



**GROWING THE
SOUTHEAST REGION**
2016–2017 Annual Report

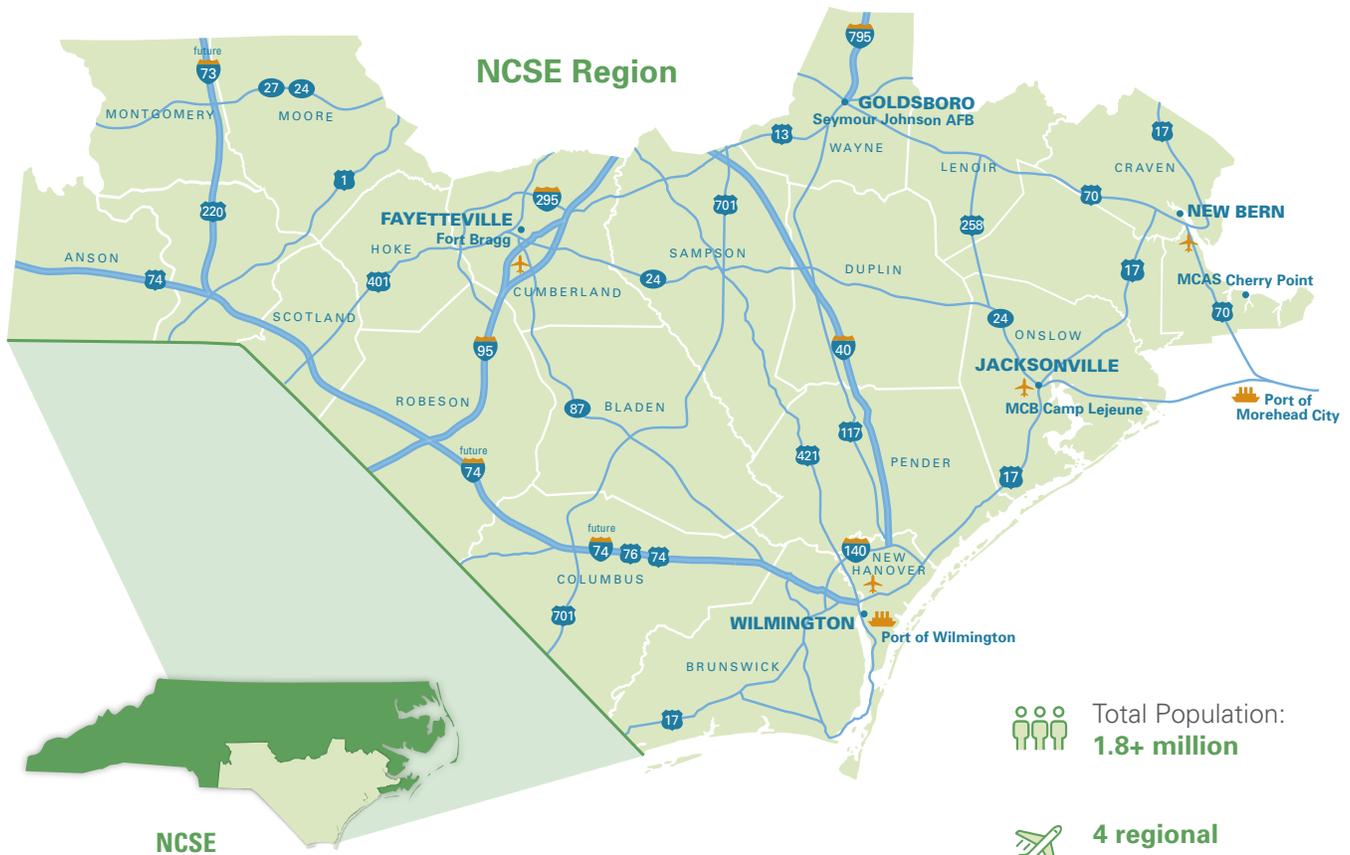
**NORTH CAROLINA'S
SOUTHEAST™**

Regional Economic Development Partnership

THE SOUTHEASTERN PARTNERSHIP

MISSION

Provide strong economic development leadership in southeastern North Carolina through innovative marketing and collaborative regional initiatives that will support the creation of new jobs, generate capital investment, and secure new business locations.



