NC Chamber | N.C. CRITICAL TECHNOLOGIES ALLIANCE

STATE CAPABILITIES BRIEFING

REBUILDING AMERICA'S MARITIME ADVANTAGE

Land, labor, logistics, and a robust Navy supplier network next to the world's largest naval base.

OCTOBER 2026

THE ATLANTIC CORRIDOR · NORTH ↑

- **HAMPTON ROADS**
  Norfolk · Newport News
- **ELIZABETH CITY**
  Largest USCG air base
- **FRC EAST**
  ~4,000 MRO workers
- **MOREHEAD CITY**
  45-ft channel
- **CAMP LEJEUNE**
  II MEF
- **PORT OF WILMINGTON**
  Strategic seaport
- **SUNNY POINT**
  Largest U.S. ammunition port

4th
Largest active-duty military population in the U.S.

479K+
Manufacturing workers, the largest workforce in the Southeast

100+
NC suppliers in the submarine and carrier industrial base

~1 hr
From northeastern NC to Naval Station Norfolk

THE OPPORTUNITY

NEXT TO THE FLEET. READY TO BUILD.

Hampton Roads is the center of the Atlantic fleet. North Carolina, about an hour away, offers the complementary capacity the maritime industrial base needs: cost-competitive land, a manufacturing and veteran workforce at scale, strategic ports and corridors, and more than 100 suppliers already serving the Navy's submarine and carrier programs.

This briefing outlines the state's capabilities, the partners ready to help companies grow here, and how to engage.

FOUR ADVANTAGES. ONE STATE.

TALENT
Manufacturing, technology, and veteran workforces at scale

COASTLINE
Home to world-class boatbuilding, primed for test & evaluation

POSITION
Strategically located between multiple Navy hubs

BUSINESS CLIMATE
Low taxes and a top-ranked place to do business

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ABOUT THIS BRIEFING

This report was prepared by the **North Carolina Critical Technologies Alliance** and the **NC Chamber**.

It builds in part on the NC Chamber Foundation's 2026 report, *North Carolina's Maritime Assets: Working Waterfronts, Waterways, and Supply Chain Competitiveness*, which examines the state's broader maritime ecosystem and its role in supply chain competitiveness, defense-adjacent suppliers, marine manufacturing, ports, inland waterways, and coastal economic development.

01 · WHY NORTH CAROLINA

FIVE REASONS MARITIME COMPANIES CHOOSE NC

01 STRATEGIC TRANSPORTATION CORRIDORS

North Carolina connects major road, rail, and river networks, including I-95, I-40, I-85 and the future I-87 Raleigh–Norfolk corridor; CSX and Norfolk Southern Class I rail; and the Atlantic Intracoastal Waterway. These corridors place the state near coastal defense assets and the mid-Atlantic shipbuilding corridor, while routes tied to the Strategic Highway Network (STRAHNET) and Strategic Rail Corridor Network (STRACNET) support defense mobility and the movement of military equipment and supplies.

02 INTEGRATION WITH HAMPTON ROADS AS A MACRO-REGION

NC's supplier and training infrastructure lines up with the Hampton Roads maritime defense ecosystem and regional Navy pipelines. That positions NC as a primary Atlantic Coast hub for logistics, supply chain, and repair support. Northeastern NC is about an hour from Naval Station Norfolk and Norfolk Naval Shipyard.

03 AN ESTABLISHED MILITARY AND SUSTAINMENT BASE

NC has the 4th-largest active-duty population in the U.S. and is home to Fleet Readiness Center East, the Coast Guard's largest aviation facility, and Military Ocean Terminal Sunny Point, the nation's largest military terminal and ammunition port.

04 A MANUFACTURING WORKFORCE AT SCALE

NC has the largest manufacturing workforce in the Southeast, with more than 479,000 workers. About 20,000 service members leave the military in NC each year, and many of them are already skilled technicians.

05 A COORDINATED ECOSYSTEM

The First in Defense Coalition, an industry-led coalition supporting growth of North Carolina's defense economy, brings together industry, academic institutions, economic developers, investors, and government partners to connect suppliers, forge partnerships, and enable companies' success. Additional partners supporting workforce, defense contracting, research and development, and other adjacent activities are also active across North Carolina.

