

NORTH CAROLINA EMPLOYMENT PROJECTIONS TO 2032

Every two years, the North Carolina Department of Commerce publishes 10-year industry and occupation employment projections for statewide and sub-state areas.¹ The employment projections estimate future demand for workers based on historical employment data and various economic factors.² They provide valuable information for policy makers, job seekers, training providers, and businesses, enabling informed workforce decisions and helping ensure that North Carolina's workforce is prepared for tomorrow's job opportunities and economic growth.

Key Highlights of the 2022-2032 Employment Projections:

- **Industry Employment Projections**
 - North Carolina is projected to add more than 509,500 new jobs between 2022 and 2032.
 - The **Service-providing sector** is projected to contribute nearly 88% of all net new jobs created.
 - **Health Care and Social Assistance**, the state's largest industry by employment, is projected to add 101,500 new jobs by 2032.
 - **Manufacturing** industry is expected to see a slow growth with slightly over 16,000 jobs in the next 10 years.
 - **Agriculture, Forestry, Fishing and Hunting** is the only industry sector projected to lose jobs, although very marginally.
- **Occupational Employment Projections**
 - North Carolina is projected to have over 628,000 job openings annually, comprising nearly 254,000 openings from exits³, 323,600 from transfers⁴, and almost 51,000 from economic growth.
 - **Occupations in Computer and Mathematical, Healthcare Support, and Healthcare Practitioners and Technical groups** are projected to be among the fastest growing jobs.
 - **Production Occupations** are projected to grow very modestly, following a rather slow trend in the Manufacturing industry.
 - **Food Preparation and Serving Related Occupations** and **Sales and Related Occupations** will have the largest turnover with more than 84,000 and 70,000 annual job openings, respectively.
 - The share of occupations requiring no formal educational or high school diploma is projected to decline from 60.8% to 59.4% statewide over the next 10 years; however, they are projected to generate the most job openings (68.8%), mostly due to high separation rates.

¹ This report analyzes only statewide projections. Sub-state projection results will be available in early Fall 2024.

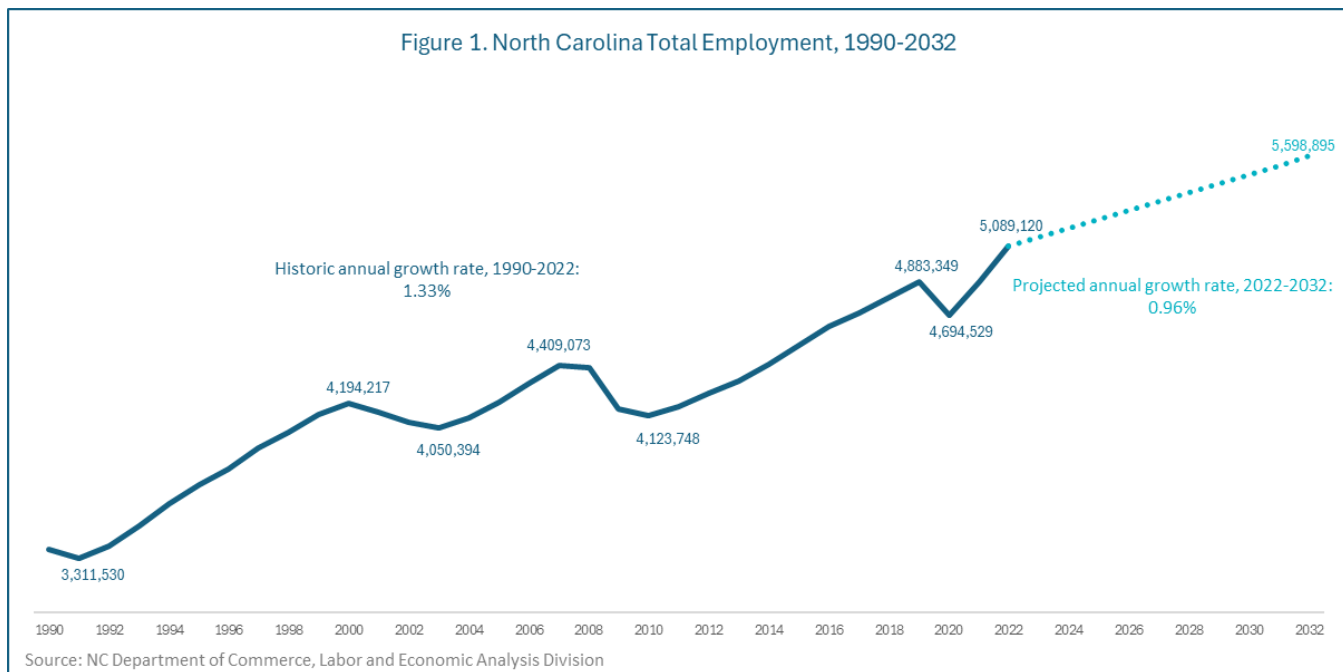
² Projections assume full employment for the economy in the projected year. No major economic or political disruption is expected to occur during the projected period. Thus, the projections are not intended to be an economic forecast of future employment.