 **Nationally ranked** universities and colleges

 Home to **7 military installations** and more than 18,000 exiting military annually

 **Two deepwater ports**

 **Top 10 region** in U.S. for agricultural productivity

 Total Population: **1.8+ million**

 **4 regional airports**

 Highway access I-40, I-95, I-74, I-73, I-295, I-140, I-795, future I-42

 **6 universities**

SUMMARY



Jeff Etheridge
Chairman



Steve Yost
President

Growing the Southeast Region

A well-defined scope of work plus measurable goals have equaled long-term success for North Carolina's Southeast. The two principles continue to guide our work under a new three-year strategic plan unveiled in 2017. We've set ambitious objectives regarding lead and project generation, as well as outcomes central to our mission: company locations, job creation and the arrival of new investment.

We move into this exciting phase with three new counties. In 2017, the Southeast welcomed Craven, Lenoir and Moore counties into the region, significantly expanding our workforce, inventory of business assets, industrial product and leadership ranks. Our region is highly diverse – economically, geographically and demographically – and that diversity breeds synergies and scale that raise our national and international visibility.

The region performed well in 2016-2017. While Hurricane Matthew brought great personal tragedy to several communities in the Southeast, regional leaders moved quickly to work with state, local and federal officials in limiting disruption to our economy and business community. The storm did not deter hard-won location announcements by Pepsi Bottling Ventures in Robeson County and King Charles Industries in Anson and Montgomery counties. Both were augmented by the NC Southeast's marketing program.

Working closely with our partners, we assisted the location of Carbon Cycle Energy and Optima KV in Duplin County and Mountaire Farms in Scotland County. In addition to their obvious economic impact, our 2016-2017 announcements marked wins for key regional industry clusters like distribution, consumer foods and alternative energy.

Through it all, we've maintained our role as a vocal advocate for regional prosperity, with strong support for new energy infrastructure, high-quality industrial properties, continued port improvements and competitive incentives tools.

We're proud of our accomplishments over the past year and will work diligently to build on NC Southeast's strong track record of results.

3,644
ANNOUNCED JOBS

\$838
MILLION IN
INVESTMENT

FISCAL YEARS 2014 – 2017



SOUTHEASTERN PARTNERSHIP SUPPORTERS

Investor Relations

Public and private investors provide the fuel for The Southeastern Partnership and its important regional economic development programs. Sustained financial support from counties and businesses is critical to the organization's proactive, results-driven agenda that includes producing a measurable return-on-investment for regional investors. Investors benefit through:

- Lead-generation and business location opportunities for member counties
- Focused, aggressive marketing of the region that leverages technical, financial and leadership resources
- Economic intelligence that forms the basis of presentations, proposals and active business projects considering the region
- Marketing product through a globally-accessible regional buildings and sites database
- Flexible avenues for private investment through 501(c)(6) and 501(c)(3) organizations

Public Partners

Anson County	Montgomery County
Bladen County	Moore County
Brunswick County	New Hanover County
Columbus County	Onslow County
Craven County	Pender County
Cumberland County	Robeson County
Duplin County	Sampson County
Hoke County	Scotland County
Lenoir County	Wayne County

Private Partners

Aberdeen & Rockfish
Railroad Company
Aberdeen Carolina &
Western Railway
AROC, LLC.

Atlantic Telephone
Membership Corp.
BB&T

Brunswick EMC
Campbell Oil Co.

Cape Fear Farm Credit
Columbus Regional
Healthcare System

Duke Energy Progress
Engineering Consulting
Services Southeast, LLP

Electricities of
North Carolina

Fayetteville Cumberland
County Economic
Development Corp.

Fayetteville Public Works
Commission

First Citizens Bank

Four County EMC

Jacksonville Onslow
Economic Development

Jones-Onslow EMC

Liberty Healthcare

Lumbee Guaranty Bank

Lumbee River EMC

North Carolina State Ports
Authority

North Carolina's Electric
Cooperatives

Pee Dee Electric

Piedmont Natural
Gas Company

Poyner Spruill

Randolph EMC

Robeson County
Committee of 100, Inc.

