

DISCOVER. CONNECT. ACHIEVE.

IN THE RESEARCH TRIANGLE REGION

REGIONAL PROFILE



WITH DELTA, INNOVATION MEETS OPPORTUNITY.

Raleigh-Durham is on the rise.

With some of the world's top universities and most forward-thinking companies, this region is a growing center for global innovation. That's why Delta is proud to be the official airline for the Research Triangle Regional Partnership, and we make it our priority to connect you to every opportunity.

As RDU's #1 airline, Delta offers nearly 80 flights per day to over 29 nonstop destinations connecting you to the world. Since 2010, we've more than doubled our annual seat offering in RDU—from 1.2 million in 2010 to 2.5 million in 2019. Plus, one-stop access to more than 120 destinations in Europe, the Middle East, Africa and India via our partners means you're never too far from the next big break.

What's more, Delta and our partners Air France and KLM are committed to supporting small- to medium-sized businesses on their journey to success. It's why we offer our industry-leading corporate loyalty programs, SkyBonus for U.S. based companies and BlueBiz for U.K. based companies. Learn more about the benefits at www.skybonus.delta.com and www.bluebiz.com.

Together, we'll share Raleigh-Durham's greatest ideas with the world. Thanks for flying with us.

Seattle/Tacoma

Salt Lake City

Las Vegas

Los Angeles





CANADA

Paris (CDG)

• Minneapolis/St. Paul

Boston

Detroit

Hartford

Chicago
(ORD)

Cleveland

LGA

New York

Newark

JFK

Pittsburgh

Baltimore

Philadelphia

Columbus

Indianapolis

Washington, D.C. (DCA)

