). This places statewide consumer prices approximately 5.7% below the national level. The state's nonmetropolitan index was 88.410, approximately 11.6% below the national level. These are state and statewide nonmetropolitan measures, not an ECC nine-county cost-of-living index.

Source: US Bureau of Economic Analysis (BEA), Regional Price Parities, 2024, via Federal Reserve Bank of St. Louis. Lower relative prices do not establish that housing is affordable for every household; wages, rents, transportation costs, and household circumstances remain relevant to CEDS priorities.

Highlights of Key Changes to the Regional Economy

Reporting-year activities point to practical opportunities and constraints affecting regional development. The following discussion evaluates their implications for the CEDS; it does not attribute regional employment or income changes to ECC projects.

Blue economy infrastructure

The Aquaculture Hub's progression to construction bidding moved a regional blue economy investment closer to implementation. Shared waterfront and processing infrastructure can reduce barriers faced by individual growers. The CEDS should continue supporting the project while tracking actual construction milestones and later business and employment results.

Digital access and workforce participation

Digital inclusion implementation connected the regional plan to locally selected services in all nine counties. Digital skills, devices, and reliable connectivity affect job searches, education, telehealth, and access to public services. Continuing assistance should focus on the barriers identified in county plans and measure participation and service results.

Recovery and access to essential services

The regional substance use assessment identified the importance of transportation, housing, and access to care. These issues also affect workforce participation and community stability. The COSSUP application and regional task force work created a basis for coordinated services, while implementation funding and measured recovery outcomes remain separate milestones.

Infrastructure resilience and utility capacity

The March 12, 2026 Board presentation by NC DEQ introduced the Viable Utilities Program, technical assistance, funding opportunities, and regional approaches to distressed water and wastewater systems. The June 11 presentation introduced the Resilient Communities Planning Guide. Together with Blueprint and watershed planning, these activities reinforced the relationship between reliable infrastructure, disaster resilience, and economic opportunity.

Organizational capacity and partnerships

Membership withdrawals and limited staffing affected ECC's capacity to provide regional assistance. The Interim Executive Director also carried economic development and planning responsibilities. ECC continued outreach to local governments and economic development partners and initiated discussion of a dedicated regional economic development professional, including potential local financial participation. ECC established an organizational Strategic Plan Committee in September to assess economic development, aging, and local government services. Its work complements the regional CEDS.

ECC also strengthened administrative support for grant management. The Board approved an FY 2023-2024 audit response in February 2026 and an FY 2024-2025 audit response in September 2026. ECC modernized its Operations Manual and emphasized reconciliations, internal controls, procurement, documentation, and oversight. Effectiveness of these corrective measures requires continued monitoring.

Evaluation of the CEDS Action Plan

Priority Area 1 Regional collaboration and partnership

ECC's role is to convene local governments and economic development partners, connect projects to regional priorities, and encourage participation across the nine counties. Existing approaches include representative CEDS participation, project-based partnerships, alignment with local initiatives, and inclusion of underrepresented voices.

Progress included adoption of the previous annual update, county coordination on digital inclusion, regional recovery assessment presentations, grant-writing training, and economic developer outreach. September engagement addressed ECC's EDD role, regional needs, survey feedback, and possible support for additional economic development capacity. No dedicated position or funding commitment is reported as approved.

Recommended adjustment: establish a manageable schedule of regional economic developer and county manager meetings; document participation by county; identify a small set of shared projects with responsible leads; and distinguish the organizational Strategic Plan Committee from the CEDS stakeholder process.

Key partners: county economic developers, local government managers, the ECC Board, Eastern Carolina Workforce Development (ECWD), chambers, education and industry representatives, and nonprofit organizations.

Priority Area 2 Infrastructure and disaster resiliency

ECC's role is to assist with project development, funding connections, and grant administration for regionally important transportation, water, sewer, communications, and resilience investments. Existing approaches emphasize infrastructure redundancy, underserved areas, technical assistance, and disaster preparedness partnerships.

Progress included Aquaculture Hub grant management and bid authorization, digital inclusion implementation, flood resilience coordination, water quality planning administration, and dissemination of funding opportunities. Transportation planning continued during the year; local adoption of Greene County's Comprehensive Transportation Plan (CTP) was reported in April. Effective July 1, 2026, ECC ceased serving as Local Planning Agency (LPA) for the Eastern Carolina RPO counties of Duplin, Greene, Lenoir, and Wayne. Down East RPO work continued.

Recommended adjustment: maintain a project tracker showing development stage, eligible funding, match, grant status, next milestone, and responsible partner. Separate planning outputs from construction, grant awards, and verified infrastructure benefits. Follow through on training with project-specific grant assistance.

Key partners: local governments, NC DEQ, NCDOT, EDA, SCRC, the NC Coastal Federation (NCCF), regional transit organizations, utility providers, and disaster preparedness and recovery organizations.

Workforce and Quality of Life Priorities

Priority Area 3 Skilled workforce and educational attainment

ECC's role is to link education, training, career planning, and workforce partners with regional employer needs. The existing CEDS also calls for talent attraction and retention, apprenticeships and internships, and stronger connections between military experience and civilian employment.

Progress during the year was concentrated in digital inclusion partnerships and regional work on transportation and recovery barriers. County implementation linked digital literacy and technology access with workforce readiness and employment opportunities. The recovery assessment and task force discussions addressed conditions that can limit participation in work and training.

The prior military retention and talent attraction recommendations remain relevant strategic directions. This annual update does not report a completed military retention implementation plan, new certification program, regional marketing campaign, or measured increase in apprenticeships.

