



**WINNING THE
NEXT DEAL: IS
THE CAROLINA
CORE'S
INFRASTRUCTURE
READY?**

What it takes to win
economic
development deals



TREBIC

Who I Represent

- I represent the people responsible for getting projects from concept to construction
- **What I Do**
- Translate policy into real-world impact
- Work with municipalities and members to solve problems before they stall projects
- Advocate for predictability, feasibility, and affordability

About TREBIC

- Regional coalition aligning multiple industry voices into one
- Focused on smart growth, infrastructure readiness, and housing supply
- Regularly partners with local governments to identify and remove barriers

WHAT SITE SELECTORS ARE REALLY ASKING



Is infrastructure available TODAY?



Can you serve the site without delays?



What risks could slow the project?



Is housing available for the workforce?



Can employees reliably access the site?

IT'S ALL CONNECTED

- Water and Sewer
- Power
- Transportation
- Housing availability

They must all align to compete

INFRASTRUCTURE TODAY

Power

Regional water capacity

Cross-jurisdictional
partnerships

Existing interconnections
create advantage

\$3B+ in needed water/sewer
investment

Housing supply and affordability



POWER, DATA CENTERS & ECONOMIC COMPETITIVENESS

Duke Energy serves ~8.6M customers;
~34,000+ MW capacity in the Carolinas

Electricity demand projected to grow **16%–60%**
by 2040

Data centers expected to drive **~75–80%** of
new demand

Current data center load ~3 GW → projected
~6 GW+

Individual data centers can require **100–600+**
MW each

Duke investing **\$100B+** in grid, generation, and
reliability upgrades

Speed to power + capacity certainty = **critical**
for site selection



FORSYTH COUNTY – REGIONAL WATER STRENGTH

91 MGD treatment capacity; avg. demand ~37 MGD (significant excess capacity)

Peak demand ~47.6 MGD, leaving substantial room for growth

Regional wholesale provider serving Yadkin County, Stokesdale, Stokes County, and soon Oak Ridge

Strong interconnections allow water to move across jurisdictional lines



BURLINGTON

- Primary supply: **Lake Mackintosh & Lake Graham**
- Serves Burlington + surrounding Alamance communities
- Strong existing capacity, but **growth is accelerating demand**
- Strategic position along **I-40/I-85 corridor**
- Continued investment needed to support **industrial recruitment & housing growth**



SANFORD & TRIWATER: A MODEL FOR REGIONAL WATER STRATEGY

- **TriWater project:** regional water system expansion led by Sanford
- Designed to support **large-scale industrial users**
- Provides **long-term capacity certainty** for economic development
- Example of **proactive, regional collaboration**
- Positions the region to compete for **major manufacturing projects**

GUILFORD / RANDOLPH – REGIONAL STRATEGY IN MOTION

- PTRWA coordinating multi-jurisdictional water supply across Guilford and Randolph counties
- Expansion of treatment capacity to 26.7 MGD underway (target completion ~2028)
- Advanced treatment (reverse osmosis) planned for long-term reliability (~2031)
- State-led regional infrastructure plan + 2026 master plan guiding future investments
- Wastewater solutions identified but require major capital investment and regional coordination
- Growth projected to add 150,000+ people in 25 years, increasing system pressure
- Strong collaboration and planning, but key capacity solutions are still coming online

ROCKINGHAM COUNTY – FRAGMENTED CAPACITY CHALLENGE

- County does not own water/wastewater systems; relies on municipal providers
- Primary providers include Mayodan, Reidsville, and Eden
- Most available capacity is already committed, particularly for wastewater
- Mayodan is the primary wastewater provider in western county with shared regional demand
- Reidsville has some excess capacity (~9 MGD plant) but limited by permits and location
- Eden has capacity but is largely committed to major economic development projects
- Capacity exists, but not always where growth is occurring or easily accessible
- More coordination and time required to align capacity with development needs

WHEN INFRASTRUCTURE LIMITS GROWTH- DURHAM NC

- Parts of Durham experiencing a de facto development pause due to wastewater capacity constraints
- East Durham: ~700 housing units delayed due to sewer limitations
- Infrastructure upgrades not expected to fully resolve issues until ~2029–2030
- Constraints tied to treatment capacity, aging infrastructure, and regulatory requirements
- Impacts include delayed projects, uncertainty in timelines, and lost economic opportunities

