

Dear State and Local Economic Development Partners,

The Economic Development Partnership of North Carolina (EDPNC) is pleased to present the Selectsite Readiness Program Report conducted by the Site Selection Group (SSG), a national site location consulting firm, along with technical support provided by Thomas & Hutton (T&H), a full-service engineering and design firm with locations throughout the Southeast.

In 2023, the North Carolina General Assembly established a Selectsite Readiness Program (SRP) with a very specific purpose: to support the development of sites that would increase North Carolina's competitiveness for the siting or expansion of <u>major</u> manufacturing projects in key industry sectors. This Program is a counterpart to the Megasite Readiness Program (MRP). The creation of the SRP recognized that not all major manufacturing projects require the 1,000-acre minimum needed to qualify as a megasite.

Recognizing that independent analysis was needed, the EDPNC was authorized to engage a national site selection firm to evaluate North Carolina sites and identify up to fifteen (15) best positioned to successfully serve major advanced manufacturing projects with the goal that these selectsites would receive increased development and marketing support from the state and the EDPNC. There are many sites across North Carolina that may be suitable for economic development that may not be the best fit for advanced manufacturing projects of large size.

This report details the process that was undertaken to identify and support the development of the best positioned sites. SSG took care to publicize and recruit submissions of sites from across North Carolina and began its analysis with over sixty (60) sites that local governments, local economic development entities, and other partners put forward. It is important to note that the sites not recommended for inclusion in the Program may be competitive for the right project but were not as good a fit compared to the 15 selected under the guidance of the legislation, their value proposition was currently not as strong. Sites not selected will receive feedback to help improve competitiveness.

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The SSG and T&H team have provided a comprehensive analysis that includes not only a technical/engineering assessment of each site, but also an evaluation of the workforce availability, site development costs, and overall operating costs that ultimately play a significant role in a site's overall competitiveness.

We recognize that site development is the foundation of industrial economic development growth. Not every site is a perfect fit for every opportunity but North Carolina as a state is positioned well for continued investment by our targeted industries and needs to be able to provide the critical product and infrastructure to meet these demands.

Sincerely,

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Gene McLaurin Chairman, EDPNC Board

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### NC Selectsite Readiness Program Results & Recommendations





June 2024



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### Note from the Project Team

Dear EDPNC & Key Project Stakeholders:

Site Selection Group (SSG) and Thomas & Hutton (T&H) are pleased to present the results of the NC Selectsite Readiness Program (SRP). It has been a privilege to partner with the EDPNC and stakeholders across North Carolina throughout this engagement.

This report summarizes the steps collectively taken during the SRP to identify and support the development of the Top 15 sites, within the competitive set, that will increase North Carolina's competitiveness for the siting or expansion of major manufacturing projects. The Project Team has been guided by the key principles listed below throughout the engagement:

- Focus on High Impact, Advanced Manufacturing Projects: The North Carolina General Assembly established the SRP recognizing that not all major manufacturing projects require the 1,000-acre threshold traditionally associated with mega sites/projects. As a result, the Project Team developed a customized approach to identify and recommend sites less than 1,000 acres that can support the demands of mega projects. Many of the sites that were evaluated but ultimately not recommended for inclusion in the Top 15 are undoubtedly competitive sites; however, relative to the Top 15, their value proposition and ROI potential for mega projects was not as strong.
- Voluntary Participation: While the Project Team worked diligently to maximize engagement by highlighting both direct and indirect benefits of the SRP, participation in the program was voluntary. As a result, the recommendation of the Top 15 sites herein are relative to the competitive set and those sites that elected to participate. In short, the Project Team recognizes there are competitive sites in NC that chose not to participate in the SRP. It would be of great benefit to NC if this program can be replicated in part or in whole in the future to identify and support the development of additional sites to further enhance the state's product pipeline.
- Incorporate Non-Site Factors: Site readiness exercises should consider all factors that drive competitiveness. While technical site analysis played a primary role in the evaluation, each site and its surrounding labor shed were considered holistically, considering workforce and operating costs that play a significant role in corporate site selection.
- **ROI Focus:** Understanding that funds are finite, product development must be focused on return on investment. This program and process was intentionally designed to build to a comparative ROI analysis that compares the cost to develop a site vs. the overall potential said site and community offer.
- Balancing Rigor & Team Experience: The approach outlined herein was designed to be rigorous and top-down. However, the Project Team recognizes that data does not tell a complete story, and a single, numerical "site score" from a model does not fully encompass the competitiveness of a site. The Project Team has leveraged the collective professional site selection and civil engineering experience to carefully balance the art and science of site selection and ultimately arrive at the recommendation of the Top 15 sites.

