

2023-2027

Comprehensive Economic Development Strategy

Annual Performance Report

October 2023



*Prepared by the SC Appalachian Council of Governments for the Counties of
Anderson, Cherokee, Greenville, Oconee, Pickens and Spartanburg*



ACKNOWLEDGEMENTS

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Greenville Area Development Corporation
Oconee Economic Alliance

One Spartanburg, Inc.
SC Department of Commerce
SC Department of Employment & Workforce
Ten at the Top
Upstate SC Alliance

The Appalachian Council of Governments is very appreciative of the support our agency and communities have received from the US Economic Development Administration (EDA). In 2023, ACOG managed over \$21 million dollars in EDA grant funding for 6 projects in the region that will support economic development for years to come.



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INTRODUCTION

Planning for a **THRIVING,** **RESILIENT** Region

About the SC Appalachian Council of Governments

The SC Appalachian Council of Governments (ACOG) is a voluntary organization of local governments in the northwest corner of South Carolina, serving a region which includes the counties of Anderson, Cherokee, Greenville, Oconee, Pickens, and Spartanburg, as well as the 42 municipalities therein. Since its formation in 1965, the ACOG has served the dual mission of tackling issues of regional significance and providing services to local governments. Economic and community development, transportation, infrastructure development, resource management, aging services, and workforce development are all issues of regional importance in which ACOG takes an active role. At the local level, the agency's services include general administration, technical assistance, training, planning, grant writing & administration, and information & mapping services.

Background and Purpose of the Comprehensive Economic Development Strategy

Partnerships with local, state, and federal agencies are essential to ACOG's success. One such partnership is with the US Economic Development Administration (EDA). As one of more than 500 EDA-designated Economic Development Districts throughout the United States, ACOG is responsible for developing and maintaining a Comprehensive Economic Development Strategy (CEDS) for the region. The CEDS serves as a strategic blueprint for economic development and provides a foundation for capacity-building across the region's six counties. In order to maintain eligibility for EDA grants and programs, the CEDS must be rewritten every five years and performance reports must be submitted to EDA annually in the intervening years.

In December 2022, the 2023-2027 Comprehensive Economic Development Strategy for the SC Appalachian Region was approved by the EDA with effective dates of January 1, 2023—December 31, 2027. The 2023 Annual Performance Report will provide an update of economic conditions and evaluate performance measures related to the six economic development priorities established in the 2023-2027 CEDS. The period covered by this report is January 1, 2023—June 30, 2023.

2023 CEDS Advisory Committee

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2023 REGIONAL OVERVIEW

Demographic Profile

The six counties of the SC Appalachian region are home to an estimated 1.38 million residents. This is an increase of 1.25% over 2022. Greenville County remains the most populous with 40% of the region’s residents while Spartanburg County experienced the highest year-over-year growth at a rate of 1.63%. The median age of residents in the region ticked up to 40.3, slightly above that of South Carolina and the US, however, when examining the region’s population by age group, it is very much in line with that of the state and the nation. In terms of race and ethnicity, the minority population showed a small increase with those identifying as a race other than white nearing 30% and the number of Hispanic or Latino residents reaching 9%.

	ACOG Region	South Carolina	United States
Population			
Total	1,379,399	5,311,184	337,470,185
Male	49.1%	49.0%	49.4%
Female	50.9%	51.0%	50.6%
2023-2028 Compound Annual Growth Rate	0.69%	0.61%	0.30%
Age			
Under 18 Years	21.4%	21.2%	21.6%
18 to 24 Years	9.1%	9.0%	9.1%
25 to 34 Years	12.7%	13.1%	13.7%
35 to 44 Years	12.7%	12.8%	13.1%
45 to 54 Years	12.3%	11.9%	11.9%
55 to 64 Years	13.0%	13.0%	12.7%
65 Years and Over	18.7%	19.0%	17.8%
Prime Working Age (25-54)	37.7%	37.8%	38.7%
Median Age	40.3	40.1	39.1
Race & Ethnicity			
White	70.6%	63.3%	60.6%
Black or African American	15.3%	24.3%	12.5%
American Indian and Alaska Native	0.4%	0.5%	1.1%
Asian	2.3%	1.9%	6.3%
Native Hawaiian and Other Pacific Islander	0.1%	0.1%	0.2%
Some Other Race	4.7%	3.8%	8.7%
Two or More Races	6.6%	6.2%	10.6%
Hispanic or Latino (of any race)	9.0%	7.5%	19.4%