Cincinnati

Nashville

Raleigh/Durham

Atlanta

Austin

Jacksonville

New Orleans

Orlando

Tampa/St. Petersburg

Ft. Myers/Naples

Ft. Lauderdale/Hollywood

Miami

BAHAMAS

MEXICO

Cancún

KEEP CLIMBING



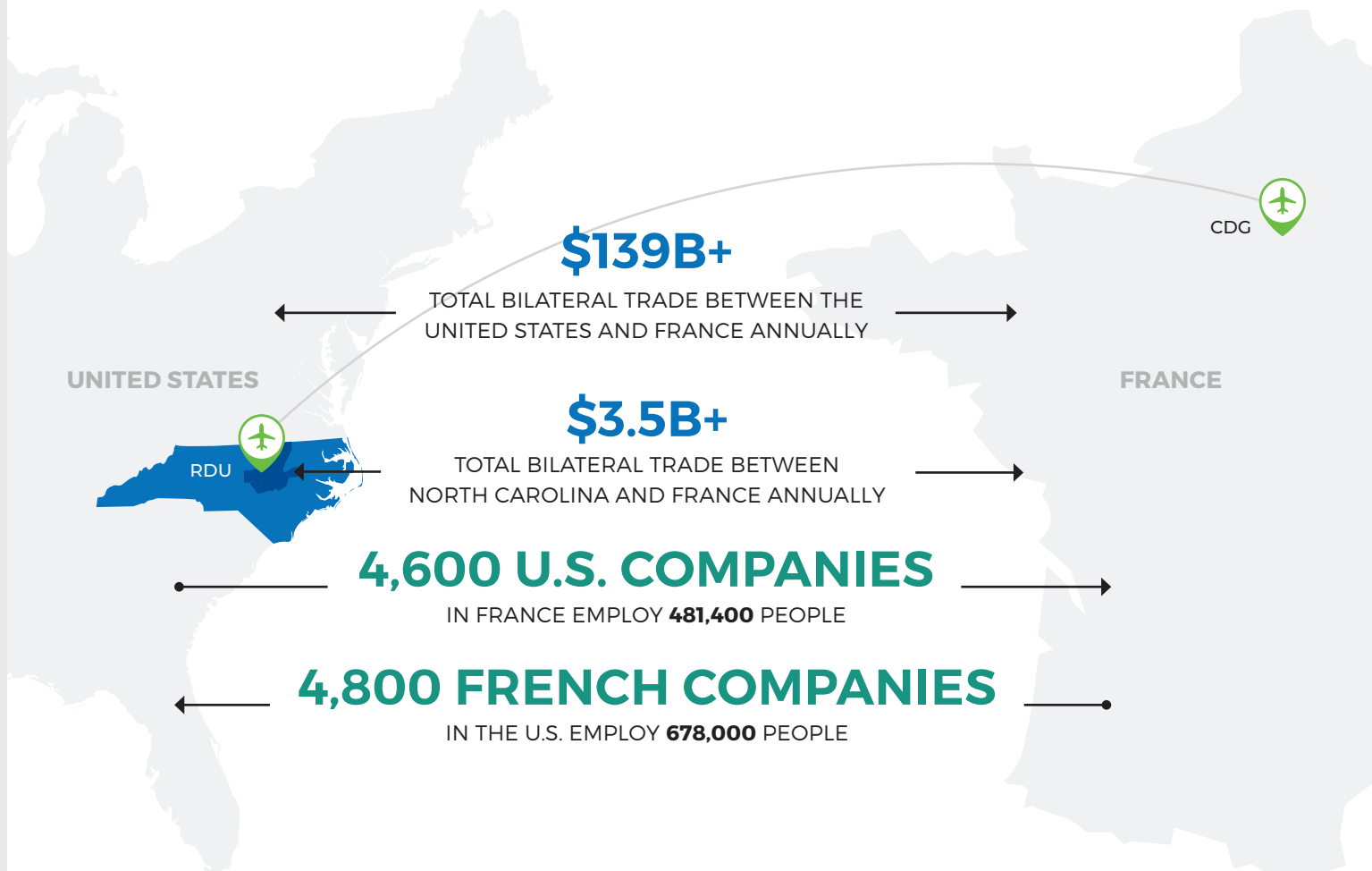
DELTA



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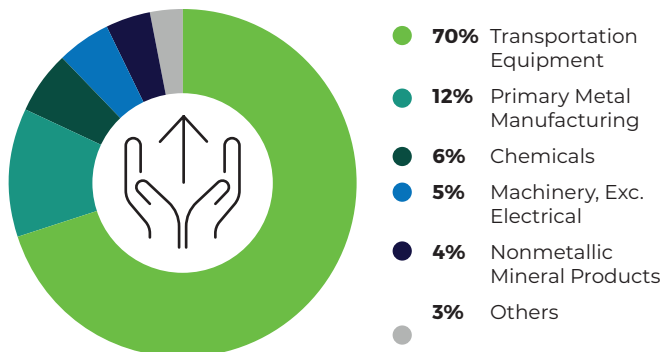
A MUTUALLY BENEFICIAL PARTNERSHIP

North Carolina is a strategic investment for French companies. In the United States, French companies are the third largest foreign employers