Sampson-Bladen Oil
Company

Scotland Health Care
System

Southeastern Economic
Development Commission

Southeastern Regional
Medical Center

Southern Bank

South River EMC

SunTrust Bank

Tri-County EMC

Waste Industries, LLC

Wayne County
Development Alliance

Wilmington International
Airport

Williams Mullen

Z. V. Pate, Inc.

BOARD OF DIRECTORS

Jeff Etheridge

Chairman, BB&T

David Burns

Vice-Chairman
ZV Pate Corporation

Jimmy Smith

Treasurer
North Carolina's EMC

Joann Anderson

Southeastern Regional
Medical Center

Steve Blanchard

Fayetteville Public Works
Commission

Pam Bostic

Southeastern Economic
Development Commission

Haddon Clark

Sampson Bladen Oil
Company

Brad Cornelius

Cape Fear Farm Credit

Scott Dacey

Craven County

Brenda Daniels

ElectriCities of
North Carolina

Roger Davis

Duplin County

Letitia Edens

Hoke County

Ed Garris

Jacksonville Onslow
Economic Development

Crystal Gettys

Wayne County
Development Alliance

Whit Gibson

Scotland County

Craig Hill

Lenoir County

Carla Hollis

Columbus Regional
Healthcare Systems

Chuck Horne

Anson County

Shawn Hunt

Lumbee River EMC

Dr. Larry Keen

Cumberland County

Whitney King

ATMC

Dr. Gary Lanier

Columbus County

Frank Lorick

Waste Industries

Jim Matheny

Montgomery County

Ron Matthews

AROC, LLC

Mike McIntyre

Poyner Spruill

Jason McLeod

ECS Southeast, LLP

John McNeill

Robeson Committee
of 100

Sandy McNeill

Liberty Healthcare

Grey Morgan

Southern Bank

John Nelms

Duke Energy Progress

Roger Oxendine

Robeson County

Charles Peterson

Bladen County

Cliff Pyron

NC Ports Authority

David Stuart

Brunswick County

John Taws

Moore County

Jaz Tunnell

Piedmont Natural Gas

Wyatt G. Upchurch

Private Investor

Dr. John D. Ward

Brunswick Electric EMC

Woody White

New Hanover County

Kermit Williamson

Sampson County

Julie Wilsey

Wilmington Airport

**Local Developers
Advisory Group****Anson County EDC**

John Marek

Bladen County EDC

Chuck Heustess

Brunswick County EDC

Mike Hargett

Columbus County EDC

Dr. Gary Lanier

Craven County EDC

Timothy Downs

Duplin County EDC

James Wolfe

**Fayetteville Cumberland
County Economic
Development Corporation**

Robert Van Geons

Teddy Warner

**Jacksonville Onslow
Economic Development**

Sheila Knight

Lenoir County EDC

Mark Pope

Montgomery County EDC

Amanda Whitaker

**Moore County Partners
in Progress**

Pat Corso

Raeford/Hoke County EDC

Don Porter

Robeson County EDC

Greg Cummings

Sampson County EDC

John Swope

Scotland County EDC

Mark Ward

**Wayne County
Development Alliance, Inc.**

Crystal Gettys

**Wilmington Business
Development**

Scott Satterfield, Billy King

BUSINESS & INDUSTRY ANNOUNCEMENTS

FY 2016–17 Announced Jobs and Investment

Company	Jobs	Investment	County	Industry Sector
Optima KV, LLC	5	\$11,000,000	Duplin	Energy
Mountaire Farms	65	\$44,000,000	Scotland	Food Manufacturing
Carbon Cycle Energy	40	\$100,000,000	Duplin	Energy
Pepsi Bottling Ventures	50	\$16,500,000	Robeson	Distribution
King Charles Industries	145	\$15,000,000	Anson & Montgomery	Advanced Textiles
TOTAL	305	\$186,500,000		

FY 2015–16 Announced Jobs and Investment

Company	Jobs	Investment	County	Industry Sector
Empire Distributors	30	\$10,000,000	Pender	Distribution
Greenfuels Energy	30	\$110,000,000	Robeson	Energy
Gann Memorials	50	\$1,000,000	Columbus	Advanced Textiles
Radix Bay	25	\$3,000,000	Columbus	IT Customer Service
TOTAL	135	\$124,000,000		