Source: Esri Business Analyst, 2023

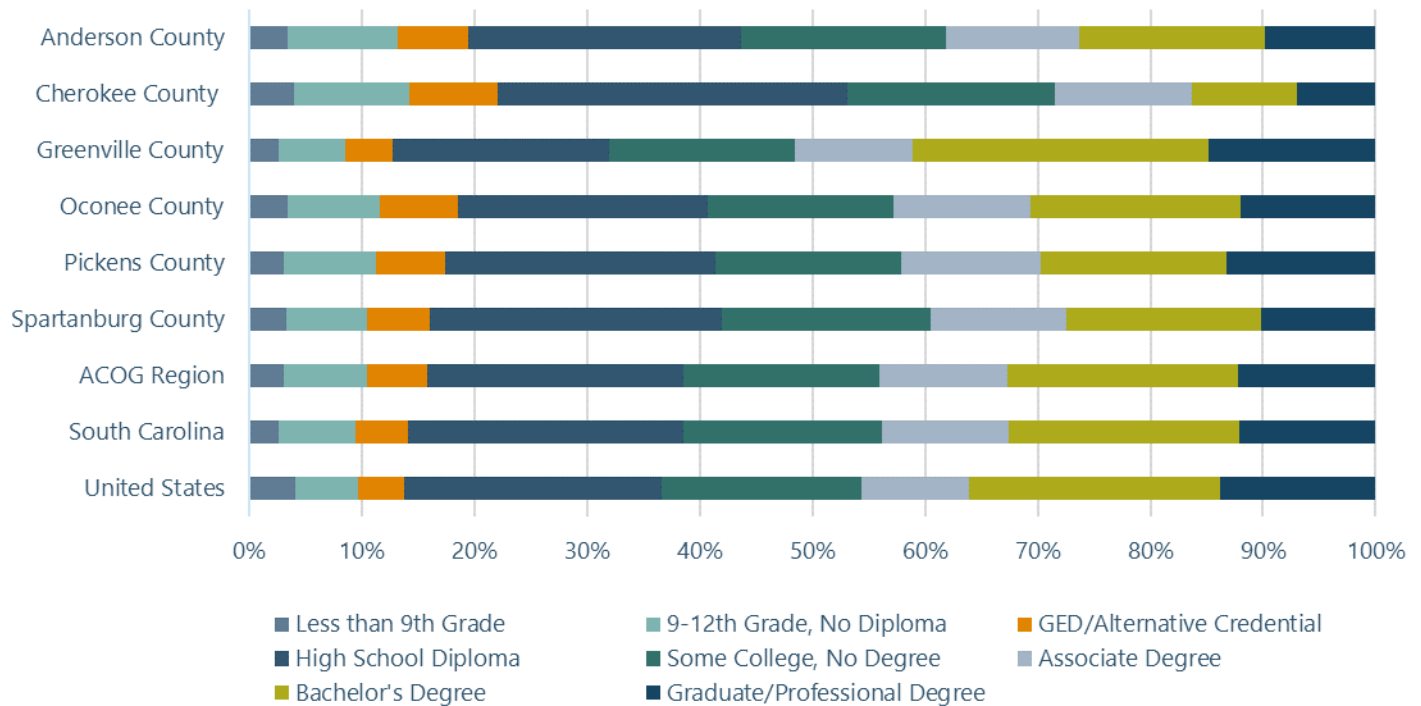


Educational Attainment

Educational attainment across the ACOG region continues to improve. Nearly 90% of residents have a high school diploma (including equivalency) or above, which is up over a point from 2022. In addition, the number of residents with a Bachelor's degree or higher has increased to 32.7%. Greenville County outpaced the rest of the region in both categories with 91.5% of residents have a high school diploma or above and a remarkable 41.2% of residents holding a Bachelor's degree or higher.

Educational attainment is intricately linked to employment as expected growth rates for occupations vary by the education and training required. While all employment in the ACOG region is projected to grow 1.2% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 1.5% per year, those requiring a bachelor's degree are forecast to grow 1.5% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 1.6% per year (*JobsEQ, Q1 2023*).