02 · NORTH CAROLINA BY THE NUMBERS

THE CASE IN DATA

$79.7B
Military's contribution to gross state product
NC Commerce / NC Military Affairs Commission, 2022

653K+
Jobs supported

4th
Largest active-duty population in the U.S. (~95,000 across 8 installations)
EDPNC

~20,000
Service members transitioning to the civilian workforce each year
NC4ME / NC DMVA

621,000+
Veterans living in North Carolina
2024 American Community Survey (Carolina Demography)

479,000+
Manufacturing workers, the largest in the Southeast; $108B manufacturing GDP
NC Commerce, 2025

106
Navy shipbuilding suppliers in NC's industrial base

54 submarine industrial base	52 aircraft carrier

Submarine Industrial Base Council (SIBC); Aircraft Carrier Industrial Base Coalition (ACIBC)

4,260 → 460
NC firms matched by industry code → Navy-vetted suppliers in the potential pipeline
Business North Carolina, Feb. 2026

2.0%
Corporate income tax in 2026, the lowest of any state that levies one; scheduled to reach 0% by 2030
Tax Foundation

Top 2
CNBC Top States for Business for 6 straight years (#1 in 2025, #2 in 2026)
CNBC

2
Strategic seaports (Wilmington and Morehead City) on the DOT/MARAD commercial list
U.S. DOT MARAD

58 + 17
Community colleges and UNC System institutions providing training capacity
NCCCS; UNC System

$9.1B
Annual impact of the recreational marine industry
NC Chamber Foundation, 2026

28,000+
Recreational marine jobs

03 · STATE CAPABILITY OVERVIEW

MILITARY PRESENCE & SUSTAINMENT

THE ATLANTIC CORRIDOR: FROM THE CAPE FEAR TO HAMPTON ROADS

- **Sunny Point** — Largest U.S. ammunition port
- **Port of Wilmington** — Strategic seaport
- **Camp Lejeune** — II MEF
- **Morehead City** — 45-ft channel
- **FRC East** — ~4,000 MRO workers
- **Elizabeth City** — Largest USCG air base
- **Hampton Roads** — Norfolk · Newport News

FLAGSHIP SUSTAINMENT ASSET

FLEET READINESS CENTER EAST

MCAS Cherry Point, Havelock

The premier depot for Navy and Marine Corps aviation maintenance, repair, and overhaul. A new MRO complex at the NC Global TransPark in Kinston opened this September.

~4,000
Employees

~1,000
Engineers

~$1B
Work performed each year

$400M
700,000 sq ft MRO complex, Kinston

MARINE CORPS

CAMP LEJEUNE & MCAS NEW RIVER

The largest Marine Corps base on the East Coast (home of II MEF) and the Marine Corps' East Coast helicopter and tiltrotor air station.

ARMY

FORT BRAGG

The largest military installation in the world.

AIR FORCE

SEYMOUR JOHNSON AFB

Home of the 4th Fighter Wing (F-15E) and the 916th Air Refueling Wing.

COAST GUARD

BASE ELIZABETH CITY

The Coast Guard's largest aviation facility. Its Aviation Logistics Center does depot maintenance for every Coast Guard aircraft.

AMMUNITION LOGISTICS

MILITARY OCEAN TERMINAL SUNNY POINT

The largest ammunition port in the U.S. and DoD's primary East Coast ammunition terminal.

04 · STATE CAPABILITY OVERVIEW

PORTS & STRATEGIC TRANSPORTATION CORRIDORS

North Carolina has two ports designated by the U.S. Department of Transportation as strategic seaports, supported by robust, strategically advantageous logistics infrastructure.

DOT STRATEGIC SEAPORT

PORT OF WILMINGTON

42 ft	9	150K+
Channel depth	Berths	TEU of added rail capacity

Neo-Panamax cranes. A $22.5M intermodal rail yard expansion adds more than 150,000 TEU of rail capacity.

DOT STRATEGIC SEAPORT

PORT OF MOREHEAD CITY

45 ft	4 mi	Class I
Channel depth	From the open ocean	Norfolk Southern rail service

Specializes in breakbulk and heavy-lift cargo.

70%+ of U.S. industrial capacity sits within **about a one-day drive** of both North Carolina ports.

CSX CAROLINA CONNECTOR

A 330-acre intermodal terminal on I-95.