³ Exits: workers who leave an occupation and the labor force due to retirement or other reasons (permanently or temporarily)

⁴ Transfers: workers who leave an occupation to enter a different occupation

1. Total Employment

North Carolina employment is projected to add more than 509,000 new jobs between 2022 and 2032, growing annually at an average rate of 0.96%. Although this rate is lower than the 1.33% average annual growth observed over the past three decades (Figure 1), it is still higher than the projected national average of 0.28%⁵ for the same period.



2. Industry employment

2.1 Service-Providing Industries

Similar to the national trends, **Service-providing** industries in North Carolina are projected to add more jobs than **Goods-producing** industries. This sector provided nearly 80% of the state's total employment in 2022 and is expected to generate nearly 446,000 new jobs by 2032 (Table 1).

The **Arts, Entertainment, and Recreation** sector is projected to be the fastest growing with an annualized growth rate of 1.93%, adding nearly 16,000 jobs overall. However, much of this growth is expected in the initial years as the sector continues to rebound from the COVID-19 impacts. In 2020, this sector lost 25% of its jobs, and its employment in 2022 remained below the pre-pandemic levels.

The **Professional, Scientific, and Technical Services** is anticipated to be the second fastest-growing sector, with an annualized growth rate of 1.79%. It is also expected to rank second in net job change, adding over 62,000 new jobs over the next decade (Figure 2). This sector has been historically strong and is crucial to the state economy, especially since it tends to pay relatively high wages.

Health Care and Social Assistance, the largest service sector by employment, is projected create nearly 102,000 new jobs by 2032. Almost half of this growth will be within **Ambulatory Health Care Services**, driven by increased demand for health care services by North Carolina's aging population.⁶

⁵ BLS Employment Projections for 2022-32: <https://www.bls.gov/news.release/pdf/ecopro.pdf>

⁶ Based on the North Carolina Office of State Budget and Management projections (<https://www.osbm.nc.gov/demog/county-projections>), the share of population aged 55 and above is expected to increase from 30% to 32% between 2022 and 2032.

The **Accommodation and Food Services** sector is expected to add over 61,000 jobs by 2032, largely in the **Food Services and Drinking Places** industry.

Retail Trade, the second largest sector by employment, is projected to grow modestly by 4.01%, adding fewer than 21,000 new jobs. The **Wholesale Trade** sector is expected to grow by 5.85%, adding nearly 12,000 jobs.

The **Educational Services** sector is projected to grow by 9.15% and add over 34,000 jobs, driven by the growth in the **Elementary/Secondary Schools** and the **Colleges/Universities/Professional Schools**.