FY 2014–15 Announced Jobs and Investment

Company	Jobs	Investment	County	Industry Sector
Enviva	180	\$244,000,000	Richmond	Energy
			Sampson	Distribution
			New Hanover	
Kuraray	25	\$5,000,000	Bladen	Building Products
Vertex	1,340	\$55,000,000	New Hanover	Metalworking
Butterball	367	\$67,000,000	Hoke	Food Manufacturing
Sanderson Farms	1,100	\$137,000,000	Robeson	Food Manufacturing
Provider Resources	40	\$1,000,000	Robeson	Health Services
Military Environmental	12	\$1,500,000	Bladen	Chemical Manufacturing
Asbury Carbons	25	\$8,000,000	Robeson	Chemical Manufacturing
Bluescope Buildings	115	\$9,000,000	Scotland	Building Materials
TOTAL	3,204	\$527,500,000		

THREE YEAR TOTAL:



3,644
JOBS



\$838,000,000
INVESTMENT

BUILDING ON KEY REGIONAL ASSETS



NC Port of Wilmington



Agricultural Base



Transportation Network



200 million
consumers within
a two-day drive



Railroad Network



Regional Airports

- EWN Airport
- FAY Airport
- ILM Airport
- OAJ Airport



Military Installations

- Camp Lejeune
- Fort Bragg
- Marine Corps Air Station Cherry Point
- Marine Corps Air Station New River
- Military Ocean Terminal Sunny Point
- Pope Army Airfield
- Seymour Johnson

\$2 billion
annually spent by the
DoD in NCSE Region



30+ Fortune 500 Companies



43 International Manufacturers



Universities

- Fayetteville State University
- Methodist University
- Mount Olive University
- St. Andrews University
- UNC-Pembroke
- UNC-Wilmington

21 colleges
and universities
located in
the region



15 Community Colleges



Advanced Healthcare Facilities



Energy Capacity

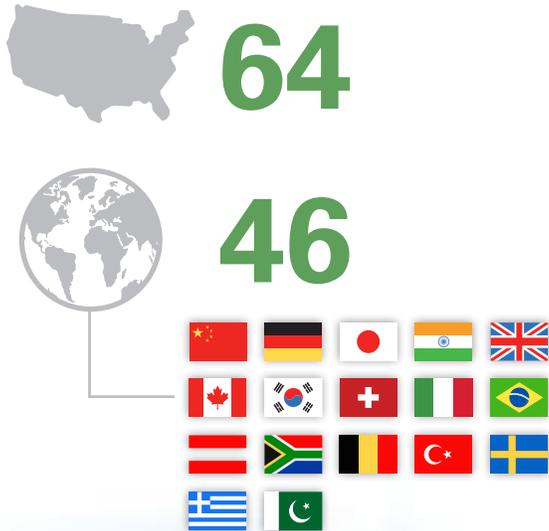
- 4 Power Generating Plants
- Natural Gas Transmission Lines
- Planned Atlantic Coast Pipeline



MARKETING AND BUSINESS RECRUITMENT

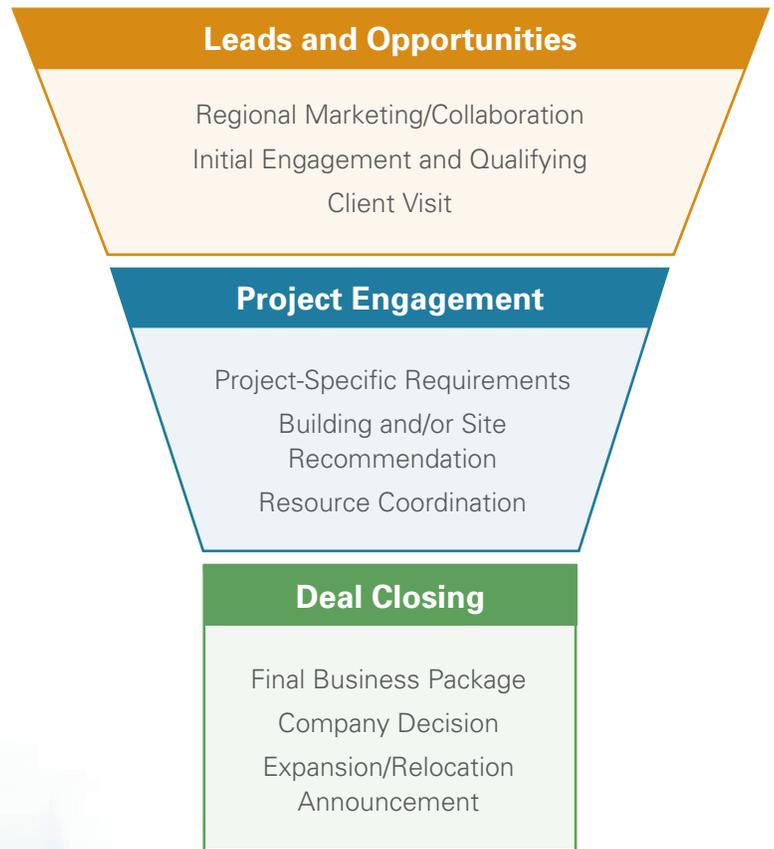
The Southeastern Partnership is focused on aggressive marketing initiatives and activities resulting in lead-generation of business expansion and relocation opportunities in the region.

