# GO Virginia Region 3

## December 2025 Growth & Diversification Plan

*Investing in Our Potential: People, Places, and Product*



GO VIRGINIA

REGION 3

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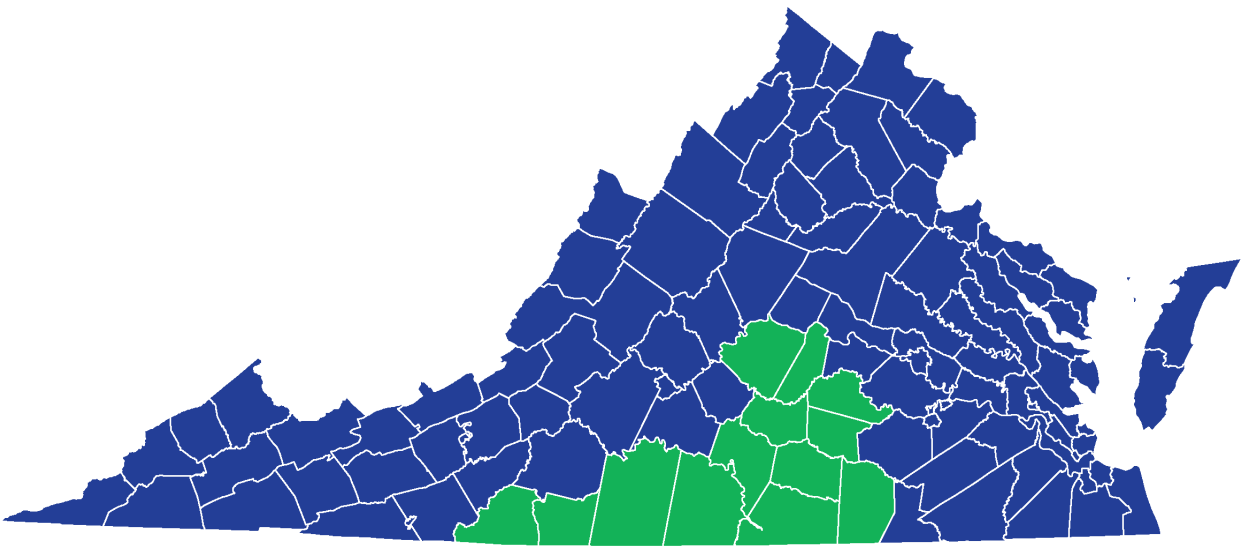
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# 1. Executive Summary

*The October 2025 GO Virginia Region 3 Growth & Diversification Plan update provides a comprehensive review of the region's economic performance, targeted industry clusters, workforce dynamics, and strategic priorities. This Executive Summary synthesizes the findings of the full report, providing regional leaders and stakeholders with clear insights into progress made, challenges ahead, and growth opportunities.*

## Regional Economic Context

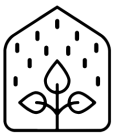
Region 3's economy continues to evolve in response to broader demographic, workforce, and technological trends. Population stability is supported by net in-migration, even as declining birth rates and aging demographics create long-term workforce pressures. Employment has shown incremental growth since 2023 with wages rising faster than in previous review cycles. Despite improvements, Region 3 still lags behind state averages in wages and household income, and disparities persist among subregions.



# Targeted Industry Sectors

The 2025 Plan confirms Region 3's continued focus on seven targeted sectors, with the addition of Logistics & Transportation as a new priority cluster.

**These include:**



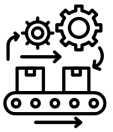
Controlled Environment Agriculture (CEA)



Business Services



Information Technology & Communications



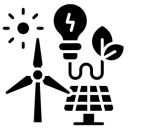
Advanced Manufacturing & Materials



Agriculture & Food Processing



Healthcare



Energy, Natural Resources, & Finished Products

## New Priority Cluster



Logistics & Transportation

Each sector demonstrates distinct opportunities for growth, job creation, and workforce alignment, though gaps in talent pipelines remain a central challenge.

| Key Trends & Industry Challenges | Strategic Imperatives Addressing These Challenges |
|---|---|
| Migration patterns are stabilizing the population, but labor force participation is under pressure. | Invest in workforce training and credentialing systems aligned to targeted sectors. |
| Wage growth is improving yet remains significantly lower than state and national averages. | Create places that attract and retain talent. |
| | Expand access to childcare, healthcare, and housing to support labor force stability. |
| Persistent workforce gaps exist in healthcare, advanced manufacturing, IT, and logistics. | Strengthen entrepreneurial ecosystems to support small businesses and startups. |
| | Advance site readiness and infrastructure to attract new investment. |
| Early childhood education and childcare remain barriers to workforce participation. | Leverage talent pathway models such as GO TEC to bridge education and employer needs. |
| Federal workforce dynamics and AI-driven job disruption may increase volatility in regional employment. | Lean into new technologies such as artificial intelligence in order to leverage its capabilities to advance the Region's economic health. |

This Executive Summary outlines the strategic framework guiding Region 3's growth over the next two years with a focus on long-term resilience and prosperity.

The integration of workforce development, community-building, and inclusive growth strategies ensures that Region 3 is prepared to navigate the dual challenges of technological disruption and demographic change.

# 2. Introduction and Background

The Virginia Growth and Opportunity Act establishes that each Regional Council is required to develop an Economic Growth and Diversification Plan to (i) promote private sector growth and opportunity in the region; (ii) identify issues of economic competitiveness for the region, including gaps in education and skills required to meet existing and prospective employer needs within the region; and (iii) outline steps that the collaborating business, education, and government entities in the region will pursue to expand economic opportunity, diversify the economy, and align workforce development activities with the education and skills needed by employers in the region. § 2.2-2489 of the Code of Virginia requires each Regional Council to review its Plan not less than biennially while receiving grants from the GO Virginia fund.

*The overall goal of this 2025 Full Review is to conduct a comprehensive analysis of all aspects of the Plan with an eye toward near-term economic acceleration opportunities as well as investments in longer-term economic growth strategies. The Plan demonstrates an understanding of the economic challenges and opportunities associated with localities encompassed in the Region as well as its population demographics.*

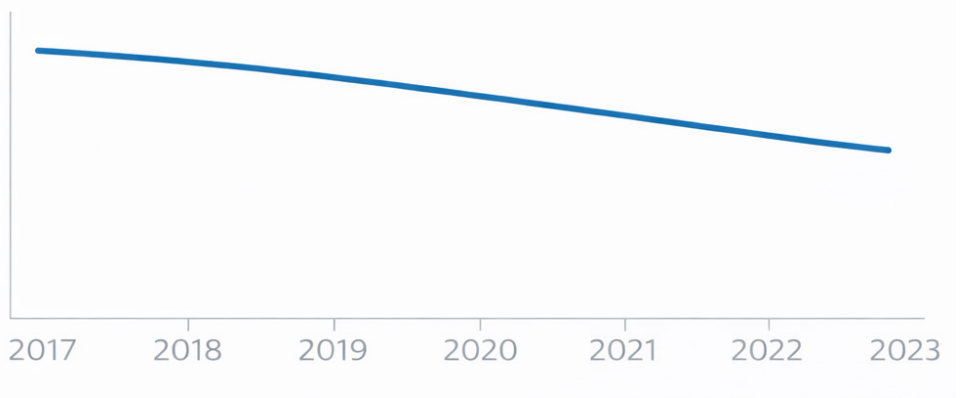
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## GO Virginia Region 3: Changes 2017 > 2019 > 2021 > 2023

As part of the 2025 Growth & Diversification Plan Update, an analysis was done based on reviews of the foundational Growth & Diversification Plan from 2017, the update completed in 2019, the update completed in 2021, and the most recent Plan Review completed in 2023.

Below is a summary of findings from this analysis, including highlights of implications to the Region. NOTE: This analysis is separate from the Longwood Small Business Development Center economic report shown later in this Plan.

# Population & Demographics




**The Region shows a flat to slightly declining population over the period, with continued net out-commuting.**



Region 3 has an older age structure than Virginia overall, and its labor force participation is lower than state and U.S. averages.

***Implication:*** *Tight labor supply and replacement demand (retirements) remain structural challenges, increasing reliance on attraction, retention, formation, and automation.*



## Educational Attainment Trends (25+)

| Measure | 2016 Baseline | 2025 Status/Insight |
|---|---|---|
| High school diploma or higher | ~77% | Still roughly the same level |
| Bachelor's degree or higher | ~15% | Still below national average |

Four-year degree attainment remains below average, underscoring an ongoing need for middle-skill credentials and stackable education pathways that align with workforce demand.

***Implication:*** *There is an ongoing need for middle-skill credentials and stackable pathways.*

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## Unemployment & Employment Trend

In 2016 unemployment was ~5.3%, which was above the Virginia average and near the U.S. average. From 2020 to 2023, region-wide employment remained roughly stable with modest improvement. However, wages grew notably from 2021 to 2023. Two and five year forecasts show gradual movement toward positive growth.

***Implication:*** *Continued investment in technical and skills education results in a talent pool with higher earning power.*

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## Leading Employment Sectors

Healthcare & Education remain as anchors. Manufacturing remained a core traded sector, in particular dominating recent announcements by the Virginia Economic Development Partnership. Business/IT services strengthened in wage levels but employ fewer total workers. Natural Resource Products (wood products, forestry, agriculture) remain strong niches.

***Implication:*** *Continued focus on traditional traded sectors, plus additional support for health care, creates a pathway for sustainable economies.*

# Average Wage by Targeted/Comparable Sectors

| SECTOR | 2021 AVG WAGE | 2022 AVG WAGE | 2023 AVG WAGE | GROWTH (2021 > 2023) |
|---|---|---|---|---|
| High-Value Natural Resource Products (Food Processing & Allied) | $45,207 | $50,375 | $54,477 | +20.5% |
| Health Care | $55,438 | $58,930 | $62,558 | +12.8% |
| Advanced Manufacturing & Materials | $64,101 | $66,492 | $69,421 | +8.3% |
| Business Services & IT | $111,013 | $116,507 | $121,586 | +8.3% |

# Labor-Market Gap (Occupational Shortages)

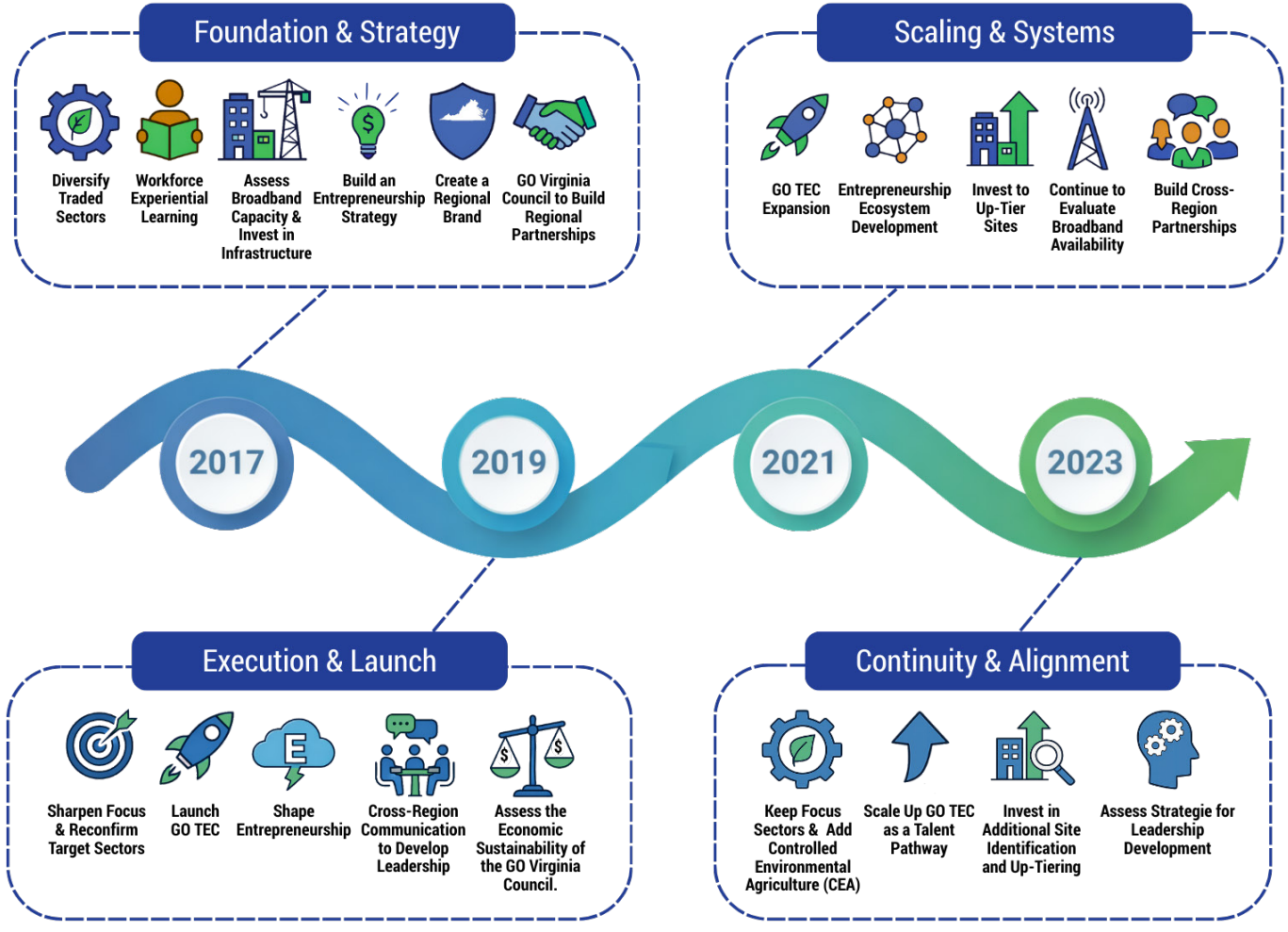
From 2017–2021, middle-skill technical roles and clinical/para-clinical roles persisted as gaps; soft-skills deficits were also cited in 2023, ongoing deficits remain for RNs/NPs, mechanics and maintenance, woodworking supervisors, and business analysts/logisticians.

***Implication**: Continued evolution of education & workforce development is necessary.*

# Stakeholder Perceptions Comparison

| Year | Strengths | Weaknesses | Opportunities | Challenges |
|---|---|---|---|---|
| 2017 | Industrial sites; low cost of doing business; broadband backbone; community colleges; outdoor assets; collaborative institutions | Aging workforce; skills gaps; perceived K-12 issues; aging infrastructure; last-mile broadband; downtown vitality | Diversify into IT, healthcare, advanced manufacturing; experiential learning; regional branding; shell/reuse buildings; entrepreneur supports | Net out-commuting; below-average attainment and incomes; uneven site readiness; underemployment |
| 2019 | **GO TEC** launch; unique assets (FASTC, Microsoft, VIR, ODAC). | Broadband barriers; soft skills; uneven prepared-site inventory, funding for economic development programs and strategies | Entrepreneurial ecosystem build-out; value-added natural resources (wood/hemp); unmanned systems | Talent shortages; sustaining coordination; equitable awareness of resources |
| 2021 | Deeper project pipeline; GO TEC scaling; maturing network (universities, utilities, foundations) | Broadband, soft skills, middle-skill gaps; uneven site product; thin office/co-work inventory | Align innovation strategy; leverage Opportunity Zones; youth entrepreneurship and increase grant funding support | Population headwinds; retirements; sustaining alignment |
| 2023 | Wage gains; CEA as growth play; GO TEC validated as preferred pathway | Workforce/talent attraction constrained; site readiness gaps | Broaden target-sector definitions; establish emerging-industries R&D; entrepreneurship supports; pursue CEA projects | Population decline/out-migration; aging population; incremental job growth |

# Strategic Roadmap Timeline: 2017 - 2023



# High-Level At-a-Glance Changes Across Plans

**Economy:** From post-recession healing (2017) to steady incremental progress (2019/2021), interrupted by the COVID pandemic impact, to measurable wage gains (2023).

**People:** Persistent educational attainment gaps vs. VA; GO TEC pipelines strong; rural demographic headwinds intensify. Traded-sector aligned issues rise in importance: housing, childcare, and transportation.

**Sectors:** Core focus remained stable (advanced manufacturing, High Value Natural Resource Products, business/IT, health); add Controlled Environmental Agriculture in 2023 and logistics in 2024. The impact of artificial intelligence on businesses, people, and education is beginning to emerge as a significant disruptor.

**Sites & Infrastructure:** Available shell buildings and the adaptive reuse of existing buildings remains uneven; site readiness continues to be flagged as not well-balanced in the Region; broadband last-mile barriers persist.

**Entrepreneurship:** From concept (2017) to investments (2019–2023) to results in 2024, in terms of services provided, jobs created, and businesses launched, the strategy is evolving with the development of new physical and programmatic assets. Access to capital remains a goal.

**Governance:** Cross-region collaboration has matured, although continued work is needed to nurture these connections.

## Stable Base, Rising Wages, New Sector Plays:

*Talent, Real Estate, and Leadership Remain the Pivot*

# 3. GO Virginia Program and Outcomes Overview

GO Virginia is an economic development strategy that encourages collaboration between local governments, higher education, private industry and workforce systems. In 2016, the State GO Virginia board certified nine distinct GO Virginia regions across the Commonwealth. These regions consist of nine to 18 localities that share similar economic development and workforce needs. GO Virginia works with partners at the state, regional, and local levels to advance opportunities for growth in every region of the Commonwealth. GO Virginia is governed by a 24-member board composed of a majority of private sector representatives along with members of the Virginia legislature and its Cabinet officers. At the regional level, GO Virginia Councils are composed of leaders representing public, private and non-profit sectors who have been nominated at the regional level and approved by the State Board. Regional Councils are required to have a majority of private sector members, like the GO Virginia State Board.

GO Virginia focuses on four key investment areas:

- **startup ecosystems**
- **cluster scale-up**
- **talent and workforce development**
- **business site development and infrastructure**

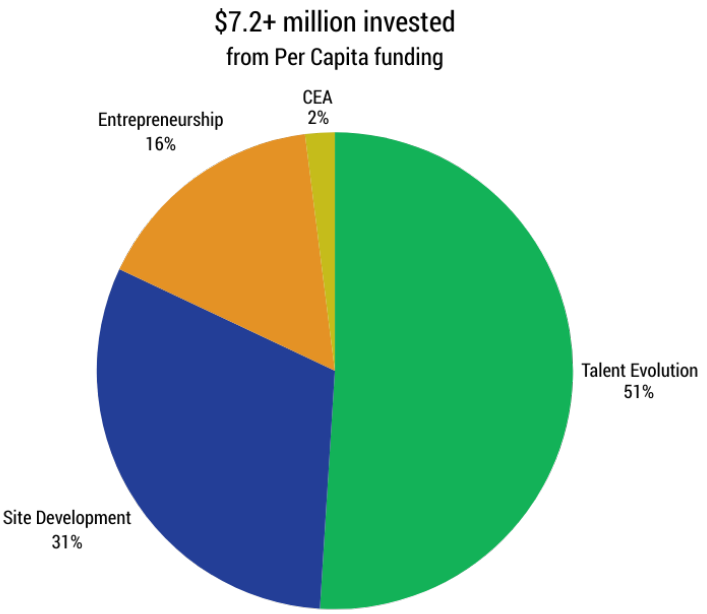
These strategies are regarded as crucial components for sustaining and accelerating the growth of traded industry clusters. Companies within these supported traded clusters are well-positioned to compete in national and international markets, ultimately creating wealth-generating employment opportunities for Virginians.

These priorities and sector focus areas support the overall program goals of encouraging and incentivizing economic development activities that will strengthen and diversify regional economies, promoting the development of employment opportunities across the Commonwealth.



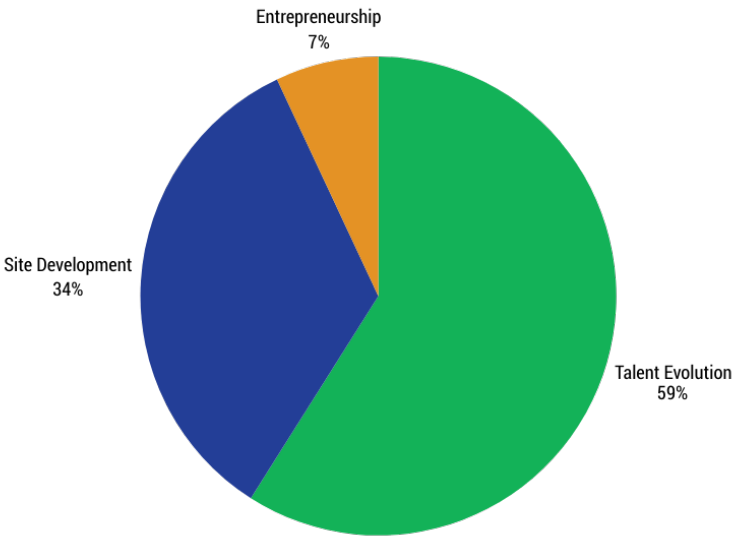
**$9,005,255**

*in matching (non-state) funds supporting the Region 3 Per Capita awards*




**$14,621,094**

*comprising 8 statewide competitive, ETT, or TPI projects*




Another **$13,190,497** in non-state matching funds were provided for the Statewide Competitive awards. Nearly all Per Capita Planning Grants have either resulted in implementation projects awarded or planned for FY26 or achieved their intended outcomes when an implementation project was not the goal.

The projects funded by Region 3 have generated significant impacts across the region; for example, the major broadband investment will enhance connectivity and drive progress across all five investment areas.

**Two of the projects are highlighted below:**

GO TEC

Great Opportunities in Technology and Engineering Careers

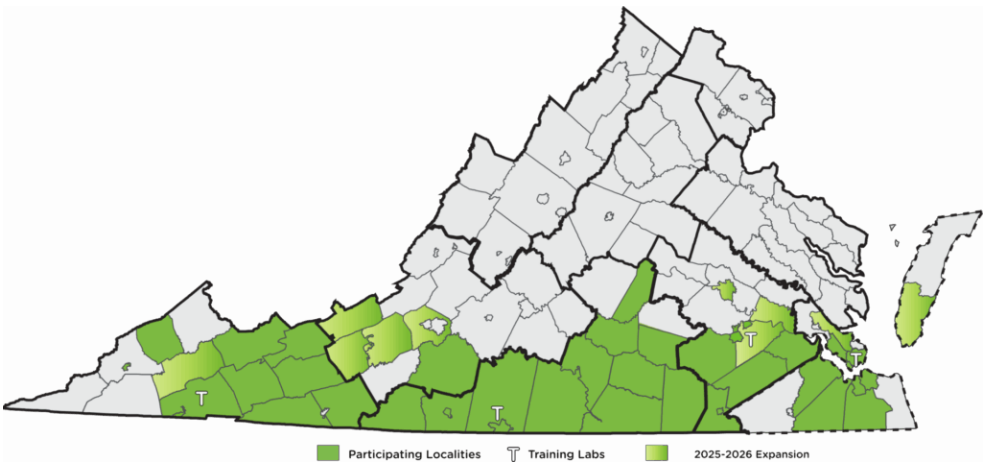
GO TEC is a talent pathway initiative that introduces middle school students to the strategic sectors of Healthcare Technologies, Automation & Robotics, IT Coding & Networking, Precision Machining, Metrology, Mechanical Engineering, Electrical Engineering, Manufacturing Engineering, Welding, Precision Agriculture and Energy. The GO TEC franchise is transforming traditional trade skill training.

**GO TEC**
as of Fall 2025

**73 schools**
**11,000 students**
served by **GO TEC**

**$12 million**
GO Virginia Funding supporting **GO TEC**

**$14 million**
non-state funding supporting **GO TEC**




GO TEC has scaled up across Regions 1, 2, 4 & 5 (all regions along the Virginia/North Carolina border.)

The program drives regional collaboration in job growth; engages business and industry in creating relevant, current training content leading to skill attainment; and creates technology integration infrastructure for rapid deployment.

RISE Collaborative brings together makers, entrepreneurs, and innovators of all backgrounds, interests, and experiences from across our region to support the growth of entrepreneurship and innovation in Southern Virginia.

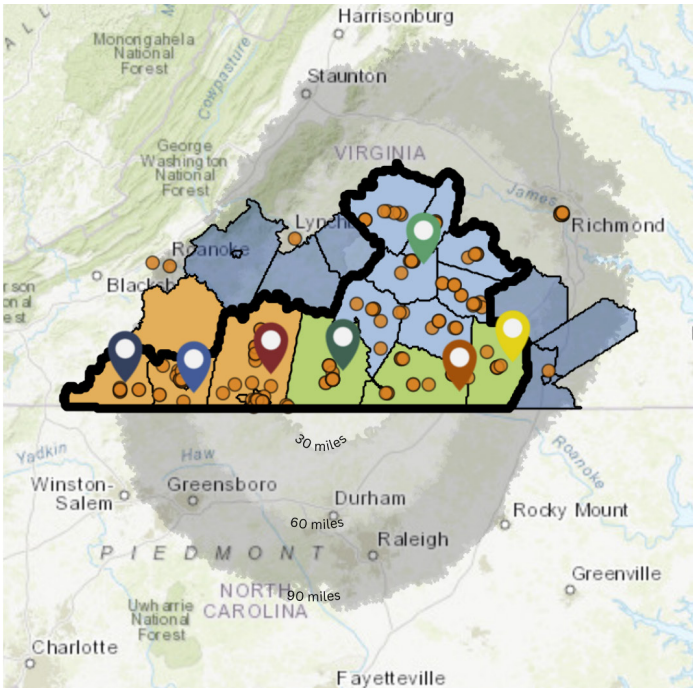
Through RISE's programs, events, and online network, entrepreneurs gain a supportive community of peers; direct access to business resource providers, dynamic training and skill-building content; and value-added networking opportunities. RISE Collaborative was created in 2021 to drive the development of a more inclusive and vibrant regional economy in which makers, entrepreneurs, innovators, and service providers interact organically and collaboratively.

Its mission is to enhance equity and access to entrepreneurship and innovation for people who have been underserved based on geographic location (anyone who lives, works, or owns a business in Southern Virginia) and for people who have been underrepresented based on race, gender, religion, or other factors.

Region 3's entrepreneurial investments resulted in two Innovation Hubs providing sub-regional access to state-of-the-art equipment.

## Southern Virginia Regional Ecosystem

- Entrepreneur Resources
- SOVA Innovation Hub
- SEED Innovation Hub
- Dan River Region Entrepreneur Ecosystem
- Henry County/Martinsville Ecosystem
- Patrick County Ecosystem
- South Hill/Mecklenburg Ecosystem
- Brunswick County Ecosystem
- West Piedmont Planning District Commission
- Southside Planning District Commission
- Commonwealth Regional Council
- GO Virginia Region 3
- VTRRC Counties Not in Region 3



# Region 3 Project Investments 2017 - 2025

| Projects Through FY25 | FY Approved | GOVA Project Award | Investment Area Calculation | | | | |
|---|---|---|---|---|---|---|---|
| **Statewide, TPI, ERR** | | | **Site Development** | **Talent Evolution** | **Entrepreneur** | **CEA** | **Leadership** |
| GOTEC Phase 2A Statewide | FY18 | $1,320,787 | | $1,320,787 | | | |
| GO TEC Phase 2B: Statewide | FY18 | $3,575,741 | | $3,575,741 | | | |
| Bridge to Recovery:ERR | FY20 | $925,000 | | | $925,000 | | |
| Operation last Mile Drone: ERR | FY20 | $75,000 | | | $75,000 | | |
| MBC MM Construction: Statewide | FY21 | $5,000,000 | $5,000,000 | | | | |
| GO TEC 2025: Statewide | FY23 | $3,474,821 | | $3,474,821 | | | |
| SoVA. Health Sciences careers Planning: TPI | FY24 | $133,000 | | $133,000 | | | |
| Advanced Manufacturing/CEA Initiative: TPI | FY25 | $116,745 | | $116,745 | | | |
| | Total | $14,621,094 | $5,000,000 | $8,621,094 | $1,000,000 | | |
| | % Investment | | 34.20% | 58.96% | 6.84% | 0.00% | 0.00% |

| Projects Through FY25 | | FY Approved | GOVA Project Award | Investment Area Calculation | | | | |
|---|---|---|---|---|---|---|---|---|
| **R3 Per Capita: Planning & Implementation** | **Project Planning Grant** | | | **Site Development** | **Talent Evolution** | **Entrepreneur** | **CEA** | **Leadership** |
| GO TEC Phase 1 | | FY18 | $648,000 | | $648,000 | | | |
| IALR Common Platform | Experience Worked project | FY19 | $90,140 | | $90,140 | | | |
| Experience Works | | FY20 | $515,628 | | $515,628 | | | |
| PHCX: GO TEC Welding Instructor | | FY23 | $118,545 | | $118,545 | | | |
| SVCC GO TEC Mechatronics | | FY23 | $139,732 | | $139,732 | | | |
| GO TEC Region 3 Expansion | | FY24 | $302,690 | | $302,690 | | | |
| | | | | | | | | |
| E&I Planning | E&I Implementation project | FY19 | $100,000 | | $100,000 | | | |
| E& I Implementation | | FY19 | $449,000 | | $449,000 | | | |
| | | | | | | | | |
| GOVA Innovation Hub | RISE: Bulld to Scale | FY18 | $80,000 | | | $80,000 | | |
| RISE: Build to Scale | | FY24 | $600,000 | | | $600,000 | | |
| SOVA IH Fob Lab | | FY25 | $510,000 | | | $510,000 | | |
| | | | | | | | | |

| Projects Through FY25 | | FY Approved | GOVA Project Award | Investment Area Calculation | | | | |
|---|---|---|---|---|---|---|---|---|
| MBC Middle Mile Planning | MDC MM Statewide Comp. const. proiect | FY19 | $100,000 | $100,000 | | | | |
| SVRA Site Dev | | FY21 | $1,534,900 | $1,534,900 | | | | |
| CEA Planning | CEA Implementation project coming in FY26 | FY21 | $77,803 | | | | $77,803 | |
| CRC REDO | REDO formed | FY22 | $65,000 | $65,000 | | | | |
| Gupton Initiative (multi region) | " | FY22 | $34,200 | | $34,200 | | | |
| SEED Innovation Hub | | FY22 | $674,304 | | $674,304 | | | |
| VGA Refresh | VGA Site Dev Project | FY22 | $100,000 | $100,000 | | | | |
| VGA Site Development | | FY23 | $335,050 | $335,050 | | | | |
| Amelia Co, Reg. Commerce Center: Study | Amelia Co Award | FY24 | $21,000 | $21,000 | | | | |
| Amelia Co Reg. Com. Center: Due Diligence | AmeliaCo Reg Com. Center raised in tier | FY25 | $100,000 | $100,000 | | | | |
| Co-Location of Data Centers & CEA | CEA Implementation project coming in FY26 | FY25 | $52,000 | | | | $52,000 | |
| Chamber- AI Project (multiregion) | AI Implementation project coming in FY26 | FY25 | $50,000 | | $50,000 | | | |
| SVCC Tank Driver & Lineman Training | | FY25 | $570,000 | | $570,000 | | | |
| | | Total | $7,267,992 | $2,255,950 | $3,692,239 | $1,190,000 | $129,803 | |
| | | % Investment | | 31% | 50.80% | 16.37% | 1.79% | 0.00% |
| | | | | **Site Development** | **Talent Evolution** | **Entrepreneur** | **CEA** | **Leadership** |

# 4. Stakeholder Engagement and Regional Collaboration

*This section documents the outreach and participation of regional stakeholders—including business leaders, educators, local governments, and community organizations—in shaping the Growth & Diversification Plan. It highlights how collaboration influenced the Plan's priorities and identifies mechanisms for sustained engagement.*

During the development of the Region 3 2025 Growth & Diversification Plan update, invitations were extended to nearly 100 stakeholders to participate in virtual focus groups or solo interviews. The sessions were confidential and no attribution is given to any one individual. The sessions took place between June and September of 2025. Sessions lasted approximately 60 minutes. A more comprehensive summary of stakeholder input is included in the Attachments section of this Plan.

## Top Five Takeaways

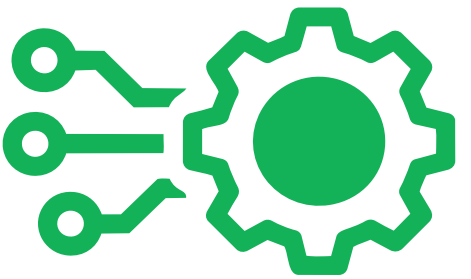
1. **Workforce & Talent:** These are the most common responses, particularly related to near-term availability and "day-one readiness," plus structural participation issues tied to childcare, transport, housing and financial capacity to maintain modernized training equipment.
1. **Sites & Infrastructure:** Shovel-ready sites with sufficient power and utilities are the difference between staying in the hunt and not.
1. **Housing & Childcare:** These now show up as "project risks"—not just community issues—because they directly affect hiring plans and retention. Financial resources to support housing and childcare infrastructure are currently a barrier.
1. **Sector Signals:** Advanced manufacturing is the constant. Data centers are a live opportunity where power and sites align. CEA appears in place-specific contexts. Healthcare workforce is both a sector and a cross-cutting constraint.
1. **Coordination:** Stakeholders want tighter alignment across K-12, community colleges, WDBs, REDOs, and VEDP so that training calendars (permitting timelines) and project milestones actually match. Opportunities for collaborative partnerships to successfully secure funding outside of GO Virginia funds is an area for exploration.

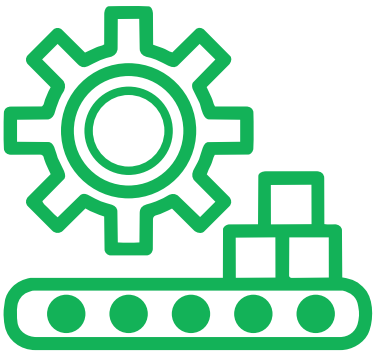
# Continuities vs. Shifts

(vs. 2017/2019/2021/2023)

### *Consistent:*

- The workforce drumbeat has not let up; occupation gaps noted in past cycles (e.g., healthcare nursing roles; maintenance/ mechanics in manufacturing; supervisors/ analysts in HVNRP and business services/IT) are echoed in 2025 wording.
- Site development and "product first" remain central, including tier-advancement and utility capacity as practical scorecards based on Virginia Economic Development Partnership criteria.
- **GO TEC** and similar talent pathways continue to be the backbone for aligning K-12 > community college > employer pipelines, with health care and CEA as prominent use cases.





### *New or Sharpened in 2025:*

- Childcare and housing appear explicitly as "deal variables," reflected in VEDP/Economic Development remarks tying them to project timelines and hiring plans.
- Power availability for data centers surfaces as a gating constraint, sharpening "Sites & Infrastructure" from general readiness to specific utility capacity and delivery windows.
- Geography of momentum becomes more granular (e.g., US-58 corridor activity) in project-led discussions about near-term wins.

# Immediate Implications for the 2025 Plan

The GO Virginia Region 3 Council serves as the region's leadership and capacity-building organization, uniquely connecting all 15 localities, their assets, and their challenges.

While sub-regional partners lead localized efforts, the Council's role is to unite these initiatives under a shared regional vision.

As the region's chief convenor, the Council commits to developing and advancing strategies that drive investment both within and beyond the GO Virginia State Board's defined focus areas. Since 2016, it has taken a holistic approach; leveraging limited state resources to identify barriers, build partnerships, and implement solutions that strengthen the region's long-term economic potential.

Two of the areas identified below are adjacent to the traded sectors (childcare/housing, and tourism).

*While not currently eligible for GO Virginia funding, it remains critical to the Region's ability to achieve a stable and healthy economy.*

- Double down on site/power readiness where the pipeline is real (manufacturing and data centers) with tier-advancement and utility capacity as the scorecard.
- Keep **GO TEC**-style ladders as the backbone of healthcare and manufacturing talent, pairing short-cycle credentials with apprenticeships and employer commitments. Find ways to connect with manufacturers who can invest in necessary equipment for training.
- Treat childcare and housing as workforce infrastructure—fundable, schedulable, and measurable within project development. Identify and support applications for funding for this infrastructure (currently not eligible for funding from GO Virginia)
- Treat tourism as a workforce retention and attraction strategy by leading with product and lodging in investable nodes, then branding and wayfinding. Such marketing has tangible experiences to promote, creating a sense of place that is useful in retaining and attracting talent (currently not eligible for GO Virginia funding).
- Use partner alignment (REDOs, PDCs, WDBs, VEDP, K-12/CC) to time training, permits, grant applications, and infrastructure to the project clock—and report against Full Review measures.

# 5. Evaluation of Regional Economic Performance

The 2025 Growth & Diversification update for GO Virginia Region 3 synthesizes fresh analysis from Longwood University on economic performance, targeted industry outlooks, and skills gaps, complemented by context on demographics, commuting, early childhood care, health care access, and recent VEDP announcements. This summary is supported by the full evaluation done by the Longwood Small Business Development Center, which is included in the Attachment section of this Plan.

The picture is one of gradual improvement and renewed momentum—buoyed by in-migration to smaller metros and rural counties and by ongoing broadband and site readiness work—tempered by persistent headwinds in population dynamics, housing attainability, childcare capacity, and health care availability. These realities shape the region's near-term priorities: advancing project-ready sites for target sectors, scaling talent pipelines (especially work-based learning and career ladders), and improving the enabling conditions—such as childcare, housing, transportation, and digital infrastructure—that unlock workforce participation and firm growth.

*Bottom line: Region 3 is trending toward resilience—steadying demographics, a clearer target portfolio (including CEA), and strong education/industry partnerships—provided the region continues to press on site readiness, talent pathways, and the family infrastructure essentials that enable people to work and firms to grow.*

## Evaluation of the Region's Economic Performance

Region 3's overall trajectory shows stabilization with selective strength. After years of uneven growth, recent data points to improving employment trends and rising wages (though still below state averages) in many localities. Population change is mixed: a natural decrease persists in much of the footprint, yet net in-migration since 2020 has helped offset declines in several communities, reflecting post-pandemic shifts toward smaller metropolitan areas and rural quality of place. Macroeconomic sensitivities remain: Virginia's outsized federal workforce and contractor base mean budget and policy shifts can ripple into Region 3, with some forecasts suggesting elevated unemployment risk into late 2026. Household infrastructure continues to influence labor supply: Childcare access and affordability are material constraints on participation, and access to primary/specialty health care affects both talent retention and employer decisions. Taken together, the region's fundamentals are improving, but productivity and earnings still lag behind the Commonwealth, necessitating continued upgrades in sector mix and business formation/expansion.

# Target Industry Sectors

The region's target portfolio remains well-grounded in its assets and market signals.

Core priorities continue to include **Advanced Manufacturing & Materials; Business Services; IT & Communications; Agriculture & Food Processing; Energy, Natural Resources & Finished Products; Health Care Services;** and **Transportation & Logistics** (with logistics gaining emphasis as freight patterns and e-commerce reshape proximity advantages).

The update also acknowledges an **emerging, cross-cutting opportunity in Controlled Environment Agriculture (CEA)**—leveraging the region's agricultural base, water access, R&D/industry partnerships, and expanding broadband/automation.

Sector narratives emphasize: (a) **site readiness and utility capacity** aligned to likely project specs; (b) **supplier and small-firm growth** that feeds anchor investments; (c) **experience-based and outdoor assets** that support visitor spending and talent attraction; and (d) **health care** as both a quality-of-life imperative and a high-demand employment engine. Recent and announced projects validate the thesis, but continued **product development (sites, buildings, zoning clarity)** and **coordinated marketing** are essential to convert interest into wins.

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# Summary of VEDP-Affiliated Economic Development Outcomes in GO Virginia Region 3

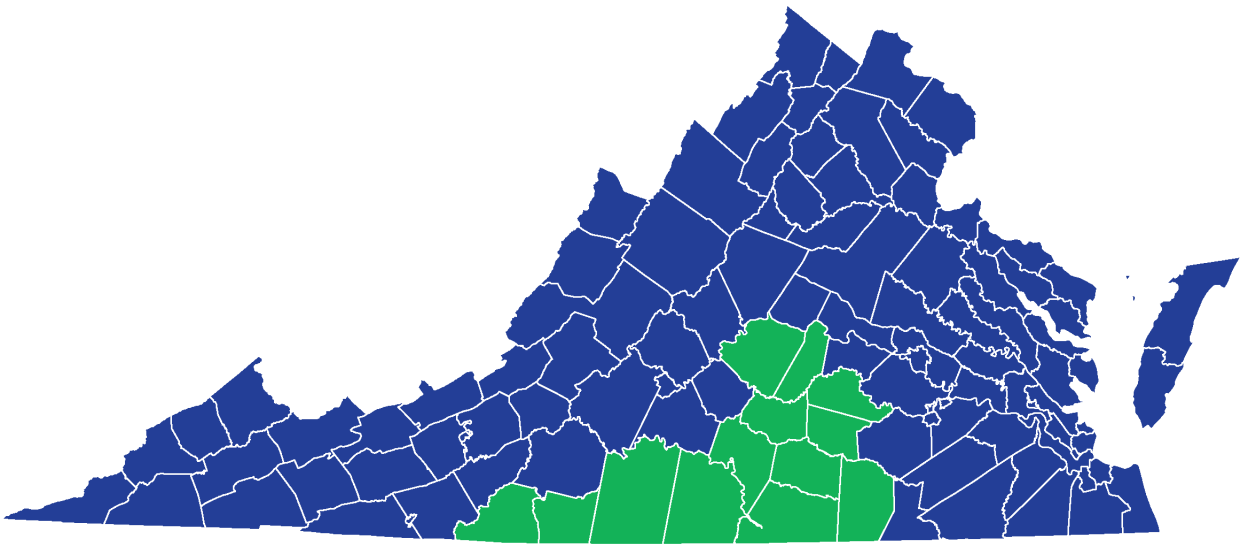
An analysis of prospect activity based solely on projects in which the Virginia Economic Development Partnership was involved provides interesting data points.

The study included prospect activity data from 2021 to 2025.

This analysis aggregates potential investment and job creation opportunities by locality and by industry sector across the GO Virginia Region 3 footprint. These are projects for which localities in the region were recommended by VEDP or included in Requests for Proposal responses from companies or site selection consultants working with VEDP.

The data reflects the total reported investment and projected new jobs from economic development opportunities tracked by the Virginia Economic Development Partnership (VEDP), for which GO Virginia Region 3 localities were recommended.

# VEDP Potential Projects by Locality



1. **Pittsylvania County** emerges as the region's strongest recommended location by a wide margin, accounting for over **$271.8 billion** in total potential investment and **188,867 potential jobs**. This suggests a major concentration of large-scale industrial projects—likely related to advanced manufacturing, semiconductors, or batteries.
2. **Danville**, as a regional urban center, follows with **$100.8 billion** in potential investment and **48,881 potential new jobs**, confirming its success in attracting transformative economic development deals.
3. **Henry County** ranks third with potential **$32.5 billion** in investment and potential **56,399 jobs**, notable for outperforming Danville in job creation relative to investment.
4. **Mecklenburg County** and **Charlotte County** round out the top five, with potential **$10.1 billion** and potential **$9.7 billion** in investment, respectively, and solid potential job creation metrics of over **23,000** and **10,900 jobs**. These results indicate a strong showing by rural communities with infrastructure and available industrial land.
5. **Prince Edward, Brunswick**, and **Halifax Counties** were each recommended for investments between **$2.5** and **$7.8 billion**, reflecting moderate activity with a diverse set of industry opportunities.
6. Smaller rural localities such as **Patrick, Cumberland, Amelia**, and **Buckingham** were significantly lower in recommendations for both investment and job creation, with Amelia being recommended for just under **$116 million in investment** and **768 jobs**, and Buckingham being recommended for a single small- scale project of **$1.5 million and 15 jobs**.

