

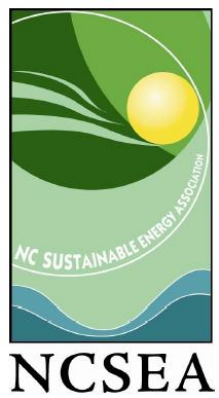
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# Market Overview: Sustainable Energy in NC

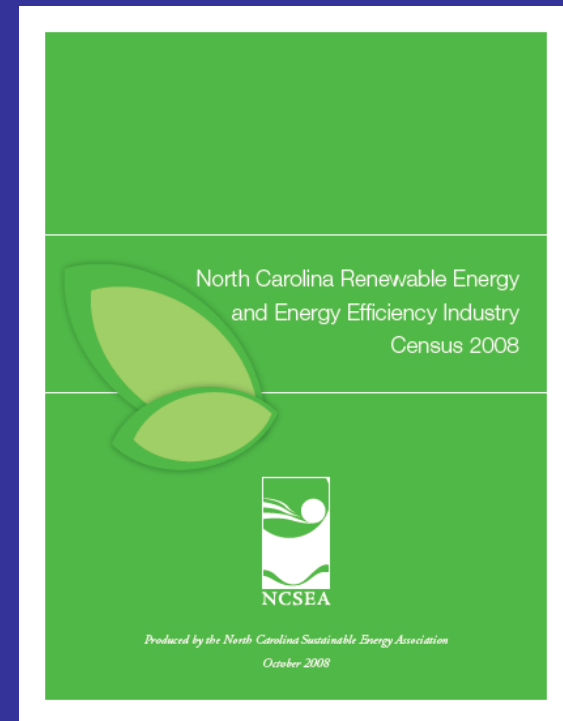
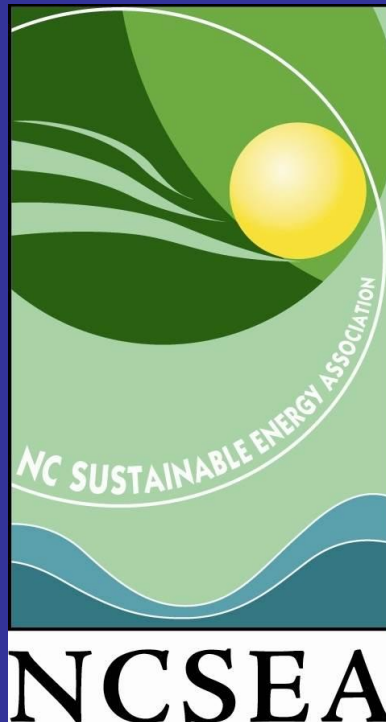
Paul Quinlan  
North Carolina Sustainable Energy Association

Green 101: Planting a Green Foundation  
for NC Workforce Development  
Hickory, NC  
September 1, 2009

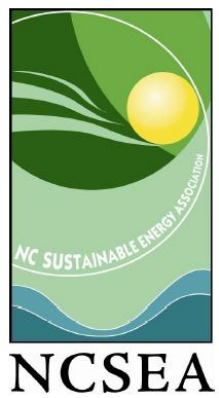
# Background



NC SUSTAINABLE ENERGY  
ASSOCIATION



NC RENEWABLE ENERGY AND  
ENERGY EFFICIENCY INDUSTRY  
CENSUS 2008



# 2009 Industry Census: Preliminary Results

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## Strengths:

- Survey of 10,000 firms active in NC
- Captures entire supply chain
- Second annual; improved questionnaire

## Limitations:

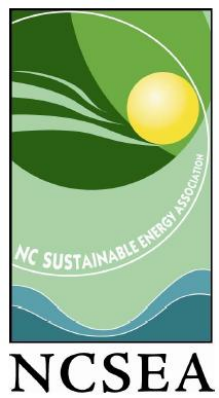
- Data self-reported by participating firms
- Evolving industry; snapshot in time
- Data aggregated by primary choice



# Employment Trends

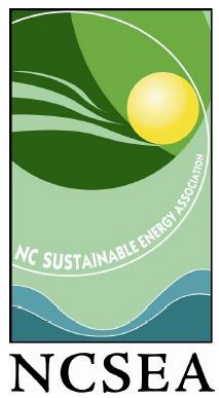
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- Industry employs over 13,000 full-time equivalent (FTE) employees
- Responding firms posted a net gain of 181 FTE jobs over the last year
  - Firms focused on manufacturing shed jobs
- Responding firms anticipate adding over 1,382 new FTE jobs over the next year