and in North Carolina, France is ranked fifth for jobs created by foreign companies, creating over 15,000 jobs. With a daily nonstop flight on Delta Airlines from Paris (CDG) to Raleigh (RDU), you can access North Carolina in a matter of hours.



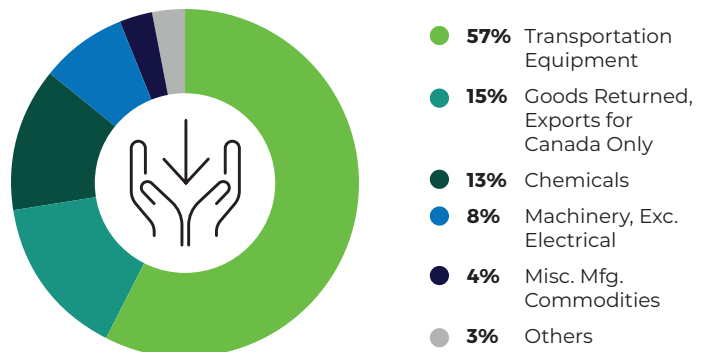
North Carolina Exports to France

\$1.5B+ ANNUALLY



North Carolina Imports from France

\$2.1B+ ANNUALLY



SUCCESS STORIES

BIOMÉRIEUX – A GLOBAL LEADER IN *IN VITRO* DIAGNOSTICS



service and training, and research and development.