Leads by National/International



Lead Generation/Project Process

■ NCSE ■ Allied Partners ■ Company and Allied Partners



Regional Economic Growth

Jobs | Investment
 Additional Tax Base
 New Regional Industry



MARKETING PERFORMANCE METRICS



110 Leads



439 Recommendations
(260 Buildings & 179 Sites)

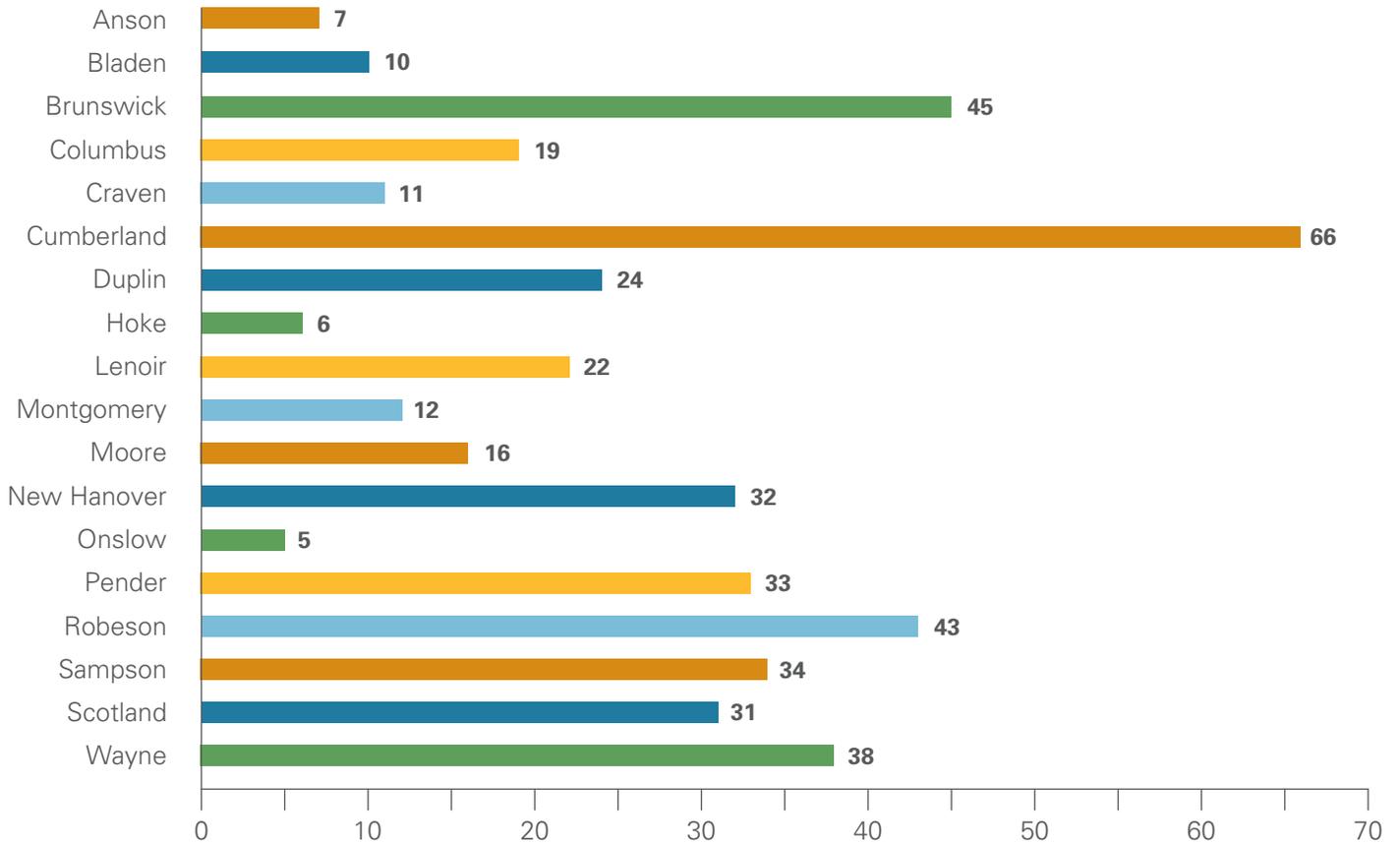


102 Projects
(45 Generated & 57 Assisted)



51 Company Visits and Meetings

Buildings/Sites Recommendations by County



FOREIGN DIRECT INVESTMENT

FDI Lead Activity in Southeast Region

FY2016-2017-46 Total Leads: EDPNC (27) and Non-EDPNC (19)



Number of Leads

10 China	3 UK	1 Belgium
7 Germany	2 S. Korea	1 Turkey
5 Japan	1 Switzerland	1 Sweden
4 Canada	1 Italy	1 Greece
3 Brazil	1 Austria	1 Pakistan
3 India	1 S. Africa	



International Presence in Southeast Region

- Over 100 foreign-owned operations
- Over 65 different foreign-owned companies
- 23 different foreign countries represented
- 43 manufacturers



Industry Sector Breakdown

43 Manufacturing	8 Distribution/Logistics
4 Biotechnology	3 Advanced Textiles
2 Agri-Industry & Food Processing	2 Back Office
1 Aerospace/Defense	1 Automotive
1 Chemicals	1 Construction
1 Mineral Extraction	

OUR COLLABORATIVE PARTNERSHIP WITH EDPNC

North Carolina's Southeast and the Economic Development Partnership of North Carolina (EDPNC) established a "project management protocol" in 2015 that has successfully increased the visibility of our region's buildings, sites, and assets to state-generated lead and project opportunities. This strong collaboration enables greater coordination and communication among EDPNC, local developers, and NCSE, and allows NCSE counties to compete for more opportunities.



REGIONAL MARKETING OBJECTIVES

2017–2020 Strategic Marketing Plan