INTERSTATE & WATERWAY ACCESS

I-95 and I-40 run north–south and east–west through the state. The future I-87 links Raleigh to Norfolk via Elizabeth City. The Atlantic Intracoastal Waterway runs the length of the coast.

DEFENSE MOBILITY CORRIDORS

NC's highway and rail networks include routes tied to STRAHNET and STRACNET, which support the movement of military equipment and supplies to installations, ports, and deployment nodes.

05 · MACRO-REGIONAL HUB INTEGRATION

ONE ATLANTIC MARITIME REGION

Hampton Roads (Naval Station Norfolk, Norfolk Naval Shipyard, and Newport News Shipbuilding) is the center of the Atlantic fleet. North Carolina offers the complementary capacity.

CENTER OF THE ATLANTIC FLEET

HAMPTON ROADS

- Naval Station Norfolk
- Norfolk Naval Shipyard
- Newport News Shipbuilding

~1 hr

Northeastern NC to Norfolk

COMPLEMENTARY CAPACITY

NORTH CAROLINA

- Cost-competitive, industry-ready land
- Cross-state labor sheds & housing
- Repair, logistics & test capacity

01

LAND AND COST

Cost-competitive, industry-ready sites about an hour from Norfolk.

02

WORKFORCE

Cross-state labor sheds and attainable housing for skilled trades and veterans. Thousands of NC residents already commute to Hampton Roads yards.

03

REPAIR AND LOGISTICS

NC's supplier and training network is organized to plug into regional Navy pipelines, which makes NC a primary logistics and repair support hub for the Atlantic Coast.

04

TESTING

Open water, DoD activity, and aviation corridors in Eastern NC support prototyping and testing of uncrewed surface and subsurface systems.

ALREADY IN THE NAVY SUPPLY CHAIN

106

NC suppliers in the submarine (54) and aircraft carrier (52) industrial bases

SIBC; ACIBC

460

Navy-vetted NC suppliers, from 4,260 firms matched by industry code

Business North Carolina, Feb. 2026

4

NCMBC Maritime Industrial Base offices: Elizabeth City, Havelock/New Bern, Morehead City, Wilmington

NCMBC

06 · TALENT & CLIMATE

A WORKFORCE AT SCALE. A CLIMATE BUILT FOR GROWTH.

WORKFORCE & TALENT PIPELINE

11,400+
Manufacturers in the Southeast's largest manufacturing workforce

~20K
Service members transitioning out of the military in NC each year

- **NC4ME** connects transitioning service members with employers.
- **Cross-state labor sheds** and attainable housing for skilled trades and veterans; thousands of NC residents already commute to Hampton Roads yards.
- Many transitioning service members are **already skilled technicians**.

BUSINESS CLIMATE

Top 2
CNBC America's Top States for Business, six consecutive years

2.0% → 0%
Corporate income tax in 2026, the lowest of any state that levies one, falling to 0% by 2030

- A **right-to-work** state.
- Discretionary incentives (**JDIG**, **One NC Fund**) and certified sites.
- **NC's maritime base supports defense readiness.** Repair yards and waterfront industrial sites, maintenance operations, and marine suppliers create workforce, fabrication, supply chain, and maintenance capacity supporting defense and dual-use customers.

NC'S TALENT PIPELINE

~95,000
Active-duty personnel across 8 installations, 4th most in the U.S.
EDPNC

~20,000
Service members transitioning to civilian work in NC each year
NC4ME / NC DMVA

621,000+
Veterans living in North Carolina
2024 ACS (Carolina Demography)

479,000+
Manufacturing workers, the largest workforce in the Southeast
NC Commerce, 2025

TRAINING AT SCALE
58 + 17
Community colleges and UNC System institutions providing training capacity across the state.

CUSTOMIZED TRAINING
NC EDGE
NC's 58 community colleges are renowned for supporting growing businesses with tailored training through the NC Edge program.

MARITIME SKILLS
CENTERS OF EXCELLENCE
Cape Fear and Carteret Community Colleges, both named Centers of Excellence for maritime workforce training.

07 · PARTNER SPOTLIGHT · INDUSTRY

BUILDING WHAT THE FLEET NEEDS

NC's maritime base is growing: home to major suppliers such as Nucor Steel and U.S. Forged Rings, and to companies developing game-changing technologies for the U.S. military.