We appreciate the trust you have has placed in us to reach this result and look forward to the success that is to come for North Carolina.

Sincerely,

Site Selection Group and Thomas & Hutton





### **Disclaimers and Limitations**

Key disclaimers and limitations are listed below.

- **Top 15 Sites:** The designation of "Top 15" is used relative to sites within the competitive set (i.e., sites that participated in the NC Selectsite Readiness Program). Further evaluation, including site developability assessments, due diligence studies, utility system viability analyses, etc. may be necessary at varying levels for each site to determine and prioritize investment. Identification of any "fatal flaws" through such studies may significantly impact a site's competitiveness, potentially leading to its removal from the Top 15.
- Statutory Requirement: The Project Team acknowledges the statutory acceptability of using contiguous, developable acreage estimates (rather than total site size) to comply with the relevant site size requirements. As defined by statute, "A "selectsite" is defined under law as "a parcel of contiguous property consisting of less than 1,000 acres that is viable for industrial development..."
- Pad Estimate: The Project Team sought to identify and estimate the largest contiguous area suitable for development (flat pad area) within each site. Minimizing impacts to wetlands and streams was a key factor in this evaluation, as was a balanced approach to earthwork (i.e., cut and fill requirements). The analysis considered slopes with a 3:1 ratio from the edge of the developable pad area to the existing grade.
- Third Party Information: The Project Team relied upon information and data provided by local economic development agencies, utility providers, commercial developers, and other stakeholders. While the Project Team exercised its best professional judgment during the evaluation process, it is important to acknowledge the inherent reliance on third-party information. The evaluation considered both the readily available utility capacity as well as the "best case scenario" that could be reasonably accommodated within 24 to 30 months, a typical industrial development timeframe. Site and utility information was gathered in Q1/Q2 2024 and should be reverified for prospect use.
- Utility System Capacity: Risk around volatile upstream utility capacities (electric, natural gas, water, wastewater) should be considered when prioritizing investment as fluctuations at the system level can and do occur, especially in a rapidly developing state such as North Carolina. While costs associated with providing service to a site (e.g., extending a service line) were documented, costs associated with upgrades at the system level were beyond the scope of this engagement and can vary widely among sites and is dependent upon individual project demands.
- Legal Review: Title review and/or legal opinion were not included within the scope of this engagement. The EDPNC should consider engaging legal counsel to conduct a more formal review of the recommended sites. This review will help identify potential impacts of ownership, easements, right-of-way limitations, etc., on investment decisions and real estate transactions.
- **Permitting:** Permitting review and associated costs may be required at varying levels across sites related to impacts of wetlands, historical resources, etc. Consultation with the US Army Corps of Engineers and North Carolina Divisional of Historical Resources (SHPO) should be considered as a next step.
- Ability and Motivation of Local Economic Development Teams: The Project Team's perception of the ability of local economic development teams to execute the necessary development plans and recruitment strategy for a major manufacturing project has not been formally scored in this engagement.

### **Project Timeline**

	1/22	1/29	2/5	2/12	2/19	2/26	3/4	3/11	3/18	3/25	4/1	4/8	4/15	4/22	4/29	5/6	5/13
Preliminary Phase: Program Alignment &	Kickoff																
Alignment of Program & Goals																	
Minimum Criteria Screening																	
Ensure Program Dovetailing (e.g., NC Certified Sites)																	
Phase 1: Site & Market Canvassing & Prel	iminary	Site Sc	reening	]													
Distribute RFIs & Partner Outreach																	
Receive & Review RFI Responses																	
Preliminary Site Screen																	
Phase 2: Comprehensive Desktop Evaluat	ion (Site	e, Work	force, 8	Costs	)					1			1				
Desktop Site Evaluation																	
Follow-up & Virtual Site Visits (as necessary)																	
Phase 3: Site Visits & Engineering Assess	ment	1			1							Į.	1		1		
Conduct In-person Site Visits																	
Buildability & Engineering Analysis																	
Develop Improvement Plans (i.e., cost & schedule)																	
Phase 4: Final Analysis, Executive Summa	ry & Fee	edback			1		1		I								
Conduct Economic Impact Analysis																	
Develop Industry Specific Development Plans																	
Organization of Final Deliverables																	
In-person Presentation of Findings																	
Finalize Deliverables and Outreach																	

#### Summary

- The graphic at left shows the timeline used throughout this Selectsites engagement.
- Although the project adhered to an expedited timeline to comply with the program's statutory requirements, it nonetheless employed a rigorous, top-down approach.
- Further, the Project Team met virtually with key stakeholders each week to ensure alignment on methodology and results.