Marcy L'Étoile based bioMérieux, a world leader in the field of in vitro diagnostics to fight infectious disease, has their America's headquarters located in Durham, North Carolina. The Durham facility includes key functions such as commercial operations, customer

"From Durham, we serve the world."

Alexandre Mérieux, CEO of bioMérieux

The Durham site also is a primary manufacturing hub, supplying the world with millions of blood culture bottles each year. The company employees over 1200 locally and in 2017 bioMérieux announced a \$60 million expansion to their Durham manufacturing facility. The decision to invest and expand in Durham came as a result of the special research and development expertise that is rooted at the company's existing outpost there and also the strong life sciences talent pool in the area bolstered by neighboring academic institutions.

DIAGNOSTICS IS POWER

The power to sustain antibiotic efficacy for future generations



CELLECTIS SELECTS TRIANGLE REGION

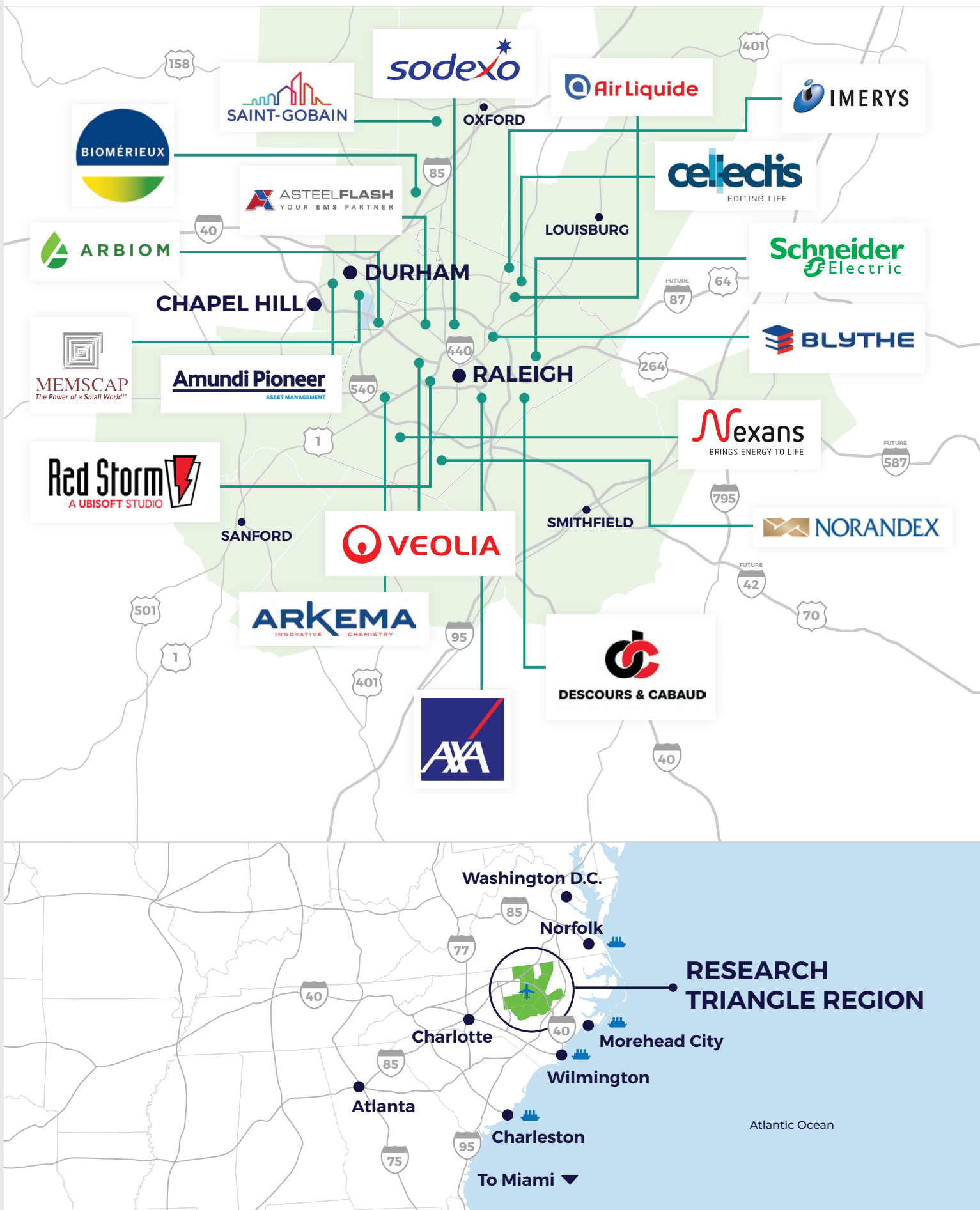
Paris-based biotechnology company Collectis selected Raleigh as the location for its first North American manufacturing facility in March of 2019. Collectis, a clinical-stage biopharmaceutical company developing a new generation of cancer therapies, is investing nearly \$70 million and plans to hire 200 scientists, engineers, analysts, manufacturing and operations personnel.