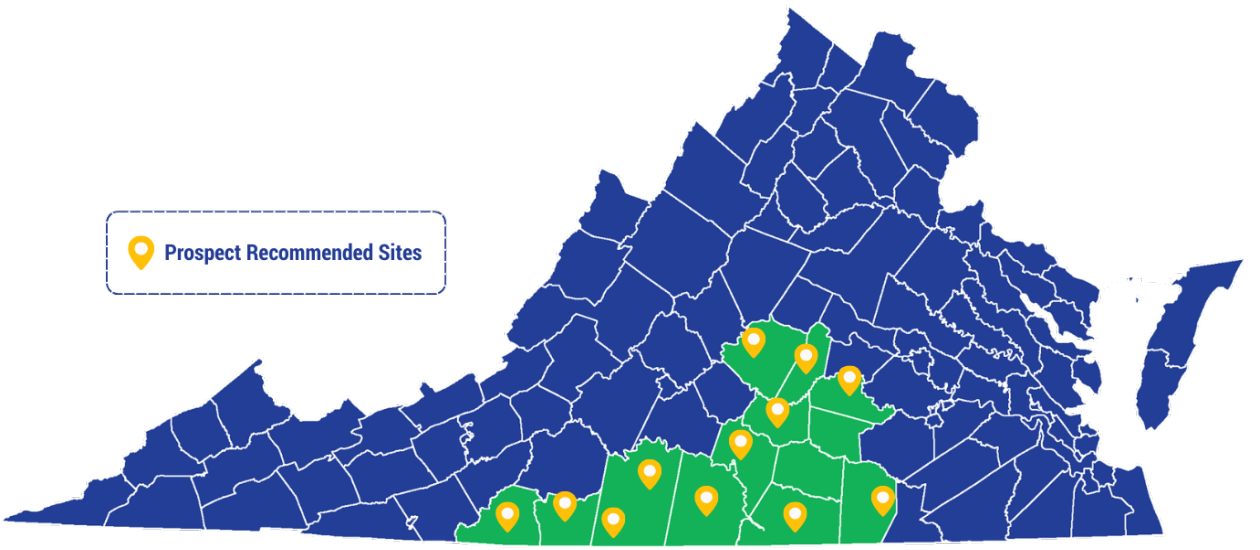
# Prospect Recommendations by VEDP Industry Sector

1. The **Semiconductor** sector led all industries, representing the potential for over **$200.9 billion in investment** and **45,242 jobs**. Pittsylvania and Danville were likely considered for this investment.
2. **Battery manufacturing** came in second, with a potential investment of **$79.8 billion** and the **creation of 63,446 jobs**, further highlighting Region 3's competitive advantage in the electrification and energy storage sectors.
3. **Advanced Materials** and **Other Common Tradeable Sectors** also posted significant recommendations, with over **$39 billion** each in investment and **46,000+** jobs in each.
4. Other notable sectors for which Region 3 localities were recommended included:

    - **Electric Vehicles (EVs):** Potential $15.6B investment / 29,377 jobs
    - **Traditional Automotive:** Potential $14.6B / 29,034 jobs
    - **Wood Products:** Potential $11.0B / 9,852 jobs
    - **Food & Beverage Manufacturing:** Potential $7.1B / 18,179 jobs
    - **Aerospace & Defense Manufacturing:** Potential $9.6B / 3,064 jobs
    - **Data Centers:** Potential $5.7B / 1,300 jobs
    - Smaller but still impactful sectors for which Region 3 localities were recommended included **Nuclear Energy, AgTech**, and **Transportation & Logistics.**
    - Sectors such as **Offshore Wind, Biopharmaceuticals**, and **Business Services** showed smaller potential job totals, or in some cases, investment figures of zero, despite job creation, suggesting potential business attraction without capital investment (e.g., remote or leased office work).

# Summary of Prospect Recommendations in Region 3

"Prospect recommendations" are companies for which one or more Region 3 localities were initially recommended. Not all prospect recommendations result in projects occurring within Region 3.




In terms of actual project announcements in Region 3 between 2021 and 2025, the conclusions from the recommendations show that Region 3 localities were recommended to 767 business prospects and "won" 37 of those projects. The total potential capital investment was over $4.1 billion; the actual announced capital investment totaled $2.45 billion. The total potential jobs were over 278,000; the actual jobs announced were 4,609. (See chart below).

*The success rate of 5.1% for announced projects indicates a strategic opportunity for increased success if further analysis of the reasons for the lost projects can be conducted.*

| Overall Success Rate | Capital (Announced vs Referred) | Jobs (Announced vs Referred) |
|---|---|---|
| 5.1%<br>39 announced<br>767 referred | $2.45B announced vs<br>$414.21B referred | 4,609 announced vs<br>278,274 referred |

# Analysis of VEDP-Assisted Project Announcements and Prepared Sites

*An analysis of announced projects in Region 3, focusing solely on those involving the Virginia Economic Development Partnership, provides interesting data points.The analysis included announcement data from 2021 – 2025 (see Attachments for full list).*

Of the 39 projects announced in the Region between 2021 – 2025, 23 (60%) were for localities along the US 58 corridor (Patrick, Henry, Pittsylvania, Danville, Halifax and Mecklenburg). Seven localities had no announcements. Of the total 4,500 announced jobs, over 4,300 (96%) were for the same localities, and 99% of the announced investment was in those localities.

While VEDP-assisted projects do not represent all business locations in Region 3, they do represent the types of business locations that generally required prepared sites and/or available buildings. In the Attachments section of this Plan is a full listing of sites as shown on the VEDP "VirginiaScan" database, which is fundamental to the VEDP-assisted project opportunities.

Region 3 localities have 81 total sites listed in VirginiaScan. Of these, a significant portion (35 out of 81) are rated a Tier 4 or 5 (on a Tier Scale of 1-5 with 5 being the highest rating). 43 of the 81 sites are certified through the Virginia Business Ready Sites Program. One site is certified by an outside consulting firm (Ady).

A variety of "zones" are also available to localities. Zones typically offer additional financial advantages for projects locating within the zones. When prepared sites are either located in or overlayed by one or more of these Zones, their marketability should improve.

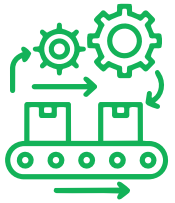
***Four Zones were analyzed in this report:***

1. Virginia Enterprise Zones
2. Foreign Trade Zones
3. Opportunity Zones
4. Technology Zones

Of the sites listed in VirginiaScan, 69 are overlayed by an Enterprise Zone, 15 by a Foreign Trade Zone, 40 by an Opportunity Zone, and 0 by a Technology Zone. **There was not enough information to conduct a deeper analysis of the prospect activity against the Zone designations, but this could be an interesting data point for further review.** Zones are most prevalent in the same localities in which the majority of announcements occurred: Patrick, Henry, Pittsylvania, Danville, Halifax, and Mecklenburg.

# Region 3 Situational Analysis of Target Sectors (SWOT)

Region 3's economic strategy focuses on a mix of established and emerging traded sectors. Advanced Manufacturing, Health Care, Information Technology, Logistics, Agriculture and Food Production, Energy and Natural Resources, and Business Services remain the backbone of the region's competitive base. Among these, Controlled Environment Agriculture (CEA) stands out as a high-potential emerging cluster. CEA builds on the region's agricultural heritage while integrating technology, automation, and sustainability. Its growth trajectory positions it to become a defining feature of the regional economy over the next decade, spurring allied industries, creating resilient food systems, and generating quality jobs. Highlighting CEA as an emerging cluster ensures that Region 3 not only sustains its legacy strengths but also invests in future-oriented industries that can diversify and stabilize the economy.



## Advanced Manufacturing & Advanced Materials

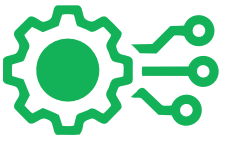
Advanced manufacturing remains a cornerstone of Region 3's economy with a strong heritage, a concentration of employers along corridors such as US-58, and ongoing investments in automation, additive manufacturing, and materials innovation. The sector benefits from workforce pipelines through community colleges, GO TEC, and apprenticeships, providing skill-based training for mechanics, welders, and mechatronics.

Challenges include aging infrastructure, the need for shovel-ready sites with adequate utilities, and persistent workforce shortages in skilled trades and maintenance occupations. Wage levels, while growing, remain lower than state averages, making retention difficult. Global competition and cyclical demand swings further constrain stability.

Opportunities include leveraging supply chain reshoring trends, expanding data-driven manufacturing processes, and aligning site readiness with VEDP's project pipeline. Threats from global downturns, input cost volatility, and competition from other U.S. regions remain significant. Region 3's ability to secure and expand new projects will depend heavily on talent pipelines and site/power readiness.

## Information Technology & Communications

The IT and communications sector in Region 3 is tied to broadband expansion, data centers, and IT services that increasingly underpin all industries. Strengths include the presence of Mid-Atlantic Broadband Communities Corporation and significant state interest in expanding middle-mile fiber. IT consultants, digital services, and remote work opportunities create pathways for higher-wage growth.



Weaknesses include a thin local pool of advanced IT talent, with many skilled graduates leaving the region. Broadband access remains uneven in some rural localities, limiting participation and remote work expansion. Stakeholders report gaps in business analysts, logisticians, and IT specialists, and they note that retaining credentialed talent is a persistent challenge.

### Information Technology & Communications, Continued

Opportunities include leveraging investments in data centers (contingent on power availability), expanding cybersecurity and digital literacy training, and growing consulting and back-office functions in cost-competitive locations. Threats include power capacity constraints, rapid technology shifts outpacing local training, and competition from metro areas that offer deeper IT ecosystems.



## Logistics & Transportation

Region 3's logistics and transportation sector benefits from its geography—interstate and U.S. highway corridors, rail access, and proximity to major metros. The region has affordable land and potential sites for distribution centers, especially along US-58. Logistics also links strongly to manufacturing and agribusiness, providing a competitive advantage in moving goods.

Weaknesses include infrastructure gaps—particularly in shovel-ready sites with sufficient utilities and modern facilities. Workforce readiness is another issue: CDL drivers, warehouse managers, and logistics technicians are in demand, but training pipelines remain thin. Housing and childcare challenges also affect workforce participation.

Opportunities exist in developing multimodal hubs, leveraging e-commerce growth, and promoting supply chain resilience. The expansion of advanced manufacturing and food production could anchor logistics demand; however, threats include rising fuel costs, national competition for distribution projects, and potential bottlenecks from aging rural infrastructure.

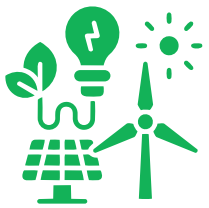
## Agriculture & Food Production



Agriculture and food production remain a historic and culturally embedded sector, with assets ranging from traditional crop and livestock production to emerging opportunities in controlled environment agriculture (CEA). Strengths include extensive agricultural heritage, available land, and research partnerships through the Institute for Advanced Learning and Research.

Weaknesses include an aging producer base, limited awareness of emerging ag-tech, and challenges with capital access for small and mid-scale food processors. Infrastructure gaps—particularly in water, power, and broadband—limit the scaling of advanced production systems. Workforce pipelines are also stretched thin, with recruitment challenges for technicians and agribusiness specialists.

Opportunities include expansion of CEA and aquaculture, biofuel development, and value-added food processing. The sector is positioned to benefit from trends in resilient food systems and sustainable production. Threats include volatile commodity markets, trade tensions, climate risks, and competition from larger agribusiness hubs outside the region.



## Energy, Natural Resources & Finished Products

Region 3 has deep ties to energy and natural resources, particularly wood products and related manufacturing. Strengths include access to raw materials, established companies, and global export demand for products like wood pellets and furniture components. Renewable energy, including solar, presents an emerging growth area.

Weaknesses include exposure to commodity price swings, dependence on construction cycles, and competition from substitute materials. Infrastructure modernization and environmental permitting remain hurdles, and local workforce shortages in woodworking and supervisory roles persist.

Opportunities include expanding renewable energy projects, increasing exports tied to European fuel standards, and developing higher-value finished products. Additional opportunities exist where energy transmission lines are located throughout Region 3 and could lend to natural VEDP site-ready locations. Threats include global market volatility, regulatory uncertainty, and declining demand in traditional segments like furnishings. Positioning the Region as both a raw material supplier and a finished-product innovator will be key to sustaining this cluster.

## Business Services



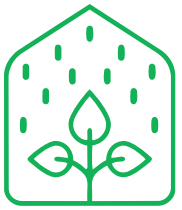
Business services—ranging from legal and financial to consulting and IT support—form a growing component of Region 3's economy. Strengths include affordability compared to metro areas, opportunities in back-office operations, and growth in demand for IT and professional consulting driven by digital transformation. Stakeholders cite this sector as increasingly viable in the region's smaller cities and towns.

Weaknesses include a shallow pool of advanced professional talent, with many young graduates migrating elsewhere for higher wages. Gaps in soft skills, business analysts, and logistical specialists further constrain growth. Limited office space in rural communities and connectivity challenges reduce competitiveness for larger firms.

Opportunities include attracting remote workers, leveraging entrepreneurship initiatives like SOVA RISE Collaborative, and expanding consulting and IT services linked to infrastructure and broadband expansion. Threats include wage competition from metro regions, automation reducing some back-office roles, and continued out-migration of younger talent.

# Controlled Environment Agriculture (CEA)

Controlled environment agriculture (CEA) is an emerging industry for Region 3 that builds on the region's deep agricultural heritage while incorporating technology, automation, and entrepreneurship. Strengths include strong research and development assets (e.g., Institute for Advanced Learning and Research), relevant workforce programs through GO TEC, and an abundance of suitable sites for greenhouse and aquaculture facilities. CEA also aligns sustainability and resilient food system priorities, making it attractive to investors and consumers.



Weaknesses include limited public awareness and understanding of CEA, gaps in entrepreneurial support, and relatively few shovel-ready sites prepared for this specialized industry. Workforce attraction also remains a challenge, particularly in high-tech roles such as robotics, environmental controls, and ag-engineering. The industry's nascency means there is limited economies of scale which can hinder competitiveness against more established global players.

Opportunities are significant: CEA is forecast to grow rapidly, driven by demand for sustainable food systems, local production, and climate resilience. The sector can spur allied industries in advanced manufacturing, logistics, and IT, while also producing highquality jobs in rural communities. Colocating data centers and greenhouses could be a feasible step to utilizing energy and infrastructure efficiently for food production. Threats include high capital costs, uncertain consumer adoption in some markets, and the risk that larger national players outpace regional firms. Region 3's ability to integrate CEA into its broader agricultural and entrepreneurial ecosystem will determine whether it becomes a leading-edge cluster or a niche experiment.

# Health Care Workforce Development



Health care is both a major employer and a critical enabler of workforce participation in Region 3. Health care is not currently defined as a traded sector in the GO Virginia program; it can therefore be seen as a strategy as well as a sector. Strengths include steady and rising demand driven by an aging population, strong local partnerships (e.g., Southern Virginia Partnership for Health Science Careers), and alignment with GO TEC pathways that support career ladders from high school through community college. Telehealth adoption and federal incentives for rural service delivery also provide growth opportunities.

Weaknesses remain acute in the form of workforce shortages, particularly registered nurses, nurse practitioners, and technicians. Retention is hindered by housing and childcare constraints, while high labor and pharmaceutical costs place pressure on providers. Limited mental and behavioral health services further strain community wellbeing and workforce productivity.

Opportunities lie in expanding clinical training pipelines, strengthening regional partnerships for shared placements, and attracting investment tied to digital health. However, threats include persistent workforce shortages, reimbursement uncertainty, and rural access barriers. Without reliable health infrastructure, employers face hiring challenges, and absenteeism risks reducing productivity across other sectors. Additionally, regional economic development attraction can be hindered by health care infrastructure concerns.

# Summary SWOT Table by Target Sector

| SECTOR | STRENGTHS | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|---|
| **Health Care Services** | Strong demand; GO TEC career ladders; telehealth opportunities | Workforce shortages; housing and childcare barriers; high labor costs | Expand training pipelines; digital health investment | Ongoing shortages; reimbursement uncertainty; rural access issues |
| **Advanced Manufacturing & Advanced Materials** | Heritage sector; strong pipelines; corridor activity | Aging infrastructure; skilled trade shortages; lower wages | Reshoring; advanced tech adoption; site readiness | Ongoing shortages; reimbursement uncertainty; rural access issues |
| **Information Technology & Communications** | Broadband expansion; data center opportunities; MBC presence | Thin talent pool; broadband gaps; outmigration | Cybersecurity training; backoffice growth | Power constraints; tech shifts; metro competition |
| **Logistics & Transportation** | Strategic geography; highway & rail access; affordable land | Infrastructure gaps; CDL driver shortages; childcare barriers | E-commerce; multimodal hubs; supply chain resilience | Rising fuel costs; competition; aging infrastructure |
| **Agriculture & Food Production** | AG heritage; land availability; IALR partnerships | Aging producers; limited ag-tech awareness; capital access gaps | CEA growth; biofuels; value-added processing | Commodity volatility; climate risks; global competition |
| **Energy, Natural Resources & Finished Products** | Natural resources base; established companies; export demand | Price swings; construction dependency; workforce gaps | Renewables; higher-value products; expanded reports | Market volatility; regulation; declining traditional demand |
| **Business Services** | Affordable; backoffice opportunities; digital consulting demand | Thin professional talent pool; outmigration; office space limits | Remote worker attraction; entrepreneurship support | Metro wage competition; automation talent leakage |
| **Controlled Environment Agriculture (CEA)** | Ag heritage; IALR R&D; strong state support; available sites; GO TEC aligned workforce training | Nascent industry; limited awareness; few prepared sites; workforce attraction challenges | High growth trajectory; resilient local food systems; allied industry development; good-quality jobs | High capital costs; lack of economies of scale; global competition; limited public understanding |

# Available Sites Analysis — Target Industry Alignment

**81**

total Region 3 sites listed in VirginiaScan

**35**

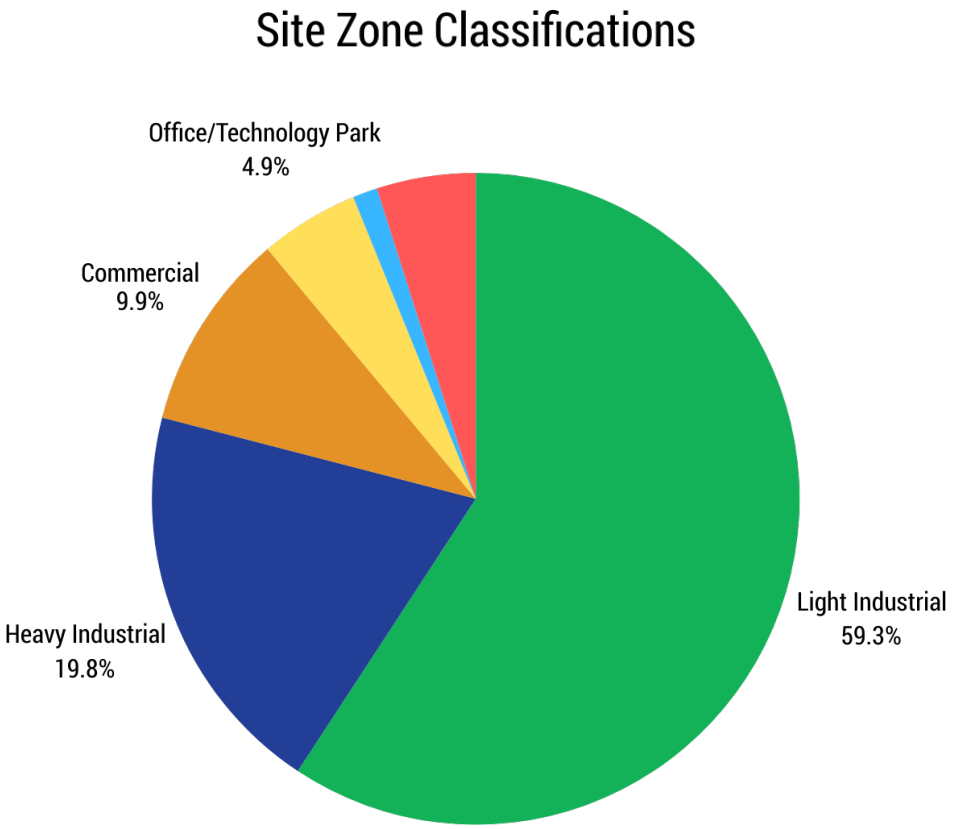
sites rated Tier 4/5 or Tier 5/5

**43**

sites certified through the Virginia Business Ready Sites Program

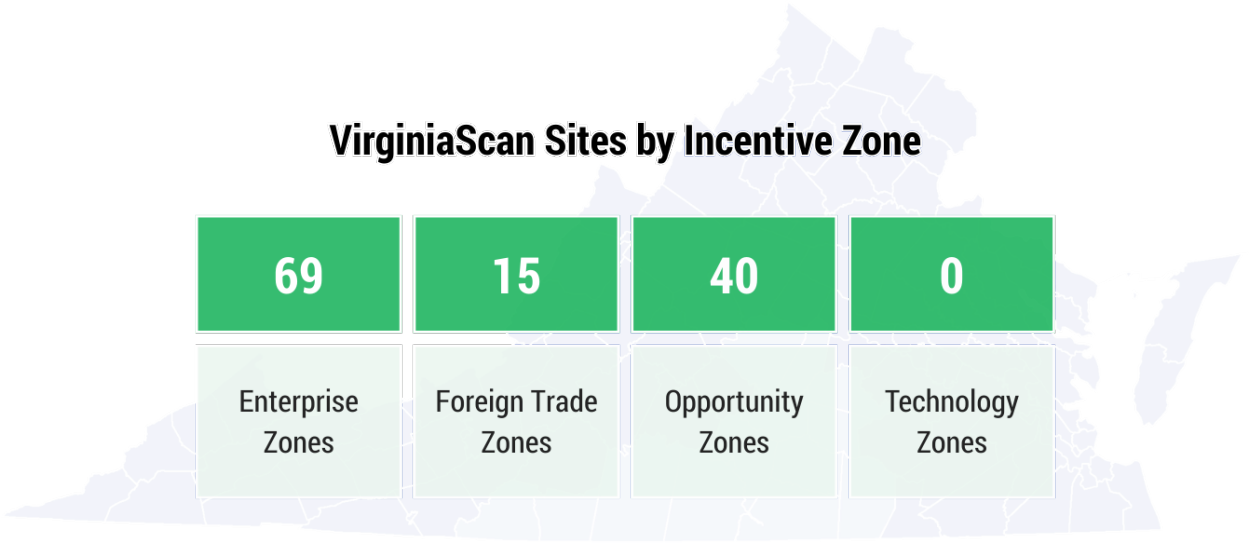
This overall ratio of high-tier, certified sites positions Region 3 among the more competitive rural regions in Virginia for large-scale industrial investment. A chart outlining the alignment of sites with sectors can be found in the Attachments.

In addition to readiness, the alignment of site zoning classifications with target sectors is a critical factor for long-term competitiveness.



## Available Sites Analysis — Target Industry Alignment, Continued

- The **light industrial and heavy industrial sites**—comprising nearly 80% of the total—are well suited for **advanced manufacturing and advanced materials, energy and natural resource processing, and agriculture** and **food production facilities**.
- The **office and technology park sites** align with **information technology and communications, business services**, and emerging **health care technology** operations.
- The single **logistics-zoned site**, while limited in number, is well aligned with **transportation and distribution operations**, a critical enabling function for manufacturing and food production sectors.
- The **agricultural-zoned sites** provide an opportunity to support **Controlled Environment Agriculture (CEA)** operations, especially those blending light industrial processing with agricultural production.
- Based on these alignments, Region 3 currently demonstrates **strong site readiness for capital- and land-intensive industries** such as advanced manufacturing, energy, and agribusiness; **moderate readiness** for office, technology, and business services uses; and **emerging readiness** for Controlled Environment Agriculture, where site suitability may depend on water, power, and environmental control infrastructure rather than traditional zoning categories. This suggests that future site development priorities should emphasize **flex zoning or adaptive reuse** provisions to accommodate cross-sector growth, particularly at the intersection of manufacturing, technology, and agriculture.
- A variety of economic development incentive zones also enhance the competitiveness of these properties. Zones typically offer financial advantages for projects locating within them. When prepared sites are located in or overlaid by one or more of these Zones, their marketability improves. Four types of Zones were reviewed in this report: **Virginia Enterprise Zones; Foreign Trade Zones; Opportunity Zone; Technology Zones**. Other Zones also exist (i.e., Defense Production Zones) but data for these was unavailable.




*Of the sites listed in VirginiaScan,* **69** *are located within an* **Enterprise Zone, 15** *within a* **Foreign Trade Zone, 40** *within an* **Opportunity Zone***, and* **none** *within a Technology Zone.*

*Although a detailed assessment of prospect activity within each Zone type was not available, this alignment underscores the concentration of site readiness and incentive tools within key sub-regions—most notably* **Patrick, Henry, Pittsylvania, Danville, Halifax, and Mecklenburg Counties***—where industrial growth has been strongest.*

Collectively, this pattern reflects a **high degree of physical and policy alignment** between Region 3's available sites and its targeted traded sectors. The next phase of planning should focus on (1) **preparing flexible zoning overlays** to capture emerging technology and Controlled Environment Agriculture projects; (2) **tier advancement of light industrial sites** in underrepresented northern and eastern subregions; (3) identifying and advancing sites to support the **CEA sector** specifically; (4) **enhancing broadband, energy, and water/wastewater infrastructure** to ensure that all sectors—especially advanced manufacturing, IT, and agriculture—can be served efficiently and sustainably; and (5) conducting a **deep-dive analysis** of sites, buildings, and zone overlays against the target sectors.

# Skills Gap Analysis

Across sectors, employer demand is driven far more by **replacement needs (exits and transfers)** than by net new growth, keeping near-term hiring volumes elevated even in industries experiencing modest growth. The analysis highlights **occupation clusters with persistent gaps**—industrial maintenance, machining/welding, production techs, CDL/logistics roles, health care clinical and allied occupations, and digital/IT roles that cut across industries. Region 3's **pathway infrastructure is a strength**—K-12 CTE, community college programs, GO TEC, and university partners—yet **scaling work-based learning, credential alignment, and rapid-reskilling** remains the lever to close mismatches.

Two system constraints complicate progress: **childcare capacity/costs** that limit participation (especially among early-career and shift-based workers) and **housing attainability** near job centers.

Priority actions, therefore, focus on:

- Expanding **talent pipelines at scale** (youth apprenticeships, incumbent upskilling, clinical placements)
- Tightening **program-to-occupation alignment** with employer input
- Removing **barriers to work** (childcare, transportation, broadband-enabled learning).

For emerging opportunities like **CEA and advanced automation,** layering **mechatronics, controls, and data/IT skills** onto traditional agricultural and manufacturing pathways will be key.

This analysis is based on data from the Longwood Performance of the Regional Economy report, which utilized data provided by the Department of Housing & Community Development and sources as cited in the report, and is in Attachments section of this Plan.

The Skills Gap Analysis for GO Virginia Region 3 is based exclusively on data from the region's fifteen localities. While this provides a valuable snapshot of internal supply and demand trends, **it does not fully represent the broader labor market in which employers and workers operate**. Labor markets rarely align with administrative boundaries. Employers in South Boston, Martinsville, and Farmville regularly draw workers from neighboring regions and states, and many Region 3 residents commute to employment centers in Lynchburg, Richmond, and North Carolina's Piedmont and Research Triangle.

A more accurate labor market catchment area extends beyond the GO Virginia boundary to include parts of Regions 1, 2, and 4, as well as adjacent North Carolina counties such as Person, Caswell, Guilford, Forsyth, and Rockingham. Analyses by the Virginia Economic Development Partnership, the Virginia Office of Education and Employment, and Virginia Works confirm that Southern Virginia's commuting patterns and workforce flows are strongly regionalized, tied to transportation corridors and major employers rather than county lines.

The data presented here—drawn from institutional completions and VOEE employment projections—reflect Region 3's internal training and employment capacity but not the full breadth of workforce dynamics influencing local employers.

Additional talent is supplied through nearby institutions such as Liberty University, Central Virginia Community College, and Piedmont Community College, as well as workforce training partners in North Carolina including Alamance Community College, Rockingham Community College, and the North Carolina Community College System's regional workforce centers. These partners strengthen the Region's broader talent ecosystem.

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*Accordingly,* **the workforce "gaps" and "surpluses" shown in the following tables should be interpreted as indicators of Region 3's internal capacity rather than as definitive measures of total labor availability**. *Recognizing and planning for the wider labor market catchment area— and collaborating across it—will be critical to accurately aligning education, training, and industry demand in Southern Virginia.*

# Skills Gap Analysis for Targeted Industry Sectors with Statewide Benchmarks

This Skills Gap Analysis evaluates labor requirements across Region 3's targeted industry sectors, provides supporting data to demonstrate the magnitude of workforce gaps, and compares these gaps to statewide averages where available. These benchmarks highlight where Region 3 is underperforming relative to Virginia and where targeted investments are most critical.

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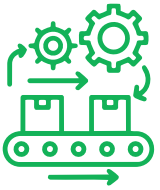
## Healthcare Services

**Region 3:** Deficit of approximately 1,200 Registered Nurses (RNs) and Nurse Practitioners (NPs) with a 15% vacancy rate.

**Virginia:** Average vacancy rate for RNs is 9%.

**Gap:** Region 3 vacancy rates are 6 percentage points higher than the state, representing a more acute shortage relative to peer regions. Rural hospital systems experience extended hiring times, often exceeding 120 days (compared to a statewide average of 75 days).

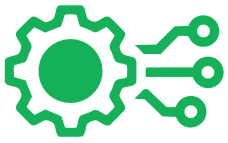
## Advanced Manufacturing & Advanced Materials



**Region 3:** Annual shortfall of 700+ workers in welding, mechatronics, and machining; vacancy rates at 12%.

**Virginia:** Vacancy rates in manufacturing average 8%.

**Gap:** Region 3 exceeds the statewide shortage rate by 4 points, and training output per capita is 30% lower than the state average, leaving employers more reliant on overtime and contract labor.



## Information Technology & Communications

**Region 3:** The workforce covers only 60% of IT demand, with a projected shortfall of over 500 cybersecurity and IT jobs over the next five years.

**Virginia:** IT workforce supply meets 85% of demand statewide.

**Gap:** Region 3 lags by 25 percentage points, reflecting limited higher education pipelines and credential programs in Southern Virginia.

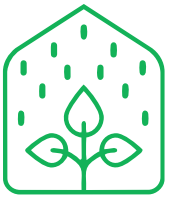
## Logistics & Transportation

**Region 3:** 400+ CDL drivers required annually, with training capacity for fewer than 150.

**Virginia:** CDL training programs statewide meet 70% of demand.

**Gap:** Region 3 meets only ~37% of CDL demand, a gap almost double the statewide shortage rate. This makes logistics one of the most pressing sectoral gaps regionally.

## Controlled Environment Agriculture (CEA)



**Region 3:** Emerging sector with demand for 300+ specialized positions by 2030; current training capacity is fewer than 50 annually.

**Virginia:** CEA workforce development remains nascent statewide, with no established NAICS benchmarks. However, Region 3 has been identified as a leader through IALR's programs.

**Gap:** While statewide gaps are undefined, Region 3 must scale faster than peers to maintain a competitive advantage in this new sector.

## Agriculture & Food Processing

**Region 3:** Shortfall of 150+ annually in line supervisors and quality assurance technicians.

**Virginia:** Statewide vacancy rates in food processing average 7%.

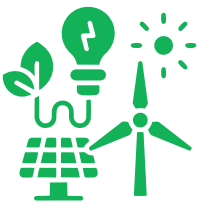
**Gap:** Region 3 vacancy rates exceed 11%, making shortages in food safety certifications more acute than in the state as a whole.

## Energy, Natural Resources, and Finished Products

**Region 3:** Annual replacement demand of 500 workers, with training pipelines producing fewer than 200.

**Virginia:** Vacancy rates for forestry and related trades average 6%.

**Gap:** Region 3 vacancy rates exceed 10%, with turnover among equipment operators significantly higher than the statewide average.





## Business Services

**Region 3:** Annual shortfall of 400+ in analysts, accountants, and paralegals.

**Virginia:** Statewide workforce supply meets roughly 85% of business service demand.

**Gap:** Region 3 meets only 70% of demand, a 15-point underperformance relative to Virginia as a whole.

# Prioritization of Workforce Gaps with Benchmarks

1. **Healthcare** – Region 3 vacancy rates (15%) vs. Virginia (9%).
2. **Advanced Manufacturing** – Region 3 vacancy rates (12%) vs. Virginia (8%).
3. **Logistics** – Region 3 meets 37% of CDL demand vs. Virginia's 70%
4. **IT** – Region 3 supply covers 60% of demand vs. Virginia's 85%.
5. **CEA** – Region 3 emerging leader, but statewide programs are minimal.
6. **Agriculture/Food Processing** – Region 3 vacancy rates (11%) vs. Virginia (7%).
7. **Energy/Natural Resources** – Region 3 vacancy rates (10%) vs. Virginia (6%).
8. **Business Services** – Region 3 demand coverage 70% vs. Virginia 85%

# Key Skills Gap Insights from the Performance of the Region 3 Economy report:

- Severe undersupply exists in Health Science, Manufacturing, Maintenance/Repair, Finance, and Transportation/Logistics, with coverage well below 25%. These gaps indicate employers will struggle to source talent locally without new training capacity.
- Information Technology shows somewhat better alignment at 44% coverage but still falls short of demand. Credential and associate-level pathways are the strongest contributors, but bachelor's production lags.
- Business Management programs produce 21% of projected demand, supplying generalist degrees but not addressing specialized occupational gaps in accounting, analytics, or paralegal roles.
- STEM shows apparent oversupply (908%) due to large numbers of general science and biology degrees. However, many of these graduates do not enter high-demand technical occupations in the region. This oversupply must be interpreted cautiously.
- Energy and Transportation/Logistics have no measurable completions from Region 3 institutions, leaving total dependence on employer-provided training.

## Institutional Contributions

Community Colleges (Southside, Danville, Patrick & Henry) provide the bulk of workforce credentials and associate completions, especially in health, manufacturing, IT, and logistics. Universities (Longwood, Averett, Hampden-Sydney) contribute primarily to business, education, and health programs at the bachelor's level. Regional centers (NCI, IALR, SVHEC, Lake Country Knowledge Center) add critical depth in applied technical programs such as precision machining, mechatronics, and clinical lab training.

## Underserved Populations

**Region 3:** Over 14,800 children under the age of 5 live in households at or below 85% of the SMI, creating childcare barriers. Broadband gaps persist in multiple counties.

**Virginia:** The statewide average of children under 5 in low-income households is 38%. In Region 3, it is 46%, indicating a heavier burden on families in accessing affordable childcare and workforce participation.

## Overall Implications

**Region 3 institutions are supplying less than one quarter of projected demand in most targeted industry sectors**. Without the strategic expansion of credential and associate-level pipelines, the region risks persistent shortages in healthcare, manufacturing, logistics, and business services. Partnerships to expand faculty capacity, clinical placements, and equipment throughput are essential. Closer alignment of bachelor's programs to regional employer needs will also help bridge the gap. Additionally, Region 3 should advocate and support businesses that have or can create work-based learning opportunities. These opportunities can help strengthen the workforce for in-demand fields. A great example of this is the Virginia Talent + Opportunity Partnership (V-TOP).

*This comparative analysis underscores that Region 3 faces a more severe workforce shortage than Virginia overall in nearly every targeted sector. Addressing these disparities will require expanded credentialing programs, investment in childcare and access supports, and coordinated regional strategies to attract and retain talent. Additional analysis of the true labor market region (the drive-time analysis) is also recommended.*

# 8. Regional Plan Goals and Actionable Strategies

*This section presents revised and newly identified goals based on data analysis and stakeholder input. It maps current and proposed strategies to these goals and is organized around GO Virginia's four priority investment strategies: workforce development, startup ecosystems, site development/ infrastructure, and cluster scale-up.*

# Investment Area: Talent Evolution

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Advance and sustain a K-14 career pathways -anchored by GO TEC - through effective implementation and continuous EDO-led awareness and promotion to businesses. | K-12 systems, community colleges, local economic developers, REDOs | # prospect visits; # businesses participating in job fairs; # job fairs held; # internships | # students enrolled in pathways; # students attending job fairs; # credential awarded | • Support efforts to extend the brand awareness of GO TEC within Region 3 |
| Build regional AI literacy and sector-specific upskilling so Region 3's target sectors can boost productivity and ensure a skilled talent pipeline. | Four-year higher ed institutions, existing business partners, community colleges, Virginia Chamber, VOEE, Virginia Works | # individuals trained; # jobs placed; # new interns placed | AI Credential established; # new programs implemented; # students completing training | • Support efforts that analyze current offerings and gaps among educational institutions with the needs of employers<br>• Strengthen and expand non-degree programs (e.g., certifications and credentials) that enable career pathways into new or emerging target sectors<br>• Assess training gaps based on employers input<br>• Support efforts to promote collaborative workforce development and training solutions |

# Investment Area: Talent Evolution

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Pilot a high quality apprenticeship model for one of Region 3's target sectors | Existing businesses, community colleges, local economic developers, REDOs, DOLI | # employers committed; model developed; # individuals enrolled | # employers providing input; training curriculum designed | • Support efforts to assess employer awareness and market demand for apprenticeship |
| Develop and implement a coordinated approach to talent attraction and retention | Community Colleges, 4-year higher education institutions, Chambers of Commerce, Tourism departments, DHCD, VTC, VEDP, local economic developers, REDOs | Regional or sub-regional talent attraction strategy designed | # participating localities and/or REDOs; branding and messaging developed; # media placements for messaging | • Develop and pilot a plan of action to retain and attract talent in Region 3<br>• Pilot an initiative for upskilling incumbent talent<br>• Invest in sustainable models that introduce career pathways at the elementary school level<br>• Support efforts to identify barriers to talent attraction including childcare and housing<br>• Support efforts to identify target audiences and align communication strategies to create a regional brand for talent attraction |

# Investment Area: Talent Evolution

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Remove housing as a workforce barrier by increasing supply, diversity and affordability of housing stock | Planning District Commissions; Housing Authorities, Regional Foundations; Realtors; Housing Developers; Local economic developers; REDOs | # new housing units built; # of diverse types of housing built | Housing partners identified; Housing funding sources identified | • Conduct a subregional housing capacity assessment<br>• Assess best practices and partners across Virginia for replicable missing-middle and workforce housing models |
| Expand capacity, improve quality, and reduce costs to ensure affordable, high-quality and accessible child care in Region 3. | Planning District Commissions; Faith-based institutions, Regional Foundations; State partners; Small Business Development Center; Local economic developers; REDOs | Business Plan Template produced; # entrepreneurs enrolled in training | # best practices identified; # partners involved in planning; # financial partners identified | • Conduct a region wide assessment of current childcare supply, demand, capacity and waitlists.<br>• Document best practices and proven models from across Virginia including identification of partner organizations<br>• Build a childcare business model analysis template (startup, operating costs, revenue and fiscal model analysis) |

# Investment Area: Site Development

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Prioritize regionally-significant sites that align with Region 3 target sectors | Region 3 REDOs, Region 3 Localities, Planning District Commissions, VEDP, Electric Utilities, MBC, Rail Companies, VDOT | # Acres Up-Tiered; # Acres identified | Infrastructure improvements | • Develop regionally-significant sites that support priority target sectors.<br>• Support the expansion of power generation and power distribution to support priority target sectors |
| Support development of strategies and plans to sustain a regional approach to site development | Region 3 REDOs, Region 3 Localities, Planning District Commissions, Regional Foundations, Tobacco Commission, VEDP | # new RIFAs created; # localities as members in a RIFAs | Discussions among locality partners | • Develop strategies and plans to sustain a regional approach to site development (i.e. RIFAs) |

# Investment Area: Site Development

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Strengthen the capacity of eastern and northern sub-regions EDO's | Region 3 & 4 REDOs, Region 3 Localities, Planning District Commissions, Tobacco Commission, VEDP, DHCD | # VEDP prospect referrals; # VEDP prospect visits; # new businesses created | # RFI responded to; # entrepreneurs served | • Convene local economic developers and county administrators and regional planning organizations<br>• Support development of strategies and plans to sustain regional approach in the subregions |
| Increase the number of Business-Ready Sites to Tier ratings 3, 4, and 5 | Region 3 REDOs, Region 3 Localities, Planning District Commissions, VEDP, Electric Utilities, MBC, Rail Companies, VDOT | # acreage increased by one tier; # acres identified for future development | # linear feet of water & sewer infrastructure increased; # PERs completed | • Identify and develop sites and buildings that align with the target sectors |

# Investment Area: Site Development

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Increase the marketability of unique properties in the Region | Region 3 REDOs, Region 3 Localities, Planning District Commissions, VEDP, Electric Utilities, MBC, Rail Companies, VDOT, property owners, Virginia Tobacco Commission | # unique properties identified | # vacant buildings renovated; # small towns participating; # private partners engaged | • Identify unique real estate assets and assess for market alignment<br>• Support efforts to identify downtown properties and assess for market alignment |
| Increase the number of Business-Ready Sites for business services and healthcare | Region 3 REDOs, Region 3 Localities, Planning District Commissions, VEDP, Electric Utilities, MBC, DHCD, Virginia Main Street, Regional Foundations | # acreage or square footage identified; # of properties at Tier Level 3 and above | Real estate characteristics for health care and business services catalogued; # applications received to characterize and/or up-tier properties received | • Support efforts to understand the real estate requirements for companies in the business services and health care sectors<br>• Support sub-regional efforts to identify, characterize, and promote properties that align with business services and health care sectors |

# Investment Area: Cluster Scale-Up

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Increase the number, success rate, and profitability of Virginia's CEA-related entrepreneurs, small businesses, and on-farm revenue-generating enterprises | REDOs, local economic developers, Virginia Tech, community colleges, engineering firms, DHCD, VEDP, SOVA Rise, VDACS, Virginia Farm Bureau | # CEA prospect visiting the region; # of new entrepreneurs launching a CEA project | # sites analyzed as CEA-ready; # programs and training curriculums designed; # individuals enrolled in training | • Provide tailored entrepreneurship support to small agricultural businesses and budding entrepreneurs in partnership with the SOVA Rise Collaborative<br>• Develop a CEA-business site development and building reuse standards to identify and prioritize sites and buildings in Region 3<br>• Develop an inventory and assessment of Southern Virginia's CEA-competitive business sites and existing buildings suitable for CEA production with a focus on the central business districts of Region 3's incorporated towns and cities and on-farm structures |

# Investment Area: Cluster Scale-Up

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Enhance the growth and job creation within Virginia's existing CEA firms, making the region a prime location for CEA business investment | VDACS, VEDP, REDOs, local economic developers, Virginia Tech, SOVA Rise | # new business locations announced; # new jobs created; $ capital investment committed | Marketing plan including branding and messaging finalized; # prequalified sites identified | • Developing and implementing a CEA marketing plan for the VT/IALR CEA Innovation Center to support CEA business recruitment and retention for use by local and regional economic development organizations |
| Cultivate a pipeline of skilled individuals in CEA through comprehensive talent development programs that would include CEA-relevant credentials | Community Colleges; 4-year higher ed partners; Virginia Career Works | # people trained; # jobs placed; # businesses served; # new internships placed | # credential awarded; # new programs designed; # students enrolled | • Develop and implement a comprehensive CEA talent pathway model in partnership with the GO TEC program |

# Investment Area: Cluster Scale-Up

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Increase enrollment in K-12, community college, undergraduate, and graduate-level students in CEA-related programs supplemented by internships, curricular instruction, career awareness, and relevant work-based learning experiences | Community Colleges; 4-year higher ed partners; Virginia Career Works | # people trained; # jobs placed; # businesses served; # new internships placed | #c redential awarded; # new programs designed; # students enrolled | • Develop and implement a comprehensive CEA talent pathway model in partnership with the GO TEC program |
| Position the translational research capabilities and reputation of the VT/IALR CEA Innovation Center to enhance and increase its support of existing and emerging CEA businesses and reach a complementary portfolio of companies across their supply chains | Virginia Tech; Regional Higher Education Centers; local economic developers; REDOs; existing businesses; GENEDGE; Small Business Development Center; Chambers of Commerce | # B-2-B partnerships expanded; # businesses identified as supporting CEA | # business leaders participating in convenings; # convenings held to educate on CEA | • Offer expanded translational research and technical assistance to CEA companies and their supply chain |

# Investment Area: Entrepreneurial Ecosystem

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Monitor and advance the implementation of the SOVA Rise Collaborative | SOVA Rise; Virginia Innovation Technology Authority; SEED Hub; SOVA Innovation Hub; The Launch Place | # entrepreneurs served; # minority entrepreneurs served; # businesses started; # businesses expanding; # jobs created | Capital raised; # patents filed; # participants in training programs; #media placements about training | • Support efforts to extend the brand awareness of the entrepreneurial assets within Region 3 |
| Support programmatic emphasis on agribusiness and health care sectors as identified in the 2019 Teconomy Report | SOVA Rise; Virginia Innovation Technology Authority; SEED Hub; SOVA Innovation Hub; The Launch Place; Virginia Farm Bureau; health care systems; local economic developers | # new businesses created in health and agribusiness sectors; # new jobs created in agribusiness and health sectors | # convenings of agribusiness and health care partners; # agribusiness and health care partners participating | • Convene and connect agribusiness stakeholders to identify barriers and opportunities<br>• Convene and connect health care stakeholders to identify barriers and opportunities |

# Investment Area: Entrepreneurial Ecosystem

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Identify and support efforts to grow emerging business sectors | Chambers of Commerce; local economic developers; REDOs; Small Business Development Center; Virginia Innovation Technology Authority; Virginia Chamber of Commerce; existing business leaders | # Emerging business sectors identified | # convenings of partners held; # partners | • Create an emerging business workgroup to Identify and analyze the development of emerging sectors that leverage existing capacities in Region 3 in talent, sites, and new business formation |
| Support the growth and sustainability of the entrepreneurial hubs in Region 3 | SEED Innovation Hub; SOVA Innovation Hub; The Launch Place; community colleges; 4-year higher education institutions; Virginia Innovation Partnership Authority; Chambers of Commerce; local economic developers; REDOs; financial institutions and organizations; Federal | # new businesses created; $ of private capital invested | # participants in training programs; # businesses introduced to financial partners | • Support efforts to ensure access to capital is aligned with various stages of entrepreneurial development from pre-seed to later stage<br>• Support efforts to ensure access to program resources is available across the Region |

# Investment Area: Leadership

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Anticipate the future | GV Regions; DHCD; Virginia Chamber; Virginia Innovation Technology Authority; Virginia Career Works | # Statewide Competitive Projects; # state partners involved in project applications | # convenings with state partners; # presentations by state partners | • Look for opportunities to engage with other Regions for investment opportunities<br>• Conduct a retreat/advance to hear from experts in rural economic development<br>• Monitor changes in state programs and leadership that may impact the economy of Region 3 |
| Ensure strong and sustained leadership for the Council and the Region | Region 3 business leaders; local economic developers; REDOs; Chambers of Commerce; Regional Foundations; Technology Councils; Young Professionals Organizations | $ available to support Region 3 projects;<br>Framework for R3 Leadership Academy | # individuals serving on R3 Advisory Committees; # participants in R3 All-Hands meetings | • Proactively identify and engage citizen leaders to serve on Council committees and initiatives<br>• Proactively champion stable funding support from state, regional and private sources<br>• Assess the creation of a leadership academy |

# Investment Area: Leadership

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Support Sustainable Regional Economic Development Systems in Eastern and Northern Sub-Region | Region 3 business leaders; local economic developers; REDOs; Chambers of Commerce; Regional Foundations; Technology Councils; Young Professionals Organizations | $ and in-kind commitment of localities for projects; # grant applications submitted by REDOs or localities for R3 investment | # convenings held with REDOs and localities; # participants from REDOs and localities | • Convene or support convening of local economic developers and county administrators and regional planning organizations<br>• Support development of strategies and plans to sustain regional approach |
| Build regional coalitions of strategic partners | Region 3 business leaders; local economic developers; REDOs; Chambers of Commerce; Regional Foundations; Technology Councils; Young Professionals Organizations | # project applications submitted by partners; value of project applications submitted by partners | # convenings of peer partner groups; # peer partners participating in convenings | • Convene and connect leaders of Chambers of Commerce, economic developers, Chief Administrative Officers and Chief elected officials, School Superintendents, and Young Leaders, both with their peers as well as across operational roles |

# Investment Area: Leadership

| GOAL | POTENTIAL PARTNERS | OUTCOMES | IMPACT MEASURES | IMPLEMENTATION STRATEGIES |
|---|---|---|---|---|
| Continue to build a multi-faceted communication strategy to reach diverse audiences | Media consultant; Region 3 business leaders; regional news organizations; local economic developers; REDOs; Chambers of Commerce; Regional Foundations; Young Professional Organizations; Faith-Based Institutions; Civic Clubs | # new followers on social media; # referrals for projects based on social media | # media placements; # social media posts | • Ensure the positive outcomes of Region 3's investments are visible<br>• Build awareness of new leaders to support the goals of Region 3 and its organizational development and sustainability |

# 9. Strategic Partnerships and Collaboration Opportunities

LEGEND FOR ECONOMIC DEVELOPMENT ORGANIZATION PARTNERS MAP

***LOCAL ECONOMIC DEVELOPMENT OFFICES – 15***

*Patrick, Martinsville/Henry, Danville, Pittsylvania, Halifax, Mecklenburg, Brunswick, Nottoway, Amelia, Cumberland, Prince Edward, Charlotte, Lunenburg, Buckingham*

***LOCAL PARTNER OFFICES (CHAMBERS, MAIN STREET, TOURISM)***

***REGIONAL ECONOMIC DEVELOPMENT ORGANIZATIONS – 2***

*Virginia's Heartland Economic Development Alliance, Southern Virginia Regional Alliance*

***REGIONAL PLANNING DISTRICT COMMISSIONS – 3***

*Southside Planning District, Commonwealth Regional Council, West Piedmont Planning*

***REGIONAL FOUNDATIONS – 2***

*Danville Regional Foundation, The Harvest Foundation*

***REGIONAL COMMUNITY COLLEGES, VIRGINIA CAREER WORKS, GO TEC, K-12 Partners – 20***

*Southside Virginia Community College, Danville Community College, Patrick & Henry Community College, West Piedmont WIB, South Central WIB, GO TEC, K-12 Partners*

***REGIONAL FOUR-YEAR COLLEGES/UNIVERSITIES – 3***

*Longwood University, Hampden Sydney College, Averett University*

***REGIONAL HIGHER EDUCATION CENTERS – 4***

*Southern Virginia Higher Education Center, Institute for Advanced Learning, New College Institute, Lake Country Knowledge Center*

***STATE AGENCIES and PRIVATE PARTNERS – 13***

*Virginia Tourism Corporation, Virginia Innovative Partnership Authority, Virginia Tobacco Commission, GO Region 3, Genedge, Virginia Economic Development Partnership, Virginia Department of Housing & Community Development, Virginia Chamber of Commerce, Longwood Small Business Development Center, MidAtlantic Broadband, Mecklenburg Co Op, Southside Co Op, Dominion Virginia Power*

***LOCAL INNOVATION ASSET PARTNERS – 11***

*National Tire Research Center, Southern Virginia Product Advancement Center, FabLab, HAAS Performance Center, The Launch Place, RISE Collaborative, SOVA Innovation Hub, SEED Innovation Hub, Southern Piedmond Technology Council, StartUp Champions Network, Virginia CDFI Coalition*

# 10. Alignment with Other Regional and Statewide Plans

*As part of the review and deep update for this 2025 Growth & Diversification Plan, the Region reviewed plans and strategies from 25 existing partner organizations including planning district commissions, Career Works boards, regional economic development organizations, tourism organizations, housing partners, educational institutions, and philanthropic organizations. The plans were all current, created since the pandemic of 2021. A full list of the plans that were reviewed is included in the Attachments to this Plan.*

Below is a summary of how these plans align in terms of Goals, Strengths, Weaknesses, Opportunities, and Business Sectors.