Educational Attainment for the Population 25+



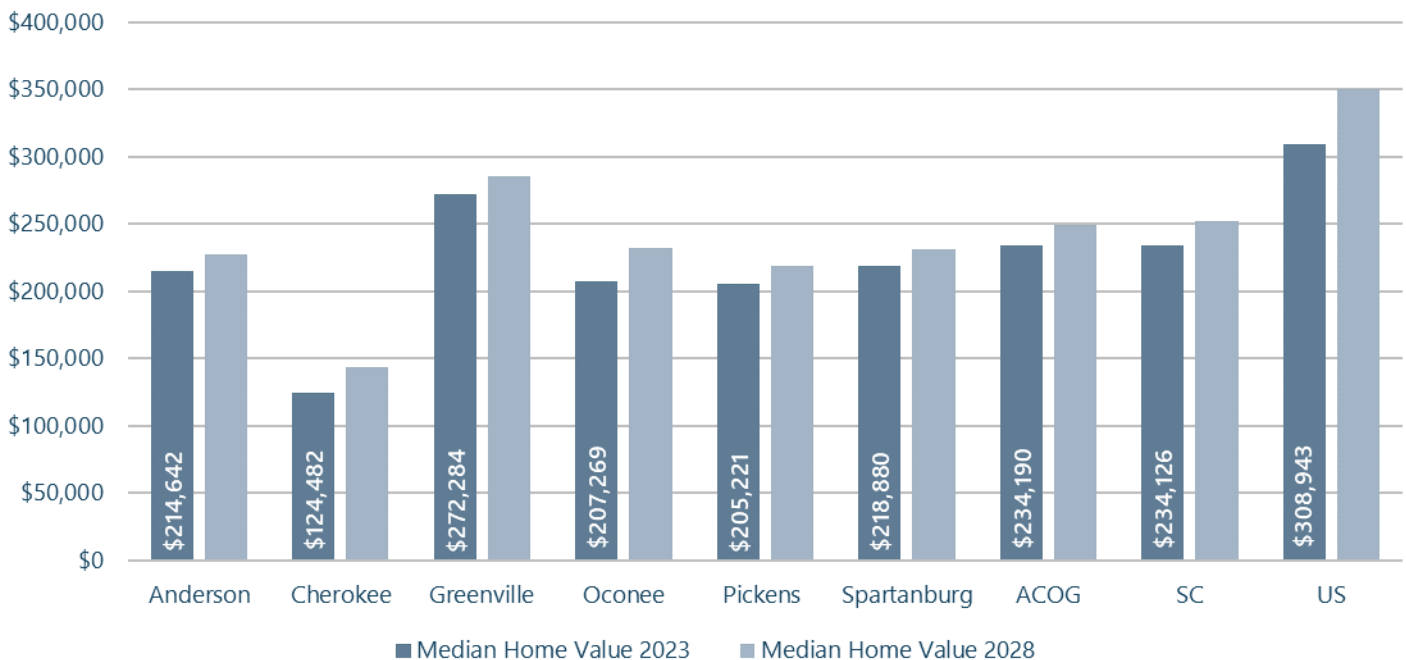
Source: Esri Business Analyst, 2023



Housing

As has been the case in many parts of the country, median home values have increased significantly in the region, particularly since the COVID-19 pandemic began in 2020. Greenville County has the region's most expensive housing market while Cherokee County is the most affordable with median home prices being \$272,284 and \$124,482, respectively. The number of housing units in the region is estimated to be 600,765 and is expected to increase by 3.65% over the next five years.