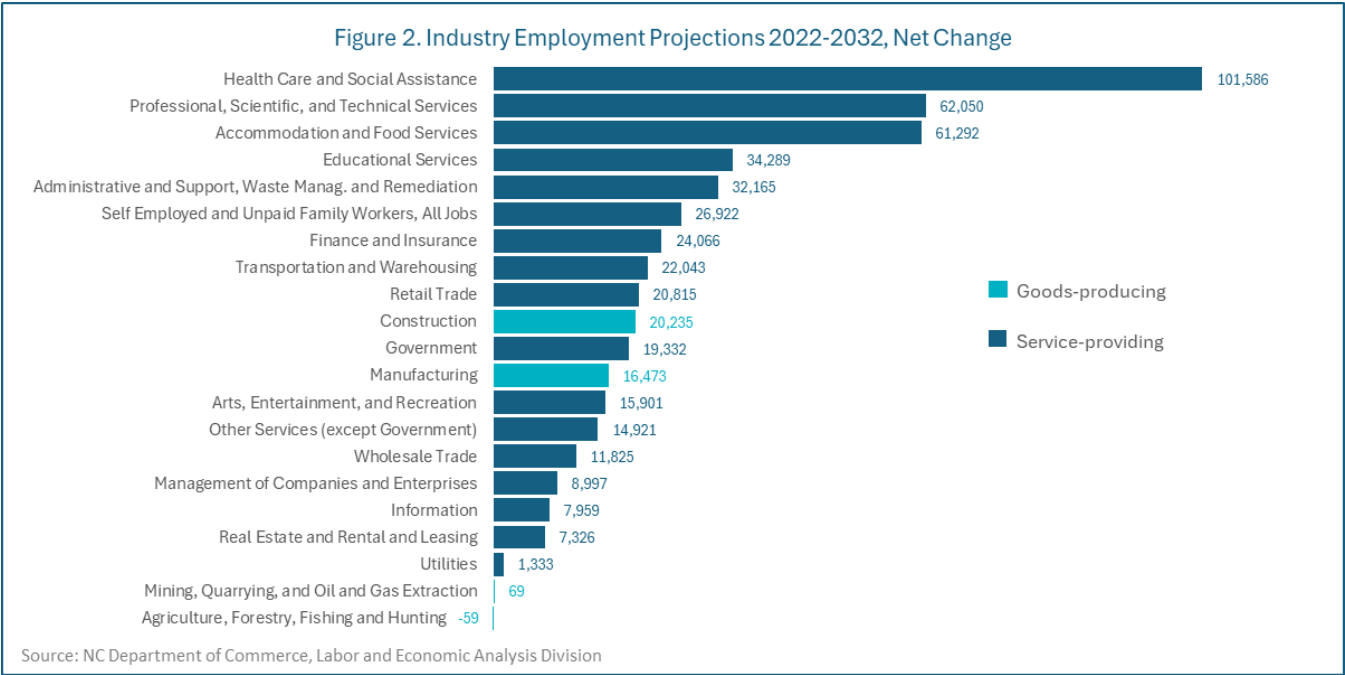
Table 1. North Carolina Industry Employment Projections, 2022-2032

Industry Sector	Employment Estimate 2022	Employment Estimate 2032	Net Change	Percent Change	Annualized Growth Rate
Total All Industries	5,089,355	5,598,895	509,540	10.01%	0.96%
Goods Producing	775,198	811,916	36,718	4.74%	0.46%
Agriculture, Forestry, Fishing and Hunting	50,618	50,559	-59	-0.12%	-0.01%
Construction	247,998	268,233	20,235	8.16%	0.79%
Manufacturing	473,468	489,941	16,473	3.48%	0.34%
Mining, Quarrying, and Oil and Gas Extraction	3,114	3,183	69	2.22%	0.22%
Services Providing	4,008,810	4,454,710	445,900	11.12%	1.06%
Arts, Entertainment, and Recreation	75,553	91,454	15,901	21.05%	1.93%
Accommodation and Food Services	428,620	489,912	61,292	14.30%	1.35%
Administrative and Support and Waste Management and Remediation Services	332,850	365,015	32,165	9.66%	0.93%
Educational Services	374,856	409,145	34,289	9.15%	0.88%
Finance and Insurance	219,449	243,515	24,066	10.97%	1.05%
Government	295,582	314,914	19,332	6.54%	0.64%
Health Care and Social Assistance	609,752	711,338	101,586	16.66%	1.55%
Information	81,664	89,623	7,959	9.75%	0.93%
Management of Companies and Enterprises	83,301	92,298	8,997	10.80%	1.03%
Other Services (except Government)	179,346	194,267	14,921	8.32%	0.80%
Professional, Scientific, and Technical Services	318,847	380,897	62,050	19.46%	1.79%
Real Estate and Rental and Leasing	68,577	75,903	7,326	10.68%	1.02%
Retail Trade	519,301	540,116	20,815	4.01%	0.39%
Transportation and Warehousing	203,744	225,787	22,043	10.82%	1.03%
Utilities	15,120	16,453	1,333	8.82%	0.85%
Wholesale Trade	202,248	214,073	11,825	5.85%	0.57%
Self Employed and Unpaid Family Workers	305,347	332,269	26,922	8.82%	0.85%

Source: NC Department of Commerce, Labor and Economic Analysis Division

2.2 Goods-Producing Industries

Compared to the **Service-providing** sector, the **Goods-producing** sector is expected to grow much more slowly. This is primarily driven by the **Construction** industry, which is projected to gain 8.16% in employment, adding over 20,000 jobs over the 10-year period.