### SRP Process: A Rigorous, Top-Down Approach

Phase 1	Phase 2A	Phase 2B	Phase 3	Phase 4
Market Canvassing & Fatal Flaw Screen	Preliminary Site Screening	Comprehensive Desktop Evaluation	Site Visits & Engineering Assessment	Final Analysis, Executive Summary & Feedback
64 sites submitted 8 sites failed an initial "fatal flaw" review due to mis-aligned site characteristics such as acreage, zoning, configuration, major utility system deficiencies, or withdrawn by applicant.	<ul> <li>The Project Team then performed a further site screen. 12 sites were eliminated due to:</li> <li>Buildability concerns and/or lack of contiguous, developable acreage to support major projects.</li> <li>Concerns on ability to provide services, extend infrastructure, or generally be ready within 24 months.</li> </ul>	<ul> <li>The remaining 44 sites were evaluated based on three core analyses and weighted to create a composite score.</li> <li>Technical Site Suitability (50% of score)</li> <li>Workforce (35% of score)</li> <li>Operational Cost (for an end user) (15% of score)</li> <li>Erring on the side of inclusion, the Project Team recommended visiting 30 sites.</li> </ul>	<ul> <li>Conduct site visits.</li> <li>Based on site visit, eliminate sites that were less competitive in the view of Project Team.</li> <li>Evaluate impact of improvements to site competitiveness by target industry.</li> <li>Develop cost &amp; timeline for improvements.</li> </ul>	<ul> <li>Combine all analytic results and generate ROI metrics &amp; incorporate Project Team's experience.</li> <li>Review Top 15 recommended sites with full team.</li> <li>Finalize this report and produce supporting documents for Top 15 awards.</li> <li>Buildable area and master utility maps</li> <li>Industry specific development recommendations</li> <li>Feedback to communities</li> </ul>

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- graphic at left vs the top-down ng process the ect Team leveraged wn-select from 64 to the Top 15.
- recommendation of op 15 sites herein elative to the petitive set and e sites that elected rticipate. The ect Team onizes there are petitive sites in NC chose not to cipate in the SRP, ould, however, the needs of ng project types sizes.

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### Summary: Map of Top 15 NC Selectsites



© 2024 Mapbox © OpenStreetMap

### **Target Industry Profiling: Critical Driver for Analysis**

		Advance MFG	Aerospace	Automotive	Food & Ag Tech	Biotech	Clean Energy	Semiconductor
Headcount	Baseline	250	300	500	150	250	500	600
	Average	500	1,000	1,500	300	500	1,000	1,250
	Mega	1,000	5,000	5,000	800	800	1,500	3,000
Сар Ех	Baseline	\$100.000.000	\$250.000.000	\$500.000.000	\$150.000.000	\$200.000.000	\$250.000.000	\$1,500,000,000
	Average	\$400,000,000	\$750.000.000	\$1,000,000,000	\$300,000,000	\$600,000,000	\$450,000,000	\$7,500,000,000
	Mega	\$800,000,000	\$2,000,000,000	\$5,000,000,000	\$500,000,000	\$2,000,000,000	\$1,200,000,000	\$15,000,000,000
Square Footage	Raseline	250.000	200.000	200.000	150.000	200.000	400 000	500.000
oquare rootage	Average	500,000	600,000	500,000	300,000	600,000	800,000	1,500,000
	Mega	1,000,000	1,200,000	2,000,000	800,000	1,000,000	1,500,000	4,000,000
		50	7-	50	50	50		50
Acreage	Baseline	50	/5	50	50	50	/5	50
	Average	200	200	250	100	100	150	100
	Mega	400	400	1,000	250	250	300	300
Electric - Demand (MW)	Baseline	5	10	25	5	5	20	25
	Average	25	20	50	10	15	50	75
	Mega	50	50	200	25	30	80	150
Gas (MCF/hr)	Baseline	10	15	15	10	10	40	40
	Average	40	50	50	40	40	80	80
	Mega	80	100	100	80	80	120	120
Water (GPD)	Baseline	250,000	200,000	500,000	500,000	200,000	750,000	750,000
	Average	500,000	400,000	1,500,000	1,000,000	400,000	1,500,000	1,500,000
	Mega	1,000,000	1,200,000	3,500,000	2,000,000	800,000	3,000,000	3,000,000
Wastewater (GPD)	Raseline	175000	140 000	350 000	350.000	140 000	525 000	525,000
	Average	350,000	280,000	1 050 000	700.000	280,000	1 050 000	1 0.50 000
	Mega	700,000	840,000	2,450,000	1,400,000	560,000	2,100,000	2,100,000