CORVID TECHNOLOGIES

Digital engineering & weapons systems production · Mooresville · corvidtec.com

Corvid combines high-fidelity modeling with in-house manufacturing for missile defense, lethality, and test vehicles. **In October 2026, Gov. Josh Stein announced Corvid's $95 million expansion of its Mooresville campus:** a new 400,000 sq ft facility for engineering and manufacturing vehicle launch systems, creating 423 jobs at an average salary of $81,550. Corvid's manufacturing space has grown from 8,000 to 800,000 sq ft in about two and a half years, and the company has acquired hundreds of additional acres for a future multi-tenant defense campus. In March 2025 the U.S. Navy awarded Corvid a contract worth up to $268M for sub-orbital test vehicles.

$95M	423	100x
Campus expansion	New jobs	Mfg. space growth

VULCAN ELEMENTS

Domestic rare earth magnets · Benson & Durham · vulcanelements.com

Vulcan Elements makes rare earth permanent magnets for defense systems, including submarines, and critical commercial technologies. In November 2025, Vulcan chose Benson, North Carolina to build the world's largest rare earth magnet production facility outside of China. Co-founded by a former U.S. Navy acquisitions officer, the company is scaling production in partnership with the DoW's Office of Strategic Capital and the U.S. Department of Commerce.

1.1M sq ft	~1,000
Benson factory	Jobs

MSI DEFENSE SOLUTIONS

Systems integration · Mooresville · msidefense.com

MSI integrates weapons from machine guns to guided missiles onto tactical platforms and builds counter-drone and air-defense systems for U.S. and allied forces. Its EAGLS counter-UAS system went from concept to deployment in under 180 days and is built in Mooresville. MSI received the NC Governor's Export Award of Excellence in 2026.

VIRTUS MARITIME

Manned & uncrewed surface vessels · Morehead City · virtusmaritime.com

Founded and led by a Special Operations veteran and technical experts in autonomy and robotics, Virtus Maritime designs and builds low-cost uncrewed surface vessels. Its vessels are TRL 8 and have an open architecture design, enabling integration with a wide array of payloads, platforms, and systems.

0 BASE DESIGN, LLC

RF sensing & signal processing · Raleigh · 0basedesign.com

0 Base Design develops perception systems, signal processing, and machine learning for spectrum awareness, with deep expertise in maritime applications for telemetry, acoustic sensing, optics, RF, and alternative precision navigation and timing. It has won several DoW awards, including contracts for passive RF detection, classification, and localization, as well as Navy-funded work on hull monitoring solutions, towed arrays, and enhanced long-range navigation.

07 · PARTNER SPOTLIGHT · GROWTH & CONTRACTING SUPPORT

PARTNERS THAT HELP YOU SCALE

ECONOMIC DEVELOPMENT PARTNERSHIP OF NC

State business recruitment & export promotion · Raleigh · edpnc.com

The EDPNC is the economic development organization for the state of North Carolina. A public-private partnership operating under contract with the NC Department of Commerce, the nonprofit attracts new businesses, supports existing companies, helps NC companies reach new markets through international trade, counsels small businesses and startups, promotes tourism, and markets the state for film and television production. It is funded by the North Carolina General Assembly and private-sector companies.

The EDPNC's business recruitment spans industries, including defense and other sectors with dual-use applications like advanced manufacturing, aerospace, and critical minerals. It led North Carolina's delegation to the 2026 Farnborough Airshow, focused on recruiting defense and aerospace companies to the state.

NC MILITARY BUSINESS CENTER (NCMBC)

Statewide defense business development · ncmbc.us

A state-funded entity housed in the NC Community College System, NCMBC helps businesses prepare for government contracting requirements, identify opportunities, and perform federal contracts. It runs a dedicated Maritime Industrial Base program covering NAVSEA, the Coast Guard, DLA, and prime shipyards, with regional offices in Elizabeth City, Havelock/New Bern, Morehead City, and Wilmington.

7,049	$18.9B
Federal contract wins supported since 2005	Total value

NORTH CAROLINA'S SOUTHEAST

Regional business recruitment & expansions · Elizabethtown · ncse.org

A regional public-private economic development partnership serving a 20-county region, including much of North Carolina's coast. It offers free, confidential site selection, workforce, and incentive support. The region is home to seven military installations, including MCAS Cherry Point, Fleet Readiness Center East, and Military Ocean Terminal Sunny Point, with a military labor force of more than 132,000 and over 20,000 service members transitioning to civilian life each year.