Median Home Values, 2023 & 2028



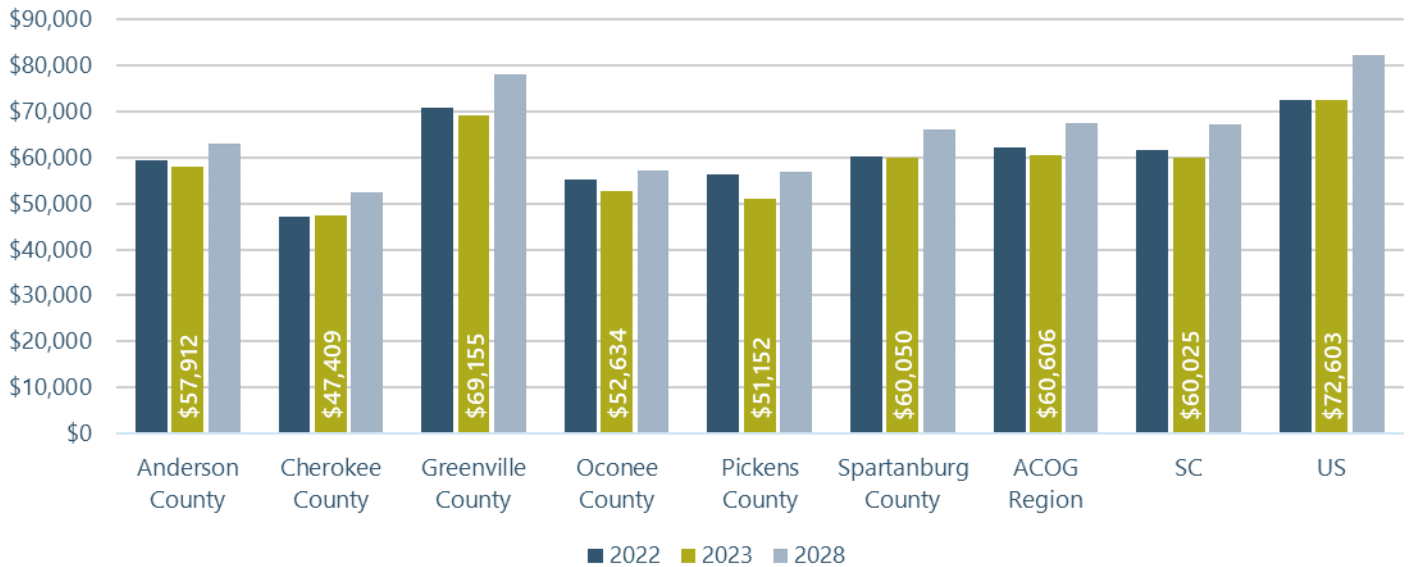
Source: Esri Business Analyst, 2023

Income

Between 2022 and 2023, per capita income decreased in half the counties in the ACOG region, while median household income decreased in all but one: Cherokee County. The ACOG region's per capita income fell 0.6% to \$35,273 and the median household income fell 2.7% to \$60,606. This downward trend is not expected to continue, however, as both per capita and median household incomes are projected to increase over the next five years.



Median Household Income, 2022-2028

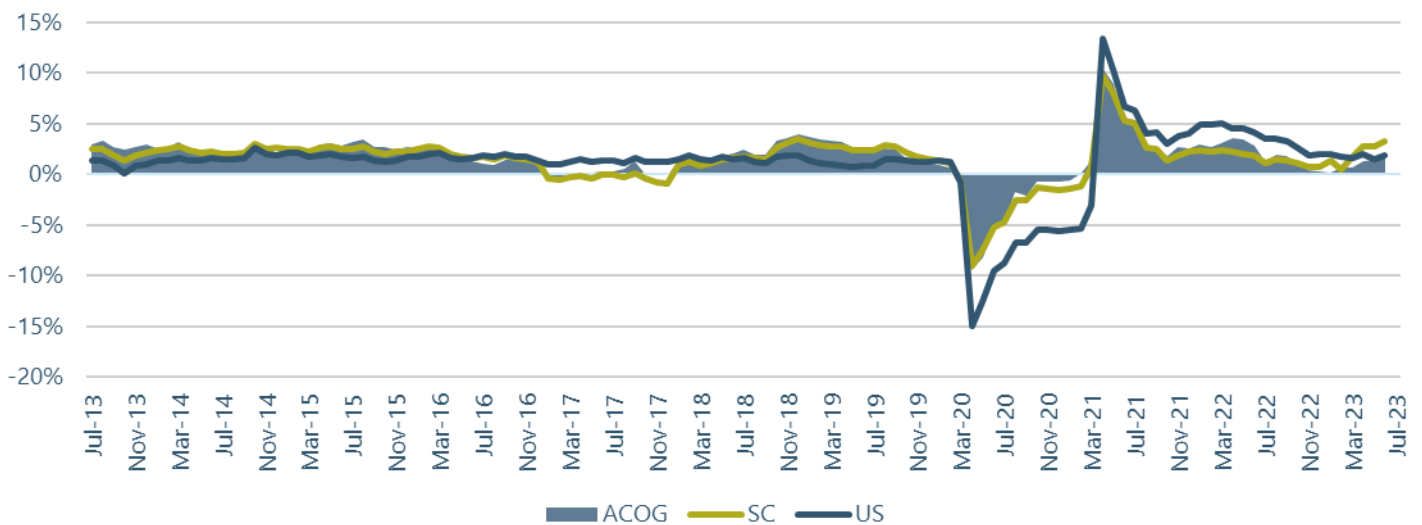


Source: Esri Business Analyst, 2023

Employment Trends

Total employment across the ACOG region was 623,359 as of June 2023. This represents a 3% increase year over year.