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#### Summary

- The table at left shows parameters used to measure the suitability of each site's competitiveness for the siting or expansion of major manufacturing projects across key target industries as defined by EDPNC.
- The parameters (e.g., headcount, ,utilities, etc.) were developed based off the Project Team's collective project experience, and further calibrated based on EDPNC's project pipeline.
- These project profiles were a critical component of the desktop analysis and ultimately the full recommendations. They were calibrated to focus on impactful projects aligned with the goals of the Selectsites program.

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### **Return on Investment: Summary of Approach**



- The graphic above shows the overall approach to the Project Team's comparative return on investment modeling for the final recommendations. The next page provides greater detail on how each component was evaluated.
- The potential benefits, or opportunity, provided by each site/community are shown on the top, while the estimated cost to develop each site is shown at the bottom.
- This analysis employs a comparative approach, prioritizing sites that exhibit a greater potential for benefits relative to their associated costs.

### **Return on Investment and Impact Analysis: Detailed Approach**

#### **Development Costs**

#### **Cost Estimates**

- Demolition
- High level erosion control & stabilization
- Clearing
- On-site cut/fill
- Unit price for stormwater management
- Sewer extension
- Pump station
   construction/improvements
- Water extension
- Wetland/Stream mitigation
- Relocation of site impediments
- Rail extension
- Gas extension

#### Key Assumptions

- Cut/fill balance for largest contiguous flat pad -> "Best Pad Estimate" as shown in results.
- Assumed minimal (less than 1 acre) wetland/stream impact.
- 3:1 cut / fill slopes.
- DOES NOT include system level upgrades for water and wastewater.

### Site & Community Potential

#### Technical Site Profile

- Yes or No: Binary approach either the site meets Target Industry Profiles or not.
- Example: With assumed investments this site can meet requirements of Baseline Biotech project (acreage, water, etc.) but not a Mega Automotive project (acreage, water, etc.)
- Include key buffers on acreage & utilities.

#### Workforce & Operating Costs

- Overlay previously conducted analyses to estimate a site's potential to land certain types of projects.
- Example: Site X has a better workforce and cost score vs. Site Y for an Aerospace project.

#### Examples

- Site cannot meet technical requirements, BUT strong workforce and/or cost scoring = NO POTENTIAL (the site doesn't work.
- 2. Site can meet technical requirements, BUT moderate workforce and/or cost scoring = SOME POTENTIAL.
- 3. Site can meet technical requirements, AND strong workforce and/or cost scoring = HIGH POTENTIAL.

### Project Impacts

#### **Direct Project Impact**

- Assume Target Industry Profiling as shown on previous page.
- Some projects will have larger direct impacts than others.
- Example: Attracting a baseline Aerospace project brings 300 jobs and \$250mm in capex, while a Food & Ag Tech project would only have 150 jobs and \$150mm in capex.

#### Gross Impact

- Develop Impact Multipliers including Jobs & Earnings.
- Analyzed from the state's perspective, rather from the community's perspective.
- Example: Automotive has higher multipliers, but Biotech has higher wages.

#### **ROI & Recommendations**

#### **Total Benefits**

- Site & Community Potential x Project Impacts
- Example: Sites that can meet more of the different project profiles are better, all things being equal.
- Example: Sites that can meet higher impact projects are better (e.g., biotech vs. food), all things being equal.
- Example: Sites with stronger workforce & cost profiles are better, all things being equal.

#### ROI

- <u>Total Benefits</u> / <u>Development Costs</u>
- Example: Sites with lower costs are better, all things being equal.
- Example: But sites with higher Total Benefits relative to Development Costs are also better, all things being equal.

#### **Results & Recommendations**

- Summarize ROI across all project types, transform to comparative ranking, and sort and rank.
- Adjust based on statutory requirements by acreage (not needed), project experience, and factors not captured in modeling (e.g., ownership structure and impact on attractiveness, assets like rail not fully captured in scoring Project Team Experience)
- Test model sensitivities and buffers.