In contrast to the national trends, **Manufacturing** in North Carolina is projected to grow modestly by 3.48%, adding about 16,500 jobs by 2032 while the U.S. is expected to decline by -0.88%.

Significant job gains are expected in **Food Manufacturing (+4,500)**, **Machinery Manufacturing (+4,100)**, **Chemical Manufacturing (+3,600)**, and **Transportation Equipment Manufacturing (+2,600)**. However, **Textile Mills (-4,200)** and **Apparel Manufacturing (-2,500)** are projected to lose the most jobs.

Employment in the **Agriculture, Forestry, Fishing and Hunting** industry is expected to decrease slightly (-59), driven by a decline in **Animal Production and Aquaculture (-459)**, offset by a small gain in the **Crop Production (+466)**.

3. Occupational employment

3.1 Employment Growth

Table 2 shows occupational employment estimates for 2022-2032. The following five largest occupational groups together are expected to account for almost half of the total employment in 2032:

- **Office and Administrative Support Occupations** (Customer Service Representatives, Office Clerks, Secretaries and Administrative Assistants, etc.)
- **Sales and Related Occupations** (Cashiers, Salespersons, Sales Representatives, etc.)
- **Food Preparation and Serving Related Occupations** (Cooks, Waiters and Waitresses, etc.)
- **Transportation and Material Moving Occupations** (Material Movers, Stockers and Order Fillers, Truck Drivers, etc.)
- **Management Occupations**

All these occupational groups are projected to gain jobs by 2032, with three experiencing significant expansion: **Food Preparation and Serving Related Occupations (+55,700)**, **Transportation and Material Moving (+55,500)**, and **Management Occupations (+45,900)**, each increasing by over 10%.

Table 2. North Carolina Employment Projections by Major Occupational Group, 2022-2032

Occupational Group	Employment Estimate 2022	Employment Estimate 2032	Net Change	Percent Change	Annualized Growth Rate	2023 Median Annual Wage
Total, All Occupations	5,089,355	5,598,895	509,540	10.01%	0.96%	\$45,440
Architecture and Engineering Occupations	72,761	82,664	9,903	13.61%	1.28%	\$80,290
Arts, Design, Entertainment, Sports, and Media Occ.	72,288	81,062	8,774	12.14%	1.15%	\$51,170
Building and Grounds Cleaning & Maintenance Occ.	156,751	171,581	14,830	9.46%	0.91%	\$32,420
Business and Financial Operations Occupations	323,873	365,505	41,632	12.85%	1.22%	\$77,430
Community and Social Service Occupations	84,735	94,985	10,250	12.10%	1.15%	\$50,600
Computer and Mathematical Occupations	170,235	208,183	37,948	22.29%	2.03%	\$106,380
Construction and Extraction Occupations	220,254	241,964	21,710	9.86%	0.94%	\$47,440
Educational Instruction and Library Occupations	265,545	292,268	26,723	10.06%	0.96%	\$49,400
Farming, Fishing, and Forestry Occupations	33,431	33,100	-331	-0.99%	-0.10%	\$36,290
Food Preparation and Serving Related Occupations	413,229	468,891	55,662	13.47%	1.27%	\$27,920
Healthcare Practitioners and Technical Occ.	307,436	362,460	55,024	17.90%	1.66%	\$76,340
Healthcare Support Occupations	180,295	213,906	33,611	18.64%	1.72%	\$35,270
Installation, Maintenance, and Repair Occupations	207,585	231,029	23,444	11.29%	1.08%	\$50,230
Legal Occupations	30,876	33,952	3,076	9.96%	0.95%	\$75,270
Life, Physical, and Social Science Occupations	45,870	52,239	6,369	13.88%	1.31%	\$73,390
Management Occupations	372,599	418,495	45,896	12.32%	1.17%	\$110,700
Office and Administrative Support Occupations	587,922	590,605	2,683	0.46%	0.05%	\$40,680
Personal Care and Service Occupations	106,303	123,612	17,309	16.28%	1.52%	\$30,010
Production Occupations	340,034	347,938	7,904	2.32%	0.23%	\$39,500
Protective Service Occupations	104,302	112,445	8,143	7.81%	0.75%	\$43,720
Sales and Related Occupations	515,116	538,557	23,441	4.55%	0.45%	\$35,670
Transportation and Material Moving Occupations	477,915	533,454	55,539	11.62%	1.11%	\$36,530