Year Over Year Percent Change in Employment, July 2013—June 2023

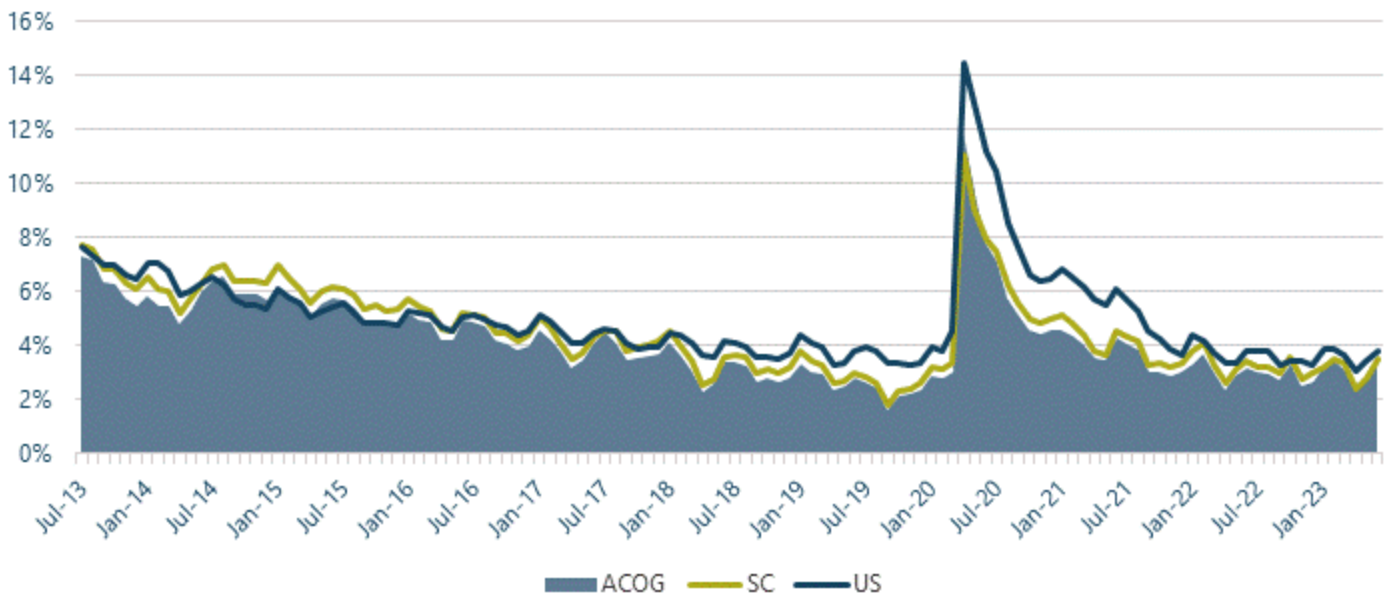


Source: US Bureau of Labor Statistics



As of June 2023, ACOG region's unemployment rate was 3.4%, slightly below that of South Carolina (3.5%) and the US (3.8%), but up over the 2022 annual average of 3.1%.

