

## WORKFORCE

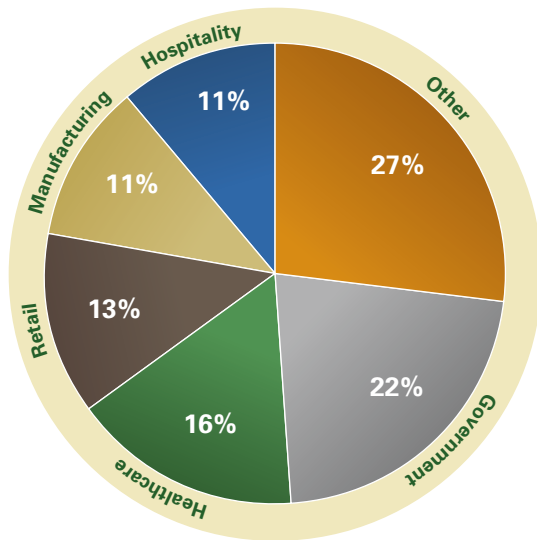


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# WORKFORCE

## Workforce by Industry



## Regional Industry Clusters

Southeastern NC has several industry clusters and concentrations. These are listed below with supporting data and information concerning their prevalence and importance to the region. Manufacturing employs over 40,000 people in the region, which represents 11% of the total workforce. Transportation and logistics and food processing and agricultural industries also have vibrant clusters in the region. Due to growth at Fort Bragg, more defense contractors are locating in the region, crossing several industry sectors. Within the biotechnology sector, a strong contract research organization (CRO) cluster exists in Wilmington.

## Manufacturing & Industry Clusters and Concentrations

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## AVIATION AND AEROSPACE

Southeastern North Carolina is an ideal location for aviation and aerospace companies. Our excellence in logistics and distribution, existing metalworking and manufacturing base, the largest military presence on the east coast and the location of over 280 aerospace companies statewide are a few of the assets NC can offer for this growing industry. In our region there are in excess of 10,000 exiting military personnel each year equipped with the skills needed for success in this industry as well as 5 public and private universities graduating over 4,000 students annually and 8 community colleges with an annual enrollment of 115,000 students (roughly 10% of the region's population) to meet this cluster's workforce needs. The southeastern region also boasts five airports with runway lengths ranging from 5,000 to 8,000 feet all with adjacent industrial sites and three with uncontrolled airspace. Several other resources exist in NC to assist new aviation and aerospace companies such as the North Carolina Aerospace Initiative, a joint venture with educational and economic development organizations to promote applied research and aerospace education. The region's strategic proximity to the port of Wilmington, GE's aircraft engines facility in Wilmington, Boeing's Dreamliner facility in Charleston, Spirit Aerosystems in Kinston and HondaJet in Geensboro are just a few examples of why southeastern NC is poised for rapid growth and success in the aviation and aerospace sector.

## ADVANCED TEXTILES

Southeastern North Carolina has a long and productive history in the textile industry. Over the past decade, a shift from traditional weaving and sewing textiles to advanced and technical non-weaving textiles has occurred. Advanced and performance textiles are more automated and provide a variety of products in the region, including military uniforms and equipment, synthetic fibers, environmental protection products, industrial and automotive filters, and clothing. As a leading state in textile manufacturing, North Carolina has a number of excellent resource organizations to assist companies in this industry sector.

## BIOTECHNOLOGY

Southeastern North Carolina contains excellent opportunities for emerging and established biotechnology companies. North Carolina has tremendous resources and assets within this industry sector. Wilmington has one of the largest clusters of contract research organizations (CRO) in the state and nation. Additionally, the University of North Carolina at Wilmington is

developing a \$30 Million marine biotechnology research center to take advantage of the region's proximity to the coast. Agricultural biotech research is growing due to the region's strong agricultural base and network of universities and community colleges engaged in biotech research and business assistance through Bio-accelerators. The North Carolina Biotechnology Center has a regional office to lead development in this sector.

## **BOATBUILDING AND MARINE TRADES**

Southeastern North Carolina is an excellent location for boatbuilding and marine companies. The region has a proud history of craftsmanship in boat construction and possesses a skilled workforce in this industry sector. The region's natural proximity to the Atlantic coast, and the many beaches, waterways, intra-coastal waterway, lakes, and rivers provide a ready market and a great location for construction and testing. North Carolina's Industry Boating Services organization provides technical assistance and helps companies match up to potential suppliers and customers.

## **BUILDING PRODUCTS**

Southeastern North Carolina has a large number of building product manufacturers and distributors. The region is an ideal location for these companies due to overall population and business growth in the region. The Fayetteville and Wilmington areas are two of the fastest growing areas in North Carolina. Wood products have always been a strong industry sector in the region, and there are over 75 wood products companies located here, making products such as wallboard, trusses, doors, cabinets, lumber, and panels. The port at Wilmington allows for excellent access for importing and exporting of wood and other raw materials.