### Summary: Results for Top 15 NC Selectsites

				ACREAGE F	IGURES &	COSTS	SITE	ROI			
Site Name (Public vs. Private Ownership)	County (sorted A-Z)	Tier	Total Acreage	Contiguous Acreage	Pad Estimate	Estimated Development Costs for Pad	# of Technical Site Requirements the Site Can Meet	Workforce Profile	Operating Cost Profile	Total Benefits	ROI
Claremont International Rail Park (Private)	Catawba	2	227	158	76						
Triangle Innovation Point West (Private)	Chatham	3	323	130	79						
Triangle North Granville Industrial Park (Public)	Granville	2	527	108	88						
Reedy Fork Industrial Site (Private)	Guilford	2	260	146	73						
Crown Industrial Site (Private)	Guilford	2	165	139	51						
US 301 Industrial Site (Public)	Halifax	1	252	133	85						
Ferncliff Park* (Public)	Henderson	3	101	73	43						
North Carolina Global TransPark – North Site (Public)	Lenoir	1	515	375	327						
Holly Shelter Business Park (Public/Private)	New Hanover	3	300	299	253						
Farmville Corporate Park (Public)	Pitt	1	400	304	158						
Energy Way Industrial Park (Private)	Richmond	1	672	432	379						
Expressway Commerce Park @ Monroe - South (Public)	Union	3	74	50	42						
Camp Helix (Private)	Wake	3	345	156	56						
ParkEast-Ivey Site (Private)	Wayne	1	285	253	261						
Carolinian Innovation Park (Private)	Wilson	1	451	158	135						

#### Summary of Results

- The table above shows the summary results for the overall analysis of the 15 sites recommended for NC Selectsites designation.
- Each key scoring category is color coded. Darker green shaded cells are more favorable scoring for that site and category. Darker red shaded cells are less favorable for that site and category.
- Results are sorted alphabetically by county NOT by scoring and/or ranking.
- \* Ferncliff Park is an NC Certified Site

#### Notes on Acreage & Costs

- Total Acreage acreage provided via RFI.
- Contiguous, Developable Acreage estimate based on preliminary desktop analysis.
- Pad Estimate largest contiguous, developable pad estimate developed by Project Team.
- Costs Estimated costs to prepare "Pad Estimate" acreage for development.

### **Conclusions and Recommendations**

Key conclusions and recommendations are listed below.

- Product Development Investment: North Carolina is well positioned to continue competing for major manufacturing investment due to a variety of factors including availability of skilled labor, access to higher education, favorable operating cost and tax climate, etc. However, to ensure North Carolina's continued ranking as a top business destination, strategic investment in the Top 15 Selectsites, as well as other promising sites and infrastructure projects across the state, is paramount. The post-COVID-19 industrial boom has resulted in the absorption of many of the state's most attractive sites, highlighting the critical need for sustained investment in product development initiatives. Additionally, it is noteworthy that competing states have sought to emulate North Carolina's success by allocating significant resources towards funding site development and infrastructure projects.
- **Development Recommendations:** The Project Team has compiled comprehensive Final Site Exhibit packages for the "Top 15" sites, encompassing an additional tier of high-performing candidates. While the development recommendations within these exhibits are not exhaustive, the Project Team strongly recommends prioritizing the outlined tasks. The execution of these tasks, whether in full or in part, will be a critical factor in the ability of these sites to attract major manufacturing investments, thus achieving the goals of the Selectsite Readiness Program (SRP).
- **Development Cost Estimates:** The sum of the Opinions of Probable Cost for the Top 15 Selectsites developed by the Project Team is approximately \$230 million. This total represents an estimate of development costs in order to prepare the "pad estimate" sites to compete for major manufacturing investment. These cost estimates are not all encompassing, for instance, they do not include site acquisition costs, utility system upgrade estimates, asbestos abatement for structure demolition, additional cost for rock excavation in earthwork estimate, etc.
- Water & Wastewater Treatment Capacity: One of the primary indicators of a site's ability to meet the demands of major manufacturing investment is the amount of available capacity (measured in Million Gallons per Day MGD) of a site's water and wastewater treatment systems. Oftentimes, there is a substantial disparity between the allocation of the treatment system and its average or peak utilization. This underutilized capacity represents an opportunity for North Carolina to improve its competitiveness in attracting new industrial projects. State leadership should explore strategies to "recapture" this unutilized capacity within existing treatment systems. By doing so, more sites across the state could potentially compete for projects that might otherwise be eliminated during the initial stages of site selection due to capacity limitations. This approach offers an advantage over the substantial investment required for upgrading treatment systems entirely.



### **Conclusions and Recommendations**

Key conclusions and recommendations are listed below.