Source: NC Department of Commerce, Labor and Economic Analysis Division

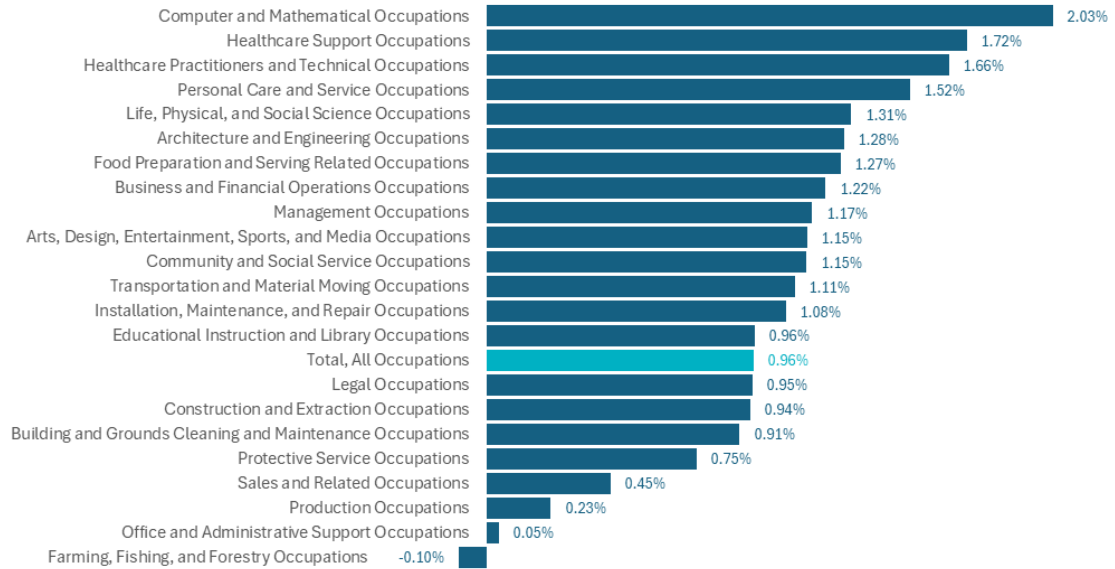
By 2032, **Healthcare Practitioners and Technical Occupations** (Doctors, Nurses, Technicians, etc.) and **Healthcare Support Occupations** (Healthcare Aides, Assistants, etc.) are projected to add 55,000 and 33,600 jobs, respectively.

Other rapidly growing occupational groups include **Business & Financial Operations** (e.g., Accountants, Market Research Analysts) and **Computer & Mathematical Occupations** (e.g., Software Developers, Computer Support Specialists), projected to gain 41,600 and 37,900 jobs, respectively.

Computer & Mathematical Occupations are projected to grow the fastest, followed by **Healthcare Support Occupations, Healthcare Practitioners and Technical Occupations, Personal Care & Service Occupations** (Childcare Workers, Hairdressers, Animal Caretakers, etc.), and **Life, Physical, and Social Science Occupations** (Chemists, Environmental Scientists, Social Science Research Assistants, etc.), as shown in Figure 3.

Farming, Fishing, and Forestry Occupations is the only occupational group projected to decline, eliminating about 330 jobs by 2032.

Figure 3. Employment Projection by Major Occupational Groups 2022-2032, Annualized Growth Rate



Source: NC Department of Commerce, Labor and Economic Analysis Division

Occupations at both the lowest and highest ends of the wage scale will experience the fastest growth (Table 2). Jobs with median annual wages below the statewide 25th percentile (\$32,910) are expected to increase by 13%, from 676,300 to 764,000 jobs between the 2022-2032 period. Jobs with median annual wages above the statewide 75th percentile (\$67,980), are expected to grow by 15%, from 1.32 million to 1.52 million jobs during the same period. In contrast, occupations with median annual wages between the 25th and 75th percentiles are expected to grow by only 7%.

