INVESTING IN NORTH CAROLINA'S INFRASTRUCTURE

July 2025

ATLAS PUBLIC POLICY

$6 billion awarded through IIJA and IRA

$23.4 billion in private investment and **21,300 jobs** in manufacturing

Fourth highest solar capacity in the nation

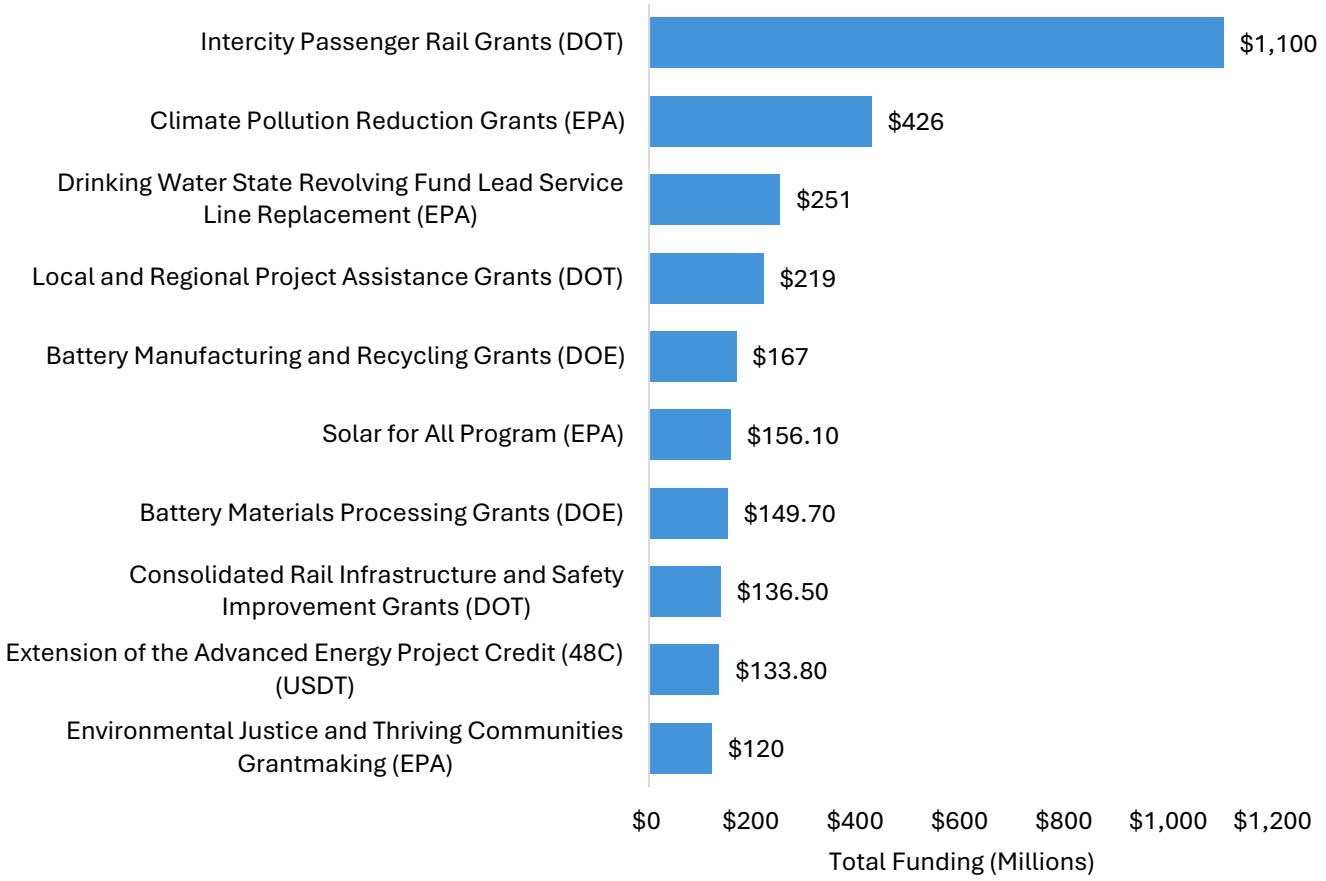
Introduction

The Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA) have catalyzed public and private infrastructure investment in North Carolina. In total, the state has seen nearly $30 billion in federal funding and private industry investment, supporting the replacement of lead water lines, the improvement of intercity passenger rail, and the generation of new clean energy. Central to these investments has been the creation of North Carolina's clean energy workforce, which is expected to grow by 21,300 jobs due to growth in the clean energy manufacturing sector.

$6 Billion in Public Infrastructure Investments

North Carolina has been awarded $6 billion in federal funding for climate and water projects from the IIJA and IRA, excluding loans and tax credits. Of the total, $920 million will go toward 55 water programs, $4.6 billion will go toward 76 climate programs covering 461 projects, and $450 million will go toward 18 overlapping programs. The following 10 programs have the largest amounts of federal funding awarded in the state, reflecting key investments across critical sectors.