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## Alignment of Goals

Across the Word summary of regional plans and the three PDC CEDS tabs, the through lines are clear: (1) grow jobs and firms (business attraction/expansion, entrepreneurship); (2) improve enabling infrastructure (sites, broadband, transportation); (3) strengthen talent pipelines (K-12, community college, upskilling); and (4) create meaningful partnerships that position localities and the region to be more successful.

## Alignment of Strengths

- **Workforce & Training Capacity:** Community college programs (e.g., mechatronics, welding, health sciences) and GO TEC are repeatedly cited as scalable assets that align training to industry needs.
- **Broadband Progress:** Fiber/middle-mile backbones and recent broadband investments are momentum drivers that enable business growth and remote/hybrid work.
- **Industrial/Logistics Footing:** Existing industrial corridors, roadway access, and deep manufacturing knowledge are common assets.
- **Natural/Recreational Assets:** Lakes, rivers, trails, and outdoor recreation—plus heritage tourism—are shared quality-of-place strengths tied to visitor spending and talent attraction.
- **Ecosystem Collaboration:** Ongoing coordination via SVRA, VGA, IALR/GO TEC, RISE Collaborative, and local EDOs presents a competitive advantage.
- **Three four-year colleges (Averett, Longwood, and Hampden-Sydney)** drive visitation, talent, and community programming.
- Ample and relatively **affordable land**; **quality-of-life advantages**; **improving broadband connectivity and access corridors** to larger markets.

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## Alignment of Weaknesses

- **Demographics & Retention:** Population decline/aging, small labor pools, and difficulty retaining graduates/young professionals.
- **Higher Poverty Levels** constrain workforce depth and disposable income.
- **Last-Mile & Site Readiness Gaps:** Despite broadband gains, pockets remain underserved; likewise, developable land and infrastructure gaps constrain project readiness.
- **Limited diversity and attainability of housing stock.**
- **Workforce Frictions:** Persistent skills mismatches, limited childcare (affecting participation), and a tight healthcare workforce supply.
- **Economic Concentration Risk:** Over-reliance on legacy or cyclical manufacturing niches leaves some places exposed to downturns or automation pressures.
- **Constrained inventory** of fully serviced, industrial-zoned acreage and regulatory friction points that slow mixed-use and hospitality development.

# Alignment of Opportunities

- **Site Development & Up-Tiering:** Coordinated, multi-jurisdictional work to move priority sites up the readiness ladder (and align sites to target sectors) is a universal theme.
- **Talent Pathways at Scale:** Expanding GO TEC-style pathways, clinical/health pipelines, and work-based learning across the region to close critical occupation gaps.
- **Entrepreneurship & Small Business Growth:** Ecosystem supports (e.g., RISE Collaborative, hubs/accelerators, procurement navigation) to drive the majority of job growth from smaller firms.
- **Leverage the SEED Hub, SOVA Innovation Hub, and Launch Place as anchors** for entrepreneurship.
- **Advance data center site preparedness.**
- **Broadband to Business:** Converting new fiber assets into firm creation, telehealth, remote work attraction, and digitally enabled services.
- **Visitor Economy Lift:** Sports/outdoor recreation and heritage assets to grow spending, catalyze main-street reinvestment, and support small-scale advanced manufacturing/artisan production.
- **Agri-innovation & CEA:** Leveraging agricultural heritage, emerging CEA, and value-added food processing to diversify, shorten supply chains, and add resilient jobs.

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# Alignment of Target Sectors

Two of the three PDC CEDS tabs explicitly list sector priorities that match each other and align with broader regional strategies summarized in the Word document. Commonly named (or implied) targets include:

- Advanced Manufacturing & Advanced Materials
- Business Services
- Information Technology & Communications Services and data centers
- Transportation & Logistics and fulfillment enterprises
- Energy, Natural Resources & Finished Products
- Agriculture & Food Processing
- Healthcare services and related support sectors
- Tourism and agritourism
- (Emerging) Controlled Environment Agriculture (CEA) as a cross-cutting opportunity tied to sites, R&D/IALR support, and workforce pipelines

# 11. Attachments

1. Performance of the Economy – Longwood Report
2. Stakeholder Summary
3. Economic Development Announcements
4. VEDP Site Inventory
5. Site Alignment with Target Sectors
6. Skills Gap Analysis
7. Council Members 2025
8. R3 Advisory Committee 2025

# GO Virginia Region 3
# Growth & Diversification Plan
# 2025 Update

# Performance of the Region 3 Economy

Prepared by the Office of Community and Economic Development
at Longwood University

Jennifer Cox Carne
Director of Local & Community Relations

# Region 3 Economic Performance and Skills Gap Analysis - Executive Summary

This Economic Performance and Skills Gap Analysis, completed by the Office of Community and Economic Development at Longwood University, is provided for the Southern Virginia Region 3 Council as part of the GO Virginia Growth & Diversification Plan, for submission to the Virginia Department of Housing & Community Development. The analysis is intended to provide insight and direction to both the Regional Council and stakeholders with the region's status (historical, current, and forecasted) in:

For Targeted Sectors:

- **Employment** - Including Employment Change, Employment Growth, and Annual average percentage change in employment
- **Average Annual Wages**
- **Location Quotient** -comparing the size of each industry's employment to the national average
- **Demand** - Forecasted demand for jobs by industry/sector (Exits, Transfers, and Employment Growth determine demand)
- **Exits -** Workers forecasted to leave the labor force
- **Transfers** - Workers moving from one occupation to another

Additional Data Sets:

- Median Household Income
- Median Age of Region 3
- Demographic Trends
- Commuting Patterns
- Early Childhood Education availability, quality, and affordability
- Healthcare availability (both primary and specialized care)
- VEDP Announcements for the Region

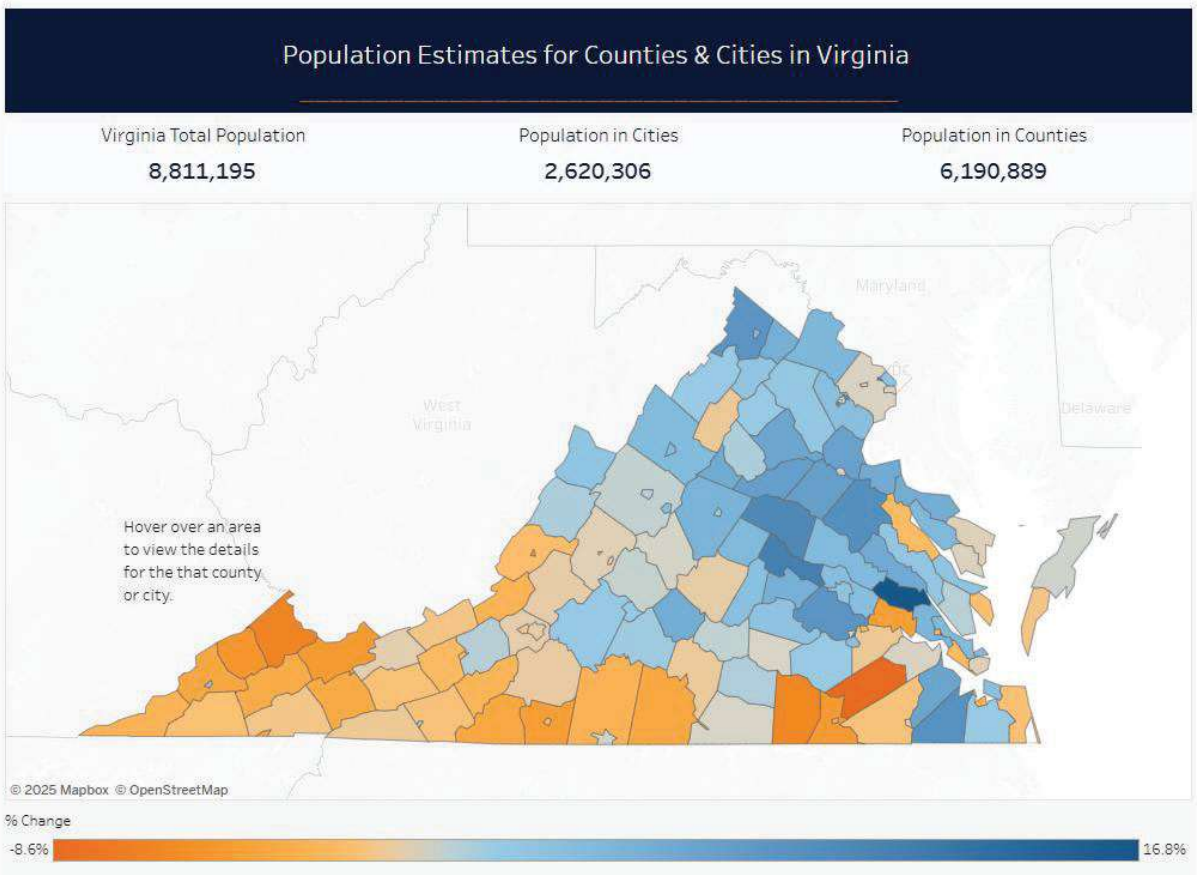
In addition to the data through charts and graphics, brief summaries are provided to provide context to the data being presented.

# What has been happening in Region 3?

Before looking at employment we need to step back and look at the wider context for Virginia and for Region 3.

## Population Changes[1]:

Weldon Cooper Center provides population estimates as of July 1st the prior year. Data below is based off of July 1, 2024 estimates.




[1] Source: Weldon Cooper: https://www.coopercenter.org/virginia-population-estimates

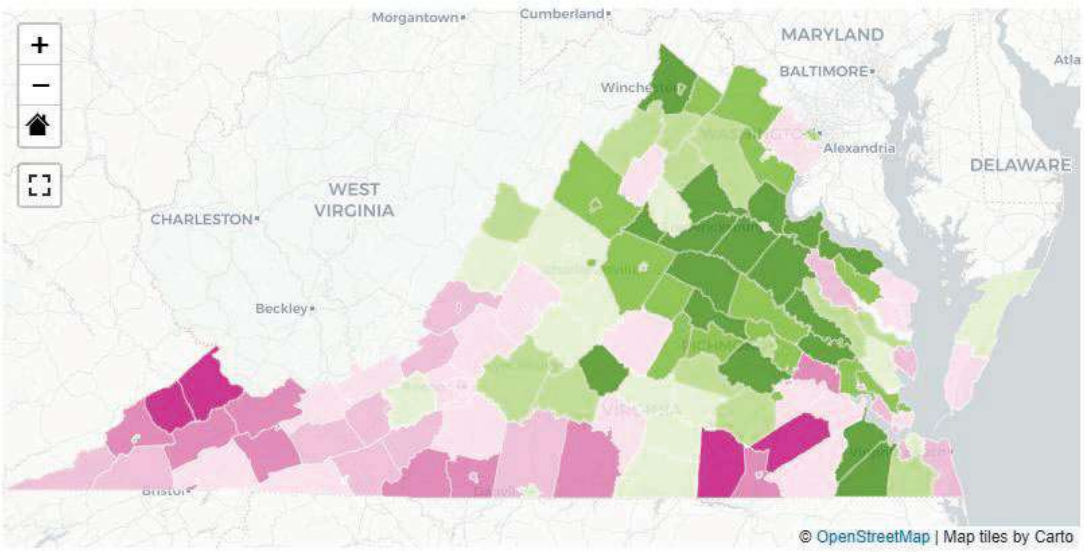
On February 17, 2025 VPAP[2] used the latest estimates from the Weldon Cooper Center to measure how population has changed across Virginia localities since the 2020 Decennial Census.

| Locality | 2024 Population (Estimated) | Births Minus Deaths | Net Migration | Total Population Change |
|---|---|---|---|---|
| Amelia | 13,629 | -231 | +595 | +364 |
| Brunswick | 14,867 | -498 | -484 | -982 |
| Buckingham | 16,736 | -279 | +191 | -88 |
| Charlotte | 11,444 | -240 | +155 | -85 |
| Cumberland | 9,982 | -67 | +374 | +307 |
| Halifax | 32,817 | -984 | -221 | -1,205 |
| Henry | 48,726 | -1,921 | -301 | -2,222 |
| Lunenburg | 12,059 | -208 | +331 | +123 |
| Mecklenburg | 30,333 | -1,036 | +1,050 | +14 |
| Nottoway | 15,647 | -337 | +342 | +5 |
| Patrick | 16,985 | -751 | +128 | -623 |
| Pittsylvania | 58,913 | -1,477 | -111 | -1,588 |
| Prince Edward | 22,548 | -270 | +401 | +131 |
| City of Danville | 42,700 | -1,423 | +1,533 | +110 |
| City of Martinsville | 13,268 | -572 | +355 | -217 |

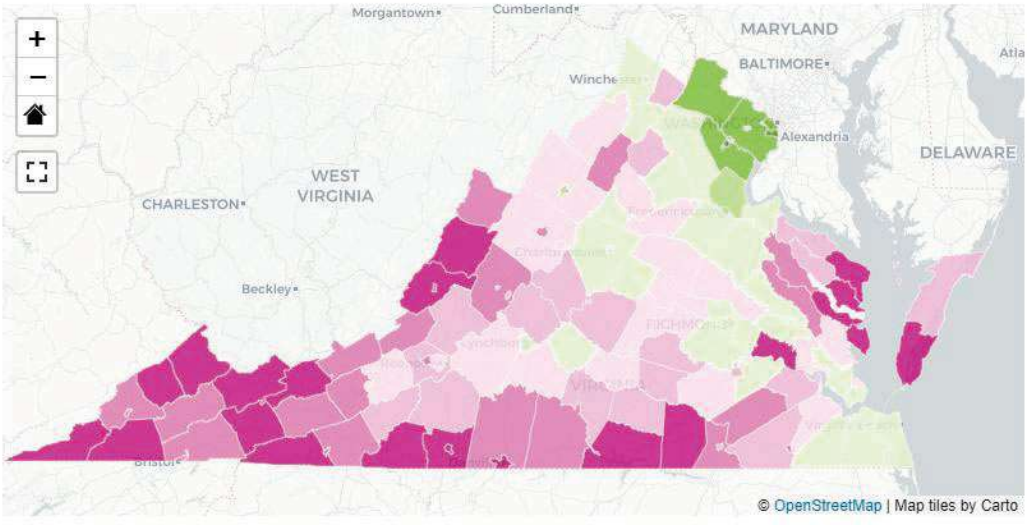
The population change for localities varied for Region 3, however one consistency is that migration into the region has supported stabilizing the overall population. The below graphics highlight the data in the chart above.

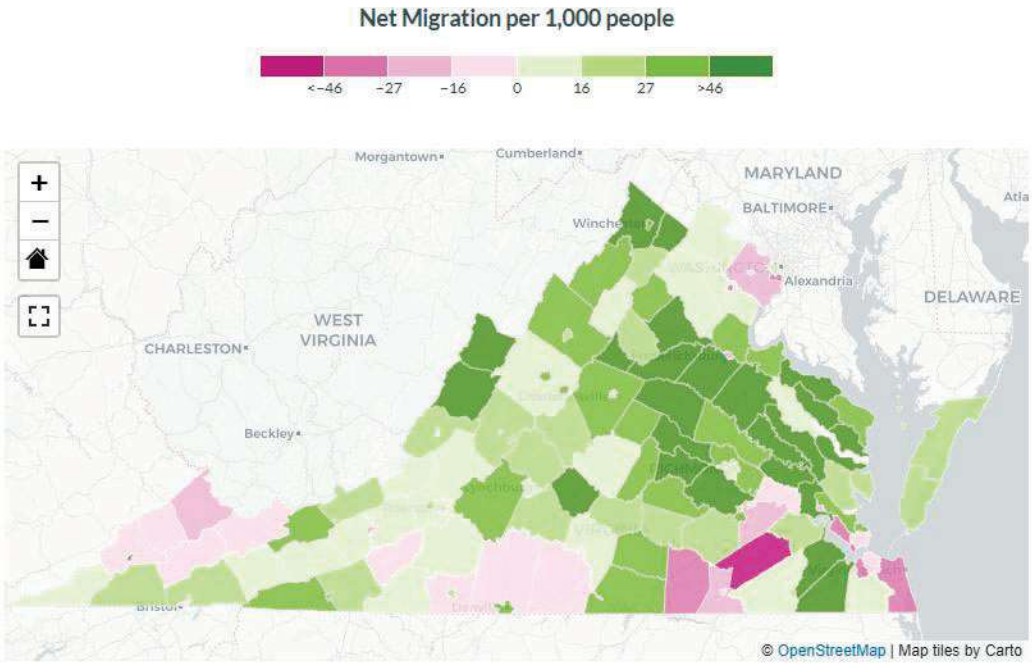
[2] Source: VPAP: https://www.vpap.org/visuals/visual/components-of-population-change/

Population Change per 1,000 people




Births minus Deaths per 1,000 people






While demographers are still uncertain about the demographic shifts caused by the COVID-19 pandemic over the upcoming decade, there are a few trends worth noting[3]:

- The current trends still show migration out of larger metro areas and into smaller metro areas and rural counties.
    - The shift to rural areas has resulted in increases in home values.
    - School enrollment projections will need to adjust (lower birth rates and shifts to private education will result in lower public school enrollment).
- With the rise in remote work, growth can shift further away from major employers/areas. (Approx. ⅓ of all workdays in 2023 were remote)
- Birth rates have declined since 2020 and not rebounded. Specifically, the total fertility rate in 2023 was at 1.62 births per woman in the United States, while the replacement level is 2.1[4]. At the same time the overall population has aged which may result in a "squeeze" of the labor force[5].

[3] Source: Weldon Cooper: https://www.coopercenter.org/research/amid-slow-population-growth-virginias-demographic-landscape-being-transformed

[4] Source: Wall Street Journal "U.S. Fertility Rate Falls to Record Low" https://www.wsj.com/us-news/america-birth-rate-decline-a111d21b?st=6mtGur&reflink=desktopwebshare_permalink

[5] Source: Weldon Cooper: https://www.coopercenter.org/research/statchat-school-enrollment-trends-in-post-pandemic-virginia

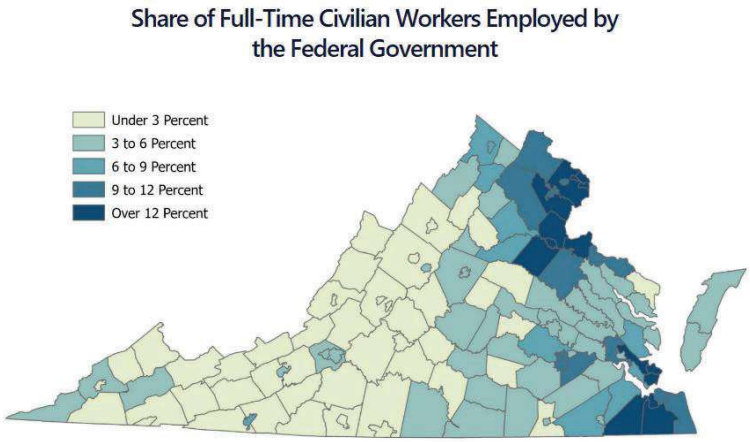
# Impact of the Federal Workforce on Virginia's Economy

It is well documented that the Commonwealth has strong workforce ties to the federal government. Hamilton Lombard, from the Weldon Cooper Center at UVA, also noted that in "nine of Virginia's 11 congressional districts, a larger share of the population is employed by the federal government than the national average".

In most Virginia localities

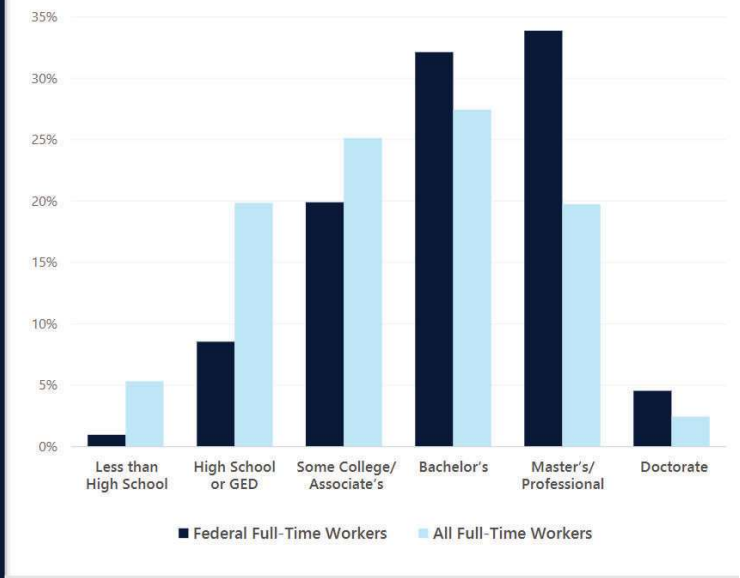
**Share of workforce in federal employment exceeds national average**

- Over 50% live in the Northern Virginia PDC
- 20% live in Hampton Roads PDC



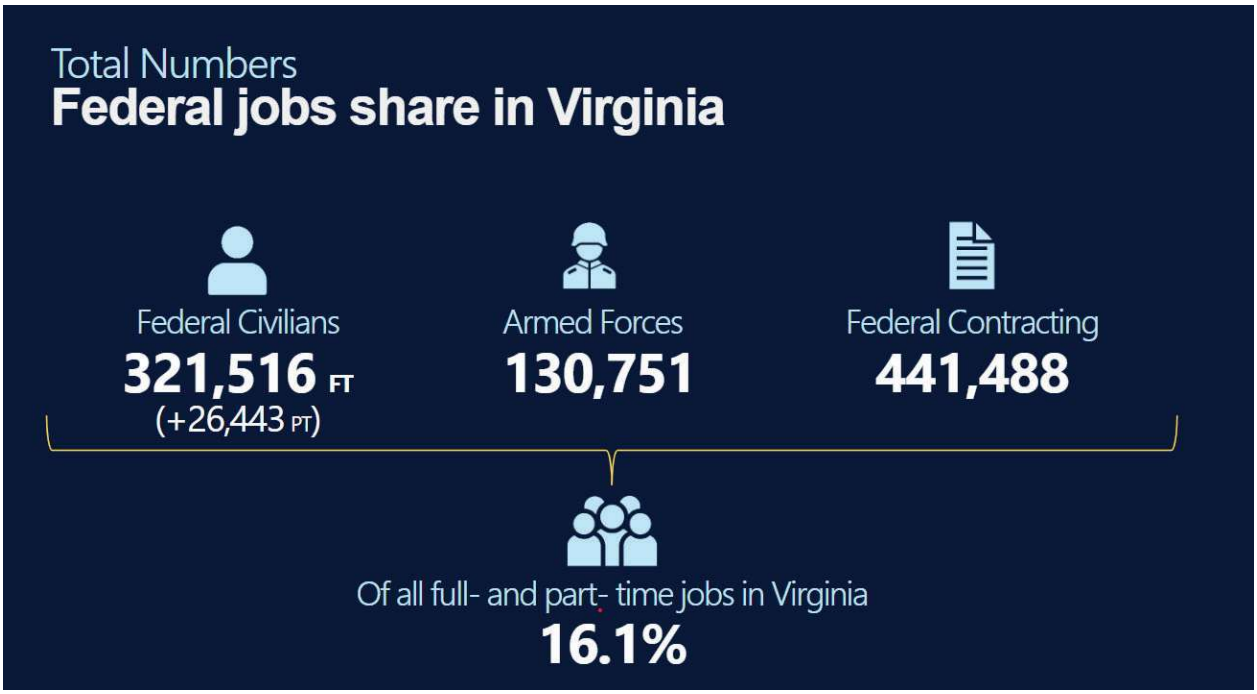

**Virginia's federal workforce is distinct**

- nearly twice as likely to hold a graduate degree (compared to other VA workers)
- earn nearly 2x more than private sector employees
- are more likely to work in high-paying fields (compared to peers nationally)




Educational Attainment of Full-Time Workers in Virginia (2023)

Even in Region 3, we are not immune to the impact of the federal workforce. “Nearly one in eight Virginians either work for the federal government or have jobs connected to federal contracts”[6]. Additionally, with the rise in remote work federal workers and federal contractors have continued to push further away from Northern Virginia[7]. Only time will tell how the federal layoffs and budget cuts will impact Region 3. Current predictions include an increase in unemployment until late 2026.




[6] Virginia Business: https://virginiabusiness.com/virginia-job-loss-forecast-2025/?oly_enc_id=0462G1080134E1E

[7] Weldon Cooper Report: https://www.coopercenter.org/research/economic-impact-slides-04082025

# Employment, Average Wages, and Median Household Income

Now that we have looked at the overall population trends and the impacts of the Federal Workforce on the Commonwealth, we can look at employment growth, average wages, and median household income. Additionally we can look at other budgetary impacts such as housing, child care, transportation, and food.

## Employment Growth in Region 3

As an update to the previous report, employment for the region from JobsEQ 2024Q4 datasets saw an increase in employment (1.37%) and an increase in annual wages (6.7%) compared to 2023Q1 datasets.

| Employment Growth | | | | | | |
|---|---|---|---|---|---|---|
| | NAICS Total - All Industries | Employment | Average Annual Wages | LQ | Employment Change (5 Year History) | Annual % (5 Year History) |
| 2020-Q3 | | 128,053 | $34,308 | 1.00 | -6,703 | -1.00% |
| 2023-Q1 | | 129,135 | $43,408 | 1.00 | -5,547 | -0.8% |
| 2024-Q4 | | 131,306 | $46,871 | 1.00 | -1,234 | -0.2% |

Looking at employment change forecasted for the next two, five, and ten years overall attrition is expected to slow (to -0.3% compared to -0.7% in the 2023 Growth & Diversification Plan update). Overall employment growth is not yet trending positive but the result is illustrative that the region's employment is improving and trending toward breakeven and potentially positive employment growth.

| Employment Forecast for Region 3[8] | | | | | |
|---|---|---|---|---|---|
| | **Total Demand** | **Exits** | **Transfers** | **Employment Growth** | **Annual % Growth** |
| 2 year forecast | 27,645 | 11,686 | 16,699 | -741 | -0.3% |
| 5 year forecast | 68,779 | 29,069 | 41,555 | -1,844 | -0.3% |
| 10 year forecast | 136,460 | 57,652 | 82,471 | -3,663 | -0.3% |

# Average Wages Nationally and for Region 3

For the first quarter of 2025 Median weekly earnings of the nation's 122 million full-time wage and salary workers were $1,192 (not seasonally adjusted)[9]. Compared to other regions, Region 3 still trails most peers in average wages.

## Wage Growth Across All Regions

| | Average Annual Wages by Year | | | |
|---|---|---|---|---|
| **Region** | **2021 Q4** | **2022 Q4** | **2023 Q4** | **2024 Q4** |
| **1** | 38,864 | 41,700 | 44,194 | 45,575 |
| **2** | 48,452 | 51,082 | 53,377 | 55,769 |
| **3** | 40,037 | 42,634 | 44,911 | 46,871 |
| **4** | 60,744 | 63,967 | 66,162 | 68,336 |
| **5** | 53,841 | 56,339 | 59,018 | 61,298 |
| **6** | 52,448 | 54,573 | 56,982 | 59,222 |
| **7** | 87,756 | 90,785 | 94,143 | 98,203 |
| **8** | 47,780 | 50,270 | 52,100 | 54,397 |

[8] JobsEQ data as of Q4 2024

[9] Source: Bureau of Labor Statistics news release April 16, 2025 https://www.bls.gov/news.release/pdf/wkyeng.pdf

| | | | | |
|---|---|---|---|---|
| **9** | 57,241 | 58,989 | 61,425 | 63,069 |
| **Virginia** | 65,958 | 69,059 | 72,101 | 75,076 |

## Wage Growth Across All Regions Sorted by Ave. Wages

| | **Average Annual Wages by Year** | | | |
|---|---|---|---|---|
| **Region** | **2021 Q4** | **2022 Q4** | **2023 Q4** | **2024 Q4** |
| **7** | 87,756 | 90,785 | 94,143 | 98,203 |
| **Virginia** | 65,958 | 69,059 | 72,101 | 75,076 |
| **4** | 60,744 | 63,967 | 66,162 | 68,336 |
| **9** | 57,241 | 58,989 | 61,425 | 63,069 |
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| **6** | 52,448 | 54,573 | 56,982 | 59,222 |
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| **8** | 47,780 | 50,270 | 52,100 | 54,397 |
| **3** | 40,037 | 42,634 | 44,911 | 46,871 |
| **1** | 38,864 | 41,700 | 44,194 | 45,575 |

## Wages by PDCs in Region 3

| | 2024Q3 Average Annual Wage |
|---|---|
| **Go Virginia Region 3** | **$46,817** |
| Commonwealth PDC | $47,069 |
| Southside PDC | $48,379 |
| West Piedmont PDC | $45,784 |

Referencing the table above, wages are in relatively close proximity to each other throughout Region 3 when broken down by the sub regional average. Similar to the previous report Southside PDC has the highest average annual wage while the West Piedmont PDC region has the widest disparity of 5.36% lower compared to Southside PDC. The region should continue to pay attention to the sub regions so that the wage growth disparity does not increase.

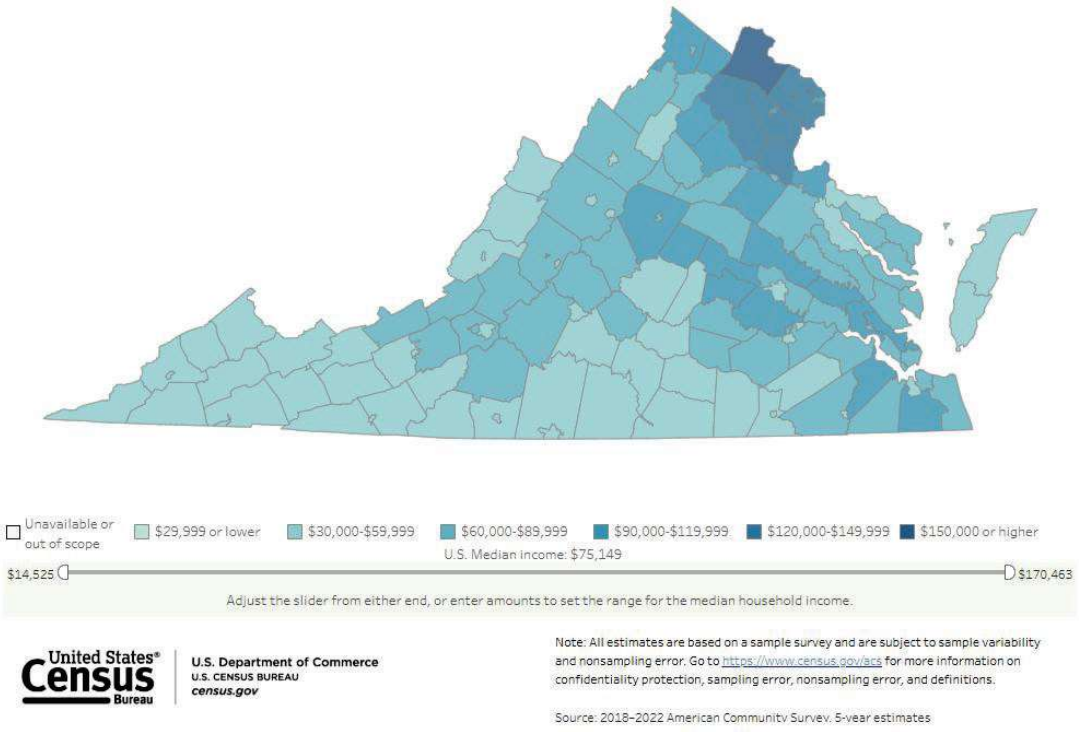
# Median Household Income & Age in Region 3

| Locality | Median Household Income per year[10] | Median Income +/- | Median Age in 2023[11] |
|---|---|---|---|
| Amelia | 63438 | 15114 | 44.8 |
| Brunswick | 52678 | 3117 | 44.4 |
| Buckingham | 59894 | 8713 | 43.7 |
| Charlotte | 51548 | 9194 | 45.2 |
| Cumberland | 56497 | 8052 | 45.2 |
| Halifax | 49145 | 2546 | 46.7 |
| Henry | 43694 | 2612 | 47.9 |
| Lunenburg | 54438 | 7866 | 44.8 |
| Mecklenburg | 51265 | 4199 | 48.8 |
| Nottoway | 62366 | 8677 | 41.2 |
| Patrick | 49180 | 5345 | 51.0 |
| Pittsylvania | 52619 | 3032 | 48.3 |
| Prince Edward | 57304 | 3789 | 32.4 |

[10] Source: U.S. Census Bureau: https://www.census.gov/library/visualizations/interactive/median-household-income.html

[11] Source: Federal Reserve Bank of St. Louis: https://fred.stlouisfed.org/release/tables?eid=329618&rid=430

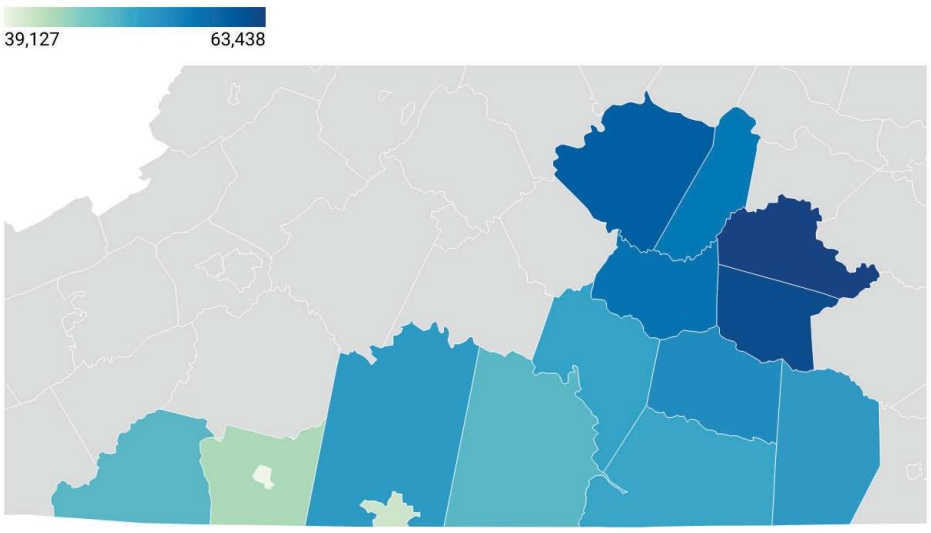
| | | | |
|---|---|---|---|
| City of Danville | 41484 | 3434 | 40.8 |
| City of Martinsville | 39127 | 3628 | 40.2 |
| Virginia Median Household Income[12] | 96490 | | 38.8 |
| U.S. Median Household Income[13] | 75149 | | 38.7 |




[12] Source: Federal Reserve Bank of St. Louis: https://alfred.stlouisfed.org/series?seid=MEHOINUSVAA646N

[13] Source: U.S. Census Bureau: Note in 2024 the Median Age increased to 39.1 https://www.census.gov/library/stories/2025/06/metro-areas-median-age.html#:~:text=Median%20Age%20in%20192%20Metro%20Areas%20Higher%20Than%20National%20Median%20of%2039.1&text=The%20U.S.%20median%20age%20%E2%80%94%20the,Bureau%20population%20estimates%20released%20today.