# Employment Trends

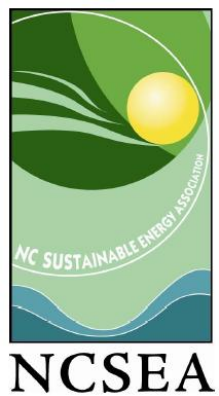
Type of Firm:	Reporting Firms	Percent of Total
Research and Development:	26	6.4%
Manufacturing:	27	6.6%
Architect / Construction / Home Builder / Building Retrofits:	166	40.7%
Renewable energy systems retailer or distributor:	26	6.4%
Renewable energy systems installer, designer, or developer:	68	16.7%
Power generation facility owner or operator:	23	5.6%
Education, Services and Consulting (law, engineering, etc.):	72	17.6%
<b>TOTAL</b>	<b>408</b>	<b>100%</b>



# Employment Trends

Type of Firm:	Reported FTEs	Average FTE	Percent of Total
Research and Development:	823	31.7	17.0%
Manufacturing:	1,226	45.4	25.4%
Architect / Construction / Home Builder / Building Retrofits:	939	5.7	19.4%
Renewable energy systems retailer or distributor:	177	6.8	3.7%
Renewable energy systems installer, designer, or developer:	587	8.6	12.2%
Power generation facility owner or operator:	247	10.7	5.1%
Education, Services and Consulting (law, engineering, etc.):	830	11.5	17.2%
<b>TOTAL</b>	<b>4,829</b>	<b>11.8</b>	<b>100%</b>

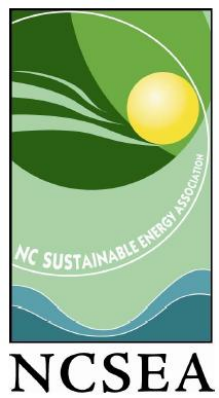
FTE = Full Time Equivalent Employee



# Employment Trends

Type of Firm:	2008-2009			2009-2010
	FTEs Gain	FTEs Loss	Net Gain/Loss	Anticipated Growth
Research and Development:	116	41	75	158
Manufacturing:	36	327	-291	82
Architect / Construction / Home Builder / Building Retrofits:	292	262	30	281
Renewable energy systems retailer or distributor:	34	3	31	43
Renewable energy systems installer, designer, or developer:	137	61	76	393
Power generation facility owner or operator:	76	3	73	47
Education, Services and Consulting (law, engineering, etc.):	225	38	187	378
<b>TOTAL</b>	<b>916</b>	<b>735</b>	<b>181</b>	<b>1,382</b>

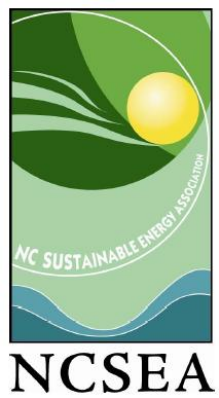
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# Industry Demographics

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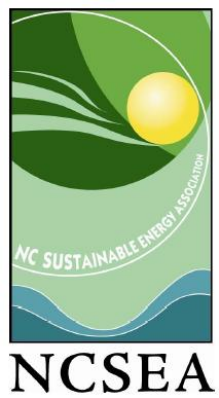
- Industry generates over \$450 million in annual revenue
  - Very conservative estimate
  - Roughly 60% of responding firms earn under \$500,000 in annual revenue
- Geographic distribution of goods and services varies
  - Almost half of manufacturers ship products throughout the U.S.
  - Green building firms almost exclusively provide services to the NC market



# Industry Demographics

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- Nearly one quarter of respondents indicated they have used or are currently using NC community colleges
  - R&D most likely to use community colleges
- Stimulus Funding:
  - 38% of companies planned use funding
  - 19% were aware, but did not plan to use it
  - 43% were entirely unaware of funding

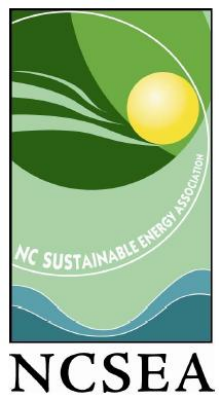


# Industry Demographics

Question: Rate the importance of recruitment potential and workforce availability for your organization or NC business:

	# Responses
Very important:	96
Important:	205
Neutral:	132
Not Important	62

- Majority of responding firms identified recruitment and workforce availability as very important or important to their NC activities.
- Access to finance and regulatory structure ranked higher in importance



# N.C. Sustainable Energy Association

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**Full Report Release: October 9, 2009**

**NCSEA Annual Membership Meeting**  
**[www.energync.org](http://www.energync.org)**

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