Unemployment by Month, July 2013—June 2023



Source: US Bureau of Labor Statistics

Industry Snapshot

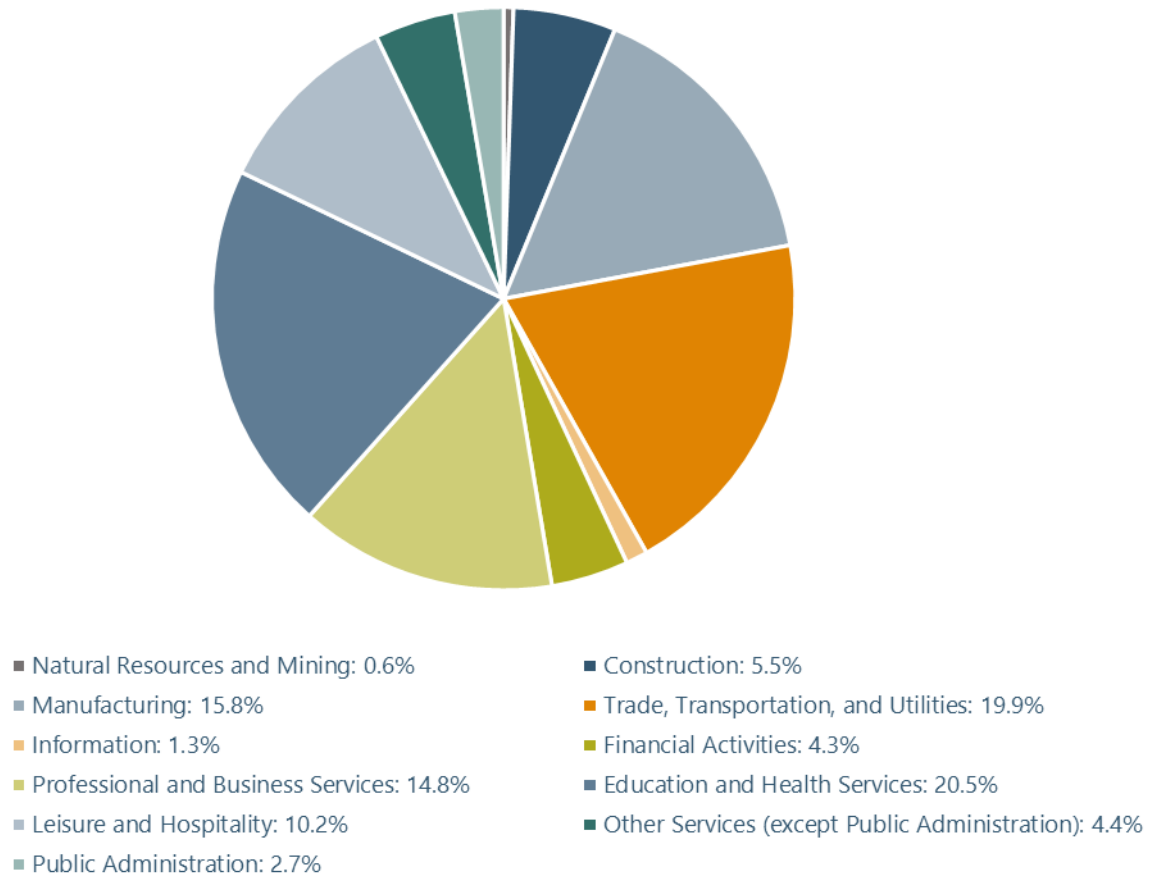
The largest sector in the ACOG region is Manufacturing, employing 101,207 workers. The next-largest sectors in the region are Health Care and Social Assistance (82,826 workers) and Retail Trade (69,443). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Manufacturing (LQ = 1.96), Administrative and Support and Waste Management and Remediation Services (1.25), and Utilities (1.14).

Sectors in the region with the highest average wages per worker are Management of Companies and Enterprises (\$103,989), Utilities (\$88,986), and Finance and Insurance (\$83,173). Regional sectors with the best job growth over the last 5 years are Manufacturing (+8,762 jobs), Health Care and Social Assistance (+7,338), and Professional, Scientific, and Technical Services (+5,270).

Over the next year, employment in the ACOG region is projected to expand by 7,655 jobs. The fastest growing sector in the region is expected to be Accommodation and Food Services with a +2.1% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for the Health Care and Social Assistance (+1,432 jobs), Accommodation and Food Services (+1,183), and Manufacturing (+712) sectors.



Employment by Industry (NAICS Supersectors), 2023



Source: JobsEQ, 2023

Occupation Snapshot

The largest major occupation group in the ACOG region is Office and Administrative Support Occupations, employing 82,558 workers. The next-largest occupation groups in the region are Production Occupations (70,042 workers) and Transportation and Material Moving Occupations (62,334). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Production Occupations (LQ = 1.94), Architecture and Engineering Occupations (1.27), and Transportation and Material Moving Occupations (1.12).

Occupation groups in the ACOG with the highest average wages per worker are Management Occupations (\$112,500), Legal Occupations (\$101,500), and Healthcare Practitioners and Technical Occupations (\$94,400). The