## Median Household Income




Map: Jen Cox Carne • Source: U.S. Census Bureau • Created with Datawrapper

## Median Age 2009 to 2023

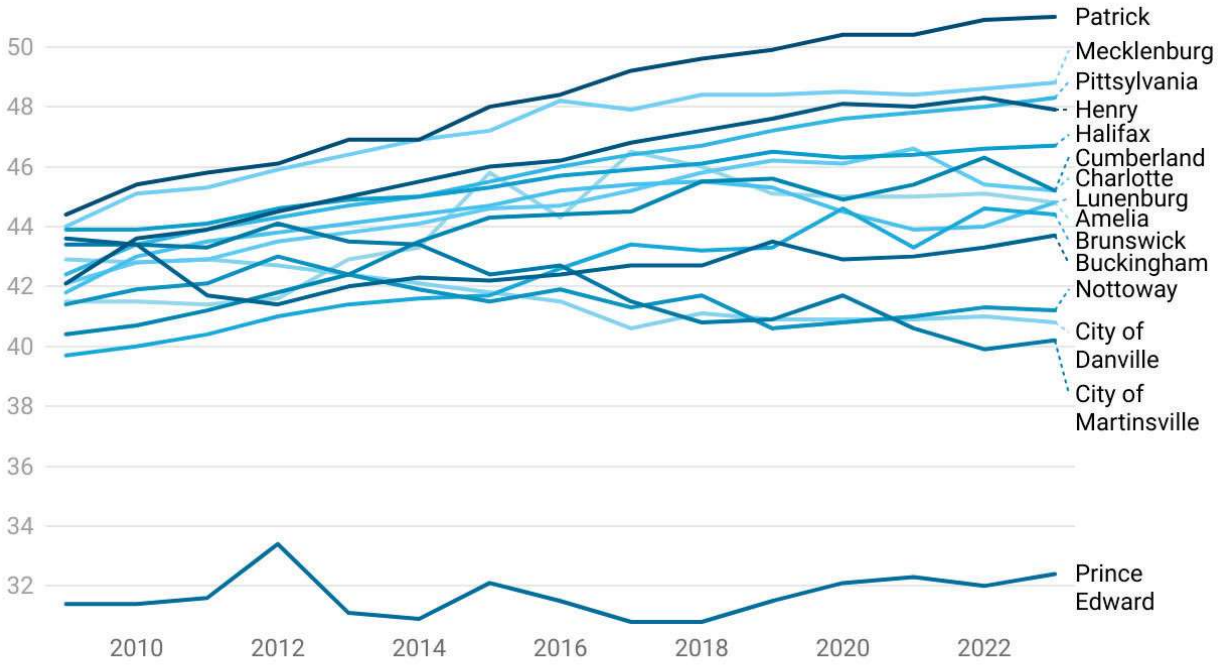


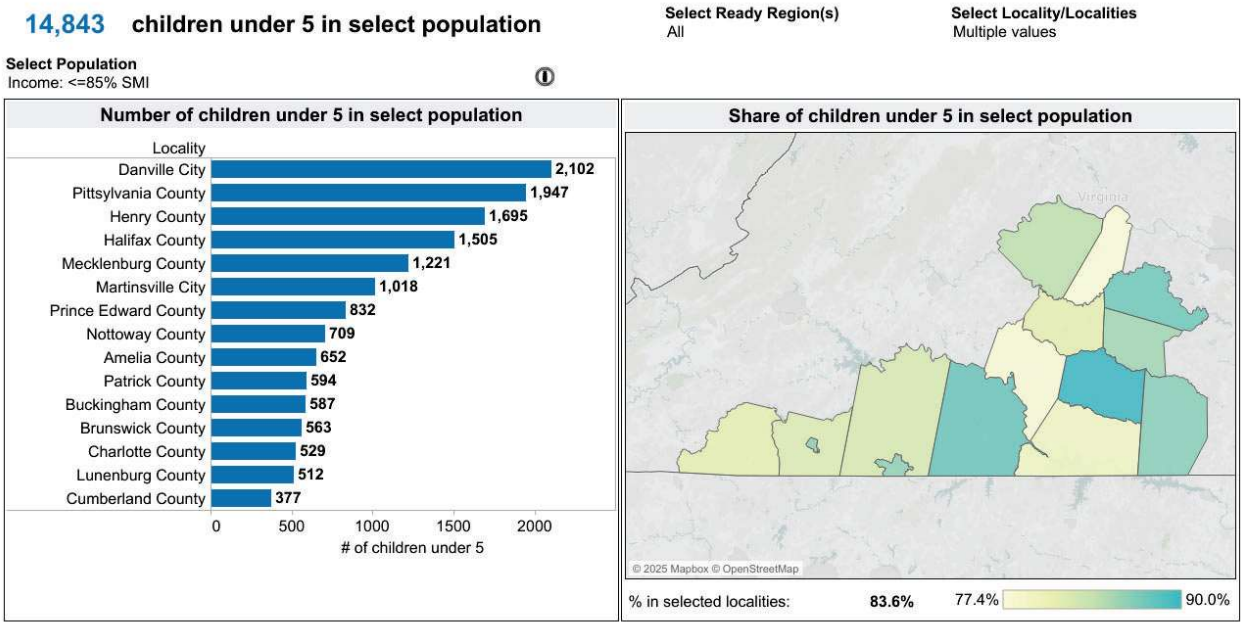

Chart: Jen Cox Carne • Source: Federal Reserve Bank of St. Louis • Created with Datawrapper

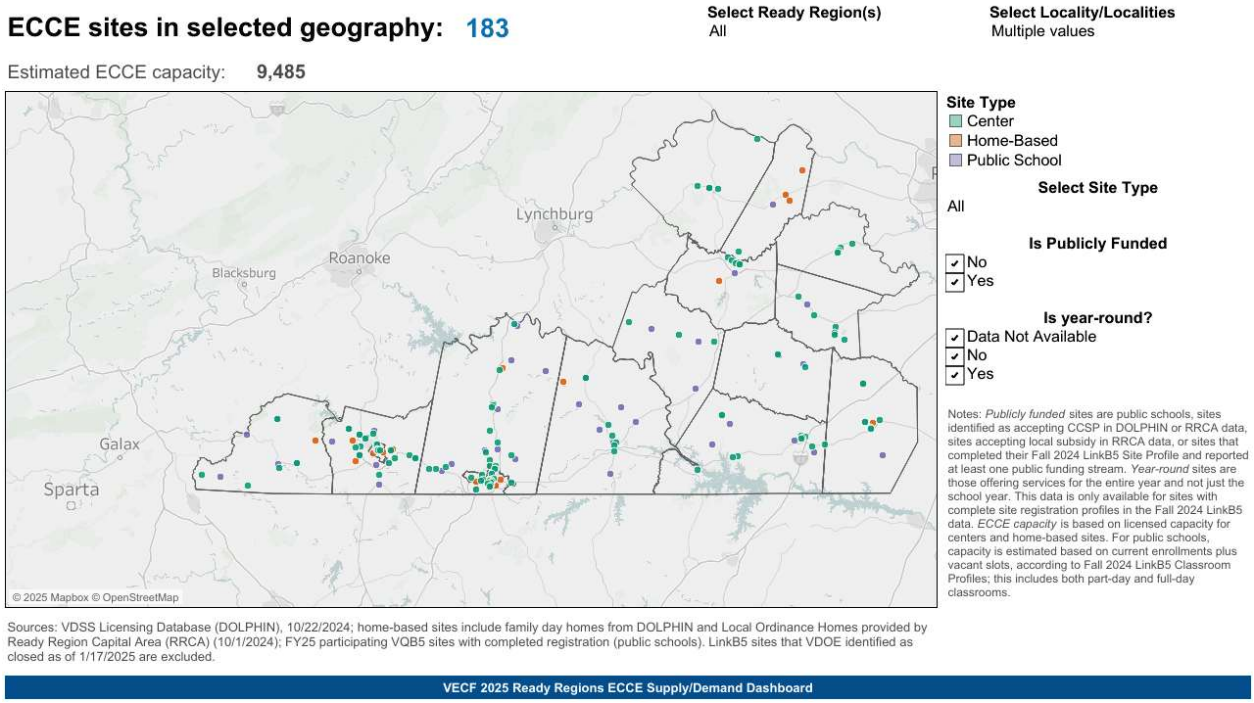
# Childcare Supply & Demand in Region 3

It is well documented that workforce and labor needs are impacted by the availability of childcare in a community. A majority of localities for GO Virginia Region 3 are in the Ready Region Southside: Region 3 based on the Virginia Early Childhood Foundation regions. Buckingham County is in Ready Region Blue Ridge: Region 9 and Henry County, Patrick County and the City of Martinsville are in Ready Region West: Region 2.

| Locality | Children Under 5 household incomes <=85% SMI | Total number of Children Under 5 | Ready Region |
|---|---|---|---|
| Amelia | 652 | 745 | 3 |
| Brunswick | 563 | 652 | 3 |
| Buckingham | 587 | 699 | 9 |
| Charlotte | 529 | 681 | 3 |
| Cumberland | 377 | 487 | 3 |
| Halifax | 1,505 | 1,716 | 3 |
| Henry | 1,695 | 2,071 | 2 |
| Lunenburg | 512 | 569 | 3 |
| Mecklenburg | 1,221 | 1,540 | 3 |
| Nottoway | 709 | 832 | 3 |
| Patrick | 594 | 734 | 2 |
| Pittsylvania | 1,947 | 2,373 | 3 |
| Prince Edward | 832 | 1,027 | 3 |
| City of Danville | 2,102 | 2,444 | 3 |
| City of Martinsville | 1,018 | 1,183 | 2 |
| Region 3 | 14,843 | 17,753 | |

The below charts show the demand for Early Childhood Care and Education (ECCE) in Region 3. Including the number of children under the age of 5 and ECCE sites across Region 3.

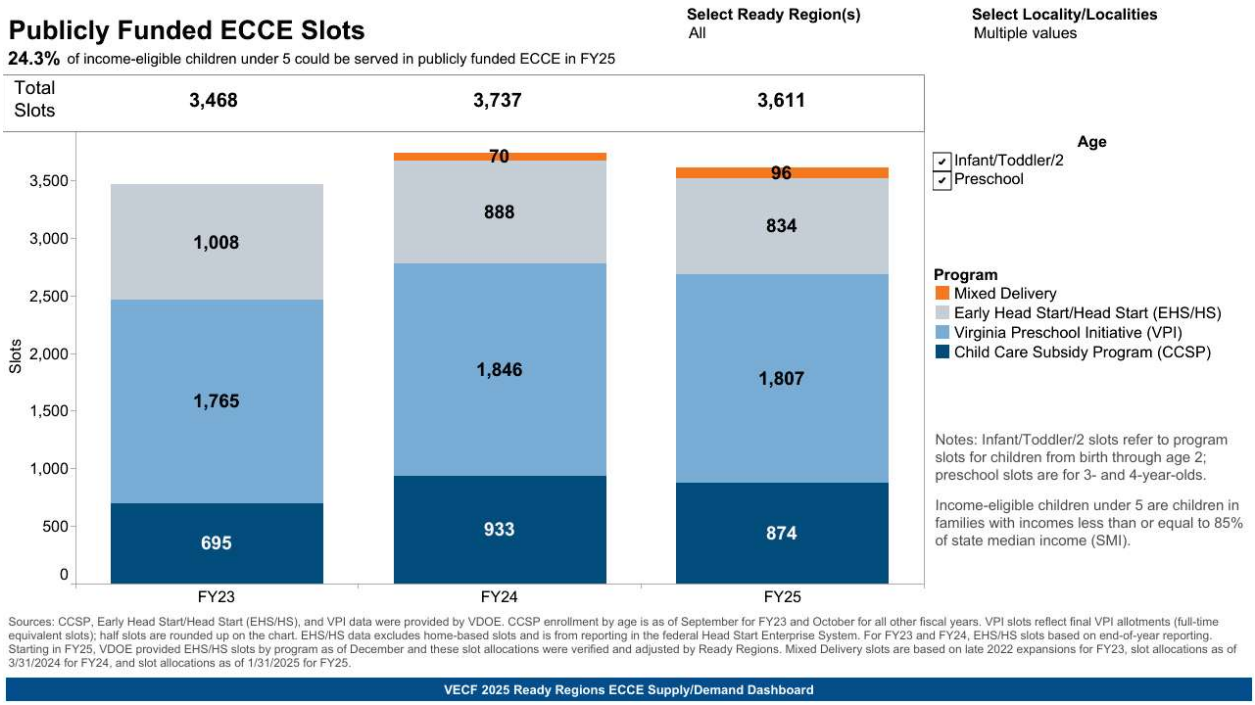


ECCE care is considered affordable if it is **7% or less** of the household income. The median total price of ECCE services for one child (from birth to age 5) is **$49,357**. The minimum household income for the median annual price of ECCE services for one child to be considered affordable (at or below 7% of income) is **$141,019**.[14]

The impact of insufficient care for children under the age of 3 through lost earnings, productivity, and revenue is $146 million per year for Region 3. The impact for the Commonwealth of Virginia exceeds $3 billion per year[15].

The Economic Policy Institute has also created a Family Budget Calculator to measure income needs for a modest standard of living. "Compared with the federal poverty line and the Supplemental Poverty Measure, EPI's family budgets provide a more accurate and complete measure of economic security in America"[16]




[14] Source: Virginia Early Childhood Foundation https://vecf.org/ready-region-southside/

[15] Source: Council for a Strong America: https://www.strongnation.org/articles/2040-the-infant-toddler-child-care-crisis-exacts-a-heavy-economic-toll-nationwide

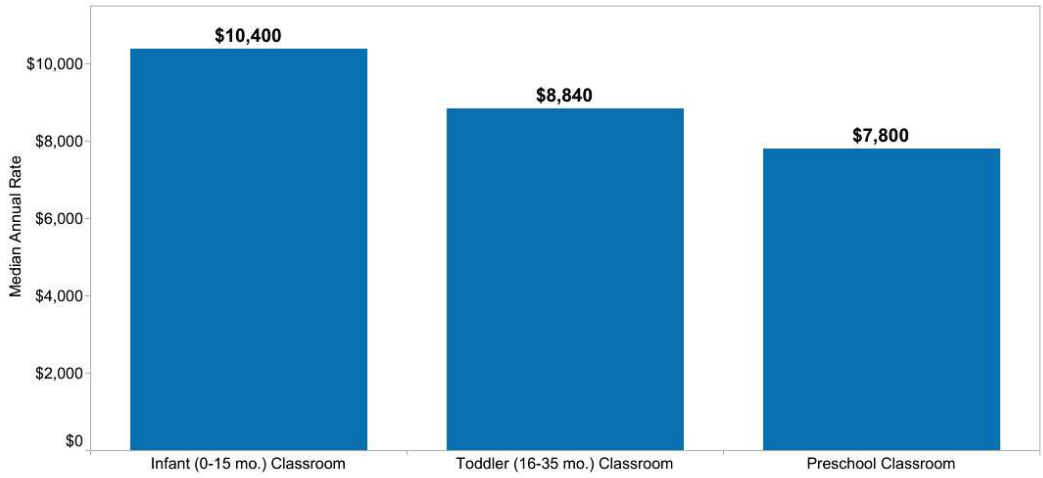
[16] Source: Economic Policy Institute: https://www.epi.org/resources/budget/

## Median Annual Price for ECCE Services, 2024

**Select Ready Region(s)**
All

**Select Locality/Localities**
Multiple values

Sites in selected geography with classroom rate information in LinkB5: 45




**Site Type**
- [x] Center
- [x] Home-Based

Notes: Rates reflect annual price of ECCE services (weekly rates * 52). Classrooms with incomplete profiles or where weekly rates were reported to be less than $10 or $1,000 or more were excluded from the analysis.

**Data is suppressed if there are fewer than 10 classrooms that meet filter criteria. Please adjust filters to display results.**

ECCE care is considered affordable if it is 7% or less of family income. The **affordability threshold** shown underneath the chart reflects the minimum family income for care to be considered affordable.

| Affordabilit.. | $148,571 | $126,286 | $111,429 |
|---|---|---|---|

Source: Fall 2024 VQB5 Classroom Profiles. Classrooms at sites that VDOE identified as closed as of 1/17/2025 are excluded.

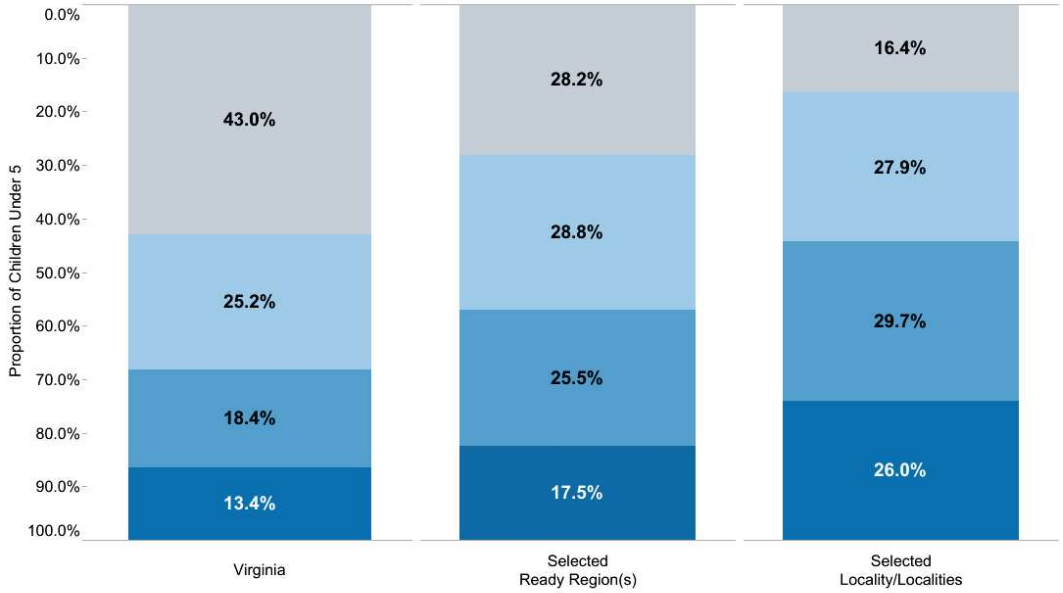
VECF 2025 Ready Regions ECCE Supply/Demand Dashboard

## Children under 5 by family income

**Select Ready Region(s)**
All

**Select Locality/Localities**
Multiple values

% by family income as a proportion of the federal poverty line (FPL) or state median income (SMI)




**Family Income**
- Above 85% SMI
- 200% FPL to 85% SMI
- 100-199% FPL
- 0-99% FPL

**FPL:** Federal Poverty Level
**SMI**: State Median Income

Sources: U.S. Census Bureau Population Estimates, 2023 5-Year American Community Survey, 2023 1-Year American Community Survey microdata. 85% SMI estimates were developed by VECF.

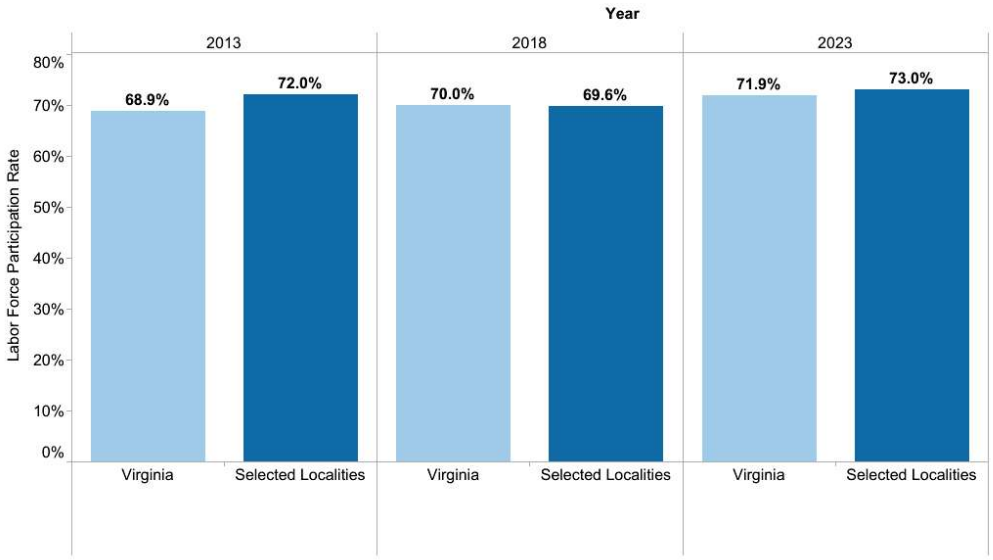
VECF 2025 Ready Regions ECCE Supply/Demand Dashboard

## Maternal Labor Force Participation

**Select Ready Region(s)**
All

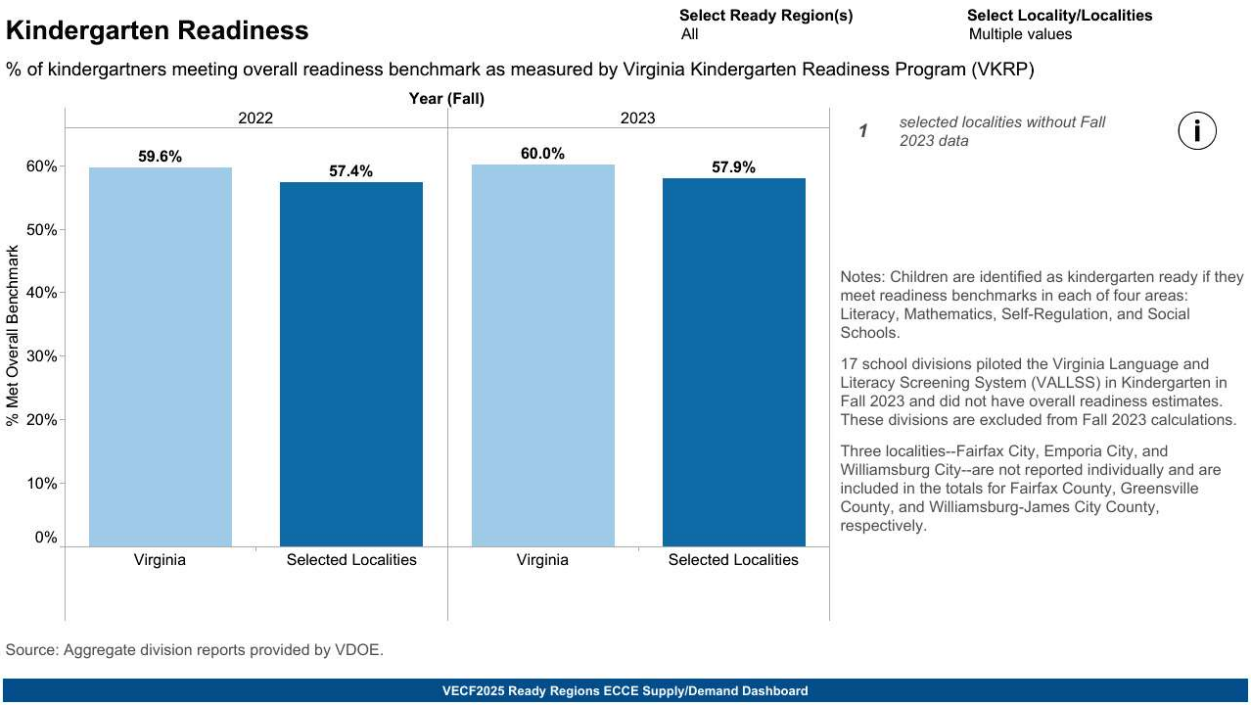
**Select Locality/Localities**
Multiple values

% of women age 20-64 with children <6 in the labor force




Notes: 2013, 2018, and 2023 reflect the end year of the 5-Year American Community Survey samples and correspond to 2009-2013, 2014-2018, and 2019-2023 data collection periods, respectively.

Source: 5-Year American Community Survey

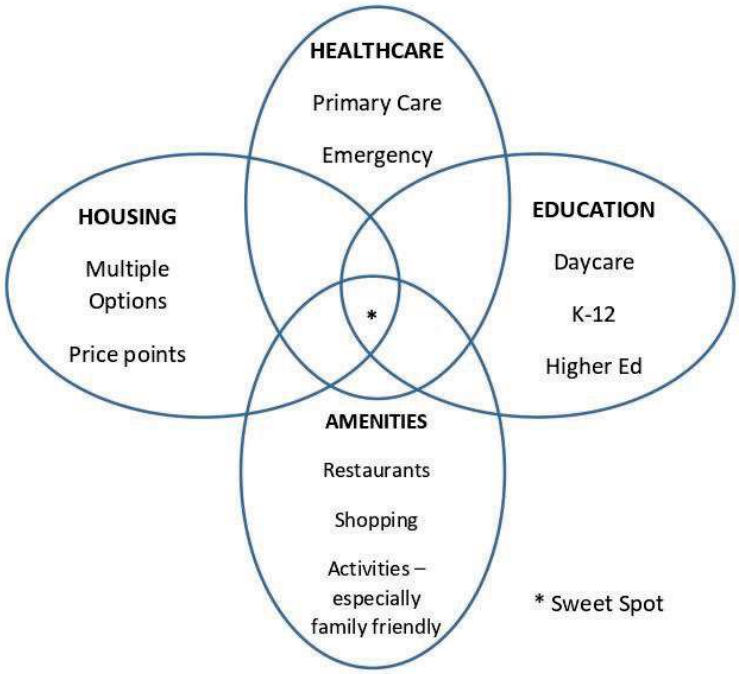



# Employment Growth
# Priority Target Sectors for Region 3

## Region 3 Priority Target Sectors

| Sector | NAICS Code |
|---|---|
| Controlled Environment Agriculture | 111400, 112500, 115000 |
| Logistics and Transportation | 4212 – 4226, 4841 |
| Business Services | 541110 – 561422 |
| Agriculture and Food Processing | 311111 – 312140 |
| Energy, Natural Resources, and Finished Products | 212111 – 337910; 541360 – 541620 |
| Health Care Services | 621991 – 622310 |
| Information Technology and Communications Services | 511210 – 541519 |
| Advanced Manufacturing and Advanced Materials | 313110 – 399999 |

For the 2025 Growth & Diversification Plan a new priority cluster, Logistics & Transportation has been added as a priority sector area. For reference in 2023 Controlled Environmental Agriculture (CEA) was added as a priority target sector.




17

## Controlled Environmental Agriculture[18]

### Controlled Environment Agriculture Market Size

Controlled Environment Agriculture Market size was valued at USD 51.9 billion in 2023 and is estimated to register a CAGR of 14% between 2024 and 2032. The market is experiencing significant growth, due to urbanization, which boosts the demand for locally produced fresh food. With urban centers facing mounting congestion, CEA systems emerge as a sustainable and efficient solution to cater to the escalating food demands of city residents.

Furthermore, agricultural producers in controlled environments face unique challenges and financial risks usually not covered by traditional insurance programs. To address

[17] Image created by Jennifer Cox Carne, 2022
[18] Source: Global Market Insights https://www.gminsights.com/industry-analysis/controlled-environment-agriculture-cea-market

these specific needs and support sustainable farming practices, new tailored insurance solutions are increasingly being developed. For instance, in October 2023, the U.S. Department of Agriculture (USDA) introduced a new crop insurance program specifically designed for agricultural producers working in controlled environments, including greenhouses and indoor farms. This initiative mitigates financial risks for greenhouses and indoor farm owners, thus enhancing the viability of urban-based food production. Further, it boosts confidence and growth in controlled environment agriculture, aligning with increasing urban food needs across the nations.



## Controlled Environment Agriculture Market Trends

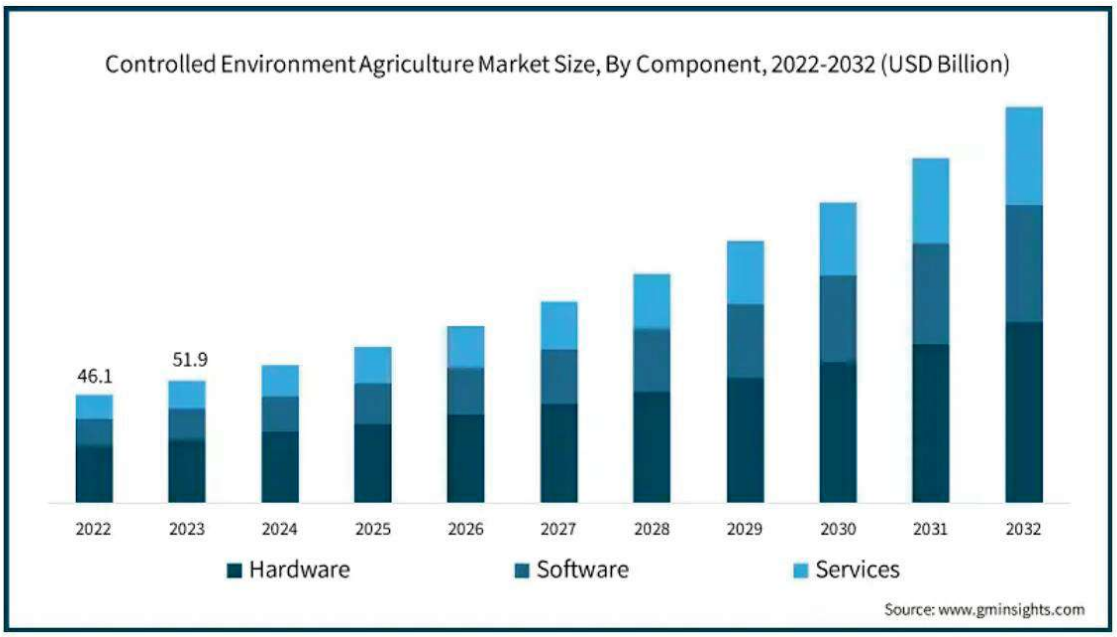
There is a growing focus on integrating artificial intelligence and automation to enhance efficiency and precision in agriculture. Advanced technologies are being employed to optimize climate control, nutrient delivery, and crop monitoring. This shift towards tech-driven solutions aims to improve yields, reduce resource usage, minimize labor, and drive innovation in food production systems.

Moreover, governments are increasingly supporting controlled environment agriculture through grants, subsidies, and research funding. These initiatives aim to promote sustainable farming practices, enhance food security, and stimulate technological innovation. By providing financial incentives and resources, governments encourage the adoption of advanced agricultural methods, driving growth and development in the sector and addressing urban food production challenges.

## Controlled Environment Agriculture Market Analysis

Based on component, the market is divided into hardware, software, and services. In 2023, the hardware segment accounted for a market share of around 52%. Development and adoption of advanced hardware solutions in controlled environments have experienced significant growth in recent years. Innovations include high-efficiency LED lighting systems, automated climate control units, and precision nutrient delivery mechanisms. These technologies enhance the efficiency and effectiveness of crop production by optimizing growing conditions, reducing resource consumption, and improving yield quality. The focus is on creating more sustainable and technologically advanced farming systems.

Additionally, the integration of smart sensors and Internet of Things (IoT) devices is becoming prevalent in controlled environments. These devices monitor environmental parameters in real-time, providing valuable data for optimizing growth conditions and automating processes. This technological advancement helps in fine-tuning operations, enhancing productivity, and ensuring consistent crop quality, further driving innovation in agricultural hardware and fueling market growth.

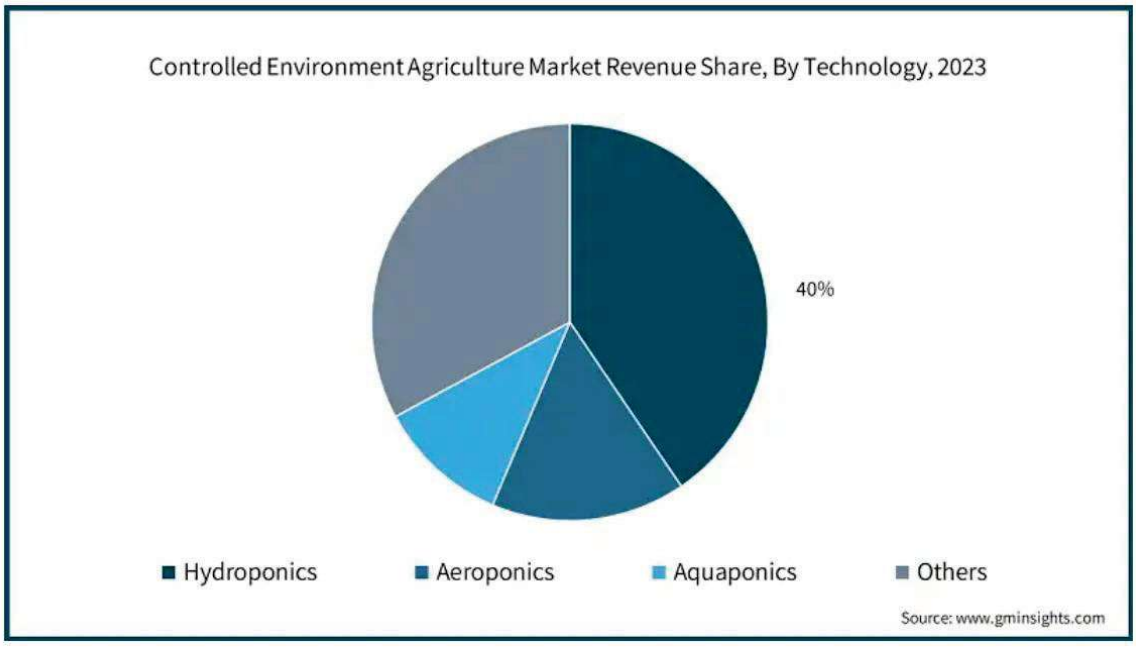



## Controlled Environment Agriculture Market Share

The leading players companies in controlled environment agriculture are focused on technological innovation, with key players developing advanced climate control systems, precision lighting, and automated nutrient delivery solutions. Their competitive edge lies in the ability to offer integrated, scalable systems that enhance efficiency and productivity. Additionally, strong R&D investments and strategic partnerships are crucial for maintaining leadership and driving advancements in agricultural technology.

Further, firms are emphasizing sustainability and resource optimization, leveraging eco-friendly technologies and energy-efficient systems to attract environmentally conscious customers. Moreover, competitors are differentiating themselves by offering tailored

solutions that address specific regional needs and regulations. Effective customer support and comprehensive service packages further enhance their market position, addressing the diverse requirements of various agricultural operations.



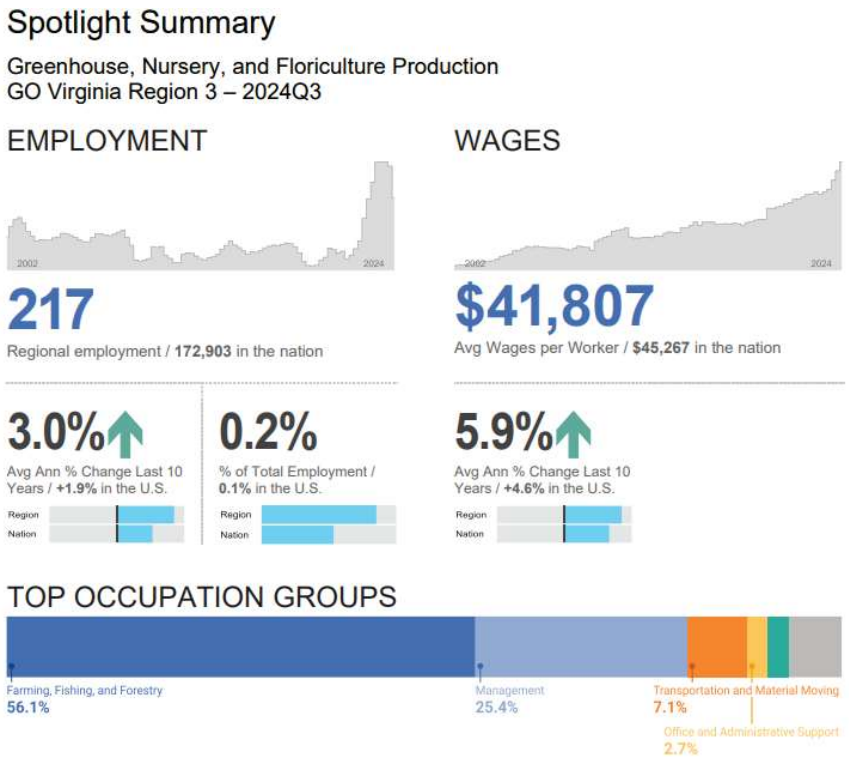

## Controlled Environment Agriculture Market Companies

The major players operating in the controlled environment agriculture industry are:

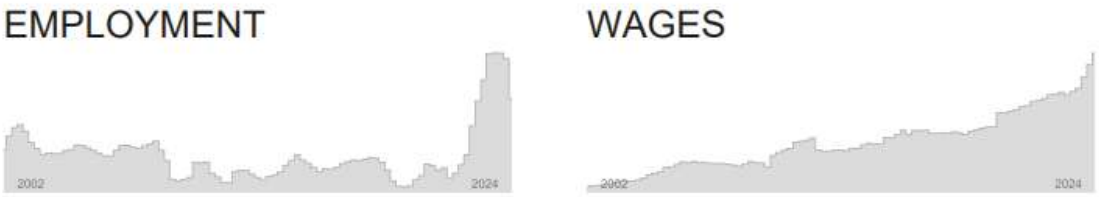
- AeroFarms
- Plenty
- Illumitex
- BrightFarms
- Agritecture
- AppHarvest
- Gotham Greens
- Bowery Farming

- Heliospectra
- Freight Farms

## Controlled Environmental Agriculture in Region 3[19]




### Industry Snapshot



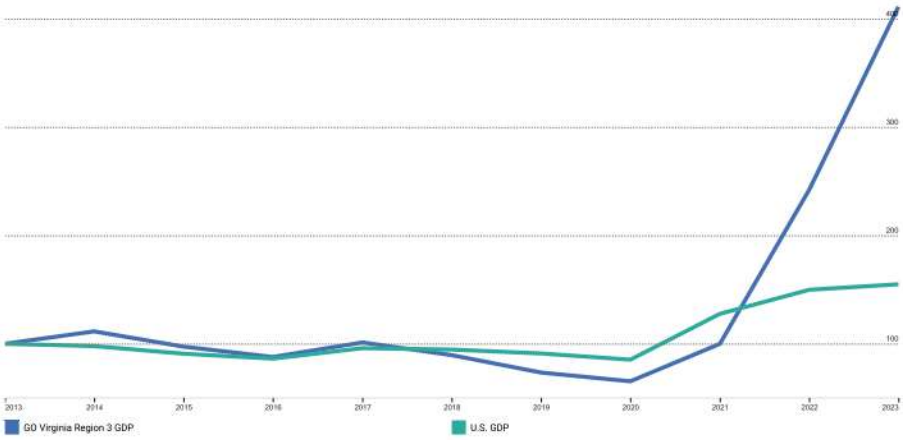

| 6-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| Other Food Crops Grown Under Cover | 86 | $46,266 | 2.87 | | 11 | -0.6% |
| Nursery and Tree Production | 73 | $26,200 | 1.11 | | 9 | -0.3% |
| Floriculture Production | 57 | $38,227 | 1.75 | | 7 | -0.1% |
| **Greenhouse, Nursery, and Floriculture Production** | **217** | **$41,807** | **1.59** | | **27** | **-0.4%** |

[19] Source: JobsEQ based off NAICS code 1114

## GDP & Productivity

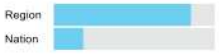
In 2023, Greenhouse, Nursery, and Floriculture Production produced $44.1 million in GDP for the GO Virginia Region 3.

GDP: Indexed 2013 = 100




**0.3 %**

Industry Share of Total GDP / **<0.1%** in the nation




**15.2 %**

Avg Ann % Change Last 10 Yrs / **4.5 %** in the nation

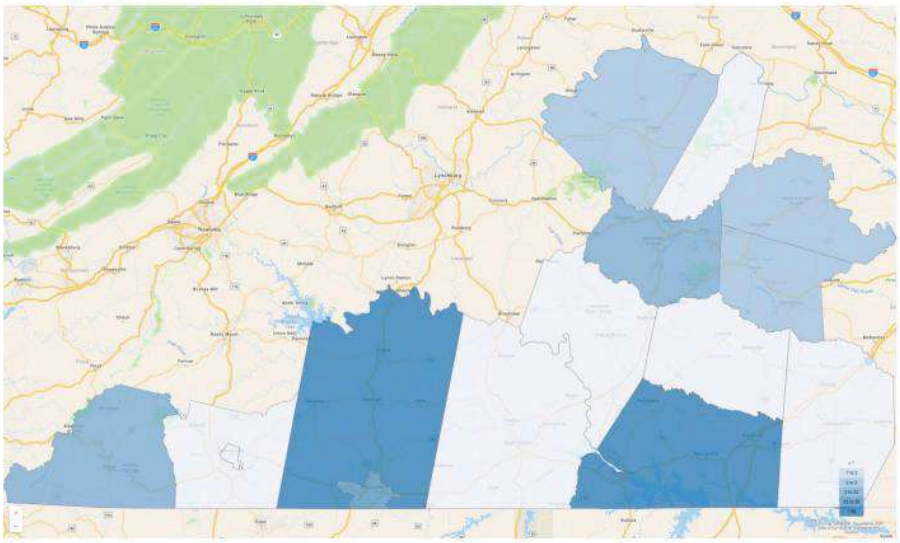



**$190k**

Output per Worker / **$268k** in the nation



## Geographic Distribution



| Region | Empl |
|---|---|
| Pittsylvania County, Virginia | 87 |
| Mecklenburg County, Virginia | 56 |
| Danville City, Virginia | 32 |
| Patrick County, Virginia | 30 |

| Region | Empl |
|---|---|
| Prince Edward County, Virginia | 4 |
| Amelia County, Virginia | 3 |
| Nottoway County, Virginia | 3 |
| Buckingham County, Virginia | 2 |

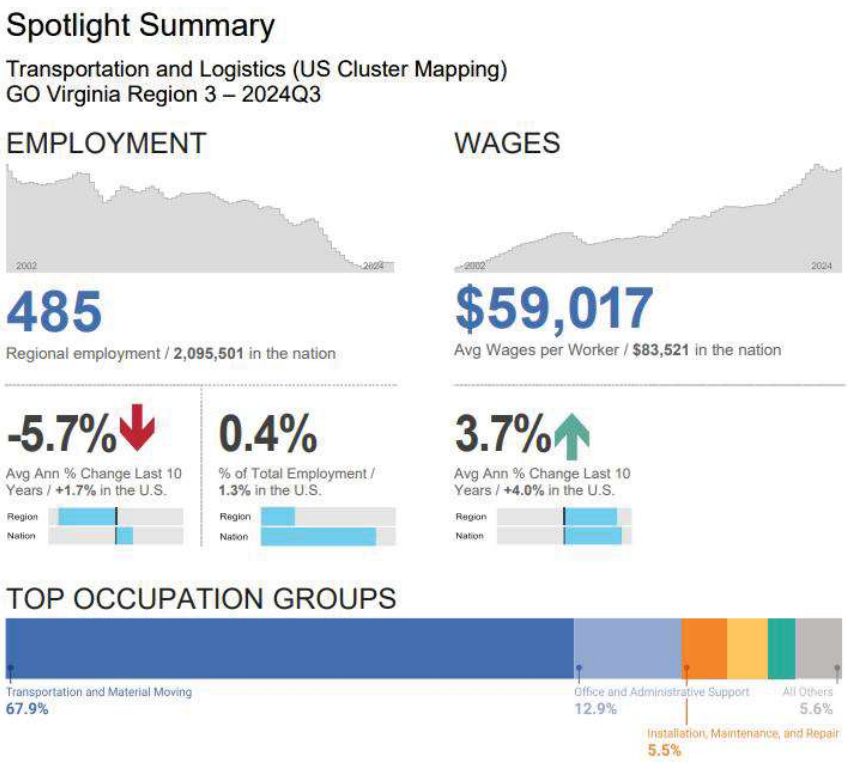
Source: JobsEQ®

## Logistics & Transportation in Region 3[20]

### Logistics & Transportation Summary

The region's central location in Virginia and proximity to major interstates, rail, and ports makes logistics and transportation a natural strength. Warehousing, freight handling, and distribution facilities are expanding to serve e-commerce and advanced supply chains. This sector is critical for linking manufacturers, farmers, and businesses to national and international markets. Investment here enhances regional competitiveness and supports growth across nearly every other industry.

### Logistics & Transportation Spotlight Summary




[20] Source: JobsEQ Transportation & Logistics Cluster Mapping

# Industry Snapshot

## EMPLOYMENT

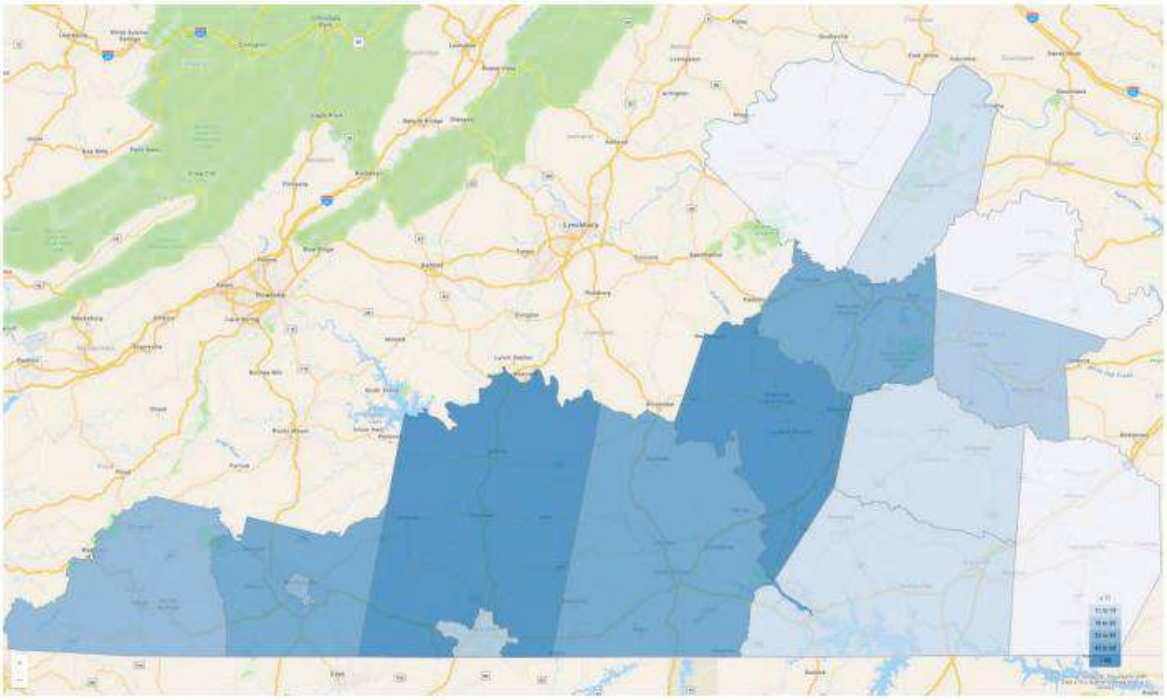



## WAGES




| 6-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| General Freight Trucking, Long-Distance, Truckload | 271 | $61,694 | 0.57 | | 26 | -0.4% |
| All Other Support Activities for Transportation | 101 | $58,689 | 6.56 | | 11 | -0.4% |
| Specialized Freight (except Used Goods) Trucking, Long-Distance | 29 | $51,276 | 0.27 | | 3 | -0.2% |
| Other Support Activities for Air Transportation | 23 | $47,008 | 0.20 | | 2 | -0.1% |
| Freight Transportation Arrangement | 21 | $50,550 | 0.10 | | 2 | 0.2% |
| Nonscheduled Chartered Freight Air Transportation | 13 | $102,042 | 1.56 | | 1 | -0.1% |
| Other Support Activities for Road Transportation | 12 | $39,304 | 0.26 | | 1 | 0.0% |
| Other Airport Operations | 10 | $35,210 | 0.08 | | 1 | -0.3% |
| Nonscheduled Chartered Passenger Air Transportation | 1 | $21,681 | 0.02 | | 0 | 0.2% |
| Charter Bus Industry | 1 | $33,771 | 0.07 | | 0 | 0.2% |
| Remaining Component Industries | 2 | $31,538 | 0.03 | | 0 | -0.3% |
| **Transportation and Logistics (US Cluster Mapping)** | **485** | **$59,017** | **0.29** | | **49** | **-0.3%** |

# Geographic Distribution



| Region | Empl |
|---|---|
| Pittsylvania County, Virginia | 76 |
| Charlotte County, Virginia | 69 |
| Henry County, Virginia | 57 |
| Halifax County, Virginia | 46 |
| Prince Edward County, Virginia | 46 |

| Region | Empl |
|---|---|
| Martinsville City, Virginia | 41 |
| Patrick County, Virginia | 35 |
| Danville City, Virginia | 33 |
| Nottoway County, Virginia | 18 |
| Mecklenburg County, Virginia | 15 |
| All Others | 49 |

Source: JobsEQ®

## Business Services in Region 3[21]

### Business Services Summary

Business and professional services provide the backbone for entrepreneurship, innovation, and business expansion. In Region 3, this includes legal, accounting, administrative, technical, and customer support services that are increasingly in demand. As industries modernize, these services are essential to help firms scale and remain competitive. Expanding this sector will both attract outside investment and provide vital support to homegrown businesses.