## **DISTRIBUTION & LOGISTICS**

Southeastern NC is one of the most competitive regions in the United States and the world in which to do business. It has a growing population of nearly 1.1 million people and a diverse industry base of more than 30 Fortune 500 companies. The region's geographic location midway on the east coast provides excellent distribution access and logistics efficiencies for companies engaged in manufacturing, assembly, and retail distribution. The region boasts a three-tiered, interlinked distribution model: 1) At-Port location offers buildings and sites within 20 miles of the Port of Wilmington. 2) Interstate corridors offer inland locations along three interstates—I-40, I-95, and I-74. 3) The region offers close proximity to key regional markets, including Charlotte, NC, Raleigh, NC, Columbia, SC, and Atlanta, GA.

## **FOOD PROCESSING AND AGRI-INDUSTRY**

Southeastern North Carolina has more than 20,000 people employed with food processing companies. Example of products made/grown here include pork, poultry, sauces, food/drink ingredients, value-added sweet potato products, peanuts, soybean oil, grapes, tobacco, and barbeque. The region has several of the top farm income producing counties in the nation. The region has long been known for its productive land and innovative agricultural companies and farms. Wineries and vineyards are a growth sector in the region, due to the area's fertile loamy soils that are ideal for grapes, as well as blueberries. North Carolina annually exports more than \$2 billion of agricultural products—transportation access is made easy by the Port at Wilmington and interstate highways.

## **METALWORKING**

Southeastern North Carolina has a cluster of metal product manufacturing companies that make a range of products, including steel coils, attic fans, aluminum fencing, grills, steel packing straps, metal buildings, pipe fittings, cranes, and nails. Overall, North Carolina has over 150,000 people employed in metalworking industries. Community colleges in the region offer customized worker and classroom training in welding and metal fabrication and technology. Machining technology and robotics programs are also available.

## **MILITARY CONTRACTORS**

Southeastern North Carolina has a long and proud heritage with the presence of military installations in the region. Ft. Bragg, located near Fayetteville, is one of the nation's largest and most important ARMY installations. Ft. Bragg hosts the 82nd Airborne Division and also the U. S. ARMY Special Operations Command, and Pope Army Airfield is located adjacent to Ft. Bragg. By the end of 2011, U.S. ARMY Forces Command (FORSCOM) and the ARMY Reserve Command (USARC) will be fully relocated to Ft. Bragg as part of the BRAC (BASE Realignment and Closure Commission). These moves will bring thousands of new personnel and contractors to the region. The southeast region has a number of excellent resources to assist military contractor companies that have interest in the region, including the Military Business Center, BRAC Regional Task Force, and the Defense and Security Accelerator.

## Union Membership Rate

Due primarily to the “Right to Work” law, North Carolina experiences the lowest unionization rate of all U.S. states.

### 2010 US Lowest Unionization States

1	<b>North Carolina</b>	<b>3.2%</b>
2	Arkansas	4.0%
3	Georgia	4.0%
4	Mississippi	4.5%
5	South Carolina	4.6%
6	Virginia	4.6%
7	Tennessee	4.7%
8	Texas	5.4%
9	Louisiana	5.5%
10	Oklahoma	5.5%

Source: U.S. Bureau of Labor Statistics, Division of Labor Force Statistics  
[<http://data.bls.gov/cgi-bin/print.pl/news.release/union2.t05.htm>].

## Number of Job Applicants Across the NCSE Region

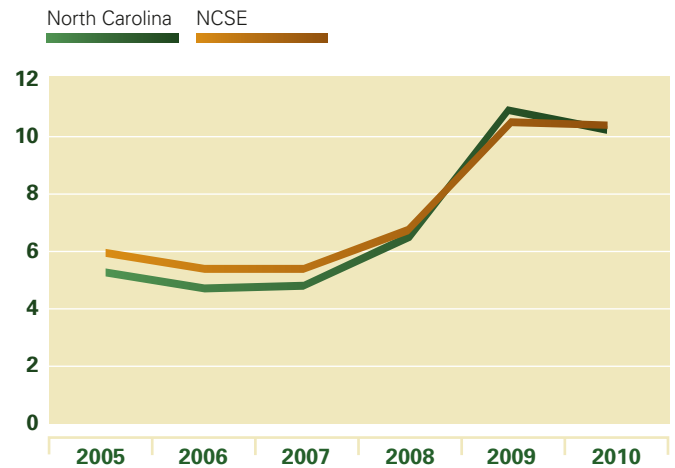
According to the NC Employment Security Commission, as of January 2011, there were a total of **58,290** job applicants across the Southeast region, of which **44,573** had over **6 months** experience in the workplace.