Figure 1: Federal Clean Energy Awards for North Carolina by Program



The above figure represents federal competitive grant funding received in North Carolina, divided by program. This excludes formula grant programs, loans, and tax credits received by recipients in North Carolina. This includes both funding that has been awarded and proposed to be canceled, but not funding confirmed to be canceled. The figures are in millions of dollars. Data as of 6/13/2025.

Source: Climate Program Portal Outcomes Dashboard and Water Program Portal Outcomes Dashboard

Spotlight Story: City of Asheville's Find and Replace Project

The City of Asheville Lead Service Line Find and Replace Project takes place in a disadvantaged community within Asheville, aiming to track down lead and galvanized service lines. The about $2 million grant funds the inspection of over 200 service lines, of which the city estimates about 30 percent or 70 service lines will require replacement. The project centers community engagement and education surrounding the dangers of lead service lines and how the city will go about inspection and replacement.

Source: Water Program Portal, IIJA State Revolving Fund Project Dashboard

$187.7 Million in Funding Is at Risk of Cancellation

We have tracked $187.7 million in cancelations for projects in North Carolina, per the Outcomes Dashboard and as illustrated in the table below. More than half of that funding stems from the Environmental Justice Thriving Communities Grantmaking program totaling $120 million.

Table 1: Canceled Grants in North Carolina

Program	Agency	Tracked Canceled Amount
Environmental Justice Thriving Communities Grantmaking	Environmental Protection Agency	$120 million
Environmental Justice Community Change Grants	Environmental Protection Agency	$41.6 million
Building Resilient Infrastructure and Communities	Department of Homeland Security	$22.6 million
Supplemental Funding for Thriving Communities Technical Assistance Centers (TCTACs)	Environmental Protection Agency	$3 million
Environmental Justice Collaborative Problem-Solving Cooperative Agreement Program	Environmental Protection Agency	$500,000

Proposed canceled refers to funding where termination has been declared by the Agency, but is either being litigated or not yet confirmed. Confirmed canceled is where there is agreement by all parties that a grant has been canceled. Data as of 7/7/2025. Note: This list only includes some of the programs getting cut under the One Big Beautiful Bill, signed on July 4, 2025. See the full list of rescinded programs here.

Source: Climate Program Portal Outcomes Dashboard

21,300 Clean Energy Manufacturing Jobs Announced

Alongside the federal funding described above, private companies have announced **$23.4 billion in investment** into clean energy manufacturing in North Carolina, the third-highest announced investment of any state in the country, behind only Michigan and Georgia. This is expected to create **21,300 jobs,** per the Clean Economy Tracker, the overwhelming majority of which (97 percent) have been announced since the

passage of the IIJA. Of the total announced investment, 73 percent is expected to go toward Republican districts. Nearly 2,000 of the announced jobs are in energy communities.[1]

The top three sectors receiving the most investment in North Carolina are:

BATTERIES
$18.4 billion announced
to support 11,682 jobs

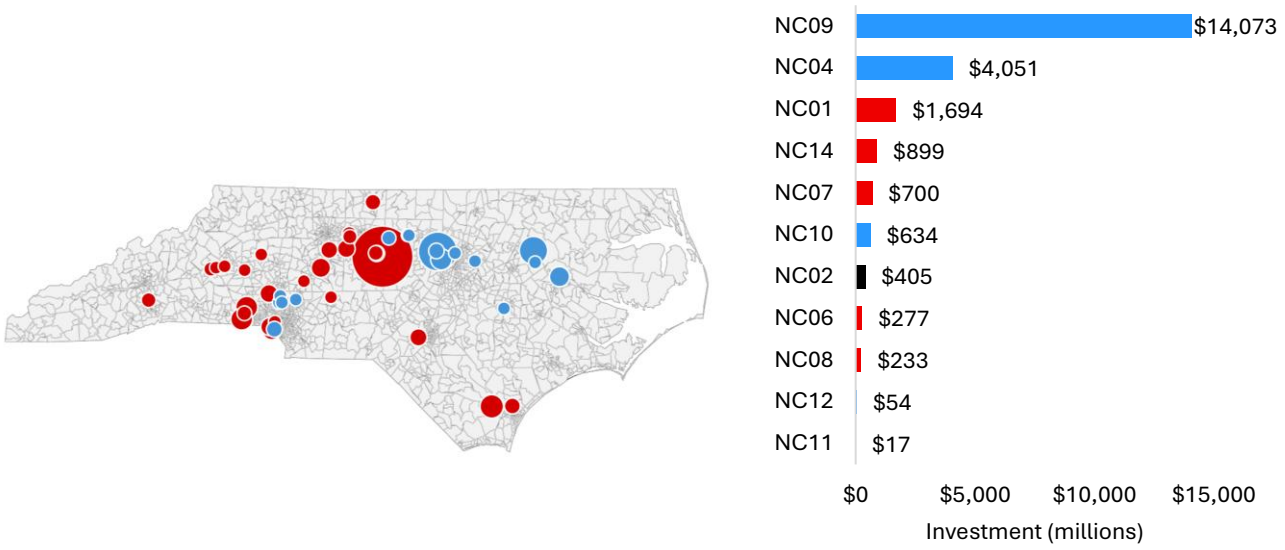
ELECTRIC VEHICLES
$2.2 billion announced
to support 5,163 jobs