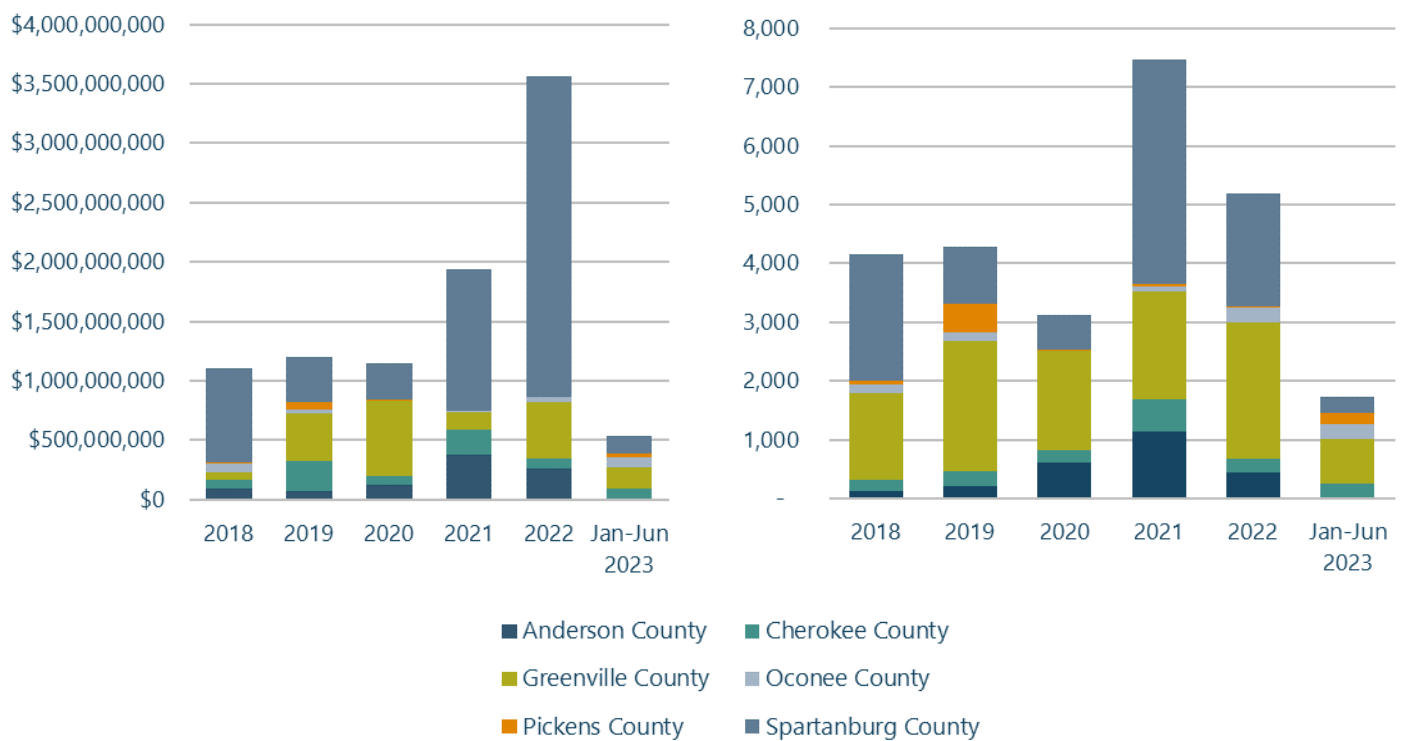
unemployment rate in the region varied among the major groups from 1.1% among Legal Occupations to 4.7% among Food Preparation and Serving Related Occupations.

Over the next year, the fastest growing occupation group in the region is expected to be Healthcare Support Occupations with a +2.3% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Food Preparation and Serving Related Occupations (+1,047 jobs) and Transportation and Material Moving Occupations (+857). Over the same period, the highest separation demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (10,746 jobs) and Office and Administrative Support Occupations (10,216).

Capital Investment & Job Creation

From 2018-2022, ACOG county economic development offices announced nearly \$9 billion in capital investment and the creation of more than 23,000 new jobs across the region. During the first half of 2023, another \$536 million in capital investment and 1,700 jobs were added. These announcements came from a mix of existing and new businesses from the US and abroad, and span a variety of industries including advanced materials, aerospace, automotive, biosciences, corporate and professional services, distribution, energy, and food and beverage manufacturing.

Capital Investment and Job Creation, January 1, 2018—June 30, 2023



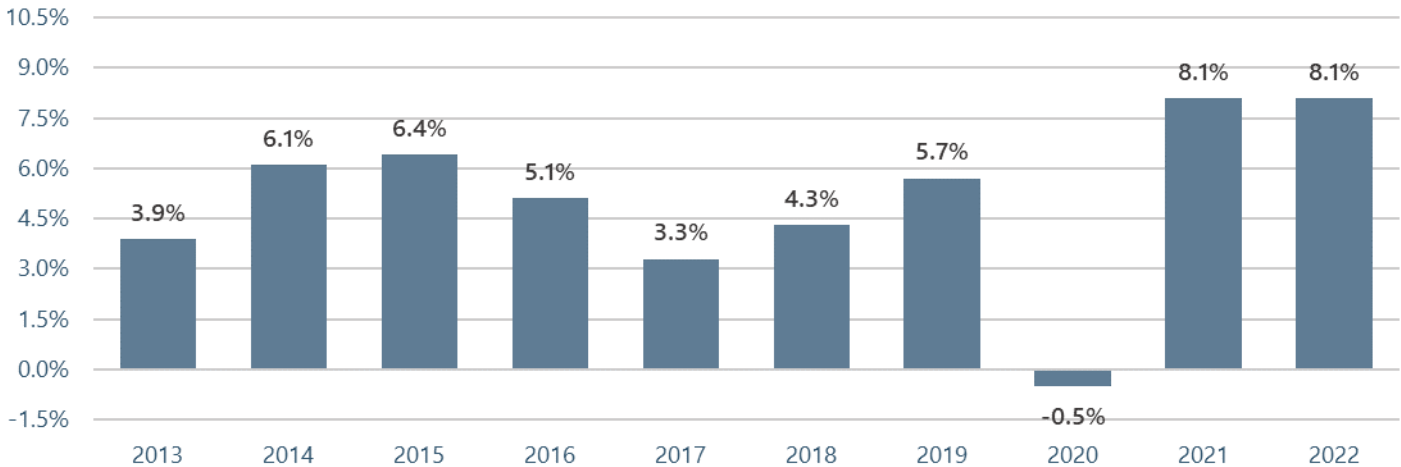
Source: County Economic Development Offices and the Upstate Alliance