MOBILITY IS
ECONOMIC
DEVELOPMENT

Key corridors: I-85, I-74, US 421

Future I-685 and I-777

Travel time and freight access matter

Congestion impacts competitiveness

PTI AIRPORT – A REGIONAL MOBILITY ADVANTAGE

- Centrally located in the Triad (Greensboro, Winston-Salem, High Point)
- Connected to I-40, I-85, and future I-73/I-74 corridors
- Serves ~4.5M people within a 90-minute drive
- Major cargo hub (FedEx) and growing aerospace cluster
- Supports 30,000+ jobs and billions in economic impact
- Recent major wins tied to airport
- Critical asset for workforce, logistics, and site competitiveness



US 421 – BACKBONE OF THE CAROLINA CORE

- Key connector between Greensboro, Winston-Salem, and Toyota Megasite
- Supports major industrial and manufacturing growth
- Directly tied to projects like Toyota Battery Manufacturing
- Ongoing improvements: interchanges, access, corridor upgrades
- Long-term vision to elevate to interstate standards (I-685 concept)

CORRIDOR INVESTMENT – PROGRESS VS READINESS

- I-85: Widening and congestion relief projects underway
- I-74: Still being built out to full interstate standards
- US 421: Upgrades underway, long-term interstate vision
- Investments happening in phases, project-by-project
- Not all segments fully built or operational today
- Strong network, but readiness varies by location and timing



HOUSING IS NOW A DEAL DRIVER

Workforce housing
availability is critical

Shortages delay projects

Increases wage pressure

Can eliminate sites from
consideration

HOUSING
AFFORDABILITY
– A GROWING
CONSTRAINT

Nearly **1 in 3 households (29%)** in NC
are cost-burdened

(spend >30% of income on housing)

Median home price: **~\$370K–\$390K**
statewide

Median household income: **~\$65K–\$70K**

Significant gap between **income and**
cost of homeownership

Housing wage: **~\$17.88/hour** minimum
needed for basic rent

Shortage of **affordable units**, especially
for low-income households

REGULATORY COST OF HOUSING

Approximately \$100,000 of the cost of a for-sale home is attributable to regulatory costs (permits, fees, inspections, zoning, slower turnaround times, etc.) – *According to the National Association of Homebuilders – This is similar for commercial properties.*

Each \$1000 increase in the price of a home prices out approximately 20,000 would-be homebuyers in North Carolina.

Average sale price of a new home in North Carolina -- \$400,000 +

Average age of first-time home buyer – 40 years old – was 29 years old in the 1980s

Commercial and industrial costs are increasing at a similar clip, resulting in higher costs for retailers, industrial operators, and ultimately, consumers.



REGIONAL HOUSING EFFORTS

- Greensboro: Road to 10,000
- Winston-Salem/Forsyth: 25,000 homes by 2045
- High Point: 5x5 strategy
- By 2029, we need approximately 200,000 new housing units over the next five years to meet projected demand



WHAT IT TAKES TO WIN

- Wastewater capacity
- Power Supply
- Housing supply and approvals
- Transportation readiness

A red location pin is positioned on a road that curves into the distance. The background is a clear blue sky. The pin is a classic teardrop shape with a circular hole in the center. The road is dark with a white dashed line on the left side and a white solid line on the right side. The overall scene is bright and clear, suggesting a positive and forward-looking path.

WHEN SYSTEMS WORK: WE WIN

- Faster project timelines
- Confidence in approvals
- Competitive, marketable sites

WHEN
SYSTEMS
FAIL: WE
LOSE

- Utility uncertainty
- Housing shortages
- Road congestion
- Projects delayed or relocated

REGIONAL STRATEGY IS THE SOLUTION



Leverage capacity
across jurisdictions



Align housing with
infrastructure



Coordinate
transportation
with growth



Invest
collaboratively

FUNDING STRATEGY

State and
federal funding

Regional cost-
sharing

Housing
incentives

Transportation
investment



BOTTOM LINE

THE REGIONS THAT WIN ARE
THE ONES WHERE
INFRASTRUCTURE, HOUSING,
AND MOBILITY SHOW UP
TOGETHER.