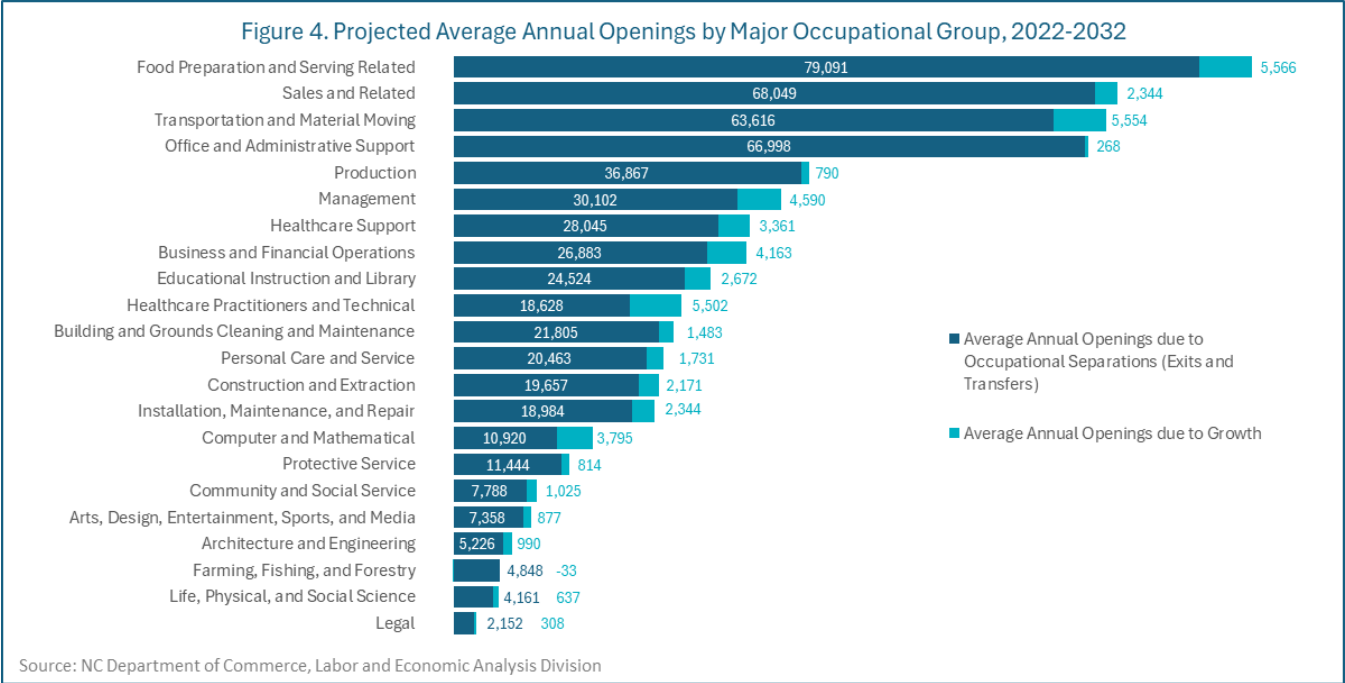
Despite the stark wage differences, many high-growth occupations share a common trait: the dominance of non-routine tasks that are difficult to automate. However, jobs with a high degree of routine work, such as **Production, Agriculture, and Office/Administrative Occupations**, are projected to grow slowly or decline.

3.2 Job Openings

Net employment change, as discussed earlier, is a key indicator of occupational growth, reflecting new job creation due to economic or demographic shifts. However, job openings might also arise from labor market turnover, such as when workers exit the labor force or move to different occupations. Occupational employment projections account for these openings, often revealing that separations create significantly more job opportunities than employment growth (Figure 4).

On average, at the state level, job openings from separations are 11.3 times greater than those from growth. This ratio varies widely among the occupation groups, from 2.9 for **Computer and Mathematical Occupations** to an impressive 250 times for high-turnover **Office and Administrative Support Occupations**. For instance, despite **Office & Administrative Support Occupations** being among the slowest-growing sectors (Table 2), this group will remain one of the top five in annual job openings due to turnover (Figure 4).