CRITICAL MINERALS
$1.7 billion announced
to support 1,360 jobs

Source: Announced investments and jobs sourced from the Clean Economy Tracker

The largest manufacturing facility by investment is the Toyota Battery Manufacturing Facility in Liberty, which has a total of $13.9 billion in announced investments and over 5,100 announced jobs. This is followed by the Vinfast Vehicle and Battery Assembly Facility at $4 billion in investment and 7,500 jobs. The congressional district with the highest announced investment, at $14.1 billion, is NC-09 represented by Republican Richard Hudson.

Figure 2: Manufacturing Investment by Congressional District in North Carolina



In the first figure, dot size indicates the size of investment in dollars, and color indicates the party of the Congressional Representative of the district where the facility is located. The second figure reflects clean technology manufacturing investment by Congressional District in North Carolina. Investments without an exact address are not included in any district totals. Data as of 7/8/2025.

Source: Clean Economy Tracker

[1] Energy Communities are areas with high unemployment and a history of coal, oil and gas extraction or generation.

Clean Energy Generation and Technology Deployment

As of Q1 2025, North Carolina has an installed nameplate generation capacity[2] for 397 megawatts (MW) of wind power, 6,792 MW from solar, and 2,076 MW from hydroelectric power. Taken together, these power the equivalent of 2.2 million homes per year.[3] Additionally, per the Energy Information Administration, North Carolina has the fourth-highest solar generation capacity of any state in the nation as of mid-2025.

SOLAR
6,792 MW
9,819 jobs

WIND
397 MW
1,569 Jobs

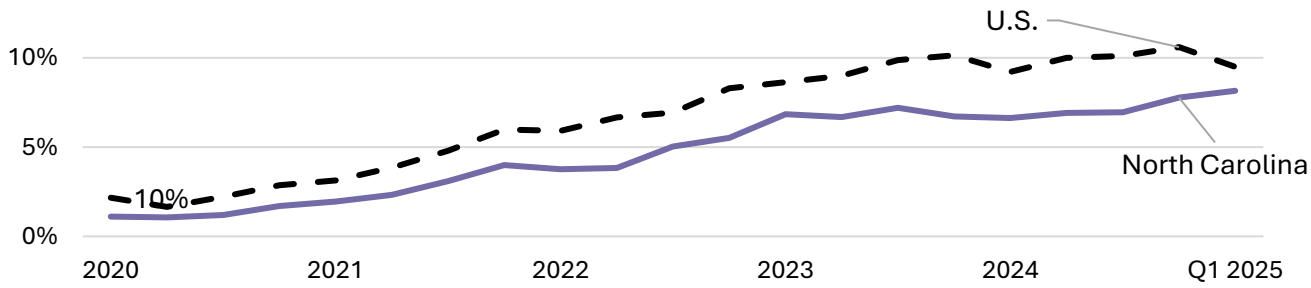
HYDROELECTRIC
2,076 MW

Source: Job counts are sourced from the USEER 2024 State Report, nameplate generation capacity is sourced from Energy Information Administration

Electric Vehicle Adoption

North Carolina has 114,646 EVs on the road, and an 8.2 percent new, light-duty EV sales market share as of Q1 2025, up from one percent in early 2020.

Figure 3: National vs North Carolina Sales EV Market Share Over Time



The figure represents the sales market share of new electric vehicles in the United States and in North Carolina, by quarter.
Source: EV Hub

Building Electrification

North Carolina updated its energy codes for commercial and residential buildings in 2019. These codes govern minimum efficiency levels that new buildings must meet and help ensure that building owners and occupants are able to balance the upfront cost of efficiency upgrades with the energy bill savings they

[2] Nameplate generation capacity is the maximum amount of electricity a generator can produce under specific conditions.
[3] Homes powered is estimated using the average capacity factor for each technology from the National Renewable Energy Laboratory and average energy use per home from the Energy Information Administration.

generate. Compared to the previous rules, North Carolina's current codes are estimated to save consumers:

$106 saved per 1,000 sq ft per year for commercial buildings

$157 or 11 percent saved per year for residential buildings

Source: Department of Energy State Energy Codes