We benchmarked several locations within North Carolina and in other states and selected Raleigh, which combined multiple advantages, including a strong state support and willingness to welcome world-class innovative companies. Collectis' priorities are very much aligned to North Carolina's and we are pleased with this partnership to write this new page of our history.

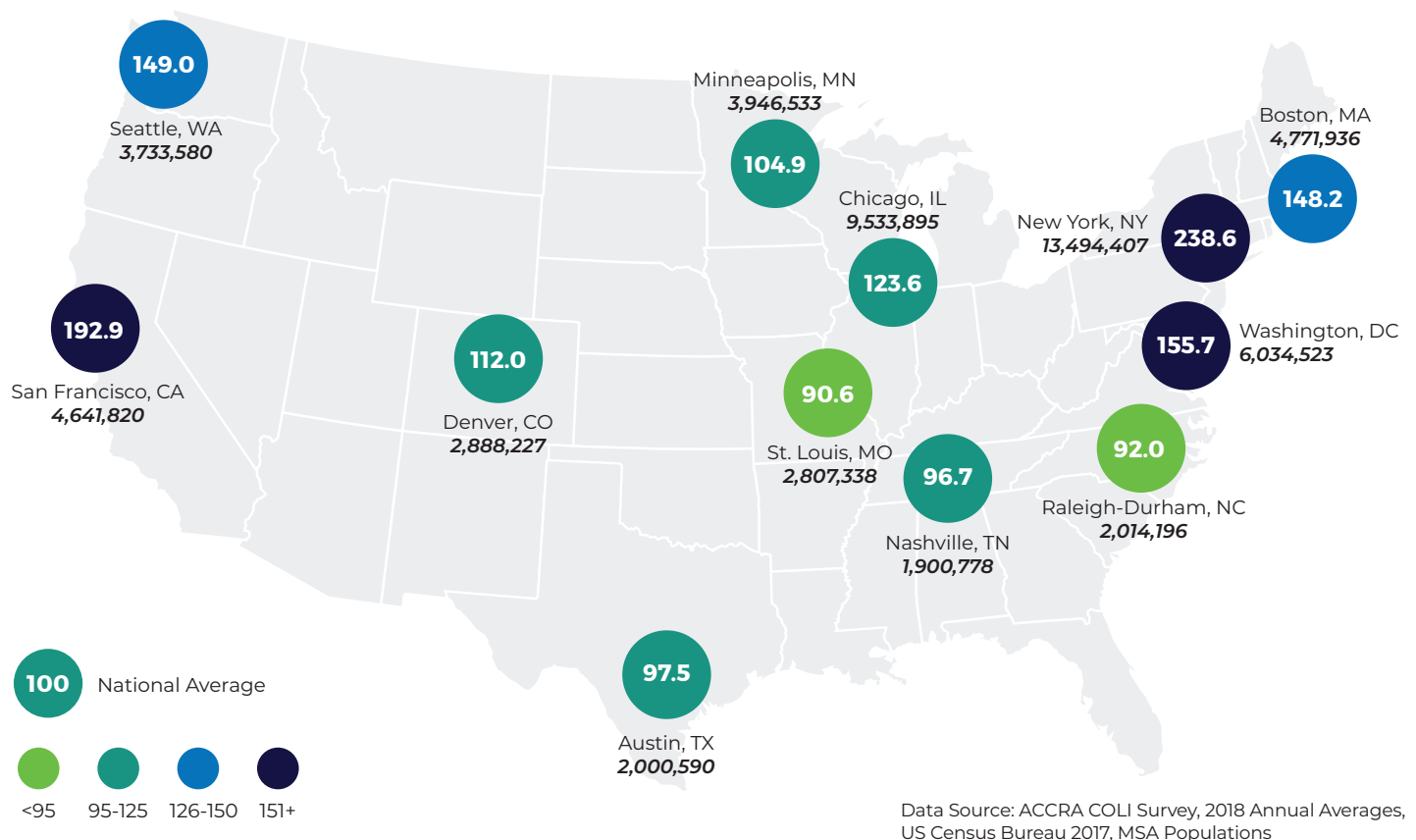
André Choulaka,
Chairman and CEO of Collectis