- Program Next Steps: The following actions are recommended as program next steps. This list is not intended to be all-encompassing.
  - Collaboration with Privately-Owned Sites: A portion of the Top 15 Selectsites involve private ownership. To ensure future development efforts for these
    sites align with the overall goals of the SRP, the EDPNC and state leadership should carefully consider establishing a collaborative framework or
    memorandum of understanding on how to proceed.
  - **Due Diligence:** Further evaluation, including site developability assessments, due diligence studies, utility system viability analyses, etc. may be necessary at varying levels for each site to determine and prioritize investment. Identification of any "fatal flaws" through such studies may significantly impact a site's competitiveness, potentially leading to its removal from the Top 15.
  - NC Certified Sites: Collaboration with the North Carolina Department of Commerce (NCDOC) should be considered as a next step to assess the alignment between each of the Top 15 Selectsites and the requirements for obtaining the North Carolina Certified Sites designation. This collaborative effort would inform the development of a tailored strategy for each site to pursue certification, potentially enhancing their marketability and competitive edge in attracting major manufacturing projects.
  - **Recurring Program:** The Project Team recommends the exploration of a recurring SRP or a similar program iteration. This program should prioritize continued investment in "smaller" sites (i.e., less than 1,000 acres) with the capacity to support major manufacturing projects. Ideally, these efforts would operate as a distinct program from existing initiatives (e.g., NC Certified Sites) as the SRP serves a distinct purpose with a lower participation barrier for economic development partners.
  - Site Identification: Targeted site identification efforts could represent a logical next step for the SRP. For example, if state leadership desires a more concentrated presence of industrial sites in underrepresented areas of the state (e.g., western NC) capable of supporting major manufacturing investment, strategic investment in upstream product development initiatives, such as targeted site identification, would be highly beneficial.

# **Top 15 Selectsite Profiles**



### **Catawba - Claremont International Rail Park**



#### Site Profile

Location	Claremont, Catawba County, NC
Total Acres	227.15 acres
Pad Estimate	75.6 acres
Ownership	Private (w/ Public Option)
Zoning	Heavy Industrial
Distance to Interstate	2.5 miles to I-40
Rail	Norfolk Southern adjacent
Electric	Duke Energy 12.47 kV line on-site
Natural Gas	PNG 4-inch line 1,000 ft. from site along Kelly Blvd
Water	City of Claremont 12-inch line 400 ft. from site along Hwy 70; 0.53 mgd excess capacity
Water System	7.8 mgd excess capacity
Wastewater	City of Claremont 12-inch gravity main adjacent; 0.22 mgd excess capacity
Wastewater System	0.45 mgd excess capacity

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### **Chatham - Triangle Innovation Point West**



	Site Profile
Location	New Hill, Chatham County, NC
Total Acres	323 acres
Pad Estimate	78.9 acres
Ownership	Private
Zoning	Heavy Industrial
Distance to Interstate	11 miles to I-540
Rail	CSX rail spur on-site
Electric	Duke Energy 23.9kV and 115 kV lines on- site
Natural Gas	Dominion Energy 6-inch line adjacent
Water	City of Sanford 12-inch line adjacent; 1 mgd excess capacity
Water System	4.5 mgd excess capacity
Wastewater	City of Sanford 36-inch gravity main adjacent; 7 mgd excess capacity
Wastewater System	4 mgd excess capacity

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# Granville - Triangle North Granville Industrial Park

![](_page_18_Picture_1.jpeg)

#### Site Profile

Location	Oxford, Granville County, NC
Total Acres	527 acres
Pad Estimate	87.6 acres
Ownership	Public
Zoning	Heavy Industrial
Distance to Interstate	0.5 miles to I-85
Rail	Norfolk Southern 4 miles from site
Electric	Duke Energy 23.9kV and 115 kV lines on- site; 230 kV line adjacent
Natural Gas	Dominion Energy 6-inch line 2,000 ft. from site
Water	City of Oxford 16-inch line adjacent; 1.2 mgd excess capacity
Water System	0.5 mgd excess capacity
Wastewater	City of Oxford 18-inch line adjacent; 1.44 mgd excess capacity
Wastewater System	0.6 mgd excess capacity

### **Guilford - Crown Industrial Site**

![](_page_19_Picture_1.jpeg)