In 2017, the Southeastern Partnership developed its next three-year strategic plan for marketing and planning. The organization successfully achieved key regional objectives and goals of its 2014-2017 plan through aggressive implementation of 30 strategies.



Goals

- Generate qualified business/industry leads and opportunities
- Generate client visits
- Generate building and site recommendations
- Support regional economic development initiatives



Performance Metrics

- Lead/Opportunity Generation
- Industry Visits to Region
- Building and Site Recommendations
- Technical/Research Assistance
- Partner Engagement
- Strategies Implemented
- Leadership Activity



Regional Marketing

- Direct Marketing
- Product Development
- Research/Technology
- County and Allied Partner Engagement
- Regional Advocacy
- Fundraising
- Communications/Public Relations



REGIONAL ECONOMIC GROWTH



- New Companies
- Private Investment
- New Jobs

MARKETING EVENTS

Targeted Business & Industry Sectors

- Advanced Textiles
- Agribusiness
- Aviation & Aerospace
- Biotechnology
- Defense & Military
- Distribution & Logistics
- Energy
- Food Processing
- Metalworking



Site Consultant Missions (2)



IMTS (International Machine Technology Show)



Canadian Foreign Direct Investment Forum



Advanced Manufacturing Canada Event



FABTECH



Fancy Foods Show



Wells Fargo Golf Championship
(Site Consultants)



Industrial Broker Briefing



Recruiting Missions (2)



Natural Products Expo



Site Selector's Guild



EDPNC (Economic Development Partnership
of NC) Regional Event



Select USA Foreign Direct Investment Event

DRONE VIDEO MARKETING

NCSE's marketing strategies strive to be cutting edge by effectively reaching out to real estate brokers, site selection consultants, company executives and other target audiences to promote the region.