FRENCH COMPANIES IN THE TRIANGLE (PARTIAL LIST)

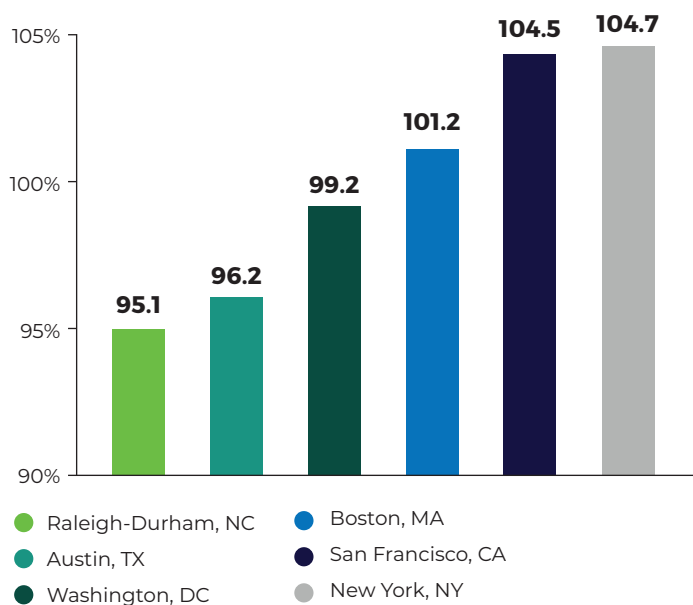


REGIONAL COMPARISON

Cost of Living Index and Population



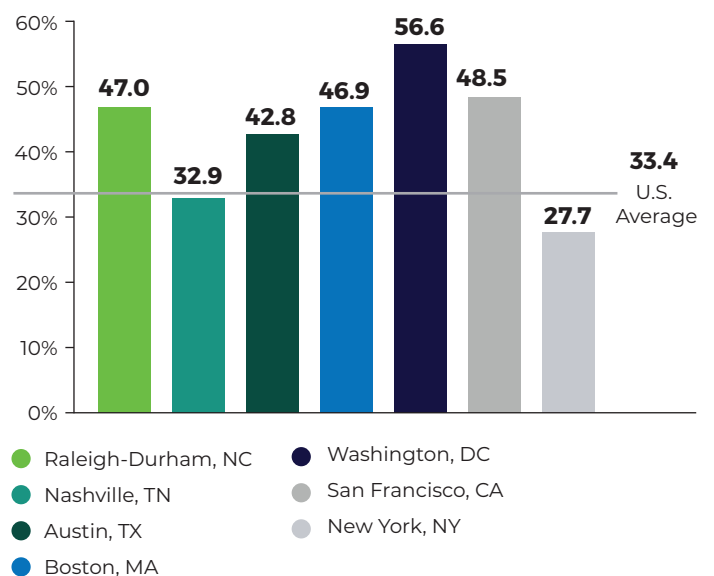
Cost of Doing Business Index



Data Source: KPMG. 2016. "Competitive Alternatives: KPMG's Guide to International Business Locations Costs."

Educational Attainment

Population Over Age 25 with Bachelor's Degree or higher



Data Source: U.S. Census Bureau. 2018. Accessed through American Factfinder2. S1501

BUSINESS ECOSYSTEM

The Research Triangle Region has a diverse business ecosystem with over 7,000 companies including 700+ foreign owned companies, across multiple industries including AgTech, CleanTech, Life Sciences, Technology and Advanced Manufacturing. From legendary corporations to disruptive startups, the Triangle Region welcomes businesses of all sizes to our innovative ecosystem.

ADVANCED MANUFACTURING

\$2.2 BILLION

CONTRIBUTED TO GROSS REGIONAL PRODUCT

- **180** firms
- **12,570** employees
- **\$86,000** average salary
- **15.2%** 5-year growth rate*

CATERPILLAR®

REVLON



AGTECH

\$1.2 BILLION

CONTRIBUTED TO GROSS REGIONAL PRODUCT

- **110** companies
- **4,870** employees
- **\$134,000** average salary
- **17.2%** 5-year growth rate*



TECHNOLOGY

\$14.6 BILLION

CONTRIBUTED TO GROSS REGIONAL PRODUCT

- **3,916** companies
- **59,900** employees
- **\$121,000** average salary
- **17.6%** 5-year growth rate*



LIFE SCIENCES

\$9.8 BILLION

CONTRIBUTED TO GROSS REGIONAL PRODUCT

- **569** companies
- **24,150** employees
- **\$142,000** average salary
- **12%** employment growth rate*
- **4,400** annual life science graduates



CLEANTECH

\$4.6 BILLION

CONTRIBUTION TO GROSS REGIONAL PRODUCT

- **1,859** companies
- **26,950** employees
- **\$113,000** average salary
- **24.4%** 5-year growth rate*



EDUCATION

Located in the heart of North Carolina, the Research Triangle Region gets its name from the largest research park in the U.S. and three Tier 1 research universities — Duke, NC State and UNC Chapel Hill — located only minutes apart. 176,000 students make up the 10 colleges and universities and 7 community colleges, producing more than 42,000 annual graduates. 47% of the population older than 25 have a bachelor's degree or higher, making the area the 4th most educated region in the United States.

Duke
UNIVERSITY

15,892

TOTAL STUDENTS

#8

BEST UNIVERSITY
IN THE NATION

Data Source: Duke University,
U.S. News & World Report,
May 2019

RESEARCH
TRIANGLE PARK

10.5 miles

24.3 miles

25.3 miles



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

30,011

TOTAL STUDENTS

#5

BEST PUBLIC UNIVERSITY
IN THE NATION

Data Source: University of North Carolina
at Chapel Hill, U.S. News & World Report, May 2019

NC STATE UNIVERSITY

35,479

TOTAL STUDENTS

\$6.5B

ANNUAL STATEWIDE
ECONOMIC IMPACT

Data Source: NC State University, May 2019



STARTUP ECOSYSTEM

Business, academia and government converge in the Research Triangle Region to create an innovative environment and hub for entrepreneurs. The region's low cost of living combined with its co-working spaces, startup incubators, networking opportunities and local tech expertise fosters an innovative startup ecosystem.