#### Site Profile Whitsett, Guilford County, NC Location **Total Acres** 165 acres Pad Estimate 51.2 acres Ownership Private Agriculture Zoning Distance to One mile to I-85 Interstate Rail N/A Duke Energy 23.9kV line on-site; 138 kV Electric line adjacent to site PNG 8-inch line 4,000 ft. from site at Natural Gas corner of Konica Rd and Hwy 61 City of Burlington 12-inch water line 5,000 Water ft. from site, along NC Hwy 61; 2 mgd excess capacity Water 16 mgd excess capacity System City of Burlington 12-inch gravity main Wastewater 1,300 ft. west from site; 0.5 mgd excess capacity Wastewater 12 mgd excess capacity System

### **Guilford - Reedy Fork Industrial Site**

![](_page_20_Picture_1.jpeg)

#### Site Profile Location Greensboro, Guilford County, NC **Total Acres** 260 acres Pad Estimate 72.7 acres Ownership Private Heavy Industrial Zoning **Distance to** Four miles to I-840 Interstate Norfolk Southern adjacent Rail Duke Energy 23.9kV line on-site Electric PNG 2-inch line adjacent and 10-inch line **Natural Gas** on Summit Rd. City of Greensboro 30-inch line adjacent; Water 1 mgd excess capacity Water 10 mgd excess capacity System City of Greensboro 24-inch gravity main Wastewater on-site; 3 mgd excess capacity Wastewater 12 mgd excess capacity System

### Halifax - US 301 Industrial Site

![](_page_21_Picture_1.jpeg)

#### Site Profile Location Enfield, Halifax County, NC **Total Acres** 251.86 acres Pad Estimate 85.2 acres Ownership Public Heavy Industrial Zoning **Distance to** 10 miles to I-95 Interstate Rail CSX line adjacent Electric Halifax EMC 24.9 kV line adjacent PNG 8-inch line 1,000 ft. from site at the Natural Gas intersection of Piper Lane and Hwy 301 Halifax County Public Utilities 12-inch line Water 2,400 ft. from site along US 301; 0.5 mgd of excess capacity Water 1.86 mgd excess capacity System Town of Enfield 4-inch force main 2,400 Wastewater ft. from site along US 301; 0.133 mgd excess capacity Wastewater 0.4 mgd excess capacity System

### Henderson - Ferncliff Park

![](_page_22_Picture_1.jpeg)

#### Site Profile Location Mills River, Henderson County, NC **Total Acres** 101.46 acres Pad Estimate 43.1 acres Ownership Public Zoning Light Industrial Distance to 2.6 miles to I-26 Interstate Rail N/A Duke Energy 23.9kV line on-site; 115 kV Electric line 300 ft. west of site Natural Gas Dominion Energy 8-inch line on-site City of Asheville 10-inch line 2,200 ft. from Water site; 1.5 mgd excess capacity Water 21 mgd excess capacity System Buncombe County 8-inch gravity main on-Wastewater site; 0.2 mgd excess capacity Wastewater 17 mgd excess capacity

System

### Lenoir - NC Global TransPark

![](_page_23_Picture_1.jpeg)

	Site Profile
Location	Kinston, Lenoir County, NC
Total Acres	515 acres
Pad Estimate	326.7 acres
Ownership	Public
Zoning	GTP-I
Distance to Interstate	20 miles to I-795
Rail	N/A
Electric	City of Kinston 7.2 kV line on-site
Natural Gas	PNG 4-inch line 2,000 ft. from site along Gateway Drive
Water	City of Kinston 12-inch line on-site; 3.95 mgd excess capacity
Water System	0.8 mgd excess capacity
Wastewater	City of Kinston 10-inch gravity main on- site; 0.37 mgd excess capacity
Wastewater System	6.85 mgd excess capacity

# New Hanover - Holly Shelter Business Park

![](_page_24_Picture_1.jpeg)

	Site Profile
Location	Castle Hayne, New Hanover County, NC
Total Acres	300 acres
Pad Estimate	252.5 acres
Ownership	Public/Private
Zoning	Heavy Industrial
Distance to Interstate	1.8 miles to I-40
Rail	N/A
Electric	Duke Energy 23.9kV line on-site
Natural Gas	PNG 6-inch line 1,500 ft. from site at the intersection of Diamond Shamrock Rd. and Holly Shelter Rd
Water	Cape Fear Public Utility Authority 16-inch water line adjacent; 1.9 mgd excess capacity
Water System	20 mgd excess capacity
Wastewater	Cape Fear Public Utility Authority 12-inch force main adjacent; 1.2 mgd excess capacity
Wastewater System	6 mgd excess capacity

### **Pitt - Farmville Corporate Park**

![](_page_25_Picture_1.jpeg)