As part of our innovative marketing, NCSE worked collaboratively with a local media production company to develop drone videos of industrial sites in the region. These drone videos add a layer of sophistication to NCSE's existing business recruitment efforts by showcasing the next frontier of how buildings and sites are marketed. The videos incorporate aerial footage, narration, site boundary maps, and additional text and graphics that highlight each site's assets.

Industrial Sites

- Anson County: Anson 74 Rail Park
- Bladen County: Elizabethtown Airport Industrial Park
- Brunswick County: Mid-Atlantic Industrial Rail Park
- Columbus County: Southeast Regional Park
- Craven County: Craven County Industrial Park
- Cumberland County: 401 North Site
- Duplin County: West Park Industrial Site
- Hoke County: Hoke County Regional Industrial Park
- Lenoir County: NC Global TransPark
- Montgomery County: Mt. Gilead Industrial Park
- Moore County: Iron Horse Industrial Park
- New Hanover County: Port of Wilmington
- Onslow County: Camp Davis Industrial Park
- Pender County: Pender Commerce Park
- Robeson County: Biggs Industrial Park
- Sampson County: Sampson Southeast Business Center
- Scotland County: Scotland Industrial Park
- Wayne County: Park East Industrial Park





COLLABORATION WITH COUNTY ECONOMIC DEVELOPMENT ALLIES

Marketing – NCSE harnesses public and private resources to implement a leveraged model for collaborative marketing of the Southeast Region. The organization’s annual marketing plan, developed with extensive input from local economic development partners, seeks to generate leads and engage site consultants through a variety of marketing and outreach events, all organized by NCSE.

Project Management – Unique among regional partnerships, NCSE has cultivated a value-added relationship with the Economic Development Partnership of North Carolina that ensures the highest quality site-selection services to clients, consultants and prospective corporate residents.

Marketing Research/Technical Assistance – NCSE provides demographic, labor force, and other data and analysis in support of industrial projects and strategic initiatives.

- Hoover’s / D&B
- ESRI
- JobsEQ
- IMPLAN
- Location One
- Salesforce

Product Development Fund – NCSE provides funding that can be leveraged to help finance the completion of technical requirements of active industrial projects or for product development initiatives such as a new industrial property.

Client Relationship Management – NCSE tracks all project activity through its customized Salesforce.com project management platform. Every lead, project and recommendation is tracked from its initial contact to the company’s ultimate location decision. We track metrics and generate reports for member counties.



FINANCIAL STRENGTH AND POSITION

The Southeastern Partnership received an unqualified audit of its financial position and management for FY 2016-17 by S. Preston Douglas, accountant. The Partnership is a 501(c)(6) non-profit organization and is supported by a 501(c)(3) non-profit organization as well. Funding from our private and public partners was used in the following ways to advance our regional mission:



42%
Business Development



37%
Marketing Strategies



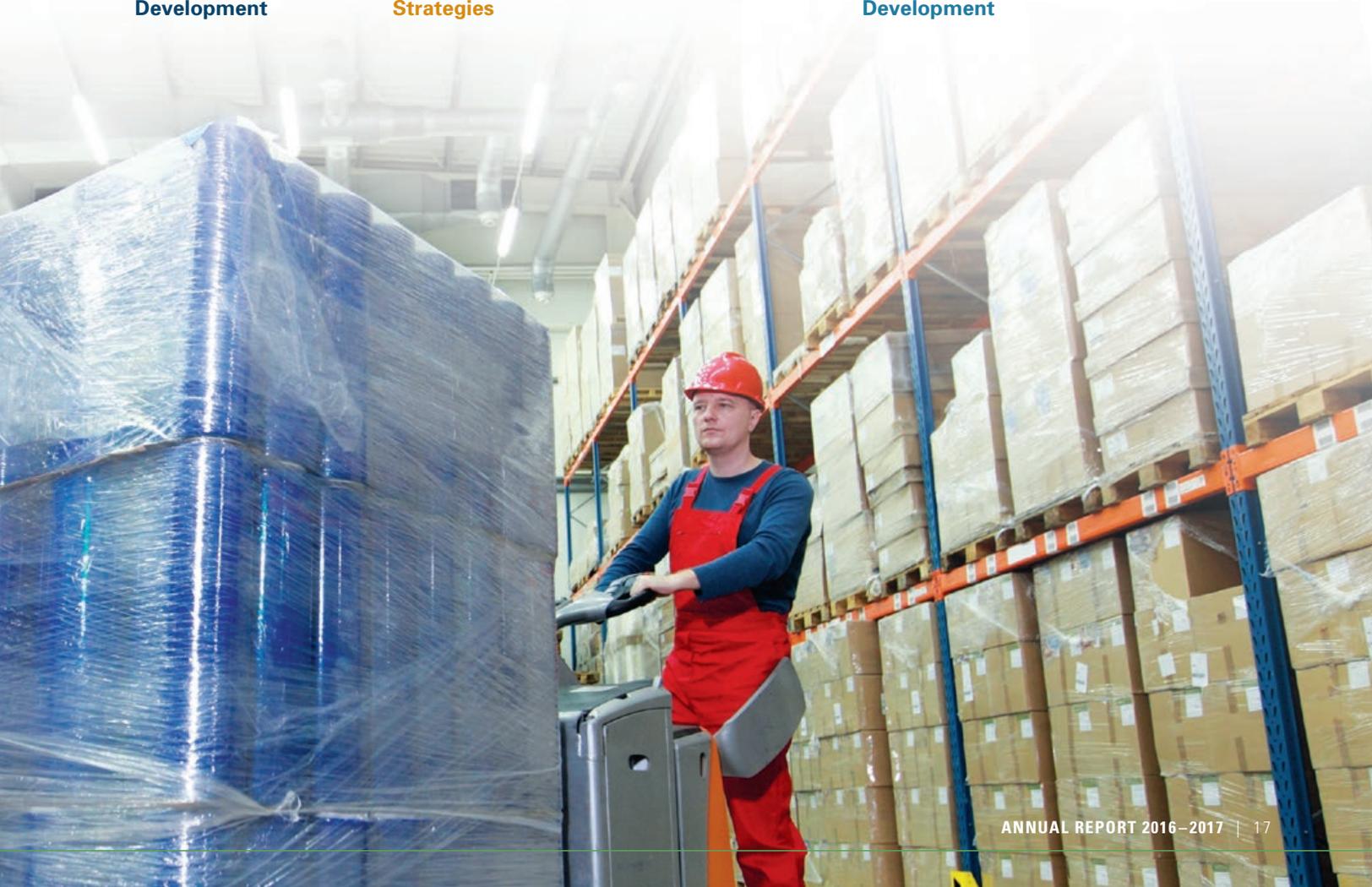
17%
Administration



3%
Product Development



1%
Fundraising



REGIONAL ADVOCACY – THE POWER OF LEADERSHIP

A central component of NC Southeast's economic vision involves giving voice to efforts aimed at upgrading infrastructure. The region, which comprises 18 of the state's 100 counties, has a direct stake in state and federal policies impacting the economy and its future. We continue to advocate proudly on the Atlantic Coast Pipeline. The project, a partnership between Duke Energy and Richmond, Va.-based Dominion Energy, will diversify its critical energy resource and ensure reliable utility pricing. Approved by the Federal Energy Regulatory Commission (FERC) in October, the project will bring construction jobs to the region, and its fiscal impact will include millions of dollars in annual property-

tax revenue for Cumberland, Robeson, Sampson and five other eastern North Carolina counties. ACP will be a strategic asset for the entire state, supporting its fast-growing population and fueling a globally-competitive manufacturing economy. NCSE President Steve Yost continued to make the case for the pipeline in state and national media interviews and in letters to the editor of newspapers in the region. In his September 17th op-ed in the *News & Observer*, Yost, as president of the NC Economic Development Association, discussed the significant benefits the pipeline will bring North Carolina.



The Southeastern Partnership is grateful to its partners, investors and allies for their support for collaborative, innovation-based strategies for regional economic advancement. We hope you share our pride in what we have been able to achieve in 2016-17 and through the first three years of our new public/private model. Together we can look forward to continued progress in our shared mission of renewing prosperity in North Carolina's Southeast.



NORTH CAROLINA'S
UTHEAST™

Regional Economic Development Partnership

THE SOUTHEASTERN PARTNERSHIP

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