### Business Management Consulting Service Market Size[22]

The business management consulting service market size was valued at USD 161.2 billion in 2024 and is projected to grow at a CAGR of 5% between 2025 and 2034. With the advent of globalization and the growth of technology, accompanied by increased regulations, companies now struggle to acquire appropriate information to aid operations; these are referred to as knowledge gaps. Business consultants apply modern AI, cloud computing, and cybersecurity frameworks along with powerful implementation strategies to international technologies and legal cross-border trade laws in order to comply with regulations and fill these gaps.

## Supply Chain: Top Suppliers

As of 2024Q3, Professional, Scientific, and Technical Services in the GO Virginia Region 3 are estimated to make $240.6 million in annual purchases from suppliers in the United States with about 48% or $114.9 million of these purchases being made from businesses located in the GO Virginia Region 3.

| 6-digit Supplier Industries | Purchases from In-Region ($M) | Purchases from Out-of-Region ($M) |
|---|---|---|
| Pharmaceutical Preparation Manufacturing | $2.1 | $9.7 |
| Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services | $4.1 | $2.9 |
| Residential Property Managers | $4.7 | $2.3 |
| Wired Telecommunications Carriers | $1.4 | $5.6 |
| Corporate, Subsidiary, and Regional Managing Offices | $5.7 | $1.2 |
| Remaining Supplier Industries | $96.9 | $104.0 |
| Total | $114.9 | $125.7 |

[21] Source: JobsEQ NAICS Code 54 (Professional, Scientific, and Technical Services)
[22] Source: Global Market Insights: https://www.gminsights.com/industry-analysis/business-management-consulting-services-market

# Spotlight Summary

Professional, Scientific, and Technical Services
GO Virginia Region 3 – 2024Q3

## EMPLOYMENT

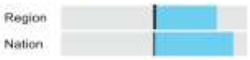



**3,621**

Regional employment / **12,088,034** in the nation

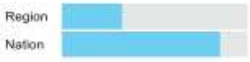
**2.0%** ↑

Avg Ann % Change Last 10 Years / **+2.5%** in the U.S.




**2.8%**

% of Total Employment / **7.3%** in the U.S.




## WAGES




**$61,308**

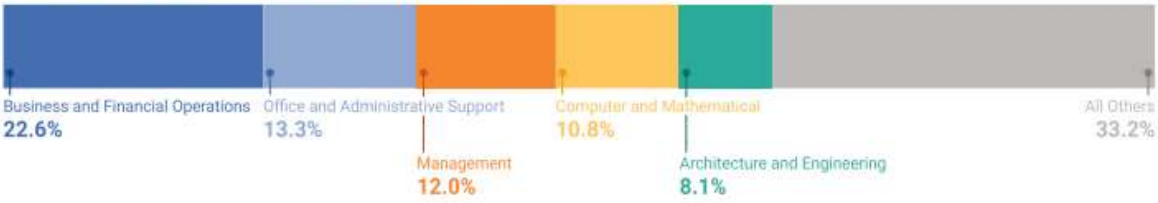
Avg Wages per Worker / **$120,502** in the nation

**4.5%** ↑

Avg Ann % Change Last 10 Years / **+3.9%** in the U.S.




## TOP OCCUPATION GROUPS



# Industry Snapshot

## EMPLOYMENT

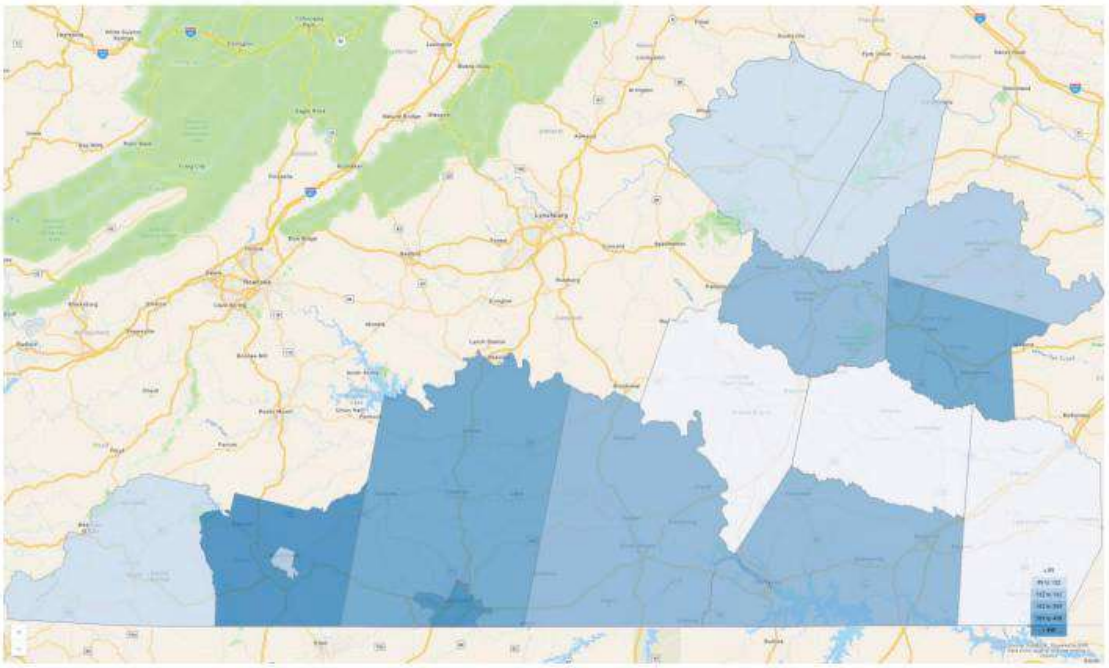



## WAGES




| 6-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| Veterinary Services | 466 | $38,351 | 1.25 | | 60 | 1.2% |
| All Other Professional, Scientific, and Technical Services | 451 | $51,986 | 1.17 | | 39 | 0.4% |
| Engineering Services | 387 | $76,682 | 0.39 | | 28 | -0.2% |
| Offices of Lawyers | 346 | $63,021 | 0.37 | | 24 | -0.5% |
| Marketing Consulting Services | 212 | $60,931 | 0.68 | | 18 | 0.3% |
| Other Management Consulting Services | 189 | $69,045 | 1.64 | | 17 | 0.6% |
| Offices of Certified Public Accountants | 164 | $68,848 | 0.38 | | 14 | -0.5% |
| Other Accounting Services | 144 | $32,899 | 0.50 | | 12 | -0.5% |
| Administrative Management and General Management Consulting Services | 137 | $77,373 | 0.18 | | 12 | 0.4% |
| Computer Systems Design Services | 116 | $82,297 | 0.12 | | 9 | 1.0% |
| Remaining Component Industries | 1,005 | $48,608 | 0.38 | | 82 | -0.1% |
| **Professional, Scientific, and Technical Services** | **3,621** | **$61,308** | **0.38** | | **301** | **0.3%** |

# Geographic Distribution



| Region | Empl |
|---|---|
| Danville City, Virginia | 781 |
| Henry County, Virginia | 498 |
| Pittsylvania County, Virginia | 373 |
| Nottoway County, Virginia | 370 |
| Mecklenburg County, Virginia | 354 |

| Region | Empl |
|---|---|
| Halifax County, Virginia | 283 |
| Prince Edward County, Virginia | 163 |
| Martinsville City, Virginia | 162 |
| Amelia County, Virginia | 133 |
| Cumberland County, Virginia | 114 |
| All Others | 391 |

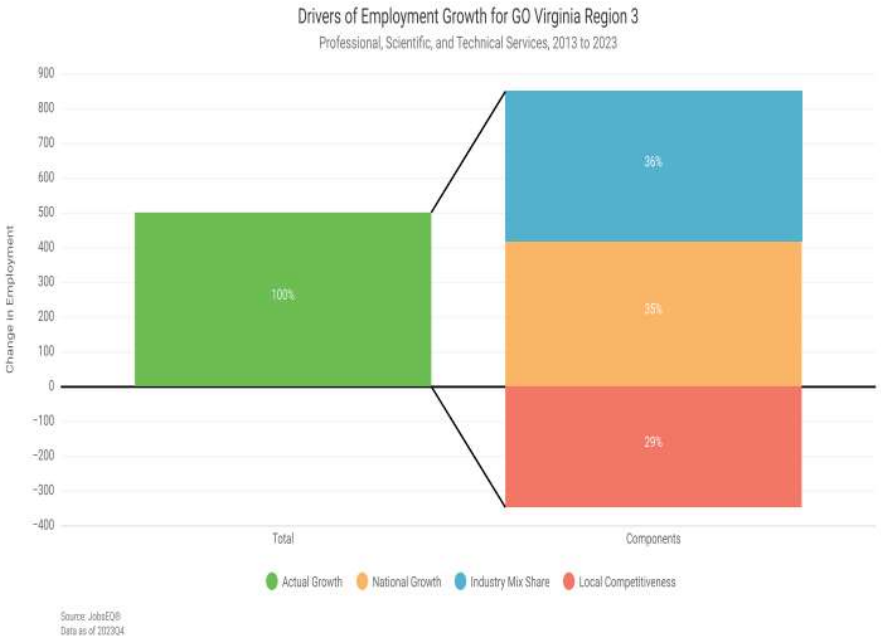
Source: JobsEQ®




Source: JobsEQ®
Data as of 2023Q4

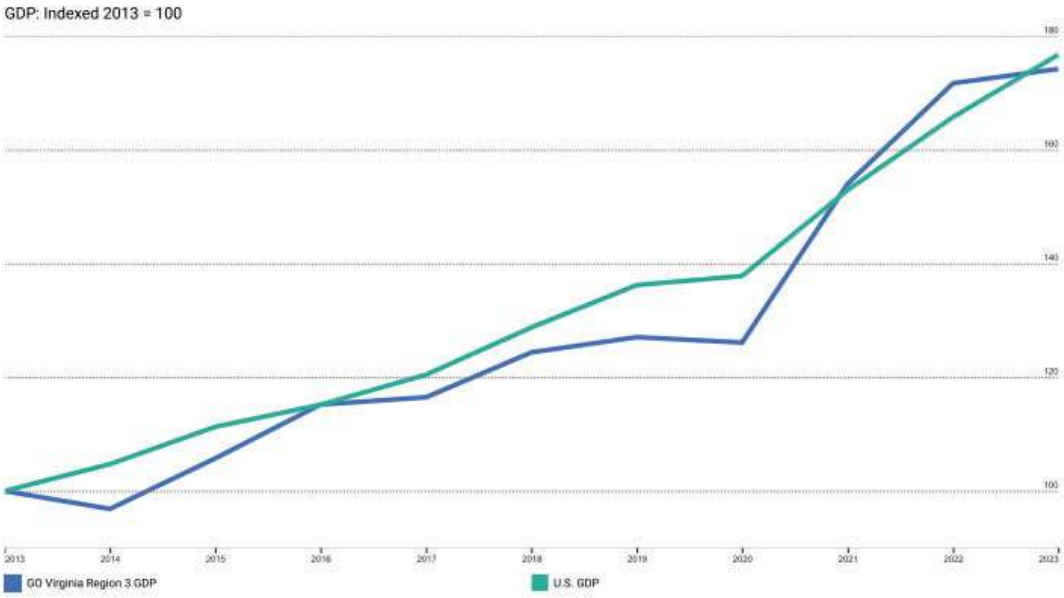
## Drivers of Employment Growth

Over the ten years ending 2023, employment in Professional, Scientific, and Technical Services for the GO Virginia Region 3 added 500 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a loss of 348 jobs—meaning this industry was less competitive than its national counterpart during this period.



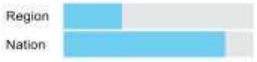
## GDP & Productivity

In 2023, Professional, Scientific, and Technical Services produced $0.4 billion in GDP for the GO Virginia Region 3.




**2.9 %**

Industry Share of Total GDP / **7.9 %** in the nation



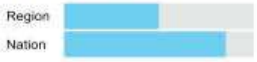

**5.7 %**

Avg Ann % Change Last 10 Yrs / **5.9 %** in the nation




**$181k**

Output per Worker / **$309k** in the nation




## Supply Chain: Top Suppliers

As of 2024Q3, Professional, Scientific, and Technical Services in the GO Virginia Region 3 are estimated to make $240.6 million in annual purchases from suppliers in the United States with about 48% or $114.9 million of these purchases being made from businesses located in the GO Virginia Region 3.

| 6-digit Supplier Industries | Purchases from In-Region ($M) | Purchases from Out-of-Region ($M) |
|---|---|---|
| Pharmaceutical Preparation Manufacturing | $2.1 | $9.7 |
| Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services | $4.1 | $2.9 |
| Residential Property Managers | $4.7 | $2.3 |
| Wired Telecommunications Carriers | $1.4 | $5.6 |
| Corporate, Subsidiary, and Regional Managing Offices | $5.7 | $1.2 |
| Remaining Supplier Industries | $96.9 | $104.0 |
| Total | $114.9 | $125.7 |

## Agriculture & Food Processing in Region 3[23]

# Agriculture & Food Processing Summary

Agriculture has long been a foundation of Region 3's economy, and food processing provides added value by transforming raw products into consumer-ready goods. This sector includes beverage production, specialty foods, and large-scale processing facilities. By developing stronger regional supply chains and supporting innovation in processing, packaging, and distribution, the region can capture more value from its agricultural base. Growth in this area also aligns with consumer demand for fresh, local, and specialty food products.

# Agriculture Gateway Market Size

Agriculture Gateway Market was valued at USD 2.4 billion in 2023 and is estimated to register a CAGR of over 10.4% between 2024 and 2032. The growth of the market is driven by multiple factors such as increasing demand for precision agriculture, government initiatives supporting the technology adoption in agriculture, and investments by companies and different end-users. The need to optimize agricultural processes and enhance productivity has led to the widespread adoption of precision agriculture. This involves the use of AI technologies, drones, sensors, and IoT devices to monitor and manage agricultural operations precisely. These technologies enable farmers to make data-informed decisions, improving resource allocation and crop yields while reducing environmental impacts. For instance, in January 2024, Advantech expanded its IoT solutions for smart agriculture, integrating AI-driven analytics to enhance farm management efficiency[24].

[23] Source: JobsEQ NAICS Code 311 (Food Manufacturing)
[24] Source: Global Market Insights: https://www.gminsights.com/industry-analysis/agriculture-gateway-market

Food Manufacturing
GO Virginia Region 3 – 2024Q3

## EMPLOYMENT

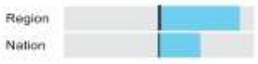



**1,489**

Regional employment / **1,801,200** in the nation

**3.3%** ↑

Avg Ann % Change Last 10 Years / **+1.7%** in the US




**1.1%**

% of Total Employment / **1.1%** in the US




## WAGES




**$47,673**

Avg Wages per Worker / **$59,873** in the nation

**0.2%** ↑

Avg Ann % Change Last 10 Years / **+3.4%** in the US




# Industry Snapshot

## EMPLOYMENT

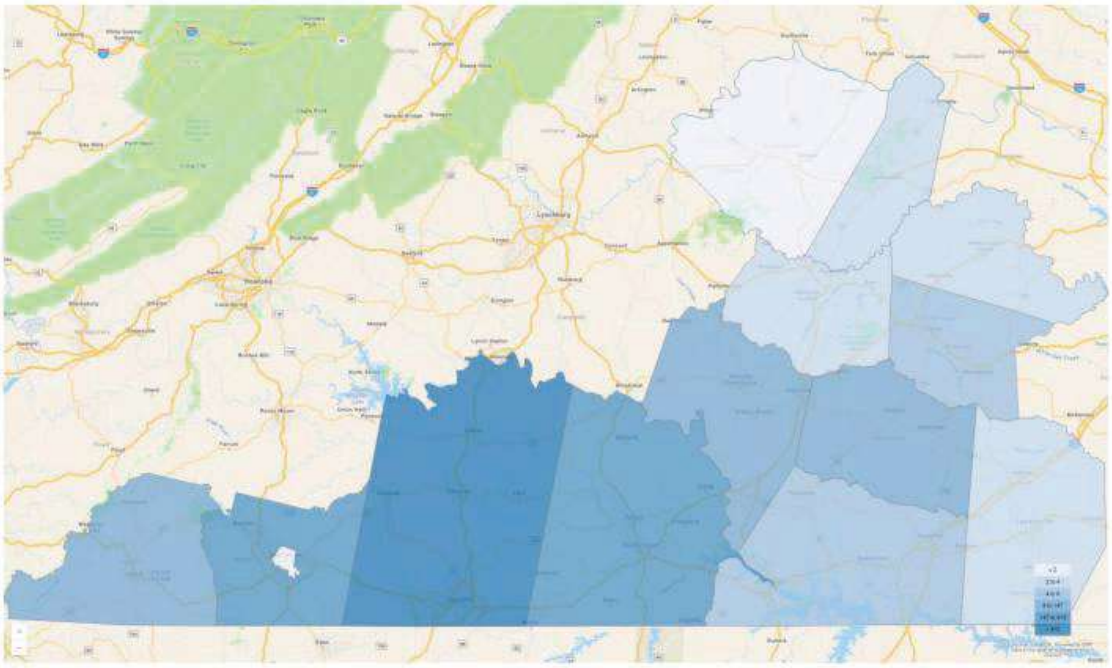



## WAGES




| 3-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| **Food Manufacturing** | **1,489** | **$47,673** | **1.05** | | **177** | **0.1%** |

# Geographic Distribution



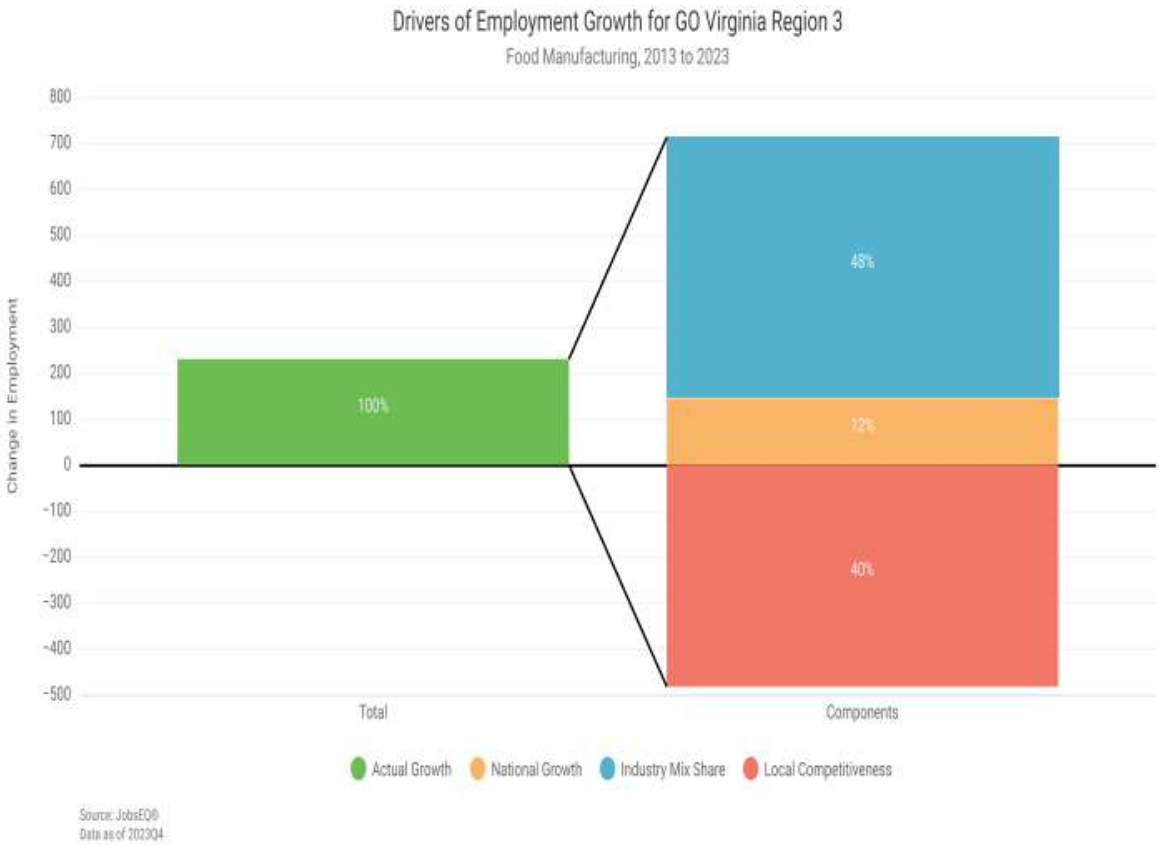
| Region | Empl |
|---|---|
| Danville City, Virginia | 536 |
| Pittsylvania County, Virginia | 416 |
| Henry County, Virginia | 218 |
| Halifax County, Virginia | 148 |
| Patrick County, Virginia | 106 |

| Region | Empl |
|---|---|
| Charlotte County, Virginia | 35 |
| Lunenburg County, Virginia | 9 |
| Nottoway County, Virginia | 5 |
| Mecklenburg County, Virginia | 4 |
| Cumberland County, Virginia | 3 |
| All Others | 9 |

Source: JobsEQ®

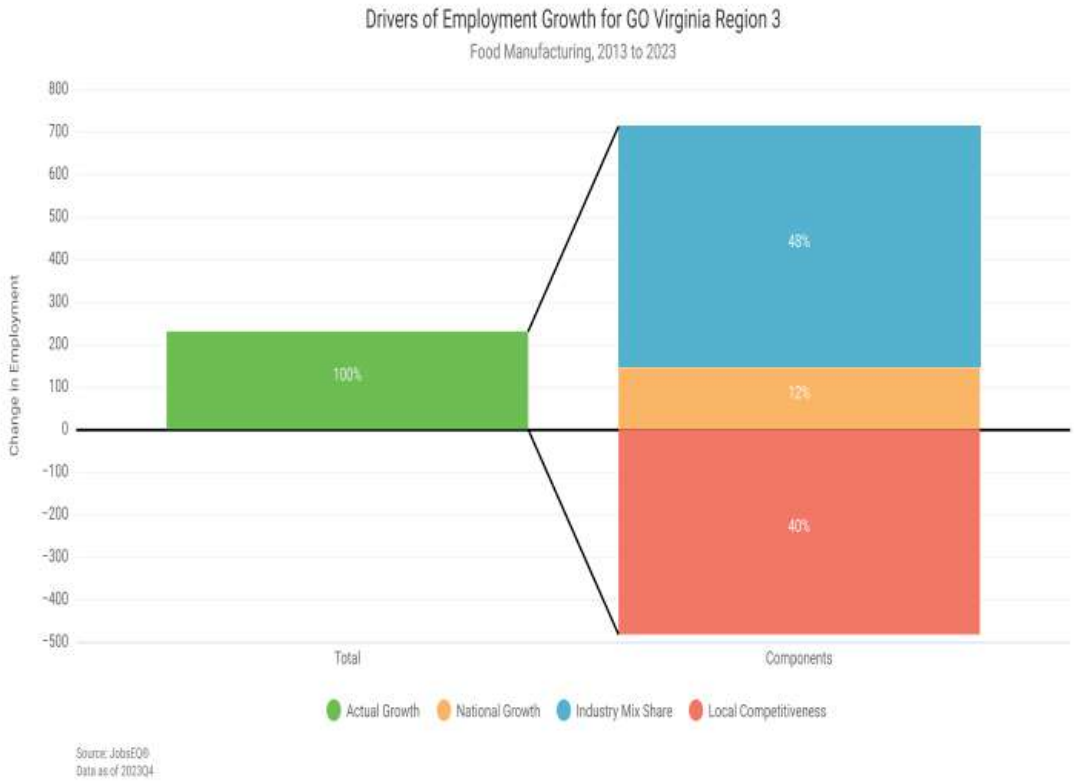
# Drivers of Employment Growth

Over the ten years ending 2023, employment in Food Manufacturing for the GO Virginia Region 3 added 230 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a loss of 482 jobs—meaning this industry was less competitive than its national counterpart during this period.



# Drivers of Employment Growth

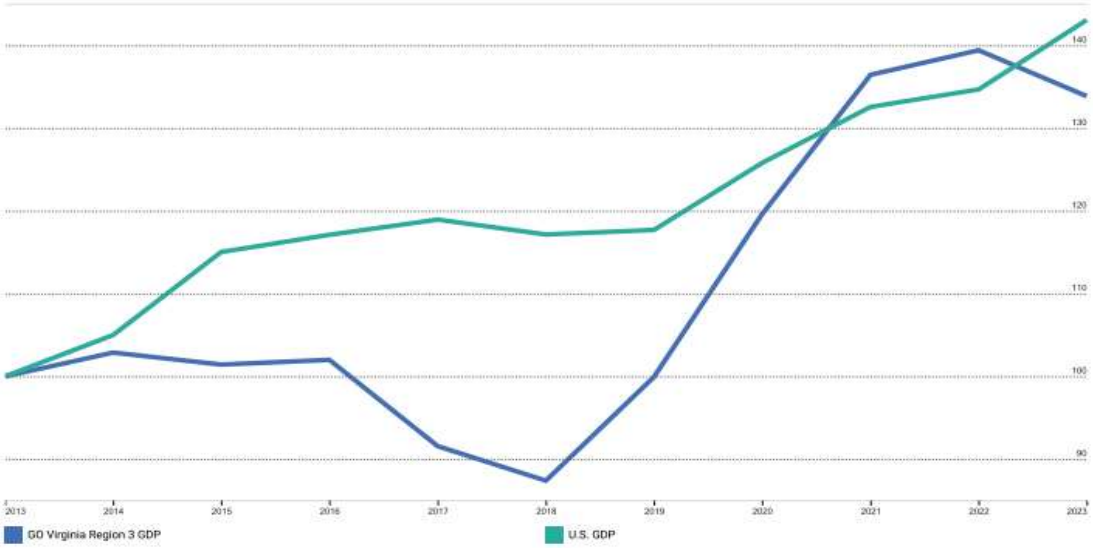
Over the ten years ending 2023, employment in Food Manufacturing for the GO Virginia Region 3 added 230 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a loss of 482 jobs—meaning this industry was less competitive than its national counterpart during this period.



# GDP & Productivity

In 2023, Food Manufacturing produced $0.5 billion in GDP for the GO Virginia Region 3.

GDP: Indexed 2013 = 100



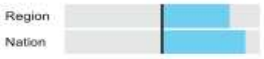

**3.5 %**

Industry Share of Total GDP / **1.0 %** in the nation




**3.0 %**

Avg Ann % Change Last 10 Yrs / **3.6 %** in the nation




**$547k**

Output per Worker / **$712k** in the nation




# Supply Chain: Top Suppliers

As of 2024Q3, Food Manufacturing in the GO Virginia Region 3 are estimated to make $591.2 million in annual purchases from suppliers in the United States with about 33% or $192.5 million of these purchases being made from businesses located in the GO Virginia Region 3.

| 3-digit Supplier Industries | Purchases from In-Region ($M) | Purchases from Out-of-Region ($M) |
|---|---|---|
| Food Manufacturing | $51.8 | $103.3 |
| Animal Production and Aquaculture | $52.7 | $13.0 |
| Crop Production | $25.2 | $38.0 |
| Chemical Manufacturing | $3.4 | $30.8 |
| Professional, Scientific, and Technical Services | $3.3 | $22.5 |
| Remaining Supplier Industries | $56.3 | $191.0 |
| Total | $192.5 | $398.6 |

## Energy, Natural Resources, and Finished Products[25]

# Energy, Natural Resources, and Finished Products Summary

The region is rich in natural resources and has a history of industries such as forestry, mining, and furniture-making. Today, these traditional strengths are evolving with new opportunities in sustainable energy, wood products, environmental services, and advanced resource management. By leveraging natural assets alongside advanced design and production capabilities, Region 3 can compete in both domestic and global markets. Region 3 has a number of natural gas transmission lines which can serve as an important asset for sectors such as Information Technology, Controlled Environmental Agriculture, and Advanced Manufacturing. This sector is also critical to building a diversified and resilient regional economy.

## Energy as a Service Market Size[26]

The global energy as a service market was valued at USD 126 billion in 2024 and is estimated to grow at a CAGR of 8.7% from 2025 to 2034. Growing shift toward sustainability, supported by favorable government incentives and increasing energy demand will support the service growth. The Indian government earmarked USD 4.3 billion in its 2023-24 budget, to drive energy transition goals and target net-zero carbon emissions by 2070.

The rising need for decentralized and resilient energy solutions coupled with the adoption of subscription-based solutions for energy services will enhance the market dynamics. Additionally, factors including long-term cost savings and improved operational efficiency will contribute to energy as a service market expansion.

[25] Source: JobsEQ NAICS Code 321 (Wood Product Manufacturing)
[26] Source: Global Market Insights: https://www.gminsights.com/industry-analysis/energy-as-a-service-eaas-market

Wood Product Manufacturing
GO Virginia Region 3 – 2024Q3

## EMPLOYMENT




**3,171**

Regional employment / **437,604** in the nation

**0.2%** ↑

Avg Ann % Change Last 10 Years / **+1.2%** in the US




**2.4%**

% of Total Employment / **0.3%** in the US




## WAGES




**$53,176**

Avg Wages per Worker / **$60,833** in the nation

**3.7%** ↑

Avg Ann % Change Last 10 Years / **+4.4%** in the US




## TOP OCCUPATION GROUPS



# Industry Snapshot

## EMPLOYMENT




## WAGES




| 3-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| **Wood Product Manufacturing** | **3,171** | **$53,176** | **9.19** | | **310** | **-0.8%** |

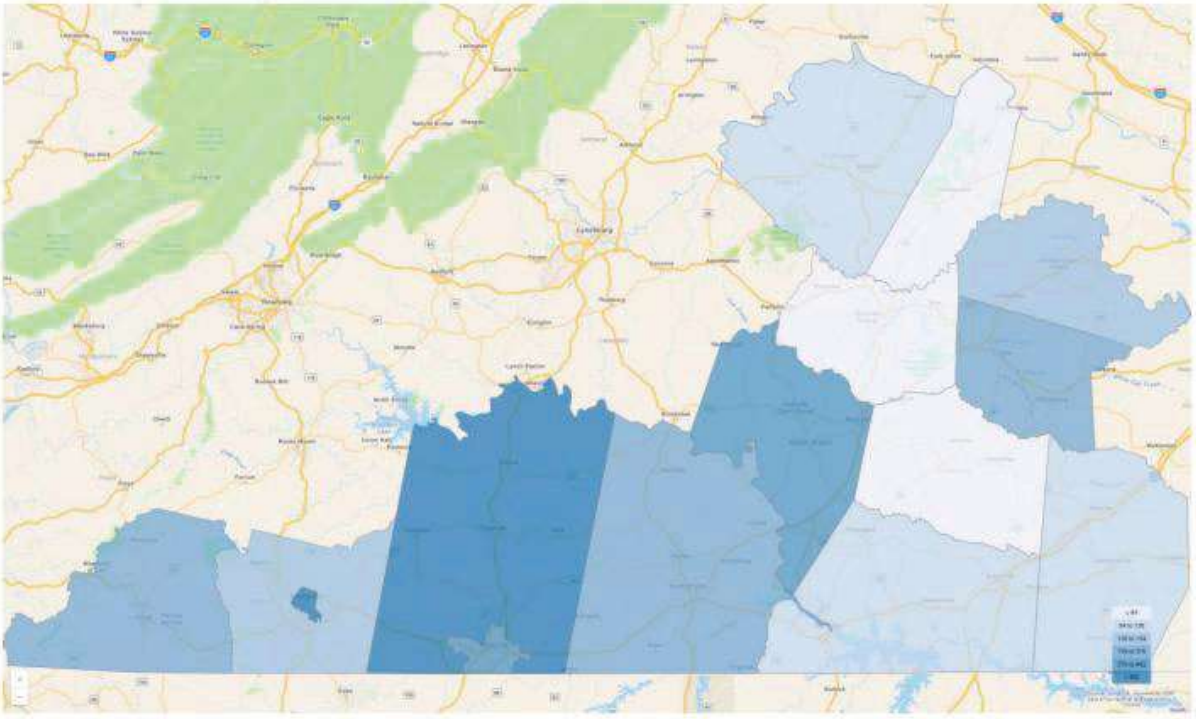
# Staffing Pattern




| 6-digit Occupation | Empl | Avg Ann Wages | Annual Demand |
|---|---|---|---|
| Team Assemblers | 413 | $40,300 | 44 |
| Sawing Machine Setters, Operators, and Tenders, Wood | 297 | $37,500 | 30 |
| Woodworking Machine Setters, Operators, and Tenders, Except Sawing | 267 | $36,600 | 25 |
| Laborers and Freight, Stock, and Material Movers, Hand | 229 | $35,600 | 28 |
| Industrial Truck and Tractor Operators | 207 | $41,900 | 18 |
| First-Line Supervisors of Production and Operating Workers | 123 | $66,300 | 10 |
| Heavy and Tractor-Trailer Truck Drivers | 88 | $49,300 | 8 |
| Machine Feeders and Offbearers | 78 | $35,700 | 8 |
| Carpenters | 66 | $36,500 | 5 |
| Industrial Machinery Mechanics | 66 | $55,500 | 6 |
| Remaining Component Occupations | 1,317 | $59,300 | 118 |
| **Total** | **3,152** | | |

The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

# Geographic Distribution



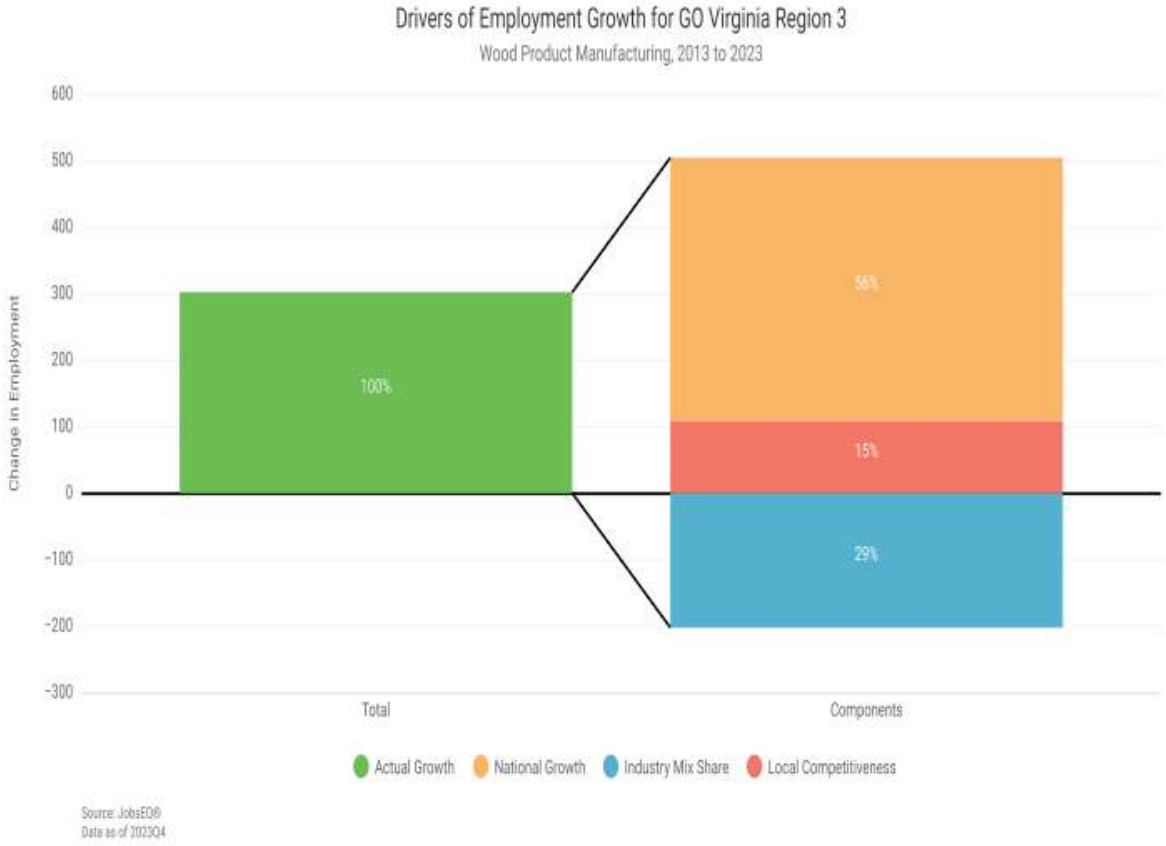
| Region | Empl |
|---|---|
| Martinsville City, Virginia | 475 |
| Pittsylvania County, Virginia | 403 |
| Charlotte County, Virginia | 394 |
| Danville City, Virginia | 377 |
| Patrick County, Virginia | 371 |

| Region | Empl |
|---|---|
| Halifax County, Virginia | 236 |
| Nottoway County, Virginia | 155 |
| Henry County, Virginia | 145 |
| Amelia County, Virginia | 139 |
| Brunswick County, Virginia | 135 |
| All Others | 341 |

Source: JobsEQ®

# Drivers of Employment Growth

Over the ten years ending 2023, employment in Wood Product Manufacturing for the GO Virginia Region 3 added 302 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a gain of 108 jobs—meaning this industry was more competitive than its national counterpart during this period.




Source: JobsEQ®
Data as of 2023Q4

Agriculture, Forestry, Fishing and Hunting
GO Virginia Region 3 – 2024Q3

## EMPLOYMENT




**3,749**

Regional employment / **2,005,539** in the nation

**-2.0%**

Avg Ann % Change Last 10 Years / **-0.5%** in the US




**2.9%**

% of Total Employment / **1.2%** in the US




## WAGES




**$36,204**

Avg Wages per Worker / **$51,478** in the nation

**3.5%**

Avg Ann % Change Last 10 Years / **+3.9%** in the US




# Industry Snapshot

## EMPLOYMENT

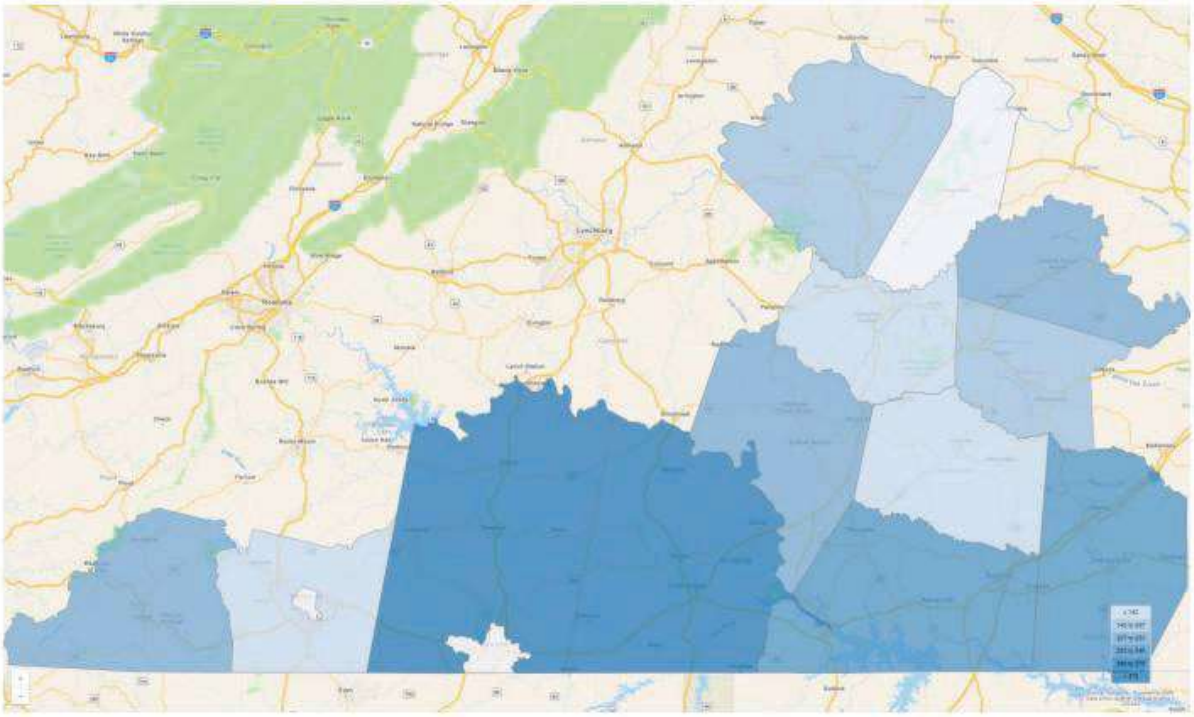



## WAGES




| 2-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| Agriculture, Forestry, Fishing and Hunting | 3,749 | $36,204 | 2.37 | | 421 | -1.0% |

# Geographic Distribution



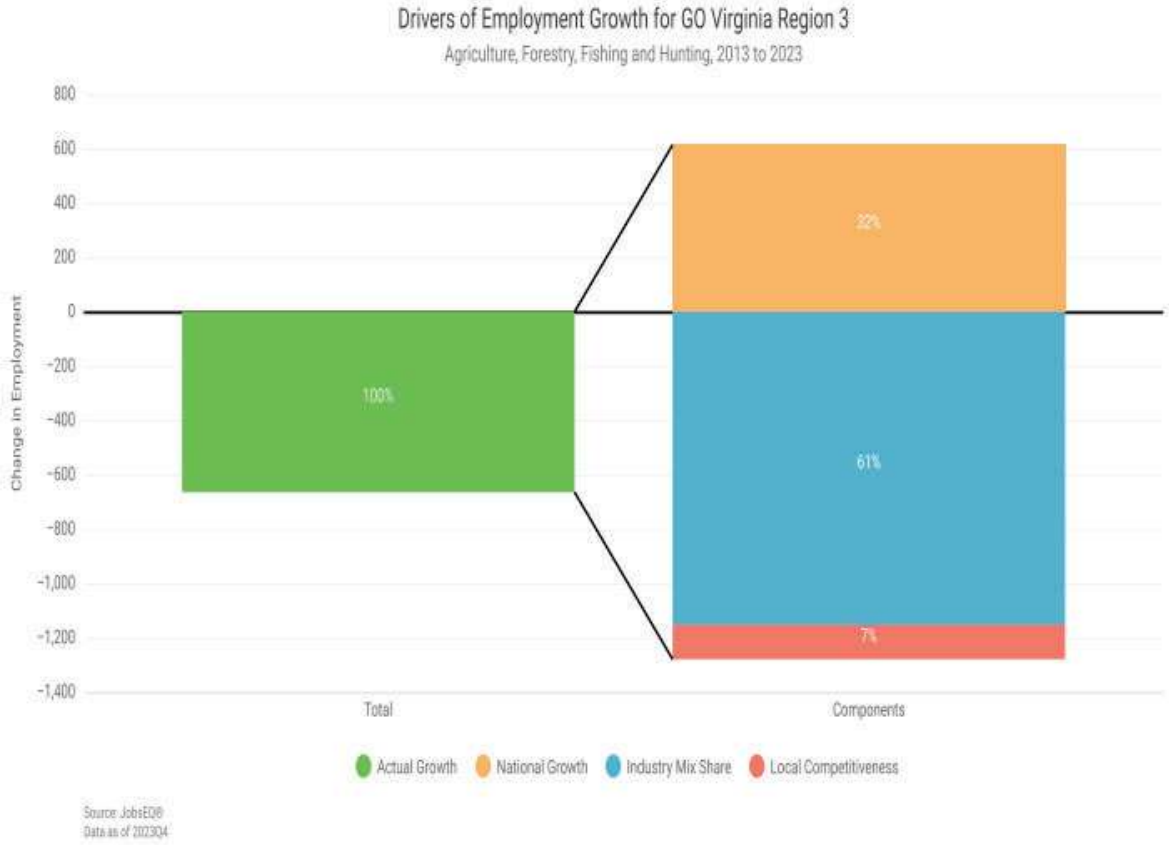
| Region | Empl |
|---|---|
| Pittsylvania County, Virginia | 688 |
| Halifax County, Virginia | 376 |
| Mecklenburg County, Virginia | 359 |
| Brunswick County, Virginia | 341 |
| Patrick County, Virginia | 286 |

| Region | Empl |
|---|---|
| Amelia County, Virginia | 264 |
| Charlotte County, Virginia | 253 |
| Buckingham County, Virginia | 231 |
| Nottoway County, Virginia | 208 |
| Prince Edward County, Virginia | 188 |
| All Others | 554 |

Source: JobsEQ®

# Drivers of Employment Growth

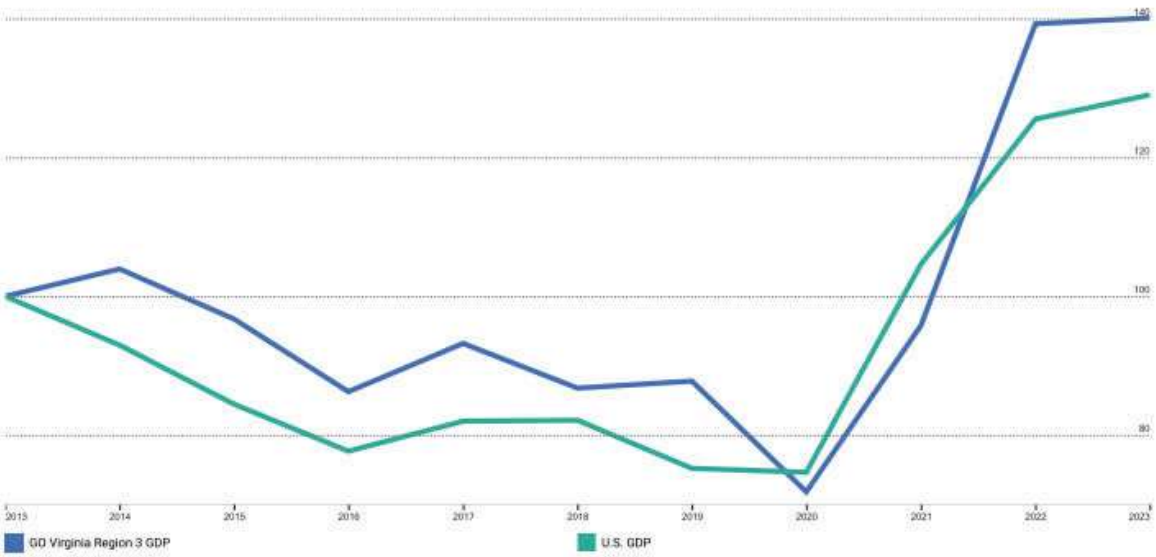
Over the ten years ending 2023, employment in Agriculture, Forestry, Fishing and Hunting for the GO Virginia Region 3 shed 664 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a loss of 127 jobs—meaning this industry was less competitive than its national counterpart during this period.