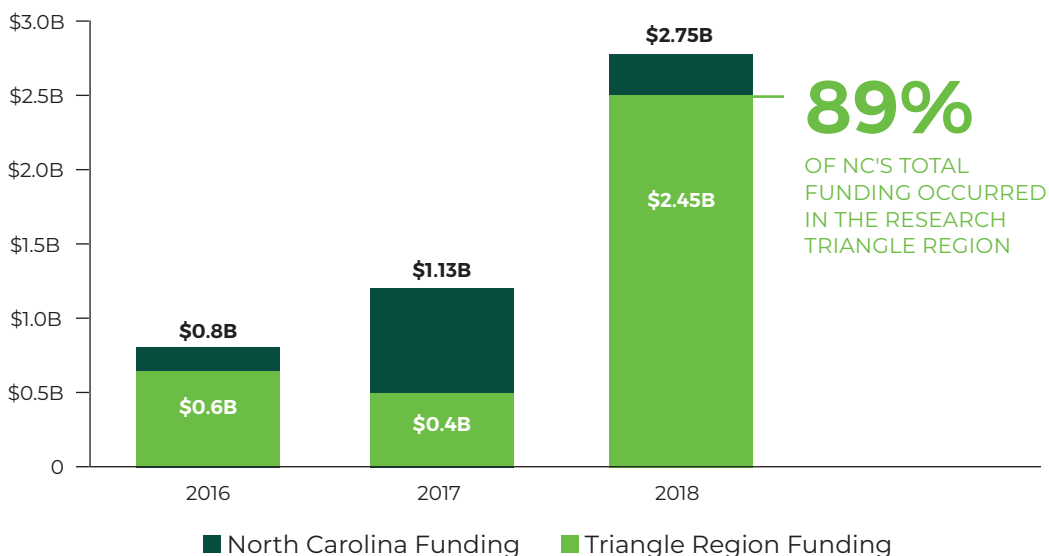
Entrepreneurial Funding Raised

Number of Deals

- North Carolina Deals
- Triangle Region Deals



Amount of Funding



Data Source: Council for Entrepreneurial Development Innovators Report, 2016, 2017, 2018.



77%

OF DEALS MADE IN NC OCCURRED IN THE TRIANGLE REGION



2,393+

STARTUPS ESTABLISHED IN THE REGION



\$1.25B

A RECORD-BREAKING FUNDING DEAL IN NC, EPIC GAMES (CARY)



\$27.00

AVERAGE CLASS A RENTAL RATE (39% BELOW NATIONAL AVERAGE)



1.2M

SQUARE FEET OF CO-WORKING SPACE IN THE TRIANGLE



25+

VENTURE CAPITAL & ANGEL INVESTING FIRMS IN REGION

CONNECT TO NORTH CAROLINA'S RESEARCH TRIANGLE REGION



EASILY ACCESSIBLE BY RAIL, ROAD, SEA OR AIR

200 million U.S. and Canadian consumers within a two-day drive
Four deep water ports in less than a 300 mile radius

Rail: CSX, Norfolk Southern and North Carolina Railroad Company
Interstates: I-40, I-85, I-95



RALEIGH-DURHAM INTERNATIONAL AIRPORT (RDU)

RANKED THE MOST CONNECTED MEDIUM-SIZED AIRPORT IN THE U.S.

12.8 MILLION PASSENGERS
IN 2018

400+ DAILY FLIGHTS

7 direct flights to international destinations, including Paris, London, Montreal and Toronto



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RTRP is a non-profit economic development organization that introduces companies from around the world to the Research Triangle Region.

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