The largest number of total annual openings will occur in occupations with traditionally high turnover rates or those require minimal skills or training, including **Food Preparation & Serving Related Occupations; Sales & Related Occupations; Transportation & Material Moving Occupations; Office & Administrative Support Occupations; and Production Occupations**. All of these are also among the lower-paying jobs, with annual median wages ranging from \$27,920 in Food Preparation & Serving Related Occupations to \$40,680 in Office and Administrative Support Occupations, all below the state median wage of \$45,440 (Table 2).



3.3 Educational Attainment

In 2022, occupations requiring no formal education or only a high school diploma⁷ accounted for 60.8% of total employment; however, this is projected to decline to 59.4% by 2032. In contrast, the share of occupations requiring education beyond high school is expected to grow moderately at each educational level (Table 3). Through 2032, jobs requiring higher education are projected to experience faster annual growth than those needing less education (Table 3). For instance, positions requiring a Master’s, Doctoral, or professional degree are projected to grow the fastest.

While over 129,000 annual job openings are projected for those with a bachelor’s degree or higher, occupations requiring a high school diploma or no formal education will see significantly more openings – over 430,000 each year – primarily due to high transfer and exit rates (Figure 5).

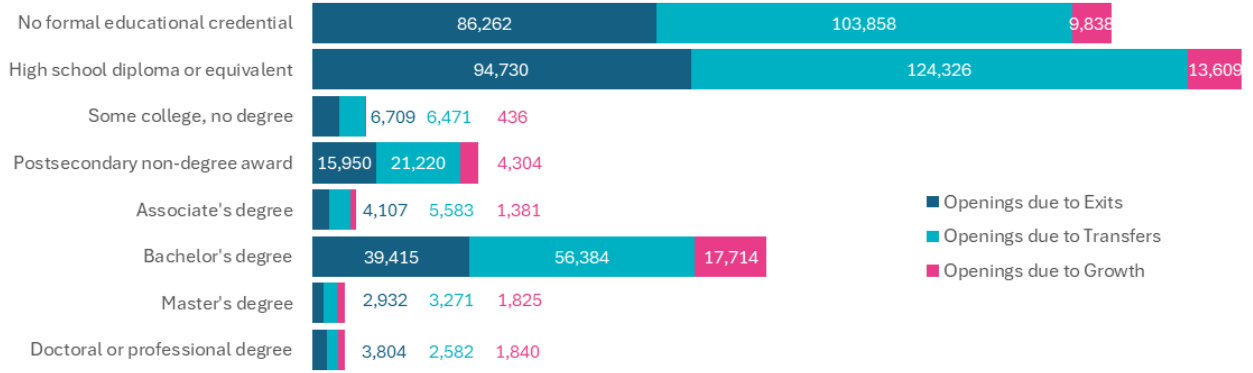
Table 3. Projected Employment by BLS Educational Requirement

Minimum Education Requirement	Employment Estimate 2022	Employment 2022, % of Total	Employment Estimate 2032	Employment 2032, % of Total	Percent Change	Annual Growth	Average Annual Openings
High school diploma (or equivalent) or No formal educational credential	3,093,067	60.8%	3,327,533	59.4%	7.6%	0.73%	432,623
Some college, no degree	119,660	2.4%	124,018	2.2%	3.6%	0.36%	13,616
Postsecondary non-degree award	331,186	6.5%	374,235	6.7%	13.0%	1.23%	41,474
Associate's degree	103,049	2.0%	116,886	2.1%	13.4%	1.27%	11,071
Bachelor's degree	1,238,682	24.3%	1,415,815	25.3%	14.3%	1.35%	113,513
Master’s, Doctoral, or Professional degree	203,711	4.0%	240,408	4.3%	18.0%	1.67%	16,254

Source: NC Department of Commerce, Labor and Economic Analysis Division

⁷ Based on the BLS entry-level education requirement scale: <https://www.bls.gov/emp/documentation/education/tech.htm>

Figure 5. Projected Average Annual Openings by Educational Attainment, 2022-2032



Source: NC Department of Commerce, Labor and Economic Analysis Division