# GDP & Productivity

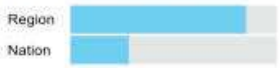
In 2023, Agriculture, Forestry, Fishing and Hunting produced $0.4 billion in GDP for the GO Virginia Region 3.

GDP: Indexed 2013 = 100




**3.1 %**

Industry Share of Total GDP / **1.0 %** in the nation



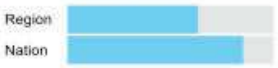

**3.4 %**

Avg Ann % Change Last 10 Yrs / **2.6 %** in the nation




**$192k**

Output per Worker / **$259k** in the nation




# Supply Chain: Top Suppliers

As of 2024Q3, Agriculture, Forestry, Fishing and Hunting in the GO Virginia Region 3 are estimated to make $322.6 million in annual purchases from suppliers in the United States with about 21% or $68.4 million of these purchases being made from businesses located in the GO Virginia Region 3.

| 2-digit Supplier Industries | Purchases from In-Region ($M) | Purchases from Out-of-Region ($M) |
|---|---|---|
| Manufacturing | $17.1 | $101.9 |
| Agriculture, Forestry, Fishing and Hunting | $38.5 | $60.5 |
| Real Estate and Rental and Leasing | $4.6 | $31.6 |
| Finance and Insurance | $0.9 | $11.0 |
| Professional, Scientific, and Technical Services | $1.1 | $10.1 |
| Remaining Supplier Industries | $6.3 | $39.2 |
| Total | $68.4 | $254.3 |

Food Manufacturing
GO Virginia Region 3 – 2024Q3

## EMPLOYMENT

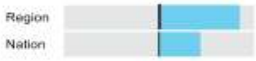



**1,489**

Regional employment / **1,801,200** in the nation

**3.3%** ↑

Avg Ann % Change Last 10 Years / **+1.7%** in the US




**1.1%**

% of Total Employment / **1.1%** in the US




## WAGES

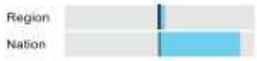



**$47,673**

Avg Wages per Worker / **$59,873** in the nation

**0.2%** ↑

Avg Ann % Change Last 10 Years / **+3.4%** in the US




# Industry Snapshot

## EMPLOYMENT

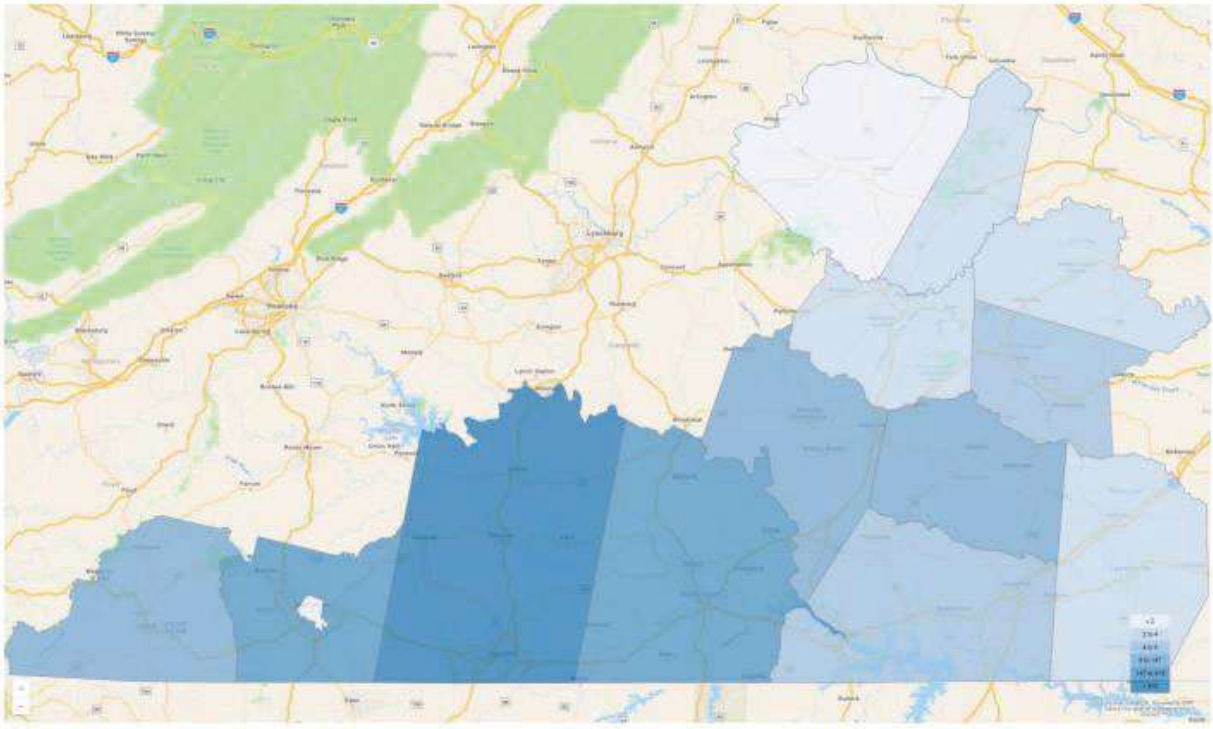



## WAGES




| 3-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| **Food Manufacturing** | **1,489** | **$47,673** | **1.05** | | **177** | **0.1%** |

# Geographic Distribution



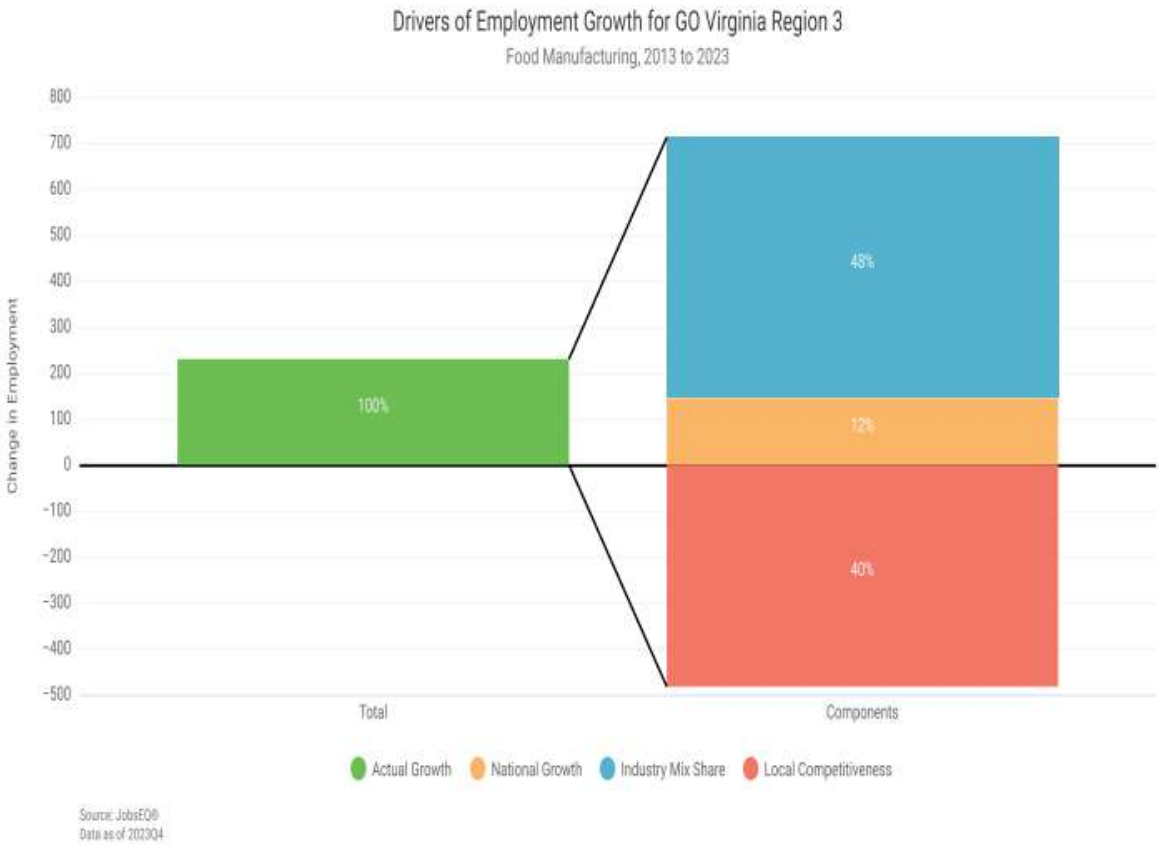
| Region | Empl |
|---|---|
| Danville City, Virginia | 536 |
| Pittsylvania County, Virginia | 416 |
| Henry County, Virginia | 218 |
| Halifax County, Virginia | 148 |
| Patrick County, Virginia | 106 |

| Region | Empl |
|---|---|
| Charlotte County, Virginia | 35 |
| Lunenburg County, Virginia | 9 |
| Nottoway County, Virginia | 5 |
| Mecklenburg County, Virginia | 4 |
| Cumberland County, Virginia | 3 |
| All Others | 9 |

Source: JobsEQ®

# Drivers of Employment Growth

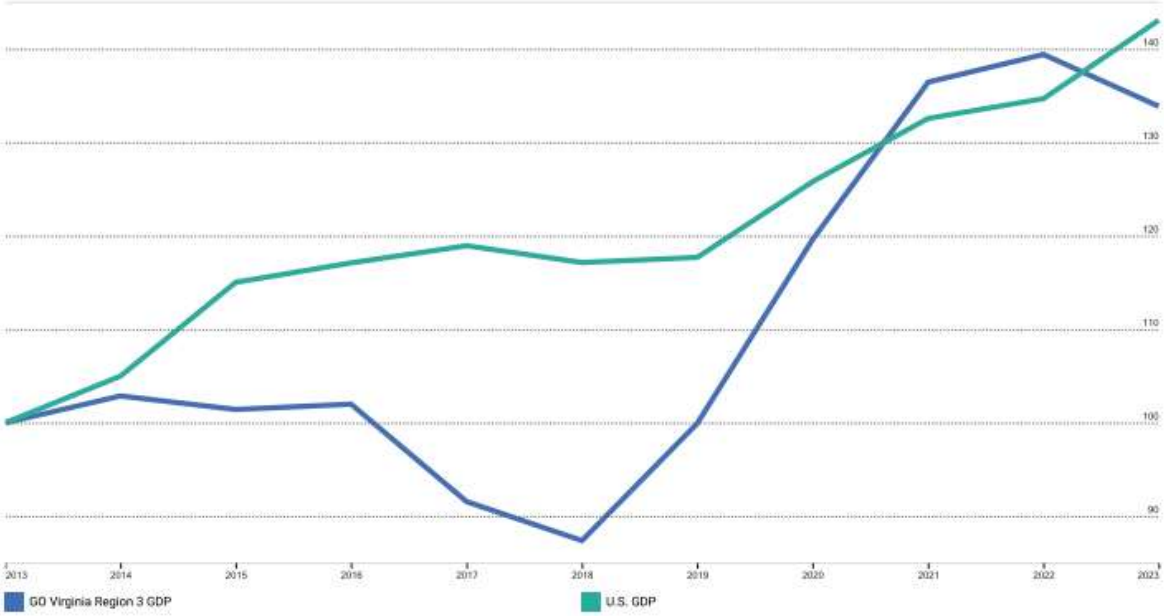
Over the ten years ending 2023, employment in Food Manufacturing for the GO Virginia Region 3 added 230 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a loss of 482 jobs—meaning this industry was less competitive than its national counterpart during this period.



# GDP & Productivity

In 2023, Food Manufacturing produced $0.5 billion in GDP for the GO Virginia Region 3.

GDP: Indexed 2013 = 100



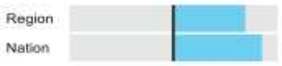

**3.5 %**

Industry Share of Total GDP / **1.0 %** in the nation



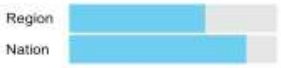

**3.0 %**

Avg Ann % Change Last 10 Yrs / **3.6 %** in the nation




**$547k**

Output per Worker / **$712k** in the nation




# Supply Chain: Top Suppliers

As of 2024Q3, Food Manufacturing in the GO Virginia Region 3 are estimated to make $591.2 million in annual purchases from suppliers in the United States with about 33% or $192.5 million of these purchases being made from businesses located in the GO Virginia Region 3.

| 3-digit Supplier Industries | Purchases from In-Region ($M) | Purchases from Out-of-Region ($M) |
|---|---|---|
| Food Manufacturing | $51.8 | $103.3 |
| Animal Production and Aquaculture | $52.7 | $13.0 |
| Crop Production | $25.2 | $38.0 |
| Chemical Manufacturing | $3.4 | $30.8 |
| Professional, Scientific, and Technical Services | $3.3 | $22.5 |
| Remaining Supplier Industries | $56.3 | $191.0 |
| Total | $192.5 | $398.6 |

## Health Care Services[27]

# Health Care Services Summary

Health care is both an essential service and a growing economic driver in Region 3. Expanding access to care, particularly in rural and underserved communities, creates opportunities for workforce training and innovation in delivery models. Hospitals, clinics, and allied health providers also serve as major employers and anchors in local economies. Continued investment in health care not only improves community well-being but also strengthens the region's overall economic vitality.




[27] Sources: Jobs EQ Health Care & Social Assistance NAICS Code 62

# Industry Snapshot

## EMPLOYMENT




## WAGES




| 3-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| Ambulatory Health Care Services | 7,726 | $56,725 | 1.03 | | 746 | 0.7% |
| Social Assistance | 5,814 | $32,172 | 1.40 | | 787 | 1.4% |
| Nursing and Residential Care Facilities | 4,579 | $41,773 | 1.64 | | 541 | -0.2% |
| Hospitals | 3,516 | $59,044 | 0.64 | | 264 | -0.4% |
| **Health Care and Social Assistance** | **21,635** | **$48,363** | **1.08** | | **2,228** | **0.5%** |

Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

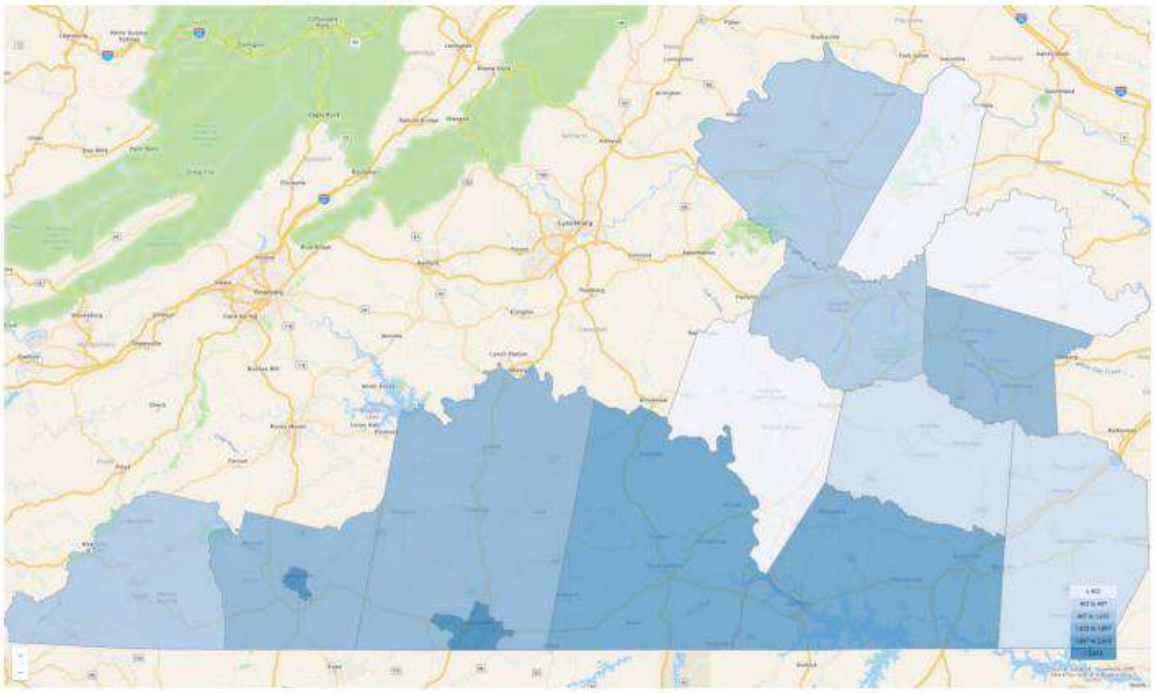
# Staffing Pattern




| 6-digit Occupation | Empl | Avg Ann Wages | Annual Demand |
|---|---|---|---|
| Personal Care Aides | 3,992 | $29,600 | 637 |
| Registered Nurses | 1,883 | $83,900 | 95 |
| Nursing Assistants | 1,607 | $38,400 | 216 |
| Home Health Aides | 1,416 | $29,600 | 186 |
| Substance Abuse, Behavioral Disorder, and Mental Health Counselors | 614 | $62,800 | 62 |
| Licensed Practical and Licensed Vocational Nurses | 602 | $61,300 | 44 |
| Medical Secretaries and Administrative Assistants | 546 | $42,200 | 53 |
| Medical Assistants | 513 | $39,800 | 72 |
| Childcare Workers | 359 | $30,400 | 56 |
| Receptionists and Information Clerks | 358 | $35,300 | 44 |
| Remaining Component Occupations | 9,723 | $78,000 | 929 |
| **Total** | **21,613** | | |

The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

# Geographic Distribution



| Region | Empl |
|---|---|
| Danville City, Virginia | 5,612 |
| Martinsville City, Virginia | 2,613 |
| Mecklenburg County, Virginia | 2,191 |
| Halifax County, Virginia | 1,897 |
| Pittsylvania County, Virginia | 1,828 |

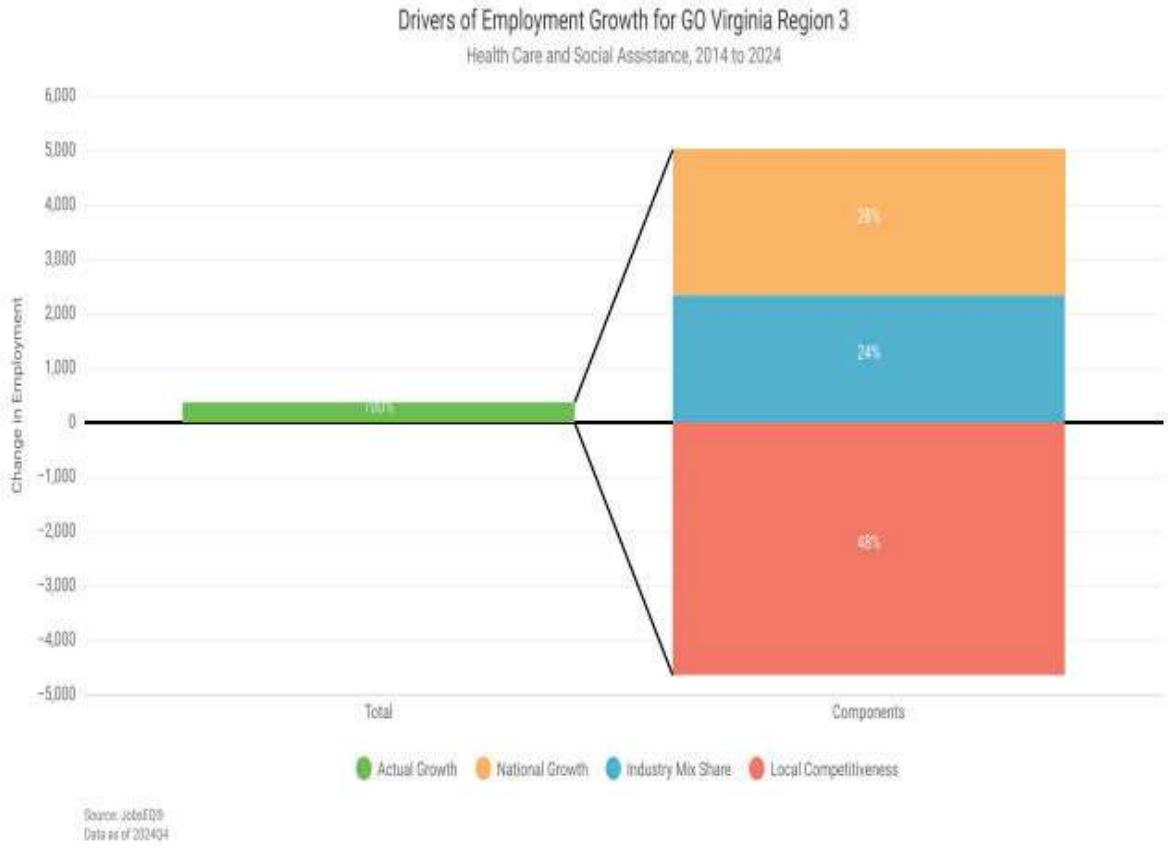
| Region | Empl |
|---|---|
| Henry County, Virginia | 1,774 |
| Nottoway County, Virginia | 1,633 |
| Prince Edward County, Virginia | 1,531 |
| Buckingham County, Virginia | 498 |
| Patrick County, Virginia | 497 |
| All Others | 1,560 |

Source: JobsEQ®

The geographic distribution of industry employment by place of work illustrates the impact on labor force demand and commuting patterns.

# Drivers of Employment Growth

Over the ten years ending 2024, employment in Health Care and Social Assistance for the GO Virginia Region 3 added 366 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a loss of 4,642 jobs—meaning this industry was less competitive than its national counterpart during this period.




Shift-share analysis sheds light on the factors that drive regional employment growth in an industry. A positive change in local competitiveness indicates advantages that may be due to factors such as superior technology, management, and labor pool, etc.

National growth is due to the overall growth or contraction in the national economy. Industry mix share is the growth attributable to the specific industries examined (based on national industry growth patterns and the industry mix of the region).

# Employment Distribution by Type

The table below shows the employment mix by ownership type for Health Care and Social Assistance for the GO Virginia Region 3. Four of these ownership types — federal, state, and local government and the private sector — together constitute "Covered Employment" (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

"Self-Employment" refers to unincorporated self-employment and represents workers whose primary job is self-employment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



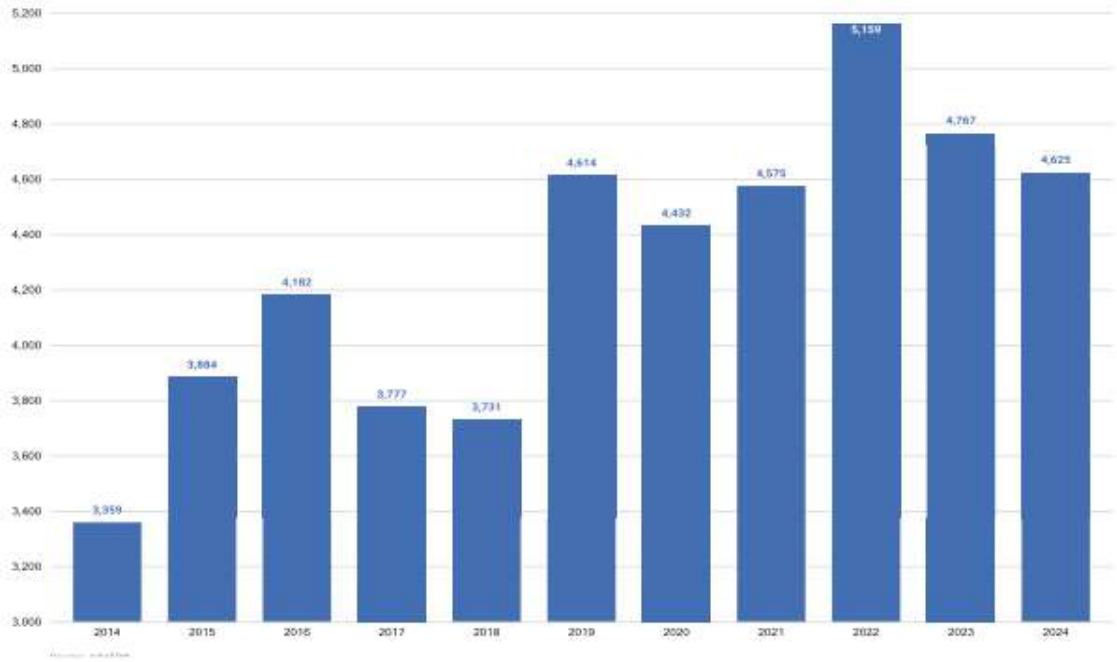

| | Empl | % |
|---|---|---|
| Private | 18,917 | 87.4% |
| Self-Employment | 686 | 3.2% |
| Local Government | 874 | 4.0% |
| State Government | 1,158 | 5.4% |
| Other Non-Covered | 0 | 0.0% |

Source: JobsEQ®

Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

# Establishments

In 2024, there were 4,625 Health Care and Social Assistance establishments in the GO Virginia Region 3 (per covered employment establishment counts), an increase from 3,359 establishments ten years earlier in 2014.

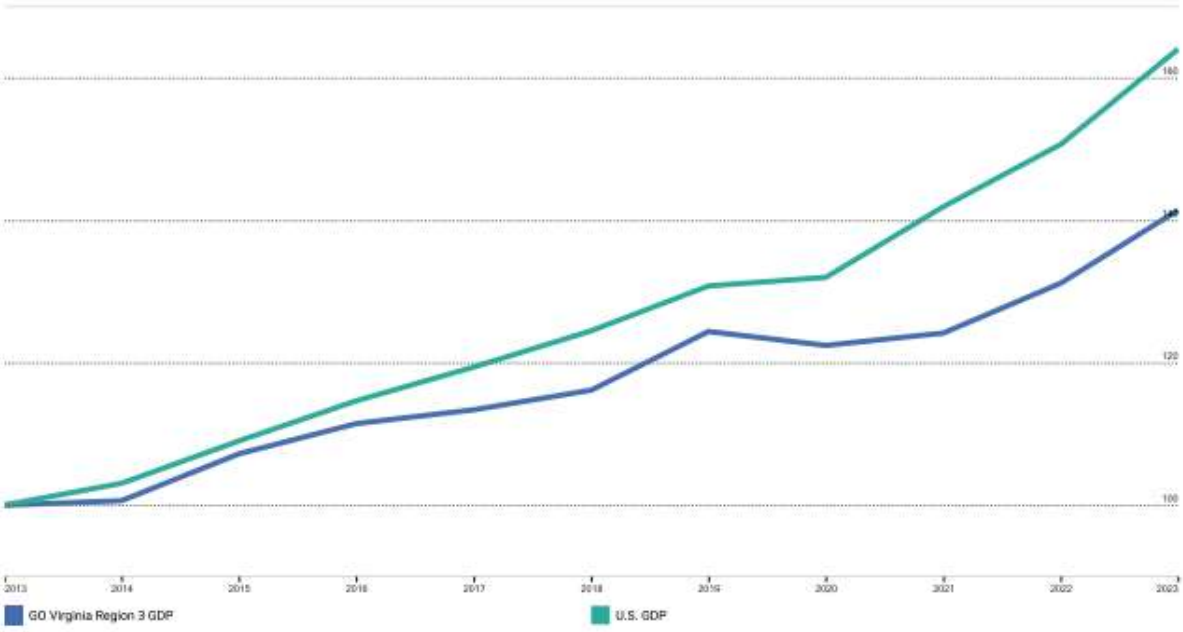



New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

# GDP & Productivity

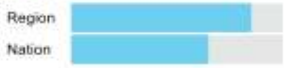
In 2023, Health Care and Social Assistance produced $1.5 billion in GDP for the GO Virginia Region 3.

GDP: Indexed 2013 = 100




**11.1 %**

Industry Share of Total GDP / **8.5 %** in the nation



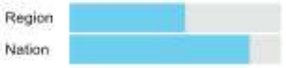

**3.5 %**

Avg Ann % Change Last 10 Yrs / **5.1 %** in the nation




**$101k**

Output per Worker / **$157k** in the nation




Gross domestic product (GDP) is the most comprehensive measure of regional economic activity, and an industry's contribution to GDP is an important indicator of regional industry strength. It is a measure of total value-added to a regional economy in the form of labor income, proprietor's income, and business profits, among others. GDP values shown on this page are nominal GDP data.

Growth in productivity (output per worker) leads to increases in wealth and higher average standards of living in a region.

# Supply Chain: Top Suppliers

As of 2025Q1, Health Care and Social Assistance in the GO Virginia Region 3 are estimated to make $845.2 million in annual purchases from suppliers in the United States with about 33% or $280.4 million of these purchases being made from businesses located in the GO Virginia Region 3.

| 3-digit Supplier Industries | Purchases from In-Region ($M) | Purchases from Out-of-Region ($M) |
|---|---|---|
| Real Estate | $42.5 | $84.9 |
| Professional, Scientific, and Technical Services | $32.3 | $81.7 |
| Insurance Carriers and Related Activities | $15.6 | $58.9 |
| Administrative and Support Services | $37.3 | $26.3 |
| Chemical Manufacturing | $10.0 | $52.8 |
| Remaining Supplier Industries | $142.7 | $260.2 |
| Total | $280.4 | $564.8 |

Supplier-buyer networks can indicate local linkages between industries, regional capacity to support growth in an industry, and potential leakage of sales out of the region.

# Postsecondary Programs Linked to Health Care and Social Assistance

| Program | Awards |
|---|---|
| **Averett University** | |
| Registered Nursing/Registered Nurse | 60 |
| **Danville Community College** | |
| Allied Health Diagnostic, Intervention, and Treatment Professions, Other | 41 |
| Child Care Provider/Assistant | 50 |
| Licensed Practical/Vocational Nurse Training | 26 |
| **Longwood University** | |
| Registered Nursing/Registered Nurse | 47 |
| **Medical Solutions Academy** | |
| Medication Aide | 26 |
| Nursing Assistant/Aide and Patient Care Assistant/Aide | 58 |
| **Southside Virginia Community College** | |
| Allied Health Diagnostic, Intervention, and Treatment Professions, Other | 31 |
| Licensed Practical/Vocational Nurse Training | 100 |
| Registered Nursing/Registered Nurse | 40 |

Source: JobsEQ®

The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.

Among postsecondary programs at schools located in the GO Virginia Region 3, the sampling above identifies those most linked to occupations relevant to Health Care and Social Assistance. For a complete list see JobsEQ®, http://www.chmuraecon.com/jobseq

## Information Technology and Communications Services[28]

# Information Technology and Communications Services Summary

The IT and communications sector supports innovation across all industries by providing software development, cybersecurity, and digital infrastructure. In Region 3, there is strong potential to expand IT-enabled services that support business operations, manufacturing, and government functions. With broadband expansion and growing training programs, the region is building a foundation for tech-driven growth. This sector is key to positioning the region for long-term competitiveness in a knowledge-based economy.

# Information Technology Service Management Market Size[29]

Information Technology Service Management Market was valued at USD 7.8 billion in 2022 and is projected to showcase over 10% CAGR from 2023 to 2032, due to the integration of various technologies such as performance management, configuration technology, network management, and database management systems are fostering innovation.Artificial Intelligence (AI) is driving the demand for IT service management. AI enhances ITSM by automating routine tasks, providing predictive analytics, and improving issue resolution. It offers intelligent chatbots for customer support, proactive maintenance, and data-driven decision-making. These AI-powered capabilities optimize IT service delivery, enhance user experiences, and reduce operational costs.

[28] Source: JobsEQ Information Technology and Analytical Instruments US Cluster Mapping
[29] Source: Global Market Insights https://www.gminsights.com/industry-analysis/information-technology-service-management-market

## Spotlight Summary

Information Technology and Analytical Instruments (US Cluster Mapping)
GO Virginia Region 3 – 2025Q1

### EMPLOYMENT



**142**

Regional employment / **1,491,412** in the nation

**9.1%** ↑

Avg Ann % Change Last 10 Years / **+2.4%** in the U.S.




**0.1%**

% of Total Employment / **0.9%** in the U.S.




### WAGES

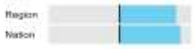


**$71,833**

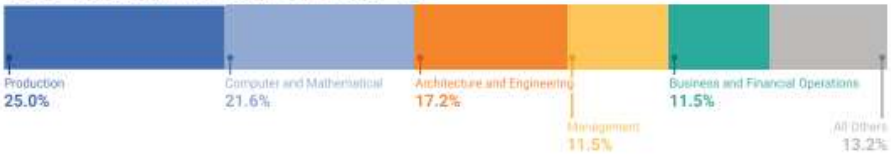
Avg Wages per Worker / **$188,155** in the nation

**4.6%** ↑

Avg Ann % Change Last 10 Years / **+5.0%** in the U.S.




### TOP OCCUPATION GROUPS




### TOP INDUSTRIES

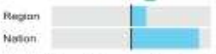
Avg Ann % Change in Employment, Last 10 Years

**n/a** ↑




Bare Printed Circuit Board Manufacturing

**0.2 %** ↑




Printed Circuit Assembly (Electronic Assembly) Manufacturing

**16.0 %** ↑




Software Publishers

# Industry Snapshot

## EMPLOYMENT



## WAGES



| 6-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| Bare Printed Circuit Board Manufacturing | 45 | $53,635 | 2.16 | | 4 | 0.6% |
| Printed Circuit Assembly (Electronic Assembly) Manufacturing | 34 | $67,825 | 0.74 | | 3 | 0.3% |
| Software Publishers | 33 | $96,954 | 0.07 | | 3 | 1.0% |
| Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables | 14 | $63,110 | 0.30 | | 1 | -0.2% |
| Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals | 8 | $81,198 | 0.28 | | 1 | 0.1% |
| Computer Terminal and Other Computer Peripheral Equipment Manufacturing | 4 | $118,277 | 0.17 | | 0 | -0.4% |
| Electromedical and Electrotherapeutic Apparatus Manufacturing | 2 | $81,783 | 0.04 | | 0 | -0.5% |
| Audio and Video Equipment Manufacturing | 0 | | 0.00 | | 0 | -0.3% |
| **Information Technology and Analytical Instruments (US Cluster Mapping)** | **142** | **$71,833** | **0.12** | | **12** | **0.5%** |

Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

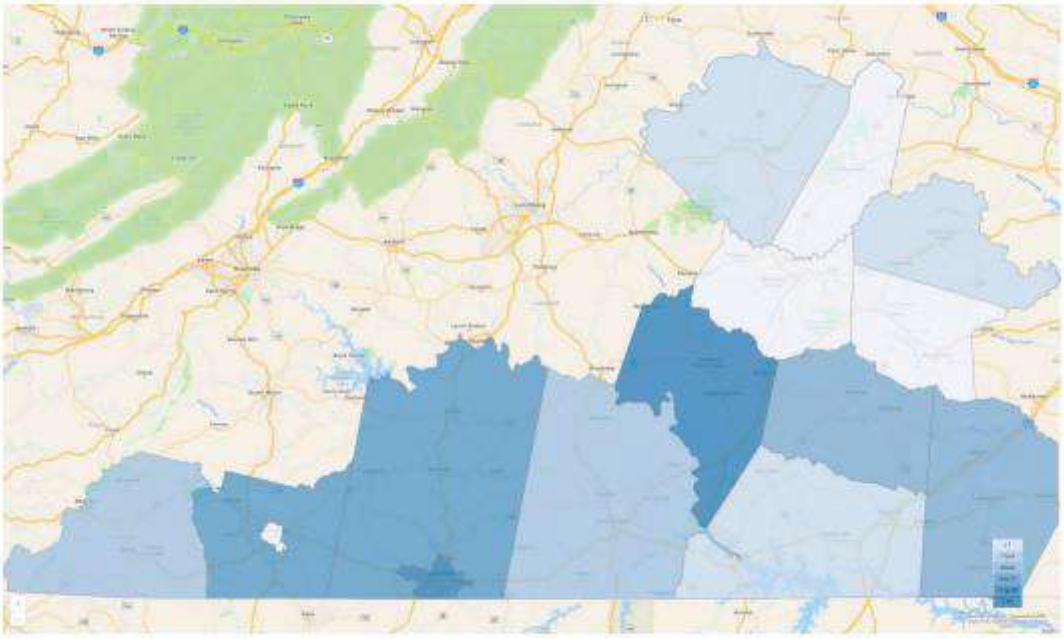
## Staffing Pattern




| 6-digit Occupation | Empl | Avg Ann Wages | Annual Demand |
|---|---|---|---|
| Software Developers | 17 | $136,400 | 1 |
| Electrical, Electronic, and Electromechanical Equipment Assemblers, Except Coil Winders, Tapers, and Finishers | 14 | $41,600 | 2 |
| Semiconductor Processing Technicians | 5 | $57,800 | 1 |
| Industrial Engineers | 4 | $108,500 | 0 |
| Inspectors, Testers, Sorters, Samplers, and Weighers | 4 | $49,900 | 1 |
| Electrical and Electronic Engineering Technologists and Technicians | 4 | $79,100 | 0 |
| Computer Hardware Engineers | 4 | $130,400 | 0 |
| Team Assemblers | 4 | $44,400 | 0 |
| Managers, All Other | 3 | $167,900 | 0 |
| General and Operations Managers | 3 | $163,700 | 0 |
| Remaining Component Occupations | 63 | $100,200 | 6 |
| **Total** | **123** | | |

The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

# Geographic Distribution



| Region | Empl |
|---|---|
| Charlotte County, Virginia | 50 |
| Danville City, Virginia | 38 |
| Henry County, Virginia | 13 |
| Pittsylvania County, Virginia | 12 |
| Lunenburg County, Virginia | 8 |

| Region | Empl |
|---|---|
| Brunswick County, Virginia | 6 |
| Halifax County, Virginia | 4 |
| Patrick County, Virginia | 4 |
| Mecklenburg County, Virginia | 2 |
| Buckingham County, Virginia | 1 |
| All Others | 2 |

Source: JobsEQ®

The geographic distribution of industry employment by place of work illustrates the impact on labor force demand and commuting patterns.

# Employment Distribution by Type

The table below shows the employment mix by ownership type for Information Technology and Analytical Instruments (US Cluster Mapping) for the GO Virginia Region 3. Four of these ownership types — federal, state, and local government and the private sector — together constitute "Covered Employment" (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

"Self-Employment" refers to unincorporated self-employment and represents workers whose primary job is self-employment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



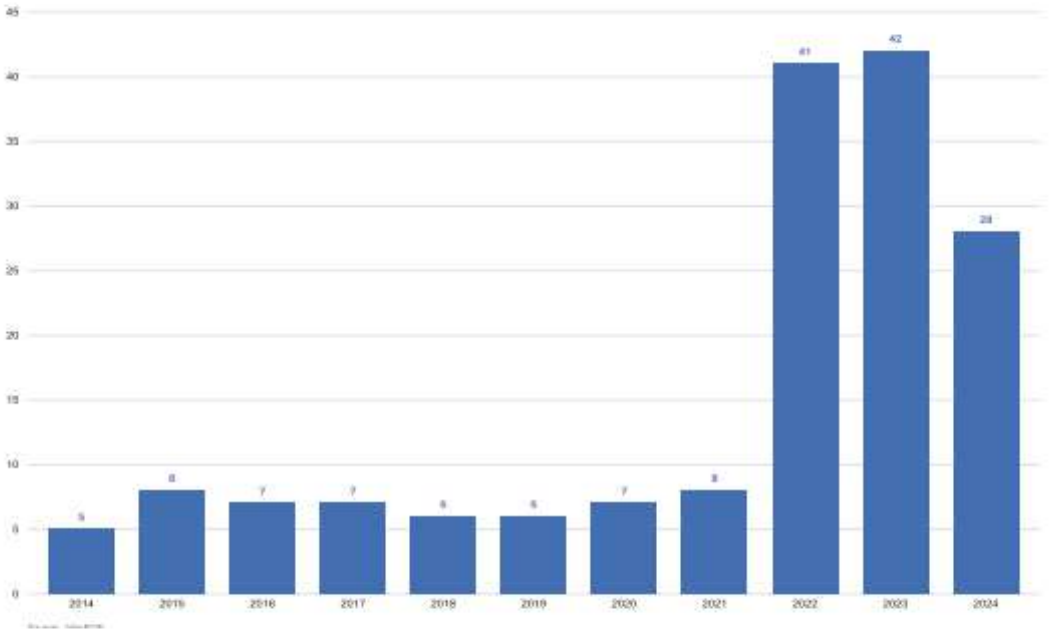

| | Empl | % |
|---|---|---|
| Private | 135 | 95.3% |
| Self-Employment | 7 | 4.7% |
| Other Non-Covered | 0 | 0.0% |

Source: JobsEQ®

Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

# Establishments

In 2024, there were 28 Information Technology and Analytical Instruments (US Cluster Mapping) establishments in the GO Virginia Region 3 (per covered employment establishment counts), an increase from 5 establishments ten years earlier in 2014.




New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

# Postsecondary Programs Linked to Information Technology and Analytical Instruments (US Cluster Mapping)

| Program | Awards |
|---|---|
| **Danville Community College** | |
| Industrial Electronics Technology/Technician | 48 |
| Industrial Production Technologies/Technicians, Other | 40 |
| Industrial Technology/Technician | 19 |
| Manufacturing Engineering Technology/Technician | 9 |
| **Patrick & Henry Community College** | |
| Industrial Electronics Technology/Technician | 18 |
| Industrial Technology/Technician | 17 |
| Manufacturing Engineering Technology/Technician | 14 |
| **Southside Virginia Community College** | |
| Environmental Control Technologies/Technicians, Other | 10 |
| Industrial Production Technologies/Technicians, Other | 38 |
| Industrial Technology/Technician | 8 |

Source: JobsEQ®

The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.

Among postsecondary programs at schools located in the GO Virginia Region 3, the sampling above identifies those most linked to occupations relevant to Information Technology and Analytical Instruments (US Cluster Mapping). For a complete list see JobsEQ®, http://www.chmuraecon.com/jobseq

## Industry Definition

**Information Technology and Analytical Instruments (US Cluster Mapping) is defined as the following NAICS industries:**

| Code | Description |
|---|---|
| 333242 | Semiconductor Machinery Manufacturing |
| 334111 | Electronic Computer Manufacturing |
| 334112 | Computer Storage Device Manufacturing |
| 334118 | Computer Terminal and Other Computer Peripheral Equipment Manufacturing |
| 334310 | Audio and Video Equipment Manufacturing |
| 334412 | Bare Printed Circuit Board Manufacturing |
| 334413 | Semiconductor and Related Device Manufacturing |
| 334416 | Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing |
| 334417 | Electronic Connector Manufacturing |
| 334418 | Printed Circuit Assembly (Electronic Assembly) Manufacturing |
| 334419 | Other Electronic Component Manufacturing |
| 334510 | Electromedical and Electrotherapeutic Apparatus Manufacturing |
| 334512 | Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use |
| 334513 | Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables |
| 334514 | Totalizing Fluid Meter and Counting Device Manufacturing |
| 334515 | Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals |
| 334516 | Analytical Laboratory Instrument Manufacturing |
| 334517 | Irradiation Apparatus Manufacturing |
| 334519 | Other Measuring and Controlling Device Manufacturing |
| 334610 | Manufacturing and Reproducing Magnetic and Optical Media |
| 513210 | Software Publishers |

## Advanced Manufacturing and Advanced Materials[30]

# Advanced Manufacturing and Advanced Materials Summary

Advanced manufacturing builds on Region 3's legacy in textiles, furniture, and industrial production, while embracing new technologies and materials. From precision machining to plastics, metals, and composites, these industries are evolving with automation, robotics, and innovation in design. The sector not only provides high-wage jobs but also strengthens supply chains for other industries like aerospace, defense, and automotive. Growth in this area will allow the region to remain at the forefront of modern production and global trade.

