



**MILITARY
FOUNDATION**

www.ncmilitary.org

Growing North Carolina's Defense Economy

The North Carolina Military Foundation

Our mission is to bolster NC's \$23 billion defense and security industry—generating long-term investment and job opportunities for NC citizens and businesses.

Connecting the Dots Between Important Centers of Influence...



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N.C. Defense Asset Inventory and Target Industry Cluster Analysis

Purpose of the Study:

- Establish a baseline understanding of N.C.'s industry, academic and R&D capacity in six major market areas of defense and homeland security procurement. Results of this analysis will feed into strategies and plans to build on the strengths and to fill in the weaknesses in order to grow the state's defense and security industry.

Partners: RTI, UNC General Administration, N.C. Community College System, N.C. Department of Commerce.

Market Areas:

- Command, Control, Communications, Computers, Intelligence, Surveillance, Reconnaissance (C4ISR)
- Fuels and Power Sources
- Performance Materials
- Unmanned Solutions
- Human Factors
- RESET Support Activities

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Types of Opportunities

Mature:

- Command, Control, Communications, Computers, Intelligence, Surveillance, Reconnaissance (C4ISR)
- Performance Materials
- RESET

Emerging:

- Fuel and Power
- Unmanned Systems

Nascent:

- Human Factors

Performance Materials Market Area

Existing Business and Industry Capacity: N.C.'s traditional materials manufacturing industries are a strength for developing and manufacturing 21st century performance materials.

- As of 2007, N.C. had more than 35,000 people working in the five industries identified within this market area.
- Location quotients for traditional textiles, non-wovens, and composites manufacturing are far higher in N.C. than the national average.
- More than 100 N.C. companies focused on plastics material and resin manufacturing, composites manufacturing, fiber manufacturing, and non-woven and woven textiles.
- Many of N.C.'s traditional textiles and materials firms have transitioned to developing products for the military.
- Presence of leading defense contractors engaged in performance materials: BAE Systems Tensylon High Performance Materials, VX Aerospace, DSM Dyneema.

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Performance Materials Market Area

Existing Higher Education Capacity: The strength of this market area in N.C. includes preeminent R&D and workforce programs.

UNC Graduates (Source: IPEDS 06-07)

- 685 bachelors, 174 masters, 113 doctorates

NC State University:

- Institute for Maintenance Science & Technology supports materials projects at Fleet Readiness Center East for a variety of vertical lift Marine Corps aircraft.
- The Nonwovens Institute is engaged in R&D for new Army combat uniforms that would help protect against chemical and biological attacks.

Duke University:

- Metamaterials expertise that is of interest to the military.

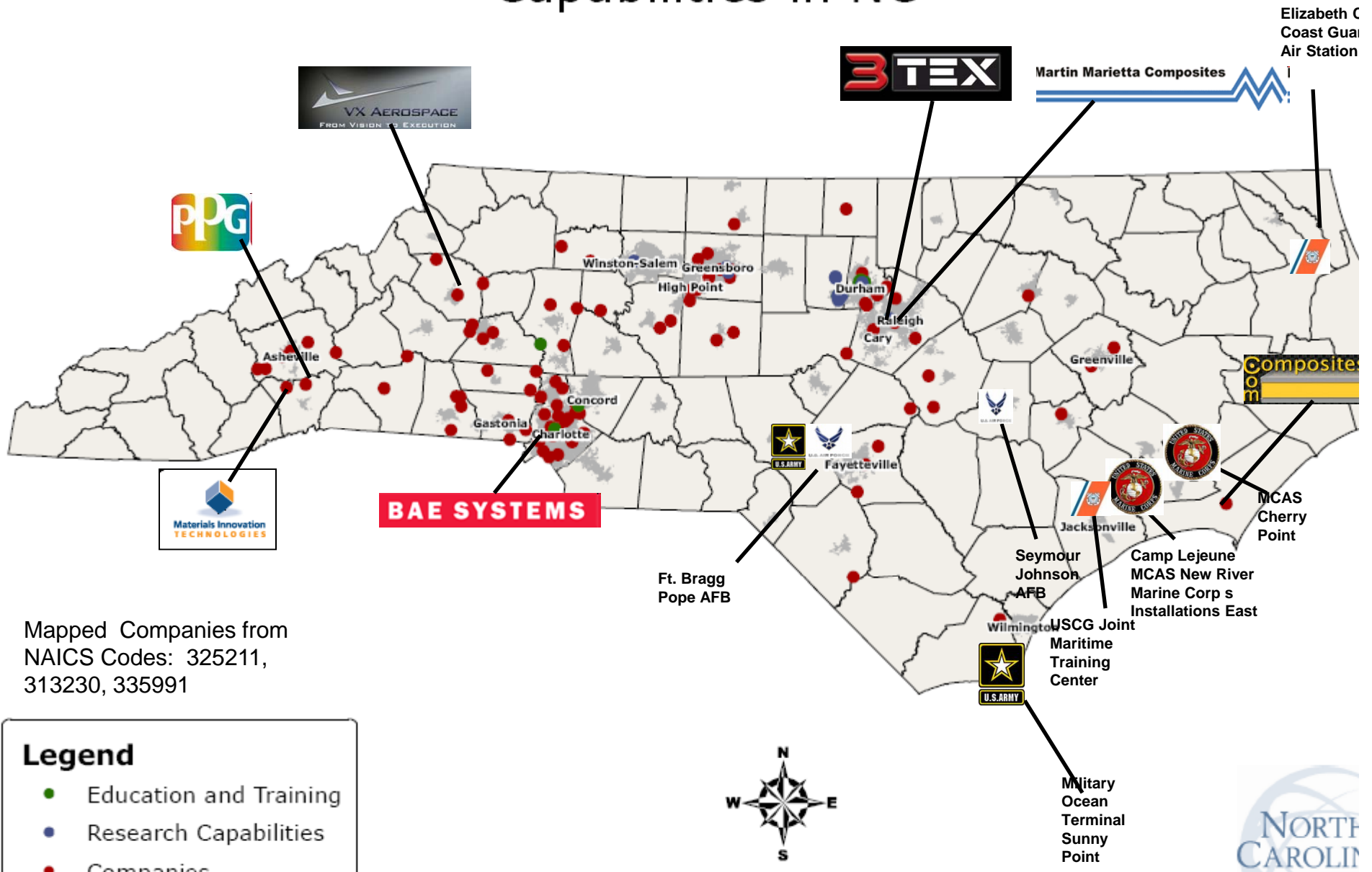
NC A&T:

- Partnerships with DoD's Center for Nanoscience and Nanomaterials, the Air Force, Army, and Navy research laboratories to support research into advanced materials and coatings.
- Center for Advanced Composite Materials provides support to MCAS Cherry Point, as well as several aviation companies and defense contractors.

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Performance Materials Industry, Research, and Educational Capabilities in NC



Mapped Companies from
NAICS Codes: 325211,
313230, 335991

Legend

- Education and Training
- Research Capabilities
- Companies



Actionable Analysis

- **Identify local, regional strengths**
- **Support recruitment/expansion projects**
- **Marketing**

Strategic Partnerships



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