215	21,006	$4.9B
Companies attracted since 1996	Jobs	Capital investment

NC STATE INDUSTRY EXTENSION SERVICES (IES)

NC Manufacturing Extension Partnership · Raleigh, serving all 100 counties · ies.ncsu.edu

IES is North Carolina's NIST Manufacturing Extension Partnership center. It gives manufacturers hands-on help with lean operations, ISO and AS9100 quality systems, CMMC cybersecurity compliance, and supplier development.

IES also leads the **North Carolina Maritime Manufacturing Initiative (NCMMI)**, a statewide effort to strengthen and modernize the Navy's maritime supply chain by using the state's manufacturing, logistics, and training assets to expand supplier capacity, ready the workforce faster, and deploy advanced technologies for the U.S. Navy and Marine Corps.

07 · PARTNER SPOTLIGHT · UNIVERSITIES & RESEARCH

RESEARCH PARTNERS FOR THE MISSION

NC STATE UNIVERSITY Defense and Security Institute

$49M
DoD research funding, 2024 (up 45% since 2019)

20
Startups using NC State IP with DoD SBIR/STTR awards

NC STATE UNIVERSITY: DEFENSE & SECURITY INSTITUTE

University defense research · Raleigh · research.ncsu.edu/defense-security

NC State received $49M in DoD research funding in 2024, the most in the UNC System. The university approved its Defense & Security Institute in December 2025 to coordinate that work and connect it with industry and government. NC State leads the 10-year, $480M FutureTEX defense textiles initiative, holds a position on the Missile Defense Agency's SHIELD contract vehicle, and has 20 startups using its intellectual property with DoD SBIR/STTR awards.

UNIVERSITY OF NORTH CAROLINA CHARLOTTE

Jan 2026
NDI3 launched

UNC CHARLOTTE: NATIONAL DEFENSE & INTELLIGENCE INNOVATION INSTITUTE (NDI3)

Applied defense & intelligence research · Charlotte · research.charlotte.edu/ndi3

NDI3 focuses on advanced manufacturing and metrology, cyber-physical resilience, UAS and counter-UAS, operational energy, directed energy and photonics, and human performance. Its early collaborators include Naval Surface Warfare Center Crane, Army DEVCOM Ground Vehicle Systems Center, and North Carolina companies including Corvid Technologies. UNC Charlotte is a member of the First in Defense Coalition.

UNCW University of North Carolina Wilmington

2024
Named a DoD-funded research hub

UNC WILMINGTON: MARITIME CYBERSECURITY (MCARTEC)

Maritime cyber research & education · Wilmington · uncw.edu

UNCW's Maritime Cybersecurity Applied Research, Technology & Education Center (MCARTEC) sits within its Center for Cyber Defense Education. It focuses on the cyber resilience of the maritime transportation system, including port and shipboard operational technology. The center was named a DoD-funded research hub in 2024 and works with the NC State Ports Authority and the U.S. Coast Guard.

FIRST IN DEFENSE

A statewide coalition that connects companies with suppliers, economic development partners, and talent pipelines to grow North Carolina's defense economy, bringing together industry, academic institutions, economic developers, investors, and government partners.

FIND YOUR PLACE IN NORTH CAROLINA

North Carolina's maritime ecosystem is organized to help your company find a site, develop partnerships, build supplier networks, access talent, commercialize solutions, and win.

01
FIND A SITE

02
DEVELOP PARTNERSHIPS

03
BUILD SUPPLIER NETWORKS

04
ACCESS TALENT

05
COMMERCIALIZE SOLUTIONS

06
WIN

CONNECT WITH THE FIRST IN DEFENSE COALITION

ncchamber.com/first-in-defense

Learn more about First in Defense and connect with potential partners in North Carolina.

Sources: NC Commerce; NC Military Affairs Commission; EDPNC; NC4ME; NC DMVA; Carolina Demography (2024 ACS); Tax Foundation; CNBC (2025, 2026); U.S. DOT MARAD; Submarine Industrial Base Council; Aircraft Carrier Industrial Base Coalition; Business North Carolina (Feb. 2026); NCCCS; UNC System; NC Chamber Foundation (2026).

NC Chamber

N.C. CRITICAL TECHNOLOGIES ALLIANCE