# Manufacturing Logistics Market Size[31]

Manufacturing Logistics Market size was valued at USD 149.6 billion in 2023 and is estimated to register a CAGR of over 9% between 2024 and 2032. The market for manufacturing logistics is mostly driven by the growth of global trade networks. As more companies execute business internationally, there is an increased demand for efficient logistics services to manage customs procedures and cross-border transportation. In addition, the industry is expanding due to the

[30] Source: Jobs EQ Advanced Manufacturing (Brookings)

[31] Source: Global Market Insights https://www.gminsights.com/industry-analysis/manufacturing-logistics-market

broad diversification of services, which includes advanced supply chain management systems, warehousing, and conventional transportation.



# Industry Snapshot

## EMPLOYMENT




## WAGES

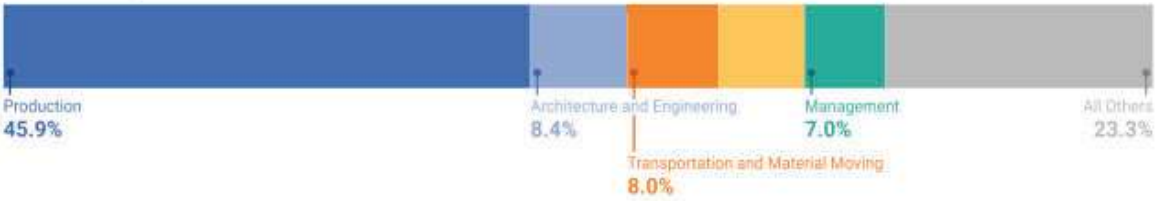



| 6-Digit Industry | Empl | Avg Ann Wages | LQ | 5yr History | Annual Demand | Forecast Ann Growth |
|---|---|---|---|---|---|---|
| Power, Distribution, and Specialty Transformer Manufacturing | 620 | $63,908 | 23.32 | | 58 | -0.1% |
| Artificial and Synthetic Fibers and Filaments Manufacturing | 327 | $56,174 | 17.34 | | 29 | -0.4% |
| Motor Vehicle Body Manufacturing | 216 | $50,976 | 4.47 | | 21 | -0.5% |
| All Other Miscellaneous Nonmetallic Mineral Product Manufacturing | 110 | $55,463 | 11.02 | | 11 | -0.4% |
| Other Communication and Energy Wire Manufacturing | 104 | $57,287 | 10.14 | | 13 | 2.7% |
| Sign Manufacturing | 102 | $39,448 | 1.38 | | 10 | -0.1% |
| Clay Building Material and Refractories Manufacturing | 96 | $44,869 | 5.53 | | 9 | -0.3% |
| Plastics Material and Resin Manufacturing | 80 | $75,796 | 1.66 | | 7 | -0.5% |
| Motor and Generator Manufacturing | 77 | $55,142 | 2.72 | | 7 | 0.0% |
| Cut Stone and Stone Product Manufacturing | 72 | $37,617 | 2.58 | | 7 | -0.2% |
| Remaining Component Industries | 722 | $46,819 | 0.49 | | 65 | -0.8% |
| **Advanced Manufacturing (Brookings)** | **2,535** | **$58,324** | **0.54** | | **231** | **-0.2%** |

Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

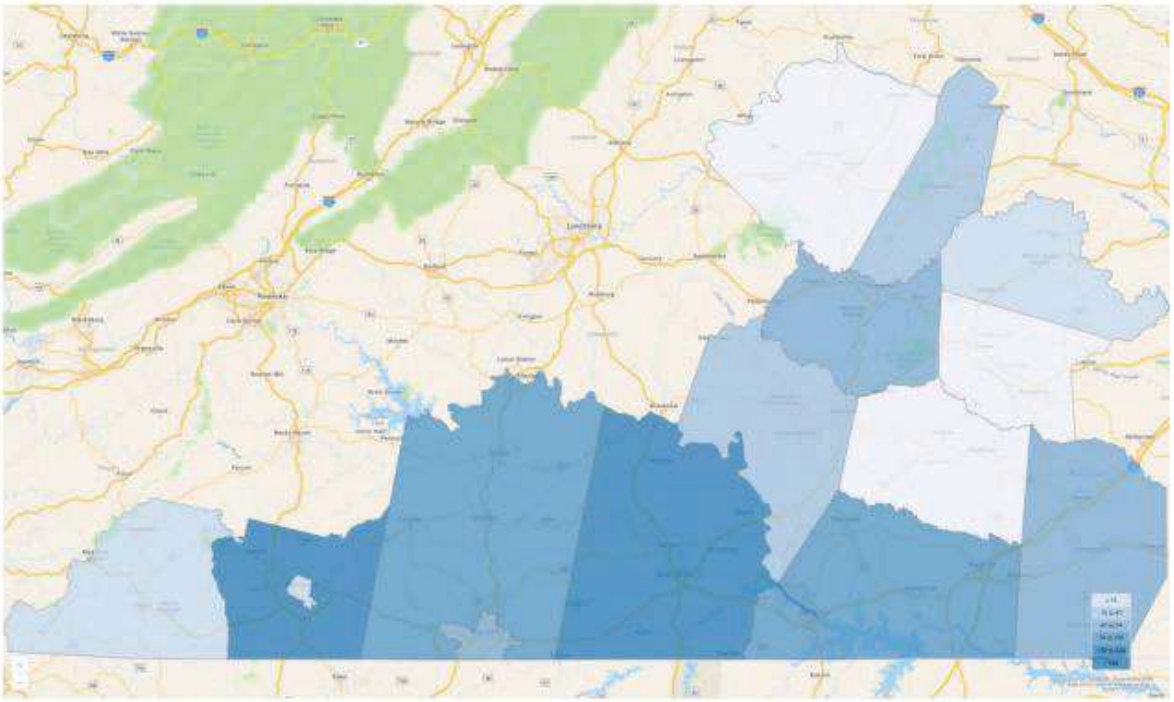
# Staffing Pattern




| 6-digit Occupation | Empl | Avg Ann Wages | Annual Demand |
|---|---|---|---|
| Team Assemblers | 227 | $44,200 | 25 |
| Electrical, Electronic, and Electromechanical Equipment Assemblers, Except Coil Winders, Tapers, and Finishers | 199 | $41,800 | 22 |
| First-Line Supervisors of Production and Operating Workers | 89 | $74,400 | 8 |
| Heavy and Tractor-Trailer Truck Drivers | 82 | $53,300 | 8 |
| Chemical Equipment Operators and Tenders | 73 | $54,200 | 6 |
| Inspectors, Testers, Sorters, Samplers, and Weighers | 68 | $49,800 | 7 |
| Welders, Cutters, Solderers, and Brazers | 61 | $49,200 | 6 |
| General and Operations Managers | 58 | $127,600 | 5 |
| Laborers and Freight, Stock, and Material Movers, Hand | 56 | $38,700 | 7 |
| Industrial Engineers | 47 | $96,700 | 3 |
| Remaining Component Occupations | 1,546 | $70,100 | 135 |
| **Total** | **2,507** | | |

The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

# Geographic Distribution



| Region | Empl |
|---|---|
| Halifax County, Virginia | 702 |
| Henry County, Virginia | 625 |
| Pittsylvania County, Virginia | 518 |
| Mecklenburg County, Virginia | 150 |
| Danville City, Virginia | 137 |

| Region | Empl |
|---|---|
| Brunswick County, Virginia | 119 |
| Prince Edward County, Virginia | 74 |
| Charlotte County, Virginia | 54 |
| Cumberland County, Virginia | 48 |
| Patrick County, Virginia | 30 |
| All Others | 76 |

Source: JobsEQ®

The geographic distribution of industry employment by place of work illustrates the impact on labor force demand and commuting patterns.

# Employment Distribution by Type

The table below shows the employment mix by ownership type for Advanced Manufacturing (Brookings) for the GO Virginia Region 3. Four of these ownership types — federal, state, and local government and the private sector — together constitute "Covered Employment" (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

"Self-Employment" refers to unincorporated self-employment and represents workers whose primary job is self-employment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



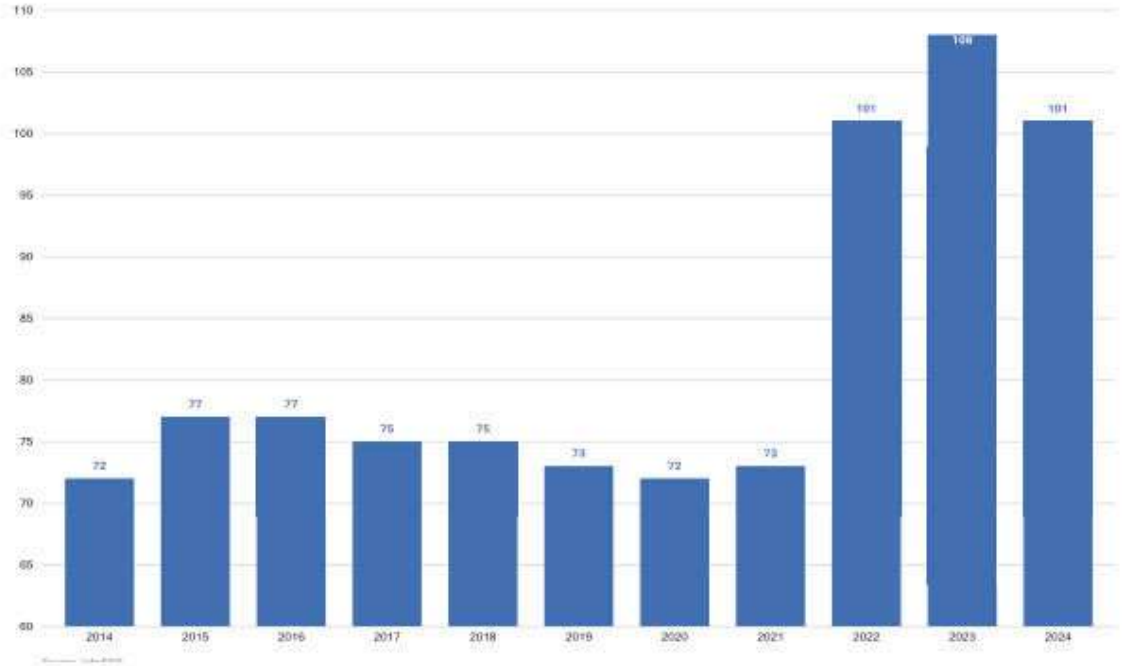

| | Empl | % |
|---|---|---|
| Private | 2,474 | 97.6% |
| Self-Employment | 60 | 2.4% |
| Other Non-Covered | 0 | 0.0% |

Source: JobsEQ®

Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

# Establishments

In 2024, there were 101 Advanced Manufacturing (Brookings) establishments in the GO Virginia Region 3 (per covered employment establishment counts), an increase from 72 establishments ten years earlier in 2014.




New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

# Postsecondary Programs Linked to Advanced Manufacturing (Brookings)

| Program | Awards |
|---|---|
| **Danville Community College** | |
| Electrical, Electronic, and Communications Engineering Technology/Technician | 35 |
| Industrial Electronics Technology/Technician | 48 |
| Industrial Production Technologies/Technicians, Other | 40 |
| Industrial Technology/Technician | 19 |
| Welding Technology/Welder | 54 |
| **Patrick & Henry Community College** | |
| Industrial Technology/Technician | 17 |
| Manufacturing Engineering Technology/Technician | 14 |
| Welding Technology/Welder | 49 |
| **Southside Virginia Community College** | |
| Industrial Production Technologies/Technicians, Other | 38 |
| Welding Technology/Welder | 56 |

Source: JobsEQ®

The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.

Among postsecondary programs at schools located in the GO Virginia Region 3, the sampling above identifies those most linked to occupations relevant to Advanced Manufacturing (Brookings). For a complete list see JobsEQ®, http://www.chmuraecon.com/jobseq

# Industry Definition

**Advanced Manufacturing (Brookings) is defined as the following NAICS industries:**

| Code | Description |
|---|---|
| 324110 | Petroleum Refineries |
| 324121 | Asphalt Paving Mixture and Block Manufacturing |
| 324122 | Asphalt Shingle and Coating Materials Manufacturing |
| 324191 | Petroleum Lubricating Oil and Grease Manufacturing |
| 324199 | All Other Petroleum and Coal Products Manufacturing |
| 325110 | Petrochemical Manufacturing |
| 325120 | Industrial Gas Manufacturing |
| 325130 | Synthetic Dye and Pigment Manufacturing |
| 325180 | Other Basic Inorganic Chemical Manufacturing |
| 325193 | Ethyl Alcohol Manufacturing |
| 325194 | Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing |
| 325199 | All Other Basic Organic Chemical Manufacturing |
| 325211 | Plastics Material and Resin Manufacturing |
| 325212 | Synthetic Rubber Manufacturing |
| 325220 | Artificial and Synthetic Fibers and Filaments Manufacturing |
| 325311 | Nitrogenous Fertilizer Manufacturing |
| 325312 | Phosphatic Fertilizer Manufacturing |
| 325314 | Fertilizer (Mixing Only) Manufacturing |
| 325315 | Compost Manufacturing |
| 325320 | Pesticide and Other Agricultural Chemical Manufacturing |
| 325411 | Medicinal and Botanical Manufacturing |
| 325412 | Pharmaceutical Preparation Manufacturing |
| 325413 | In-Vitro Diagnostic Substance Manufacturing |
| 325414 | Biological Product (except Diagnostic) Manufacturing |
| 325910 | Printing Ink Manufacturing |
| 325920 | Explosives Manufacturing |
| 325991 | Custom Compounding of Purchased Resins |
| 325992 | Photographic Film, Paper, Plate, Chemical, and Copy Toner Manufacturing |
| 325998 | All Other Miscellaneous Chemical Product and Preparation Manufacturing |
| 327110 | Pottery, Ceramics, and Plumbing Fixture Manufacturing |
| 327120 | Clay Building Material and Refractories Manufacturing |
| 327910 | Abrasive Product Manufacturing |
| 327991 | Cut Stone and Stone Product Manufacturing |
| 327992 | Ground or Treated Mineral and Earth Manufacturing |
| 327993 | Mineral Wool Manufacturing |
| 327999 | All Other Miscellaneous Nonmetallic Mineral Product Manufacturing |
| 331110 | Iron and Steel Mills and Ferroalloy Manufacturing |
| 331313 | Alumina Refining and Primary Aluminum Production |
| 331314 | Secondary Smelting and Alloying of Aluminum |
| 331315 | Aluminum Sheet, Plate, and Foil Manufacturing |
| 331318 | Other Aluminum Rolling, Drawing, and Extruding |
| 331511 | Iron Foundries |
| 331512 | Steel Investment Foundries |
| 331513 | Steel Foundries (except Investment) |
| 331523 | Nonferrous Metal Die-Casting Foundries |
| 331524 | Aluminum Foundries (except Die-Casting) |
| 331529 | Other Nonferrous Metal Foundries (except Die-Casting) |

**Advanced Manufacturing (Brookings) is defined as the following NAICS industries:**

| Code | Description |
|---|---|
| 333111 | Farm Machinery and Equipment Manufacturing |
| 333112 | Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing |
| 333120 | Construction Machinery Manufacturing |
| 333131 | Mining Machinery and Equipment Manufacturing |
| 333132 | Oil and Gas Field Machinery and Equipment Manufacturing |
| 333241 | Food Product Machinery Manufacturing |
| 333242 | Semiconductor Machinery Manufacturing |
| 333243 | Sawmill, Woodworking, and Paper Machinery Manufacturing |
| 333248 | All Other Industrial Machinery Manufacturing |
| 333310 | Commercial and Service Industry Machinery Manufacturing |
| 333611 | Turbine and Turbine Generator Set Units Manufacturing |
| 333612 | Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing |
| 333613 | Mechanical Power Transmission Equipment Manufacturing |
| 333618 | Other Engine Equipment Manufacturing |
| 333912 | Air and Gas Compressor Manufacturing |
| 333914 | Measuring, Dispensing, and Other Pumping Equipment Manufacturing |
| 333921 | Elevator and Moving Stairway Manufacturing |
| 333922 | Conveyor and Conveying Equipment Manufacturing |
| 333923 | Overhead Traveling Crane, Hoist, and Monorail System Manufacturing |
| 333924 | Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing |
| 333991 | Power-Driven Handtool Manufacturing |
| 333992 | Welding and Soldering Equipment Manufacturing |
| 333993 | Packaging Machinery Manufacturing |
| 333994 | Industrial Process Furnace and Oven Manufacturing |
| 333995 | Fluid Power Cylinder and Actuator Manufacturing |
| 333996 | Fluid Power Pump and Motor Manufacturing |
| 333998 | All Other Miscellaneous General Purpose Machinery Manufacturing |
| 334111 | Electronic Computer Manufacturing |
| 334112 | Computer Storage Device Manufacturing |
| 334118 | Computer Terminal and Other Computer Peripheral Equipment Manufacturing |
| 334210 | Telephone Apparatus Manufacturing |
| 334220 | Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing |
| 334290 | Other Communications Equipment Manufacturing |
| 334310 | Audio and Video Equipment Manufacturing |
| 334412 | Bare Printed Circuit Board Manufacturing |
| 334413 | Semiconductor and Related Device Manufacturing |
| 334416 | Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing |
| 334417 | Electronic Connector Manufacturing |
| 334418 | Printed Circuit Assembly (Electronic Assembly) Manufacturing |
| 334419 | Other Electronic Component Manufacturing |
| 334510 | Electromedical and Electrotherapeutic Apparatus Manufacturing |
| 334511 | Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing |
| 334512 | Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use |
| 334513 | Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables |
| 334514 | Totalizing Fluid Meter and Counting Device Manufacturing |
| 334515 | Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals |
| 334516 | Analytical Laboratory Instrument Manufacturing |
| 334517 | Irradiation Apparatus Manufacturing |
| 334519 | Other Measuring and Controlling Device Manufacturing |

**Advanced Manufacturing (Brookings) is defined as the following NAICS industries:**

| Code | Description |
|---|---|
| 334610 | Manufacturing and Reproducing Magnetic and Optical Media |
| 335131 | Residential Electric Lighting Fixture Manufacturing |
| 335132 | Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing |
| 335139 | Electric Lamp Bulb and Other Lighting Equipment Manufacturing |
| 335210 | Small Electrical Appliance Manufacturing |
| 335220 | Major Household Appliance Manufacturing |
| 335311 | Power, Distribution, and Specialty Transformer Manufacturing |
| 335312 | Motor and Generator Manufacturing |
| 335313 | Switchgear and Switchboard Apparatus Manufacturing |
| 335314 | Relay and Industrial Control Manufacturing |
| 335910 | Battery Manufacturing |
| 335921 | Fiber Optic Cable Manufacturing |
| 335929 | Other Communication and Energy Wire Manufacturing |
| 335931 | Current-Carrying Wiring Device Manufacturing |
| 335932 | Noncurrent-Carrying Wiring Device Manufacturing |
| 335991 | Carbon and Graphite Product Manufacturing |
| 335999 | All Other Miscellaneous Electrical Equipment and Component Manufacturing |
| 336110 | Automobile and Light Duty Motor Vehicle Manufacturing |
| 336120 | Heavy Duty Truck Manufacturing |
| 336211 | Motor Vehicle Body Manufacturing |
| 336212 | Truck Trailer Manufacturing |
| 336213 | Motor Home Manufacturing |
| 336214 | Travel Trailer and Camper Manufacturing |
| 336310 | Motor Vehicle Gasoline Engine and Engine Parts Manufacturing |
| 336320 | Motor Vehicle Electrical and Electronic Equipment Manufacturing |
| 336330 | Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing |
| 336340 | Motor Vehicle Brake System Manufacturing |
| 336350 | Motor Vehicle Transmission and Power Train Parts Manufacturing |
| 336360 | Motor Vehicle Seating and Interior Trim Manufacturing |
| 336370 | Motor Vehicle Metal Stamping |
| 336390 | Other Motor Vehicle Parts Manufacturing |
| 336411 | Aircraft Manufacturing |
| 336412 | Aircraft Engine and Engine Parts Manufacturing |
| 336413 | Other Aircraft Parts and Auxiliary Equipment Manufacturing |
| 336414 | Guided Missile and Space Vehicle Manufacturing |
| 336415 | Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing |
| 336419 | Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing |
| 336510 | Railroad Rolling Stock Manufacturing |
| 336611 | Ship Building and Repairing |
| 336612 | Boat Building |
| 336991 | Motorcycle, Bicycle, and Parts Manufacturing |
| 336992 | Military Armored Vehicle, Tank, and Tank Component Manufacturing |
| 336999 | All Other Transportation Equipment Manufacturing |
| 339112 | Surgical and Medical Instrument Manufacturing |
| 339113 | Surgical Appliance and Supplies Manufacturing |
| 339114 | Dental Equipment and Supplies Manufacturing |
| 339115 | Ophthalmic Goods Manufacturing |
| 339116 | Dental Laboratories |
| 339910 | Jewelry and Silverware Manufacturing |

**Advanced Manufacturing (Brookings) is defined as the following NAICS industries:**

| Code | Description |
|---|---|
| 339920 | Sporting and Athletic Goods Manufacturing |
| 339930 | Doll, Toy, and Game Manufacturing |
| 339940 | Office Supplies (except Paper) Manufacturing |
| 339950 | Sign Manufacturing |
| 339991 | Gasket, Packing, and Sealing Device Manufacturing |
| 339992 | Musical Instrument Manufacturing |
| 339993 | Fastener, Button, Needle, and Pin Manufacturing |
| 339994 | Broom, Brush, and Mop Manufacturing |
| 339995 | Burial Casket Manufacturing |
| 339999 | All Other Miscellaneous Manufacturing |

# 2025 Stakeholder Input Narrative Synthesis

This brief synthesizes written responses from seven stakeholder groups (Childcare; Econ Dev; Education; Health; Tourism; Workforce; VEDP). The narrative is organized by group (tab), then cross-cutting by question, followed by an overall roll-up of the most common themes, and concludes with a comparison to 2017/2019/2021/2023 inputs and implications for the 2025 plan.

Region 3 conducted stakeholder input through the spring and summer of 2025. Over 100 stakeholders were invited to participate through virtual focus group sessions, one-on-one virtual interviews, and small group interviews. The response rate to the invitations was 60%. Input during the sessions was considered confidential with all input synthesized for the questions that were asked.

## Input by Topic

### Childcare

Stakeholders frame childcare as a workforce participation issue more than a standalone social service. The through-line is that limited, affordable slots keep working parents (especially women) on the sidelines or in part-time roles, which shows up as labor availability constraints across multiple sectors. Collaboration is improving, but population thinness and distance make the business model hard in smaller localities. Bottom line: expanding reliable childcare is one of the fastest ways to free up labor supply and stabilize retention.

### Performance of the Economy

This group paints a familiar rural competitiveness picture: some communities face population decline and aging infrastructure alongside a limited tax base, which forces trade-offs between maintaining what exists and investing for future growth. They call out product deficits (sites/utilities) and enabling constraints (housing and childcare) that directly affect company decisions and project timelines. Opportunity signals include back-office operations and data centers (tempered by power availability), growth in advanced manufacturing, and solar/energy plays. A memorable line captures the leakage challenge—"our biggest export is our talented young people"—and reinforces why talent retention, housing, and childcare sit inside the economic development agenda rather than at the periphery. Partnerships through the regional alliances remain essential to punch above weight.

### Education (K-12 through Higher Education)

Education partners are oriented to practical pathways: career-connected learning, dual enrollment, apprenticeships, and nursing/health pipelines. They see CTE partnerships as a growth area and are looking for clearer crosswalks from program to placement (so that credentials map cleanly into actual jobs). The tone is solution-focused: "tell us the skills, and we'll align," while also noting that wraparound barriers (transport, childcare) still shape completion and employment outcomes.

### Health Care

Participants describe rising pressure on access and affordability—more "working poor," clinics keeping food packs for patients, and tight capacity in behavioral/mental health. Workforce shortages (especially RNs/NPs) limit service availability and growth; recruiting is hard, but retention is harder without housing and childcare. They underscore the interplay with economic development: when employers can't find nurses or technicians, projects stall; when patients can't access care, absenteeism and turnover rise. This group supports stronger ladders into health careers (from high school through community college) and sees value in regional pipelines that share training cost and clinical placement.

### Tourism

Tourism stakeholders focus on product first, then promotion. They want more investable "things to do" (trails, outdoor assets, events), better wayfinding and a sharpened brand, and additional lodging in the right nodes. They also report better community buy-in than in the past, which helps with permits, partnerships, and programming. A persistent pain point is a thin hospitality workforce; flexible scheduling, seasonal housing, and transportation linkages matter here.

### Workforce

This group centers on participation and readiness. They cite pockets of disengaged or under-engaged workers who are "flying under the radar," and the need for supportive services (childcare, transport) alongside short, stackable training that leads to quick placement. They echo employer calls for soft skills, reliability, and baseline math/digital skills; apprenticeships and work-based learning remain the most credible tools to create job-ready candidates. Better data-sharing across partners (K-12, colleges, WDB, employers) is a recurring ask.

### Virginia Economic Development Partnership

The VEDP perspective is project-driven: the pipeline is active in manufacturing and data centers, but site readiness and power availability are the gating items. The US-58 corridor gets attention for momentum, while other subareas are "less active" absent product.

They emphasize how housing and childcare now sit in the critical-path for hiring plans and how workforce readiness must be linked to specific project timelines. Net: more Tier-advanced sites with enabling infrastructure, paired with targeted talent solutions, will materially change win rates.

## Input By Question

### Specific Responses

This is where most of the substance sits across all tabs. Six of seven groups converge on workforce/talent as the dominant theme (availability, readiness, and retention). Two to five groups per theme repeatedly mention: site readiness/infrastructure (especially power, water/sewer, broadband), housing (workforce/attainable), and childcare (as a participation constraint). Sector-wise, manufacturing is the constant, with data centers and CEA appearing in targeted places; healthcare workforce spans both "sector" and "enabler."

### General Response

Where used, these entries mirror "Specific Responses" but through a project/market lens: VEDP and Econ Dev emphasize sites/utilities, manufacturing/data centers, and IT/fiber; Tourism highlights product/brand; and workforce shows up as both a risk and a place to differentiate.

### Overall Roll-Up (Most Common Across Answered Questions)

• **Workforce & talent** are the most common responses: near-term availability and "day-one readiness," plus structural participation issues tied to childcare, transport, and housing.

• **Sites & infrastructure**: shovel-ready sites with sufficient power and utilities are the difference between staying in the hunt and not.

• **Housing & childcare**: these now show up as "project risks"—not just community issues—because they directly affect hiring plans and retention.

• **Sector signals**: advanced manufacturing is the constant; data centers are a live opportunity where power and sites align; CEA appears in place-specific contexts; healthcare workforce is both a sector and a cross-cutting constraint.

• **Coordination**: stakeholders want tighter alignment across K-12, community colleges, WDBs, REDOs, and VEDP so that training calendars, permitting timelines, and project milestones actually match.

## Comparison to 2017/2019/2021/2023 Stakeholder Inputs

### What's consistent

• The **workforce** drumbeat has not let up; occupation gaps noted in past cycles (e.g., healthcare nursing roles; maintenance/mechanics in manufacturing; supervisors/analysts in HVNRP and business services/IT) are echoed in 2025 wording.

• **Site development and "product first"** remain central, including tier-advancement and utility capacity as practical scorecards.

• **GO TEC and similar talent pathways** continue to be the backbone for aligning K-12 → community college → employer pipelines, with healthcare and CEA as prominent use cases.

### What's newly emphasized in 2025

• **Childcare and housing** appear explicitly as "deal variables," reflected in remarks tying them to project timelines and hiring plans.

• **Power availability** for data centers surfaces as a gating constraint, sharpening "sites & infrastructure" from general readiness to specific utility capacity and delivery windows.

• **Geography** of momentum becomes more granular (e.g., US-58 corridor activity) in project-led discussions about near-term wins.

### Process context

• Unlike 2023 (which leaned on 2021 input and limited broad surveying), 2025 reopens wide stakeholder engagement—aligning with Full Review expectations for demonstrated stakeholder participation.

• The 2025 Full Review framework (workforce, start-up ecosystems, sites/infrastructure, cluster scale-up) maps cleanly to the emphases stakeholders raised.

## Implications for the 2025 Region 3 Plan

• Treat childcare and housing as workforce infrastructure—fundable, schedulable, and measurable within project development.

• Double-down on site/power readiness where the pipeline is real (manufacturing and data centers along proven corridors), with tier-advancement and utility capacity as the scorecard.

• Keep GO TEC-style ladders as the backbone of healthcare and manufacturing talent, pairing short-cycle credentials with apprenticeships and employer commitments.

• For tourism, lead with product and lodging in investable nodes, then brand/wayfinding so marketing has tangible experiences to promote.

• Use partner alignment (REDOs, PDCs, WDBs, VEDP, K-12/CC) to time training, permits, and infrastructure to the project clock—and report against Full Review measures.

**Partners' Strategic Plan Summaries for GO Virginia Region 3 (2020–2025)**

***Regional Economic Development & Innovation***

- **GO Virginia Region 3 Growth & Diversification Plan (2021 Update)** – This multi-year plan, updated in 2021, identifies the region's strongest opportunities for economic growth and strategies to address its challenges. It aligns workforce talent development with key industry sectors (advanced manufacturing, IT, health care, etc.) to spur high-paying jobs, while tackling issues like an aging, shrinking population. The plan serves as a roadmap for the Region 3 Council's investments and benchmarks progress toward regional growth goals. *Full document available via GO Virginia Region 3 website.*

- **Institute for Advanced Learning and Research (IALR) Strategic Plan (FY 2022–2027)** – The IALR in Danville adopted a new five-year strategic plan to "catalyze a regional economy where all can live and thrive," centered on six strategic themes leveraging IALR's unique strengths. Developed collaboratively with input from civic, education, and business partners, the FY2022–27 plan refines IALR's vision, mission, and goals to drive Southern Virginia's economic transformation. It outlines targeted initiatives (with metrics) in applied research, advanced learning, manufacturing support, and economic development to expand the region's innovation ecosystem. *Full plan available on IALR's website.*

- **GO Virginia Region 3 Controlled Environment Agriculture (CEA) Roadmap (2022)** – In partnership with Virginia Tech, Region 3 stakeholders adopted a strategic "roadmap" to grow the indoor agriculture industry (e.g. greenhouse and aquaculture farming) in Southern Virginia. The CEA roadmap recommends establishing a regional CEA Innovation Hub to lead five key strategies: raising awareness of CEA, nurturing start-ups, expanding technical assistance, preparing industrial sites for CEA projects, and enhancing workforce/talent pipelines. The goal is to make Region 3 a hub for this high-tech agriculture sector, creating jobs and new enterprises – *"the synergies outlined in this plan, including workforce training, research, increased awareness and site development will make Southern Virginia a CEA leader"*. *(Adopted 2022; see IALR press release for full report.)*

- **Danville Pittsylvania County Chamber of Commerce Strategic Plan (2023–2026)** – The regional chamber launched a four-year strategic plan in 2023 to strengthen support for local businesses and economic growth. The plan lays out specific goals, tactics, and performance metrics to increase member value and position the Chamber as *"the premier advocate for business and industry in our region"*, according to Chamber President Anne Moore Sparks. Focus areas include promoting pro-business policies, delivering relevant services/training, fostering regional collaboration, and communicating the region's advantages to drive business prosperity. *(Plan announced Jan 2023 – full document available via Chamber website.)*

## *CEDS Literature Review Summary*

The literature review of recent Comprehensive Economic Development Strategies (CEDS) from the Commonwealth Regional Council, Southside Planning District Commission, and West Piedmont Planning District Commission highlights clear areas of alignment with GO Virginia Region 3's established investment priorities. Collectively, these documents emphasize workforce development, entrepreneurship, and infrastructure as critical drivers of economic growth and resilience. Summaries are below:

### Workforce and Talent Evolution

All three CEDS stress the urgent need to expand workforce training and upskilling opportunities, particularly in technical trades, health care, logistics, and advanced manufacturing. The Southside PDC notes persistent challenges related to workforce participation rates and out-migration of talent, underscoring the importance of career pathways and partnerships between K-12, community colleges, and employers. Similarly, West Piedmont PDC highlights labor force gaps in high-demand fields and the need for stronger alignment between training programs and employer requirements. These priorities directly align with Region 3's ongoing investments in GO TEC and other talent pipeline programs.

### Entrepreneurship and Innovation

Supporting small business growth and fostering entrepreneurship are shared themes across the CEDS documents. Both Southside and West Piedmont stress the importance of creating environments that support innovation hubs, co-working spaces, and technical assistance for start-ups. These efforts complement Region 3's recent investments in entrepreneurial ecosystem development, including the establishment of Innovation Hubs that provide access to state-of-the-art equipment and mentoring resources.

### Site Development and Infrastructure

The CEDS plans collectively recognize the importance of site readiness, broadband expansion, and utility improvements to attract new business investment. The Commonwealth Regional Council places particular emphasis on broadband access as an economic development necessity, while Southside PDC cites site development as a critical step in positioning the region for advanced manufacturing and logistics investments. These align with Region 3's significant commitment of resources toward broadband and site development initiatives.

### Controlled Environment Agriculture (CEA)

While CEA is not explicitly a top focus in every CEDS, the potential of agriculture technology and value-added food processing is noted, particularly in the Commonwealth Regional Council and Southside PDC strategies. These highlight opportunities for innovation in farm-to-market systems

and renewable energy applications, signaling potential for Region 3 to expand support in this investment area.

### Leadership and Collaboration

All three CEDS underscore the importance of collaboration among local governments, educational institutions, regional organizations, and private industry. The emphasis on shared strategies and coordinated efforts reflects Region 3's commitment to regional leadership and the need to continue building capacity for long-term success.

### Conclusion

The reviewed CEDS documents demonstrate strong alignment with Region 3's Growth & Diversification Plan and provide validation for its investment strategies. Workforce training and entrepreneurship remain the most urgent needs, while broadband, infrastructure, and site development provide the necessary foundation for future growth. Opportunities exist to expand efforts in CEA and regional leadership development to ensure a balanced and diversified approach to economic resilience.

## *Workforce Development Plans*

**West Piedmont Workforce Development Board Local Plan (2020–2024)** – This is the WIOA four-year plan for Workforce Area 17, covering Danville, Martinsville, and the counties of Henry, Patrick, and Pittsylvania (West Piedmont region). The comprehensive plan analyzes regional labor market needs and outlines strategies to build a skilled workforce aligned with employer demand. It sets a vision of increasing equity, reducing employment barriers, and improving quality of life for workers in the area. Key initiatives include expanding training programs in high-demand fields, strengthening career pathways and apprenticeships, and enhancing partnerships with businesses and education providers. *(Full plan available as "VCW West Piedmont Local Plan 2020–24.")*

**South Central Workforce Development Board Local Plan (2020–2024)** – Covering the eastern portion of Region 3 (counties like Brunswick, Mecklenburg, Halifax, Charlotte, Prince Edward, etc.), this four-year workforce plan was developed in alignment with Virginia's statewide WIOA goals. It is a "comprehensive action plan designed to develop, align and integrate service delivery" across the South Central region. The plan's core strategies are to **(1)** direct workforce investments toward relevant education and training so that job-seekers gain in-demand skills and employers have a ready supply of talent, **(2)** apply "job-driven" approaches in the one-stop system to better connect workers with quality jobs, and **(3)** strengthen partnerships among education, industry and government to build an innovative, aligned workforce ecosystem. These efforts, along with targets for business engagement and credential attainment, aim to close skill gaps and support economic growth in Region 3. *(Plan available through South Central WDB/VCW South Central.)*

***Education & Talent Development Plans***

- **Danville Community College Strategic Plan (2021–2023)** – Titled "DCC 2023: Do. Create. Collaborate.", this plan guided Danville CC's priorities for student success and regional workforce development. It established four strategic pillars: **Student Success** (e.g. implementing a college-wide enrollment management plan and enhanced support services), **Advancing Excellence** (expanding workforce services, modernizing policies, and faculty/staff development), **Resource Development** (ensuring financial sustainability, building external partnerships, and leveraging technology), and **Diversity, Equity & Inclusion** (launching a DEI plan, improving recruitment of diverse faculty, and closing achievement gaps). Through these initiatives, DCC aimed to be "the college of choice" for exemplary education in the region, preparing students for careers and strengthening community prosperity. *([PDF of DCC 2021–23 Strategic Plan])*

- **Southside Virginia Community College "Aspire 2027" Strategic Plan (2022–2027)** – SVCC crafted a five-year plan called **"Aspire 2027: Pathways to Opportunities,"** adopted in 2022 to drive excellence and opportunity across its 10-county service area. Built on an updated mission (serving as a gateway to education, training and employment in a student-centered, inclusive environment), the plan focuses on five strategic priorities: **Student Success** (boosting enrollment of underrepresented groups, and improving retention, completion and transfer rates); **Teaching and Learning** (ensuring programs meet current workforce needs and expanding dual-enrollment and industry partnerships); **Community Engagement** (fueling economic opportunities and strengthening community partnerships while fostering diversity and inclusion); **Our People** (making SVCC a premier place to work through professional development, inclusive excellence, and a culture of innovation); and **Our Resources** (efficiently managing resources and pursuing funding support to sustain the college's mission). This comprehensive plan was developed "with broad input to contribute to the region's economic vitality". *(See SVCC website for "Aspire 2027" full plan.)*

- **Patrick & Henry Community College Strategic Plan (2022)** – In 2022, Patrick & Henry CC (serving Martinsville, Henry and Patrick Counties) launched a new strategic plan aligned with the Virginia Community College System's **Opportunity 2027** initiative. Spurred by the impacts of COVID-19 on its communities, P&HCC's plan is **laser-focused on eliminating equity gaps** in student outcomes. The college recognized that students from disadvantaged backgrounds were disproportionately affected by the pandemic's health, economic, and educational fallout. Thus, the strategic plan sets forth reforms to ensure all students – regardless of race, gender, or income – receive the support needed to enroll, persist, and complete credentials leading to sustainable wages. Strategies include addressing systemic barriers, fostering a "culture of care" on campus, and improving attainment for underrepresented groups, in line with the VCCS goal of closing attainment gaps by 2027. *(Full plan available via P&HCC website.)*

### *Tourism & Sector-Specific Strategies*

- **Visit SoSi Sports Tourism Strategic Plan (2024)** – **Visit SoSi** (the tourism brand for Danville and Pittsylvania County) completed a sports tourism strategic plan and facility recommendations report in mid-2024 to grow the region's sports travel economy. The plan – described as a "playbook" – includes a thorough SWOT analysis of Danville–Pittsylvania as a sports destination, an inventory and evaluation of local sports venues, benchmarking against competing markets, and a set of actionable recommendations. Key focus areas (the "power of three" in each section) involve leveraging existing assets like raceways and the Olde Dominion Ag Complex for events, developing new or enhanced sports complexes to attract regional/national tournaments, and building community partnerships (e.g. with YMCA, sports clubs) to expand programming. By implementing this strategy, Visit SoSi aims to establish the Danville area as a premier sports tourism host – boosting visitor spending and economic impact. *(Plan completed July 2024; available via City of Danville/Visit SoSi.)*

### *Regional and Local Economic Development*

- **Southern Virginia Regional Alliance – Regional Site Development Strategy (2021)** The **Southern Virginia Regional Alliance (SVRA)** launched a strategic, multi-year site development program in 2021 to expand the region's inventory of "business-ready" industrial sites. Backed by GO Virginia Region 3 and Tobacco Commission funds, the program mirrors the state's site characterization initiative. SVRA and local economic developers identified ten publicly owned sites across the region (including Danville, and Halifax, Patrick, and Pittsylvania Counties) for due diligence and engineering upgrades. The goal is to elevate these sites to higher readiness tiers (e.g. raising several Tier-2 properties up to Tier 4 "shovel-ready" status) and thereby reduce risks for prospective industries. By 2024, this effort had upgraded multiple industrial parks and sites, strengthening Southern Virginia's ability to attract new companies and jobs. **Link:** *SVRA Press Release (Oct. 2021) – "Funds to Grow Inventory of Shovel-Ready Sites," outlining the regional site development plan.*

- **Virginia's Growth Alliance – Strategic Refresh Plan (2021–2023)** a regional economic development coalition in Southside – undertook a strategic "reset" process during 2021–2023 to realign its goals and improve effectiveness. Supported by GO Virginia Region 3, the **VGA Refresh** initiative included a thorough analysis of business sectors in its member localities, a regional workforce study, and an evaluation of local incentives. The project also tested the feasibility of new fundraising campaigns to sustain VGA's operations. By 2023, VGA had completed a new strategic plan and a development/fundraising study, and it began restructuring the organization to implement the plan's recommendations. The refreshed strategy sharpens VGA's focus on high-potential industry clusters and talent needs while strengthening the alliance's capacity and sustainability. **Link:** *GO Virginia Region 3 Project Brief – "VGA Refresh," describing the strategic plan development.*

- **Virginia's Heartland Regional EDA – Alliance Strategic Plan (2023)** In 2023, seven south-central Virginia counties collaborated (via the Commonwealth Regional Council) to form the new **Virginia's Heartland Regional Economic Development Alliance (VHREDA)**, underpinned by a comprehensive strategic plan. The counties engaged an external consultant (Creative EDC) to develop the multi-year plan for this regional alliance. The resulting strategy maps out how a unified approach can "**add capacity**" to local economic development efforts – helping the Heartland region prepare for job growth, support entrepreneurship, and jointly plan critical infrastructure investments. The plan's recommendations provided the blueprint for VHREDA's creation, and a subsequent fundraising study confirmed strong support. As of 2024, the Alliance's board is being established and a private capital campaign is underway to fund implementation of the strategic plan over the next five years. **Link:** *Creative EDC case study – "Virginia's Heartland Regional EDA," summarizing the strategic plan and alliance launch.*

- **Mecklenburg County – Strategic Economic Development Action Plan (2024) Mecklenburg County** adopted a new Strategic Economic Development Action Plan in **November 2024** to guide the county's growth for the next decade. The Mecklenburg Department of Economic Development, having enjoyed recent success (e.g. landing large data centers), commissioned this plan as a "fresh look" to reach the *next level* of development. Prepared with extensive stakeholder input, the plan analyzes Mecklenburg's unique position – including financial and real estate assets that set it apart from other rural localities – and answers "Where are we, where do we want to go, and how do we get there?". It provides **practical, actionable recommendations** to leverage the county's strengths, address workforce and infrastructure needs, and modernize economic development efforts. An implementation matrix of short- and long-term actions is included to measure progress. This formally adopted 2024 the plan is now the county's roadmap for diversifying the economy and capitalizing on Mecklenburg's recent momentum. **Link:** *Mecklenburg County SEDAP (2024) – Full PDF.*

- **Halifax County Industrial Development Authority – Strategic Plan (2022)** The **Halifax County IDA** developed a multi-year strategic plan in **2022** to reinvigorate local economic development. After a 6-month process including 40+ stakeholder interviews and a joint IDA/Board of Supervisors retreat, the plan established four strategic goal areas: **Business Growth**, **Real Estate Infrastructure**, **Regional Engagement & Partnerships**, and **Organizational Sustainability**. The plan consists of 4 goals, 16 strategies and 56 tactics. It emphasizes expanding business retention and expansion efforts as a top priority (recognizing it's "easier to keep a business than attract a new one"). It calls for modernizing and marketing Halifax's industrial real estate portfolio – improving site readiness and upgrading IDA-owned buildings – to meet evolving industry needs. The IDA also committed to deepen collaboration with local government, regional partners, and the community (addressing a past "lack of regional engagement"). Finally, the plan outlines steps for the IDA to raise its profile and capacity (e.g. communications, staffing) to ensure long-term sustainability. Halifax's IDA and

County leaders have formally adopted this plan as a roadmap for economic development through the mid-2020s. **Link:** *Halifax IDA Board Presentation (Aug. 25 2022) – Strategic Plan Overview.*

- **Prince Edward County Economic Development Strategic Plan (2025).** Though county-wide in scope, the plan elevates tourism as a target growth area tied to PEC's natural settings, outdoor recreation, rural cultural heritage, and historic assets; it also benefits from two colleges (Longwood and Hampden-Sydney) that bolster visitation and quality of life. The plan notes a strong base for recreation/tourism and advantageous proximity to Richmond. Key constraints include higher poverty and lower educational attainment, ongoing population decline, and a shortage of diverse, affordable housing—conditions that also dampen workforce attraction. Low levels of commercial development further require incentives and active marketing to bring new hospitality options online. Goals and actions for tourism are explicit: expand the industry around PEC's natural, cultural, and recreational qualities; update regulations to broaden lodging choices for visitors; and formalize quarterly collaboration among the County, Farmville, Longwood, and Hampden-Sydney on shared economic development and tourism initiatives. The plan also targets "experience-based tourism" that generates higher local value. **Link***: Economic Development Strategic Plan on the Prince Edward County Economic Development website.*