#### Site Profile Farmville, Pitt County, NC Location **Total Acres** 400 acres 157.6 acres Pad Estimate Ownership Public Light Industrial Zoning **Distance to** Four miles to I-587 Interstate Rail N/A Pitt Greene EMC on-site Electric **Natural Gas** PNG 4-inch line adjacent Town of Farmville 12-inch line adjacent; Water 1.28 mgd excess capacity Water 0.79 mgd excess capacity System Town of Farmville 12-inch gravity main Wastewater adjacent; 1.7 mgd excess capacity Wastewater 2.71 mgd excess capacity System

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# **Richmond - Energy Way Industrial Park**

![](_page_26_Picture_1.jpeg)

#### Site Profile

Location	Hamlet, Richmond County, NC
Total Acres	672 acres
Pad Estimate	379.4 acres
Ownership	Private (w/ Public Option)
Zoning	Industrial and Other
Distance to Interstate	Three miles to I-74
Rail	CSX main line one mile from site
Electric	Duke Energy 115 & 500 kV lines on-site Pee Dee 25 kV line on-site
Natural Gas	PNG 30-inch line on-site
Water	Richmond County 12-inch line adjacent; 0.75 mgd excess capacity
Water System	5 mgd excess capacity
Wastewater	City of Rockingham 10-inch force main adjacent; 0.25 mgd excess capacity
Wastewater System	5.5 mgd excess capacity

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### **Union - Expressway Commerce Park**

![](_page_27_Picture_1.jpeg)

#### Site Profile

Location	Monroe, Union County, NC
Total Acres	74 acres
Pad Estimate	41.8 acres
Ownership	Public
Zoning	Light Industrial
Distance to Interstate	14 miles to I-485
Rail	N/A
Electric	City of Monroe 34.5 kV line adjacent and 100 kV line on-site
Natural Gas	City of Monroe 4-inch line adjacent
Water	City of Monroe 18-inch line 2,000 ft. from site; 5.7 mgd excess capacity
Water System	7.5 mgd excess capacity
Wastewater	City of Monroe 21-inch gravity main adjacent; 1 mgd excess capacity
Wastewater System	3.54 mgd excess capacity

### Wake - Camp Helix

![](_page_28_Figure_1.jpeg)

Site Profile		
Location	Holly Springs, Wake County, NC	
Total Acres	345 acres	
Pad Estimate	55.6 acres	
Ownership	Private	
Zoning	Mixed Use/Planned Development - Light Industrial Allowed	
Distance to Interstate	Three miles to I-540	
Rail	N/A	
Electric	Duke Energy 23.9kV and 230kV lines on- site	
Natural Gas	Dominion Energy 6-inch line adjacent	
Water	Town of Holly Springs 24-inch line adjacent; 0.5 mgd excess capacity	
Water System	3.4 mgd excess capacity	
Wastewater	Town of Holly Springs 18-inch gravity main adjacent; 0.6 mgd excess capacity	
Wastewater System	1 mgd excess capacity	

### Wayne - Park East Ivey Site

![](_page_29_Figure_1.jpeg)

#### Site Profile

Location	Goldsboro, Wayne County, NC
Total Acres	285 acres
Pad Estimate	260.7 acres
Ownership	Private (w/ Public Agreement)
Zoning	Industrial and Residential
Distance to Interstate	Seven miles to I-795
Rail	Norfolk Southern line approximately 0.5 miles to north
Electric	Duke Energy 23.9kV & 115kV lines on-site
Natural Gas	PNG 6-inch line adjacent
Water	City of Goldsboro 12-inch line adjacent; 0.9 mgd excess capacity
Water System	7.28 mgd excess capacity
Wastewater	City of Goldsboro 18-inch gravity line adjacent; 0.5 mgd excess capacity
Wastewater System	2.27 mgd excess capacity

### Wilson - Carolinian Innovation Park

![](_page_30_Picture_1.jpeg)

#### Site Profile

Location	Wilson, Wilson County, NC
Total Acres	451 acres
Pad Estimate	134.6 acres
Ownership	Private
Zoning	Agriculture
Distance to Interstate	Three miles to I-587
Rail	N/A
Electric	Wilson Energy 24.9 kV line 200 ft. from site
Natural Gas	PNG 8-inch line 5,800 ft. north from site
Water	City of Wilson 12-inch line 200 ft. from site along MLK Pkwy; 4 mgd excess capacity
Water System	8 mgd excess capacity
Wastewater	City of Wilson 8-inch gravity main 200 ft. from site along Charleston St; 0.4 mgd excess capacity
Wastewater System	7 mgd excess capacity

![](_page_31_Picture_0.jpeg)

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