Recommended adjustment: identify a feasible workforce action with workforce development and education partners; select a responsible lead; track actual participation, referrals, training completion, or employment outcomes. Reassess the scope and funding needed for military retention activities before scheduling broader initiatives.

Key partners: Eastern Carolina Workforce Development (ECWD), economic development staff, schools and colleges, employers, military transition partners, and myFutureNC.

Priority Area 4 Healthy and connected communities

ECC's role is to support livability and access to essential services, particularly in rural areas. The existing approaches address housing, affordable transportation, health care, broadband, recreation, and value-added natural resource industries.

Progress included the regional substance use assessment, transportation coordination, the COSSUP application, digital inclusion implementation, and flood and watershed planning. ECC continued local planning assistance, including contracted planning services for Peletier. These activities support community access and resilience but do not establish that identified housing or health care shortages have been resolved.

Recommended adjustment: use assessment findings to select attainable transportation, housing, and access-to-care actions. Retain the existing housing recommendations, including ordinance review and a potential regional needs assessment, as future initiatives subject to capacity and funding. Avoid counting planning assistance as housing production or service expansion without evidence of those outcomes.

Key partners: county and municipal planning staff, transit providers, health departments, recovery organizations, housing partners, the NC Coastal Federation (NCCF), and community organizations.

Regional Stakeholder Survey Findings and Implications for the CEDS

ECC's 2026 CEDS survey received 14 responses from individuals whose work collectively spans all nine counties. ECC sought feedback from Economic Developers, Planners, and Industry, Education, and Workforce Development professionals for this annual update. Feedback from these stakeholders included the following:

- The biggest needs for industries to expand / develop in the region included:

  (1) Skilled employees
  (2) Infrastructure
  (3) Housing opportunities for employees
  (4) Access to capital
  (5) Enhanced childcare

- The biggest needs for small businesses and entrepreneurs to expand and develop included:

  (1) Access to capital
  (2) Help with license/permit/regulations
  (3) Skilled employees
  (4) Marketing
  (5) Business planning/counseling

- The following were seen as the region's infrastructure advantages:
  (1) Significant advantage - Road/Highway System, Broadband, Water/Sewer
  (2) Somewhat of an Advantage - Public Transportation, Housing, Railroad

- The following were seen as the biggest threats to economic resiliency in the region:

  (1) Overreliance on one industry or employer
  (2) Housing affordability
  (3) Inadequate housing supply

- The following factors were identified as the biggest factors that would influence the region's potential for economic growth:

  (1) Economic development and workforce development systems alignment
  (2) Future pipeline of quality workers
  (3) Financial incentives for economic development

- The following were identified as the region's top competitive strengths:

  (1) Geographic location
  (2) Military/defense related assets
  (3) Lifestyle

- The following were identified as the region's top weaknesses:

  (1) Transportation infrastructure
  (2) Career/job opportunities
  (3) Workforce talent

- Emerging trends that should be highlighted included:
  - Industry and manufacturing
  - Infrastructure development
  - Artificial intelligence
  - Blue economy opportunities
  - Affordable housing
  - Transportation

Opportunities identified included:

- Regional collaboration network that brings together nonprofits, local governments, businesses, faith-based organizations, and community leaders to identify shared needs, coordinate resources, and develop joint initiatives.
- Investing in community-based initiatives that improve access to affordable housing, healthcare, nutritious food, transportation, and essential services, particularly in rural and underserved communities.
- Regional Economic Development; Help localities to develop their own economies and not be dependent on regional efforts.
- Promote reentry councils, RAI, and other collaborative efforts to join forces which would reduce time in meetings for interested leaders.

Next Year Goals

The following proposed goals cover October 1, 2026 through September 30, 2027. They continue the four CEDS priorities and should be matched to staffing, partner commitments, and available funding.

Regional collaboration and partnership

Convene economic developers and county managers to identify priority regional projects and clarify ECC's EDD services. Establish a regular CEDS stakeholder review schedule and record county participation.

Analyze stakeholder survey responses and develop a proposal for additional economic development capacity if supported by partners. Identify potential financial participation without assuming commitments.

Align service priorities with the organizational strategic planning effort while retaining the regional CEDS as the economic development framework.

Infrastructure and resilience

Track Aquaculture Hub bid advertisement, selection, contract award, construction, reporting, and reimbursement requirements. Collect business and job measures when the facility becomes operational.

Advance Blueprint, watershed, and wetland planning deliverables with local and state partners. Identify feasible mitigation and utility projects and their funding requirements.

Follow up on grant-writing workshop project concepts at three and six months. Track applications submitted, amounts requested, awards received, and communities served.

Workforce and educational attainment

Work with workforce and education partners on a practical regional workforce action, including digital skills and access to employment or training.

Review military retention, talent attraction, and apprenticeship recommendations and select actions with named partners and attainable milestones.

Healthy and connected communities

Confirm the COSSUP decision and implement the approved scope if funded. If unsuccessful, evaluate future application opportunities and attainable partner actions.

Continue coordination on transportation, housing, and access to care using the regional assessment. Record actions and service outcomes by participating community.

Evaluate county digital inclusion activities and seek resources for remaining barriers. Track participation, devices or connections supported, and service outcomes.

Performance and administrative follow through

Maintain a concise CEDS project register showing priority area, county, lead partner, milestone, funding status, output, and outcome. Provide periodic Board summaries; monitor audit corrective actions and grant records.