***Community Foundations***

- **The Harvest Foundation – "Hope" Strategic Plan (2022–2026)** Martinsville's **Harvest Foundation**, a major regional philanthropic organization, launched a new five-year strategic plan in 2022 centered on the theme of "**Hope**." After a year-long process of data gathering and community input, the **2022–2026 plan** hones Harvest's focus into three priority areas: **Thriving Youth**, **A Vibrant Community**, and a **Resilient and Diverse Economy**. Under the economy pillar, Harvest aims to support job creation and an entrepreneurial ecosystem that lifts the entire Martinsville–Henry County region. The plan explicitly positions itself as a community-wide strategy – Harvest calls on partners and local stakeholders to help realize these goals. Early implementation has included aligning grantmaking and programs with these priorities and promoting equity across all initiatives. By "choosing hope as our north star," the foundation intends to spur collaborative action that builds local capacity, uplifts youth, and strengthens quality of life and economic opportunity in the region. **Link:** *Harvest Foundation Strategic Plan (2022) – Web summary.*

- **Danville Regional Foundation – Regional Economic Development Strategic Plan (2019)** In 2019, the Danville Regional Foundation, in collaboration with Pittsylvania County and the City of Danville, developed a comprehensive Regional Economic Development Strategic Plan. This plan assesses the competitiveness of the Pittsylvania-Danville micropolitan area across ten

critical categories, including industry clusters, labor supply, housing, and the entrepreneurial ecosystem. It identifies strengths such as a business-friendly environment and available sites with infrastructure, while also addressing challenges like population decline and workforce density. The plan provides actionable recommendations aimed at enhancing the region's economic development efforts over the next 3 to 10 years, laying the groundwork for sustained growth and collaboration among stakeholders. drfonline.org

***Four-year Universities and Colleges***

- **Longwood University – Strategic Plan 2019–2025: "Forefront of the Commonwealth.** Longwood University (Farmville) is executing a 2019–2025 strategic plan that positions the institution as a catalyst for Southside Virginia's advancement. As *"the only four-year public institution in south central Virginia,"* Longwood sees regional prosperity as core to its mission. The plan underscores Longwood's commitment to academic excellence and civic leadership while strengthening its partnerships in the surrounding community. Key priorities include enhancing academic rigor and enrollment, fostering innovation in programs, and elevating Longwood's profile in the Commonwealth. Notably, the plan highlights *"college-town vibrancy"* – collaborating with the Town of Farmville, Prince Edward County, and nearby Hampden-Sydney College to enrich the area's social and economic life. Longwood also emphasizes its stewardship role in the region, from providing K–12 outreach and workforce development, to serving as an engine for civic engagement and cultural activity. This multi-year strategy was adopted by Longwood's Board in 2019 and guides the university's investments and initiatives through 2025. **Link:** *Longwood University Strategic Plan 2019–2025 (PDF).*

- **Hampden-Sydney College – Strategic Plan (Current)** Hampden-Sydney College (in Prince Edward County) continues to pursue a comprehensive strategic plan (initially adopted in the 2010s and updated since) to uphold its mission *"to form good men and good citizens"* and to secure the college's future. The plan's goals center on academic excellence, student character development, campus environment, diversity, and financial sustainability. Key objectives include strengthening Hampden-Sydney's reputation as a leader in educating men, broadening its curriculum (while preserving the liberal arts tradition), and ensuring graduates are prepared for modern careers. The college is also focused on greater community engagement – for example, one initiative encourages *increased curricular and co-curricular interaction with nearby institutions* (such as Longwood University) and local community service, reinforcing the two-college community of Farmville. Additionally, Hampden-Sydney's plan calls for expanding diversity on campus and marketing the college to wider audiences nationally. This strategic framework, though internally focused, aligns with regional goals by producing an educated workforce and civic leaders for Southside Virginia. **Link:** *Hampden-Sydney College Strategic Plan (PDF).*

- **Averett University – "Bigger Dreams, Bolder Futures" Strategic Plan (2020–2025) Averett University** is nearing completion of its *Averett 2025: Bigger Dreams, Bolder Futures* strategic plan, which launched in 2020. This five-year plan lays out ambitious strategies to grow the university and deepen its impact on the region. A key focus has been **infrastructure and program expansion** – for instance, under this plan Averett became the fixed-base operator at Danville Regional Airport and expanded its aviation education facilities, aligning with regional workforce needs. The plan's vision is *"bold"* and geared toward tangible outcomes by 2025 and beyond. It emphasizes enhancing campus facilities and academic offerings in ways that benefit both students **and the broader community/region** for decades to come. Concurrently, Averett has undertaken a rebranding initiative and is preparing a comprehensive fundraising campaign to support these strategic goals. From new degree programs to capital projects, *Bigger Dreams, Bolder Futures* is steering Averett's evolution as a vibrant, region-serving university. **Link:** *Averett 2025 Strategic Plan – Overview (Averett News, Feb 2022).*

***Miscellaneous Reports***

- **Regional Housing Strategy – Southern Virginia Housing Summits (2022–2024)** Acknowledging that housing is critical infrastructure for economic growth, Region 3 leaders from local governments, SVRA, and IALR have co-developed a regional housing strategy in recent years. A centerpiece of this effort is the **Southern Virginia Regional Housing Summit**, held annually since 2022. By the third summit in 2024, the City of Danville (with support from regional partners) convened stakeholders – developers, builders, lenders, and officials – to spur new residential development across Danville, Martinsville, and counties including Halifax, Henry, Patrick, and Pittsylvania. These summits share information on local/state/federal housing incentives and showcase active projects, with the clear goal of addressing the **shortage of workforce housing** that has resulted from the region's recent job growth. "Our area has been blessed with expanding job opportunities… however, the increased jobs have created a housing shortage. Developers have stepped up, but we need more," noted Delegate Danny Marshall at the 2024 summit. By coordinating strategies and public-private efforts (even piloting a new Tobacco Commission housing incentive), Region 3's economic and community development leaders are integrating housing solutions into their broader strategic plans – ensuring the region can attract and retain the talent needed for continued prosperity. **Link:** *IALR News – "Third Annual Southern Virginia Regional Housing Summit" (Sept. 2024).*

# Virginia Economic Development Partnership Assisted Project Announcements 2021 - 2025

| Company Name | Headquarters Location | Locality | Business Description | New (N) / Expansion (E) | New Jobs | Investment ($M) |
|---|---|---|---|---|---|---|
| Laminate Technologies | OH | Henry | Custom laminators | E | 42 | 4 |
| Intertape Polymer Group | Canada | Pittsylvania | Manufactures packaging products | E | 50 | 45 |
| Crown Holdings, Inc. | PA | Henry | Manufactures aluminum cans | E | 126 | 145 |
| J&J Truck Sales | VA | Pittsylvania | Heavy duty truck and construction equipment sales and rental firm | E | 27 | 5 |
| Walraven, Inc. North America | Netherlands | Pittsylvania | US HQ relocation; Manufacturer of fabricated smart solution products used by installation companies | N | 46 | 7 |
| MEP Ltd. | United Kingdom | Danville | Manufacturer of complex plastic and metal components for the aerospace and defense sector | N | 45 | 6 |
| Prolam | Canada | Patrick | Manufacturer of high-quality hardwood floors for commercial trucks and dry van trailers | N | 59 | 13 |
| Tyson Foods, Inc. | AR | Pittsylvania | Production of premium quality, fully cooked Tyson brand | E | 376 | 295 |
| Kegerreis | VA | Danville | HQ; Digital marketing firm | E | 62 | 2 |
| B & W Fiberglass Inc | NC | Mecklenburg | Distribution and fiberglass yarn winding facility | N | 40 | 7 |
| VF Corporation | CO | Henry | Distributes branded lifestyle apparel, footwear, and accessories | E | 82 | 10 |
| Mohawk Flooring | GA | Danville | Manufactures a wide range of flooring products | E | 48 | 1 |
| Ten Oaks, LLC | Canada | Patrick | Manufacturer of high-quality residential hardwood flooring | E | 11 | 9 |

# Virginia Economic Development Partnership Assisted Project Announcements 2021 - 2025

| Company Name | Headquarters Location | Locality | Business Description | New (N) / Expansion (E) | New Jobs | Investment ($M) |
|---|---|---|---|---|---|---|
| Worthington Biomedical Corporation | NJ | Mecklenburg | R&D; enzyme production | N | 15 | 6 |
| Commonwealth Home Health Care | VA | Pittsylvania | Distribution of medical equipment | E | 26 | 2 |
| Axxor - North America | The Netherlands | Pittsylvania | Develops and produces paper honeycomb | E | 21 | 4 |
| Crown Holdings, Inc. | PA | Henry | Expansion of metal can production | E | 0 | 20 |
| AeroFarms | NJ | Pittsylvania | Production of micro-greens | E | 66 | 0 |
| Tradesman Trucking | VA | Pittsylvania | HQ relocation; moving and transit company | E | 30 | 5 |
| IperionX | NC | Halifax | Titanium demonstration facility | N | 108 | 82 |
| Hitachi Energy | Switzerland | Halifax | Manufactures large transformers for the utility and renewable energy markets | E | 165 | 37 |
| Skip Barber | NY | Halifax | HQ relocation; Performance driving school | N | 24 | 9 |
| Amthor International | VA | Pittsylvania | Metal tanker truck manufacturer | E | 75 | 30 |
| Apex Mills | NY | Patrick | Specialty supplier and manufacturer of warp knit fabrics geared towards industrial and technical applications | N | 44 | 3 |
| Engineered Biopharmaceuticals | VA | Danville | Manufacturer of oral pharmaceutical dosing platforms | E | 34 | 6 |
| Zollner Elektronik AG | Germany | Danville | Developer of custom electronic products for clients using proprietary technology | E | 80 | 14 |
| Press Glass | Poland | Henry | Glass fabricator | E | 335 | 155 |
| Shanghai Renheng USA | China | Mecklenburg | Manufactures packaging for the food industry | N | 40 | 10 |
| KTL Restorations | VA | Pittsylvania | High-end car fabricator and manufacturer | E | 30 | 3 |
| 5 Pillar Meats | ME | Prince Edward | Processing facility for red meats | N | 12 | 2 |

# Virginia Economic Development Partnership Assisted Project Announcements 2021 - 2025

| Company Name | Headquarters Location | Locality | Business Description | New (N) / Expansion (E) | New Jobs | Investment ($M) |
|---|---|---|---|---|---|---|
| EPL America | India | Danville | Cosmetic packaging manufacturer | E | 24 | 37 |
| JKOZ Engineering | VA | Nottoway | Relocation of manufacturing division; Designs and manufactures aircraft seals | N | 45 | 4 |
| Hitachi Energy | Japan | Halifax | Manufactures large transformers for the utility and renewable energy industries | E | 100 | 26 |
| Speyside Bourbon Cooperage, Inc. US | France | Pittsylvania | Stave mill for craft beverage industry | N | 40 | 17 |
| RBW Electric Cars | United Kingdom | Pittsylvania | Manufacturer of hand-built electric classic sports cars | N | 144 | 8 |
| Shalag U.S. Inc. | Israel | Mecklenburg | Manufactures non-woven fabric for use in manufactured products | N | 52 | 17 |
| TECHnista, LLC | VA | Pittsylvania | Education consulting company specializing in curriculum development for K-12 programs in defense and advanced manufacturing industries | E | 15 | 2 |
| Microporous Llc | TN | Pittsylvania | Manufacturer of battery separators | N | 2015 | 1351 |
| Cambridge Pavers | NJ | Pittsylvania | Manufacturer of high-quality pavers, slabs, and wall systems | N | 55 | 47 |
| | | | | | **4500** | **2440** |

# Sites Listed on Virginia Economic Development Partnership VirginiaScan

| Site Name | Tier Level | County or City |
|---|---|---|
| **Boydton IDA Site** | 1 | Mecklenburg |
| **Brunswick County Industrial Park** | 2 | Brunswick |
| **Rives Road Industrial Site** | 2 | Martinsville |
| **Lunenburg-Victoria Industrial Park** | 2 | Lunenburg |
| **Gretna Industrial Park** | 2 | Pittsylvania |
| **Lunenburg Commercentre** | 2 | Lunenburg |
| **Pickett Park** | 2 | Nottoway |
| **Buckingham County Commerce/Business Park** | 2 | Buckingham |
| **Bright Leaf Rd Site** | 2 | Danville |
| **I-85 Business Center Park** | 2 | Brunswick |
| **JPS Site** | 2 | Halifax |
| **Cumberland Business/Industrial Park** | 2 | Cumberland |
| **Clarksville Commerce Center** | 2 | Mecklenburg |
| **Southern Virginia Multi-Modal Park** | 2 | Pittsylvania |
| **Old Luck Quarry site** | 2 | Prince Edward |
| **WAY Property** | 2 | Buckingham |
| **Buckingham Branch Yard Site** | 2 | Buckingham |
| **Patriot Centre II** | 2 | Henry |
| **Blairs Crossing Lot 1** | 2 | Pittsylvania |
| **Wilkins Site** | 2 | Halifax |
| **Amelia County Regional Commerce Park** | 2 | Amelia |
| **Heartland Regional Industrial Park** | 3 | Charlotte |
| **Heartland Innovative Technology Park** | 3 | Prince Edward |
| **Cyber Park** | 4 | Danville |
| **Prince Edward County Business Park** | 4 | Prince Edward |
| **Patriot Centre Industrial Park** | 4 | Henry |
| **Southern Virginia Technology Park** | 4 | Halifax |
| **Coleman Site** | 4 | Danville |
| **Cane Creek Centre** | 4 | Pittsylvania |
| **Day Site** | 4 | Halifax |
| **Commonwealth Crossing Business Centre** | 4 | Henry |
| **Kinderton Technology Campus** | 4 | Mecklenburg |
| **Southern Virginia Megasite at Berry Hill** | 4 | Pittsylvania |
| **Cane Creek Centre, Lot 11B** | 4 | Pittsylvania |
| **Cane Creek Centre, Lot 11A** | 4 | Pittsylvania |

# Sites Listed on Virginia Economic Development Partnership VirginiaScan

| Site Name | Tier Level | County or City |
|---|---|---|
| **Cane Creek Centre, Lot 10** | 4 | Pittsylvania |
| **Cane Creek Centre, Lot 12C** | 4 | Pittsylvania |
| **Cane Creek Centre, Lot 12B** | 4 | Pittsylvania |
| **Cane Creek Centre, Lot 12A** | 4 | Pittsylvania |
| **Cyber Park, Lot 10C** | 4 | Danville |
| **Cyber Park, Lot 12B** | 4 | Danville |
| **Cyber Park, Lot 5** | 4 | Danville |
| **Riverview Industrial Park, Lot 5B4** | 4 | Danville |
| **Patriot Centre Industrial Park - Tract 11** | 4 | Henry |
| **Patriot Centre Industrial Park - Tract 9N** | 4 | Henry |
| **Commonwealth Crossing - Tract 2** | 4 | Henry |
| **Stonewall** | 4 | Brunswick |
| **Commonwealth Crossing Tract 5** | 4 | Henry |
| **Cane Creek Centre, Lot 1-B** | 4 | Pittsylvania |
| **Cane Creek Centre, Lot 6B** | 4 | Pittsylvania |
| **Cane Creek Centre, Lot 6C** | 4 | Pittsylvania |
| **Southern Virginia Technology Park - Site A** | 4 | Halifax |
| **Southern Virginia Technology Park - Site C** | 4 | Halifax |
| **Southern Virginia Technology Park - Site D** | 4 | Halifax |
| **Southern Virginia Technology Park - Site G** | 4 | Halifax |
| **Commonwealth Crossing Tract 3** | 4 | Henry |
| **Rich Creek Corporate Park** | 5 | Patrick |
| **175 Airside Drive (Lot 2J)** | 5 | Danville |
| **Cane Creek Centre, Lot 8A** | 5 | Pittsylvania |
| **Cyber Park, Lot 7D** | 5 | Danville |
| **Patriot Centre Industrial Park - Tract 4** | 5 | Henry |
| **Southern Virginia Technology Park - Site B** | 5 | Halifax |
| **Southern Virginia Technology Park - Site E** | 5 | Halifax |
| **Southern Virginia Technology Park - Site F** | 5 | Halifax |
| **Rich Creek Corporate Park - Site 1** | 5 | Patrick |
| **Rich Creek Corporate Park - Site 2** | 5 | Patrick |
| **Cherrystone Industrial Park** | NULL | Pittsylvania |
| **Southside Industrial Park** | NULL | Halifax |
| **Sinai Industrial Park** | NULL | Halifax |

## Sites Listed on Virginia Economic Development Partnership VirginiaScan

| Site Name | Tier Level | County or City |
|---|---|---|
| **Lake Country Business Park** | NULL | Mecklenburg |
| **Clearview Business Park** | NULL | Martinsville |
| **Thomason Estate** | NULL | Mecklenburg |
| **Commonwealth Commercial Property** | NULL | Mecklenburg |
| **East Atlantic Street Site** | NULL | Mecklenburg |
| **1079 Industrial Park Road** | NULL | Halifax |
| **Lunenburg County Airport Site** | NULL | Lunenburg |
| **Blue Ridge Regional Airport Site** | NULL | Henry |
| **KV Road Industrial Site** | NULL | Lunenburg |
| **Philpott Road** | NULL | Halifax |
| **Solite Site** | NULL | Buckingham |
| **58 East Data Campus** | NULL | Pittsylvania |

## Alignment of Region 3 Sites with Target Industry Sectors

The following table summarizes how the 81 industrial and commercial sites listed in VirginiaScan align with GO Virginia Region 3's targeted traded industry sectors. Site alignment is based on zoning suitability, infrastructure readiness, and Tier certification levels as reported through the Virginia Business Ready Sites Program.

| Target Sector | Primary Suitable Zoning Classifications | # of Sites Potentially Aligned | Tier 4–5 Sites | Observations / Site Readiness Notes |
|---|---|---|---|---|
| Advanced Manufacturing & Advanced Materials | Light Industrial, Heavy Industrial | ~60 (48 light + 12 heavy) | ~28 | Strong alignment; high concentration in Henry, Pittsylvania, Danville, Halifax; Berry Hill and Commonwealth Crossing are Tier 4–5 anchors. |
| Energy, Natural Resources & Finished Products | Heavy Industrial, Light Industrial | ~40 | ~18 | Suited for energy and processing operations; infrastructure demands high; potential expansion at Halifax and Mecklenburg sites. |
| Agriculture & Food Production | Light Industrial, Agricultural | ~25 | ~10 | Food processing and value-add uses fit light industrial; CEA and agribusiness can benefit from 4 agricultural-zoned sites with water access. |
| Controlled Environment Agriculture (CEA) | Agricultural, Light Industrial | ~10 | ~4 | Emerging sector; requires utility infrastructure and flex zoning; ideal for re-purposed industrial parks in Prince Edward and Charlotte. |
| Information Technology & Communications Services | Office Tech Park, Commercial | ~12 (4 office + 8 commercial) | ~5 | Moderate alignment; sites such as Cyber Park and Kinderton Technology Campus are Tier 4 and strategically positioned. |
| Business Services | Office Tech Park, Commercial | ~10 | ~4 | Limited inventory; aligned to smaller footprint and mixed-use developments; needs Class A space and broadband capacity. |

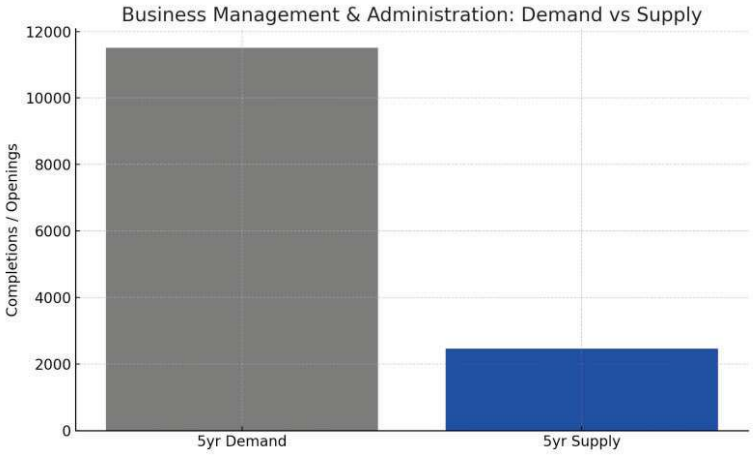
| Target Sector | Primary Suitable Zoning Classifications | # of Sites Potentially Aligned | Tier 4–5 Sites | Observations / Site Readiness Notes |
|---|---|---|---|---|
| Logistics & Transportation | Logistics, Light Industrial | ~20 (1 logistics + 19 light) | ~9 | Undersupplied zoning but functional capacity via multi-modal sites in Mecklenburg and Pittsylvania (near I-85 and U.S. 29 corridors). |
| Health Care Services | Office Tech Park, Commercial | ~6 | ~3 | Niche alignment for medical or back-office operations in tech parks; reliant on population centers and workforce clusters. |

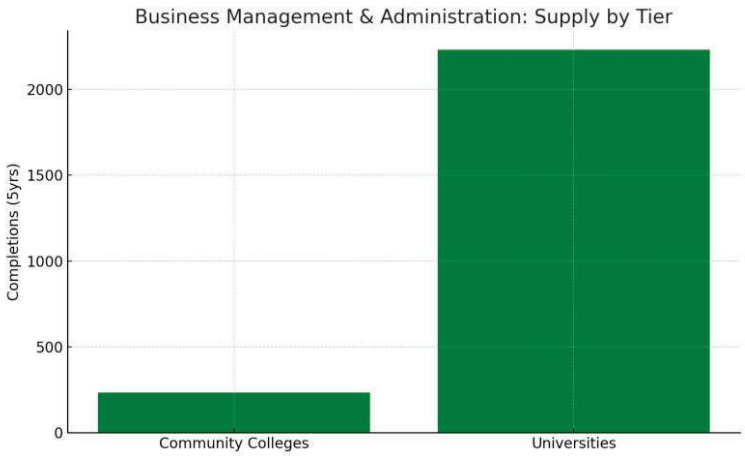
Summary Insight: Roughly 80% of all Region 3 sites are zoned light or heavy industrial—supporting the region's strong manufacturing and energy base. Office/technology and commercial zones (12 sites) enable growth in IT, business services, and health care support functions. Agricultural and flex-zoned sites (4–5 sites) represent emerging potential for Controlled Environment Agriculture and ag-tech ventures. Future investment should prioritize flexible zoning, infrastructure extension, and tier advancement to capture cross-sector projects that blend manufacturing, technology, and agriculture.

# GO Virginia Region 3 – Skills Gap Analysis (2025 Update)

## Business Management & Administration

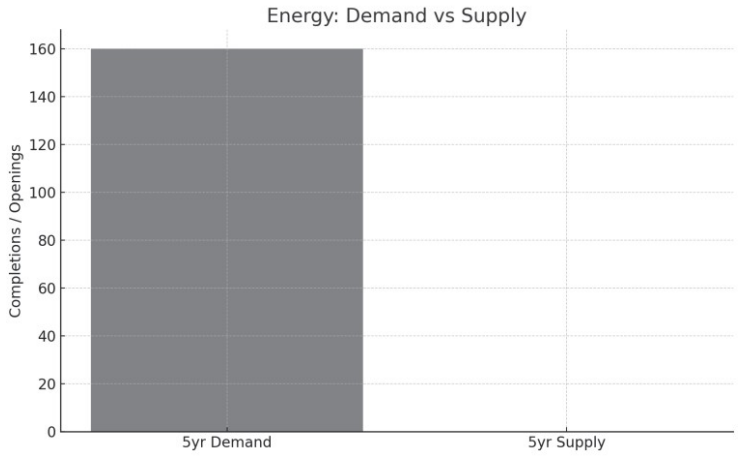
**Over the next five years, Region 3 will require about 11,510 workers in Business Management & Administration.** During the past five academic years, regional institutions awarded 2,464 relevant credentials and degrees, covering roughly 21% of projected demand. Most supply came from Community colleges contributed about 233 completions, universities produced about 2,231. This sector faces a severe undersupply, leaving employers dependent on recruitment from outside the region or expanded in-house training.



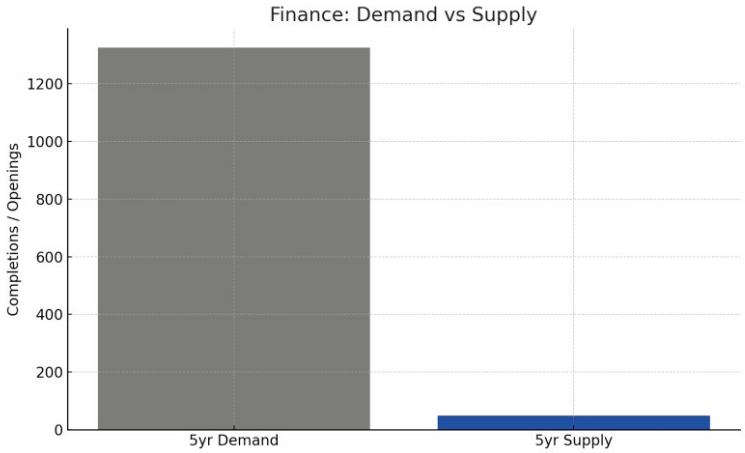
## Energy

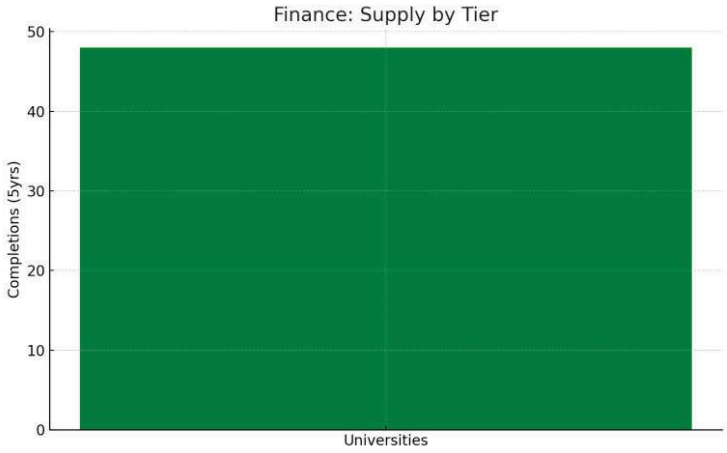
**Over the next five years, Region 3 will require about 160 workers in Energy.** During the past five academic years, regional institutions awarded no relevant completions for this sector. This sector faces a severe undersupply, leaving employers dependent on recruitment from outside the region or expanded in-house training.




## Finance

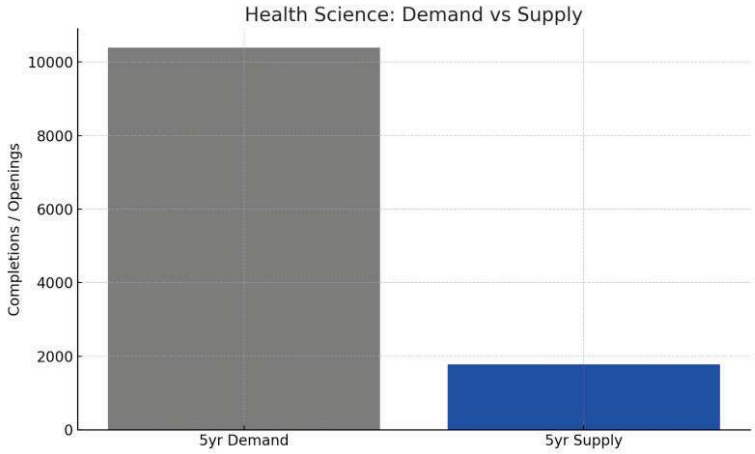
**Over the next five years, Region 3 will require about 1,325 workers in Finance.** During the past five academic years, regional institutions awarded 48 relevant credentials and degrees, covering roughly 4% of projected demand. Most supply came from universities produced about 48. This sector faces a severe undersupply, leaving employers dependent on recruitment from outside the region or expanded in-house training.

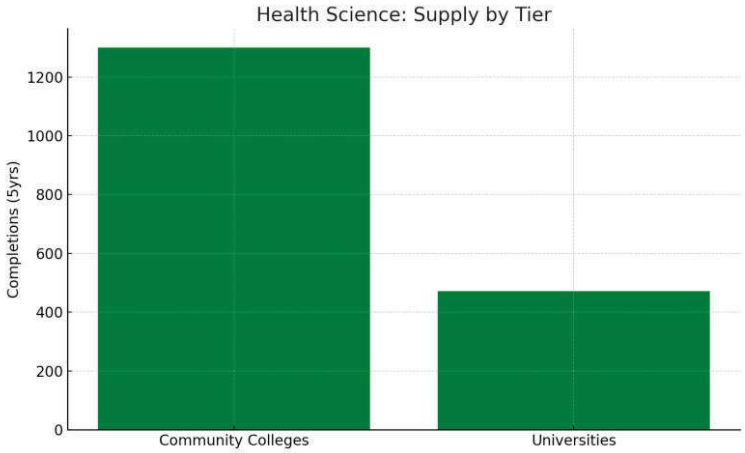





## Health Science

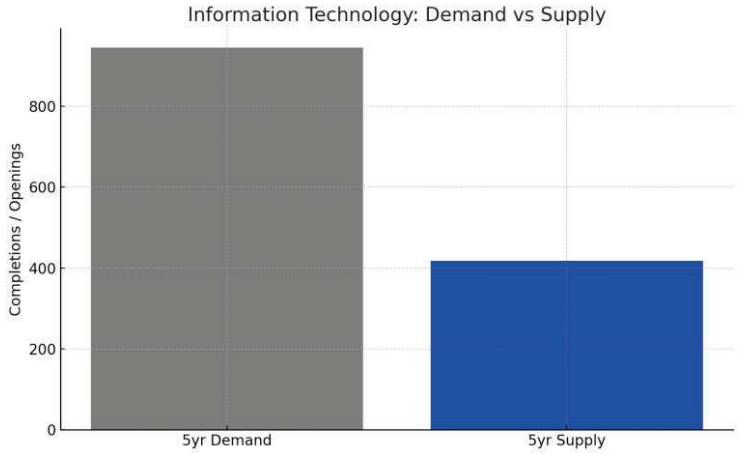
**Over the next five years, Region 3 will require about 10,395 workers in Health Science.** During the past five academic years, regional institutions awarded 1,771 relevant credentials and degrees, covering roughly 17% of projected demand. Most supply came from Community colleges contributed about 1,300 completions, universities produced about 471. This sector faces a severe undersupply, leaving employers dependent on recruitment from outside the region or expanded in-house training.

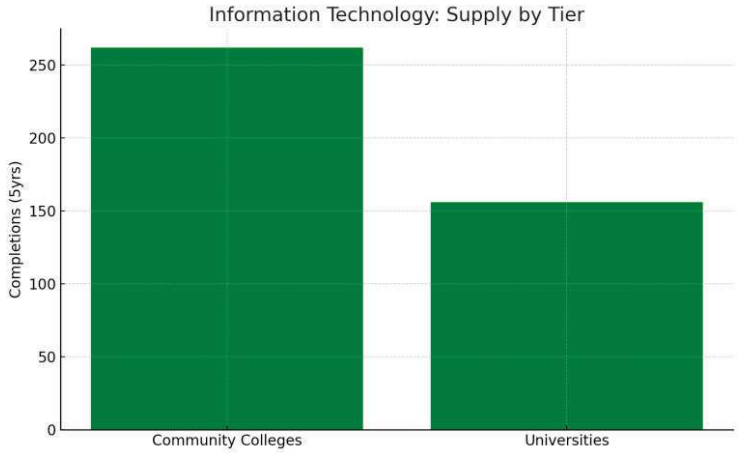





## Information Technology

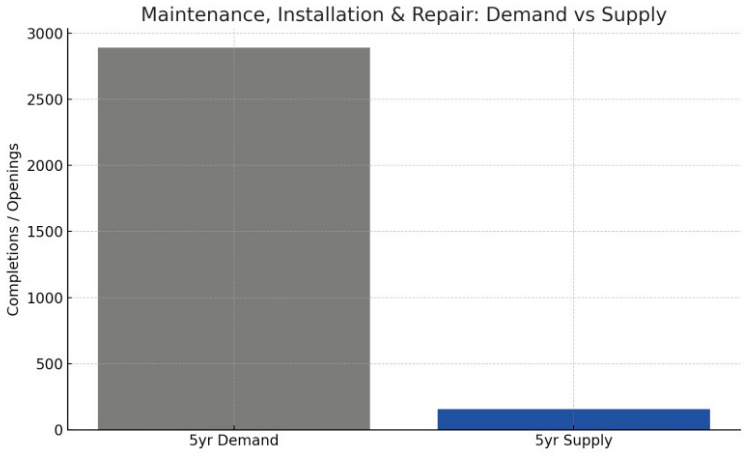
**Over the next five years, Region 3 will require about 945 workers in Information Technology.** During the past five academic years, regional institutions awarded 418 relevant credentials and degrees, covering roughly 44% of projected demand. Most supply came from Community colleges contributed about 262 completions, universities produced about 156. This sector faces a moderate gap, with existing programs contributing but not at scale to meet projected demand.

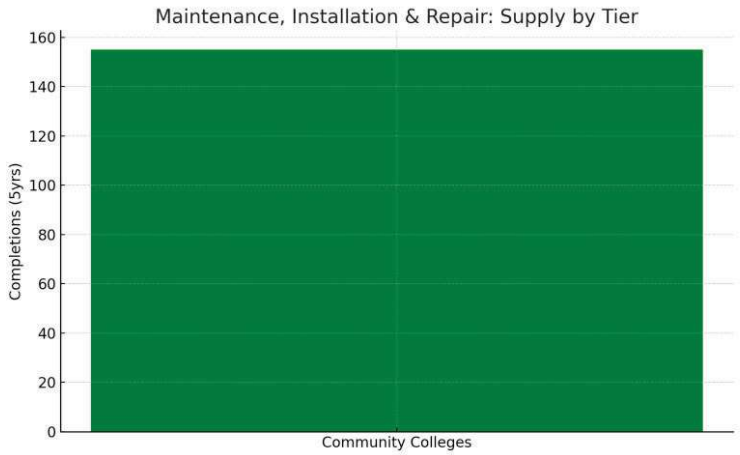





## Maintenance, Installation & Repair

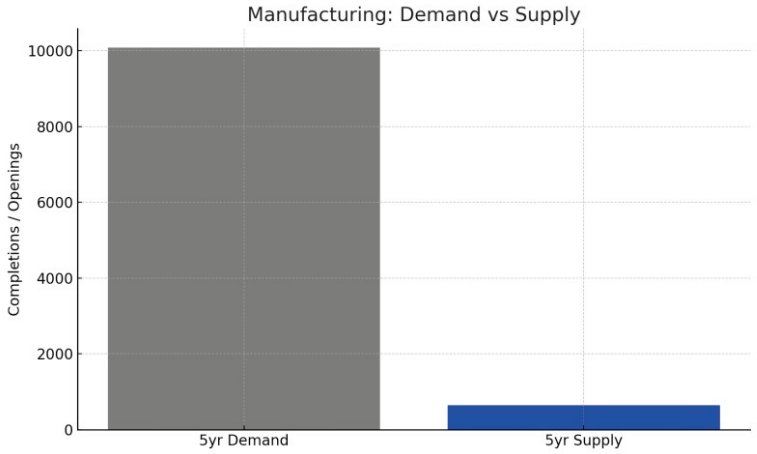
**Over the next five years, Region 3 will require about 2,890 workers in Maintenance, Installation & Repair.** During the past five academic years, regional institutions awarded 155 relevant credentials and degrees, covering roughly 5% of projected demand. Most supply came from Community colleges contributed about 155 completions. This sector faces a severe undersupply, leaving employers dependent on recruitment from outside the region or expanded in-house training.

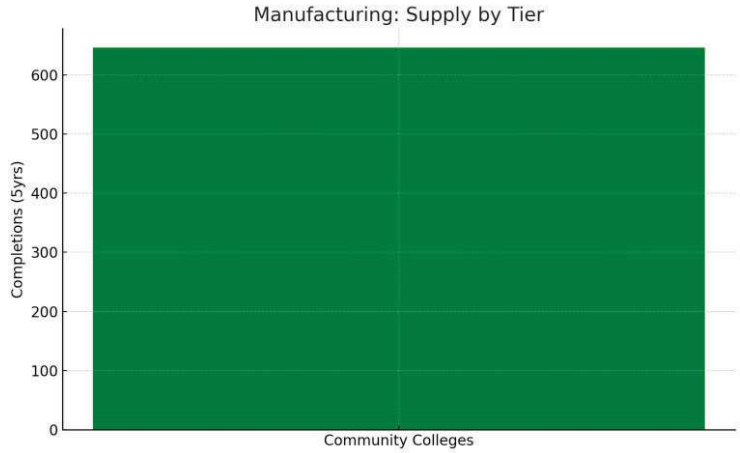





## Manufacturing

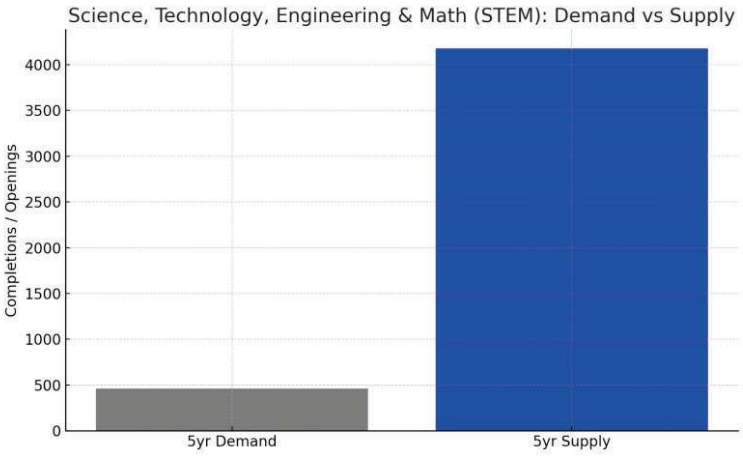
**Over the next five years, Region 3 will require about 10,085 workers in Manufacturing.** During the past five academic years, regional institutions awarded 646 relevant credentials and degrees, covering roughly 6% of projected demand. Most supply came from Community colleges contributed about 646 completions. This sector faces a severe undersupply, leaving employers dependent on recruitment from outside the region or expanded in-house training.

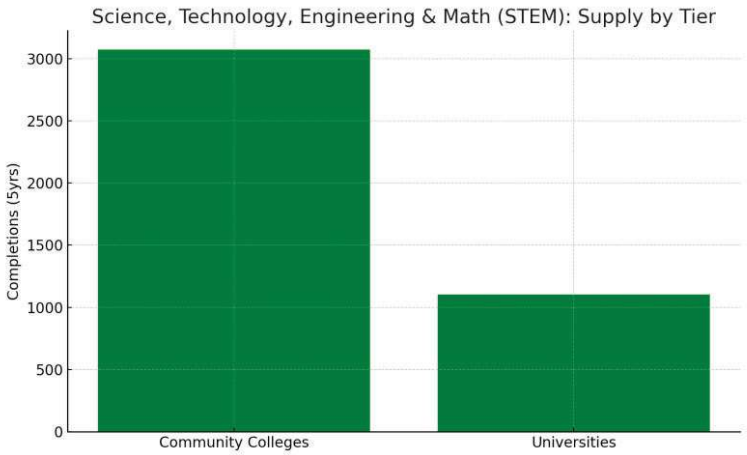





## Science, Technology, Engineering & Math (STEM)

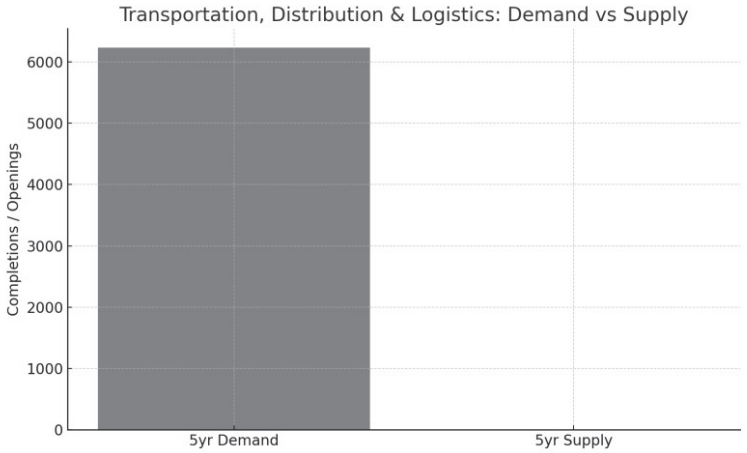
**Over the next five years, Region 3 will require about 460 workers in Science, Technology, Engineering & Math (STEM).** During the past five academic years, regional institutions awarded 4,176 relevant credentials and degrees, covering roughly 908% of projected demand. Most supply came from Community colleges contributed about 3,072 completions, universities produced about 1,104. This sector shows near balance or oversupply, though alignment of program content to specific occupations should be assessed.






## Transportation, Distribution & Logistics

**Over the next five years, Region 3 will require about 6,235 workers in Transportation, Distribution & Logistics.** During the past five academic years, regional institutions awarded no relevant completions for this sector. This sector faces a severe undersupply, leaving employers dependent on recruitment from outside the region or expanded in-house training.



## Sources of Data

Primary data sources for this analysis include:

- Virginia Office of Education Economics (VOEE), Postsecondary Completion and Alignment Dashboards (https – GO Virginia Region 3 5-year workforce demand projections and postsecondary completions, 2019–2024.
- Region 3 higher education institutions' program-level completion data as reported in VOEE dashboards.

# Council Members

| Council Member | Title - Organization | Sector |
|---|---|---|
| Lauren Willis - Region 3 Chair | Senior Administrative & Compliance Officer - Bank of Charlotte County | Private Sector |
| Randolph Lail – Region 3 Vice Chair | Chair of the Board - Mid-Atlantic Broadband | Private Sector |
| Rhonda Hodges | Vice President - Workforce, Economic & Community Development Patrick & Henry Community College | Workforce Development |
| Robert Bates | Area Manager- Benchmark Community Bank | Private Sector |
| Clark Casteel | President & CEO - Dan River Foundation | Non-Profit |
| Sheldon Barr | President - VCU Health Community Memorial Hospital | Private Sector |
| Elizabeth Leggett | Vice President- Leggett Town and Country | Private Sector |
| Melody Foster | Executive Director (retired)- Commonwealth Regional Council | Civic/Community Leader |
| Kristin Gee | General Counsel - Kyanite Mining Corp. | Private Sector |
| Dr. Amy Griffin | Deputy Executive Director- Virginia Association of School Superintendents | Civic/Community Leader |
| Dr. Keith Harkins | Vice President – Academic & Workforce Programs Southside Virginia Community College | Education |
| Ilsa Loeser | Principal & Owner - Letterpress Communications | Private Sector |
| John Parkinson | CEO - Drake Extrusion,Inc. | Private Sector |
| Sheri McGuire | Assoc. Vice President for Community & Economic Development Longwood University | Education |
| Angie Kellett | Director of Economic Development - Mecklenburg County | Local/Regional Economic Development |
| Kelly Lanier-Arnold | Senior Program Manager - Microsoft Corporation | Private Sector |
| Dale Wagoner | County Administrator - Henry County | Local Government |

## *Special Thanks to the Members of the Region 3 Advisory Committee 2025*

| Community | Name | Organization |
|---|---|---|
| Mecklenburg | Sheldon Barr | President, Community Memorial Hospital |
| Halifax | Robert Bates | Area Manager, Benchmark Community Bank |
| Danville | Jessica Dalton | Vice-President Workforce Services, Danville Community College |
| Charlotte | Melody Foster | Retired Executive Director, Commonwealth Regional Council |
| Mecklenburg | Whitney Hawkins | Community Memorial Hospital, VCU Health System |
| Patrick | James Houchins | Economic Development and Tourism Director, Patrick County |
| Prince Edward | Chip Jones | Superintendent, Prince Edward County Public Schools |
| Lunenburg | Randy Lail | Retired Executive, Peebles Corporation |
| Danville | Elizabeth Leggett | Vice-President, Leggett Town & Country |
| Patrick | Noah Mabe | Small Business and Economic Development Coordinator, Patrick County |
| Henry | Dale Wagoner | County Administrator, Henry County |
| Charlotte | Lauren Willis | Senior Administrative and Compliance Officer, Bank of Charlotte County |
| | | |
| Staff | Bryan David | GO Virginia 3, Program Director |
| Staff | Deb Gosney | GO Virginia Region 3, Southside Planning District Commission, Executive Director |
| Staff | Liz Povar | GO Virginia Region 3, RiverLink Group, Principal, Contract Staff |
| Staff | Ann Taylor Wright | GO Virginia 3, CTW Consulting, Contract Staff |