## Right-to-Work State

North Carolina is an “at-will” employment state and one of 23 states with a “right-to-work” law. Closed shops and union shops are not permitted. An employer may not require an employee to join a union, nor may an employer require an employee to refrain from joining a union.

Source: [www.dol.gov/esa/whd/state/righttowork.htm](http://www.dol.gov/esa/whd/state/righttowork.htm)

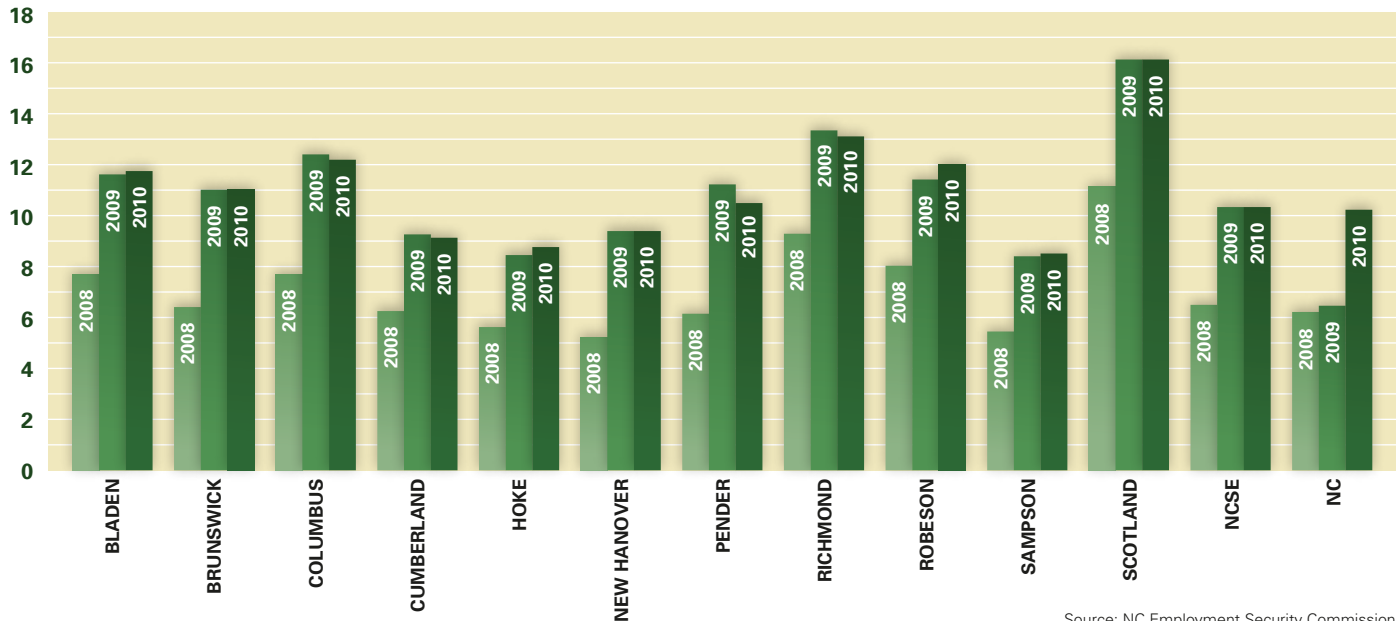
## NCSE Regional Unemployment Rates



Source: NC Employment Security Commission



## Unemployment Rates By County



Source: NC Employment Security Commission

## 3Q2010 Employment Wages

Industry	3Q2010 Employment		Average Weekly Wages		
	Employment	% of Total	NCSE	% of Total	NCSE as % of State
Agriculture, Forestry, Fishing & Hunting	6,523	1.8%	\$447	66.8%	87.8%
Construction	18,828	5.1%	\$777	116.2%	100.5%
Manufacturing	38,494	10.4%	\$878	131.2%	91.9%
Wholesale Trade	10,083	2.7%	\$812	121.3%	72.9%
Retail Trade	47,659	12.9%	\$453	67.7%	95.5%
Transportation & Warehousing	10,181	2.7%	\$751	112.3%	92.3%
Information	5,551	1.5%	\$774	115.7%	69.7%
Finance & Insurance	8,364	2.3%	\$860	128.6%	72.3%
Real Estate & Rental & Leasing	5,370	1.5%	\$588	87.9%	85.8%
Professional & Technical Services	14,293	3.9%	\$1,057	158.1%	87.2%
Management of Companies & Enterprises	2,346	0.6%	\$782	116.8%	55.6%
Administrative & Waste Services	20,007	5.4%	\$496	74.2%	88.2%
Educational Services	34,672	9.4%	\$752	112.4%	94.5%
Health Care & Social Assistance	61,195	16.5%	\$742	110.9%	92.9%
Arts, Entertainment & Recreation	5,034	1.4%	\$351	52.5%	76.0%
Accommodation & Food Services	39,085	10.6%	\$266	39.7%	92.2%
Other Services Ex. Pub Admin	8,371	2.3%	\$483	72.2%	92.2%
Public Administration	31,689	8.6%	\$834	124.6%	103.2%
Government	82,637	22.3%	\$835	124.8%	102.2%

Source: NC Employment Security Commission

# WORKFORCE

## New Incorporations

County	2008	2009	% Change 2008-2009	2010	% Change 2009-2010
<b>Bladen</b>	73	92	26.0	91	-1.1
<b>Brunswick</b>	512	515	0.6	519	0.8
<b>Columbus</b>	112	143	27.7	129	-9.8
<b>Cumberland</b>	815	1145	40.5	1093	-4.5
<b>Hoke</b>	78	99	26.9	119	20.2
<b>New Hanover</b>	1338	1546	15.5	1609	4.1
<b>Pender</b>	167	236	41.3	213	-9.7
<b>Richmond</b>	65	121	86.2	82	-32.2
<b>Robeson</b>	226	312	38.1	268	-14.1
<b>Sampson</b>	108	110	1.9	126	14.5
<b>Scotland</b>	54	77	42.6	69	-10.4
<b>NCSE</b>	3548	4396	23.9	4318	-1.8

Source: NC Secretary of State's Office

## Fort Bragg

- Established in 1918, Fort Bragg is one of the largest military complexes in the world
- Includes 10% of the US Army's active component forces
- Home of the 82nd Airborne Division
- Located just 10 miles from Fayetteville
- Base covers 160,832 acres
- Military Population comprises almost 53,000 officers and enlisted men and women
- Annual payroll is \$3 billion
- \$641 million awarded annually in government contracts
- \$12.9 billion direct and indirect annual impact on the 10 contiguous counties to Fort Bragg

## BASE REALIGNMENT AND CLOSURE COMMISSION (BRAC) - 2005

### BRAC Impact on Fort Bragg:

1. Relocating the 7th Special Forces Group to Eglin AFB, Florida and by activating the 4th Brigade Combat Team, 82nd Airborne Division and relocating European-based forces to Fort Bragg.
2. Realigning Yeager Airport AGS, WV and by relocating eight C-130H aircraft to Fort Bragg to form a 16 aircraft Air Force Reserve/active duty associate unit.
3. Closing Pittsburgh International Airport (IAP) Air Reserve Station (ARS), PA, and relocate 911th Airlift Wing's (AFRC) eight C-130H aircraft to Fort Bragg to form a 16 aircraft Air Force Reserve/active duty associate unit.
4. Relocating AFRC operations and maintenance manpower to Fort Bragg.
5. Relocating two major headquarters, Army Forces command (FORSCOM) and Army Reserve Command, to Fort Bragg. FORSCOM will transfer 3,000 positions from Atlanta by 2011.

BRAC will impact our region by injecting billions of additional dollars in the economy, increasing construction spending, attracting more defense related industries, increasing federal impact aid for schools, increasing population, raising average per capita income and creating a better business climate.

As a result of projected military investment and the relocation of personnel in this region 18,200 jobs will be created by 2013. The leading sectors where these jobs will be created are listed below.

**Projected Percentage Number of Military-Related Jobs Added in the Leading Growth Sectors (2011-2013)**

	2011-2013
Government	33%
Construction	30%
Professional & Technical Services	13%
Retail Trade	8%
Healthcare & Social Assistance	7%
Administrative & Waste Services	5%
Accommodation & Food Service	4%

Source: www.bractrf.com

**Military Spending Impact**

Breakdown of Military spending Impact on North Carolina Gross State Product, Employment, Labor Force, and Population:

	Fort Bragg
Contributions to GDP (in billions)	\$4.7
Employment (Persons)	82,620
Labor Force (Persons)	20,710
Impacted Population (Persons)	84,540

Source: East Carolina University Regional Development Services & Regional Economic Models, Inc. in cooperation with NCSU Economic Development Partnership, Feb 2005

The expected economic impact of additional military spending on the 11 counties in the southeastern region on North Carolina as a result of BRAC is summarized below:

**Economic Impact of Additional Military Investment 2013**

Personal Income	+ \$1.47 billion
Disposable Income	+ \$1.27 billion
Gross Regional Product	+ \$1.11 billion
Total Sales (output)	+ \$.86 billion
Total Demand	+ \$1.69 billion

Source: www.bractrf.com