Gross Domestic Product

Gross Domestic Product (GDP) is the total value of goods and services produced by a region. In 2022, nominal GDP in the ACOG region expanded 8.1%. This follows growth of 8.1% in 2021. As of 2022, total GDP in the region was \$75,157,272,000.

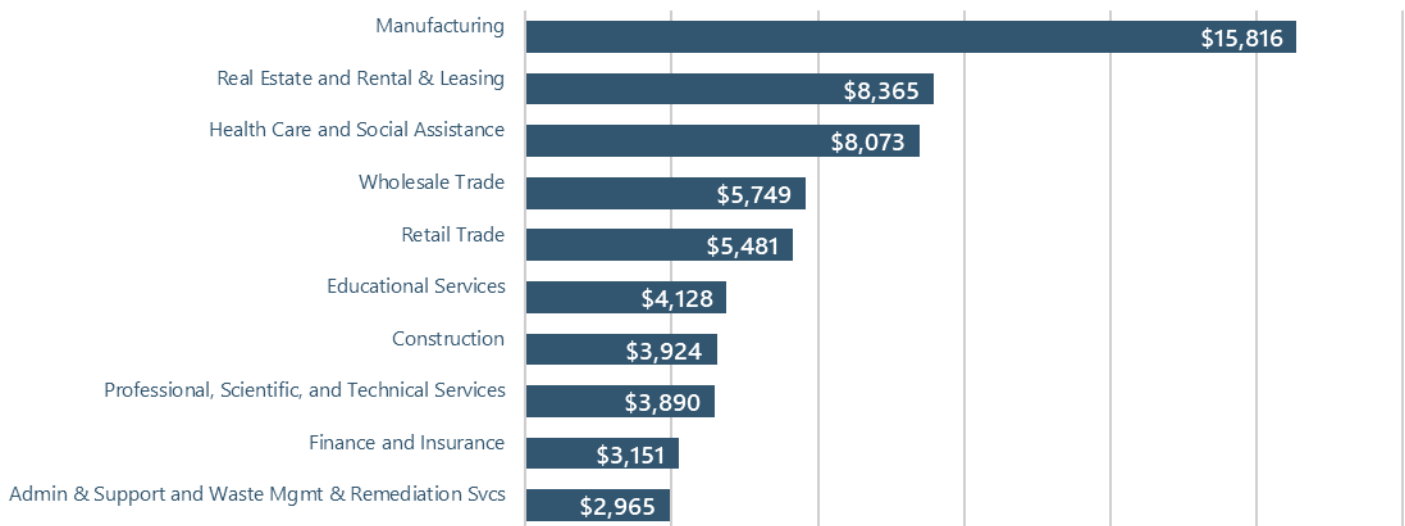
Year-Over-Year Percent Change in GDP, 2013-2022



Source: JobsEQ, 2023

Of the industry sectors in the ACOG region, Manufacturing contributed the largest portion of GDP in 2022, \$15,815,518,000. The next-largest contributions came from Real Estate and Rental and Leasing (\$8,364,732,000), Health Care and Social Assistance (\$8,073,302,000), and Wholesale Trade (\$5,749,240,000).

Gross Domestic Product (in \$ millions), 2022



Source: JobsEQ, 2023



ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY ONE

Foster economic prosperity by supporting the growth of regional clusters and encouraging local asset-based economic development.

For the ACOG region as a whole to prosper, economic development strategies at both the regional and community levels are essential. This can be accomplished in part by 1) supporting the growth of the six regional clusters of advanced materials, aerospace, automotive, biosciences, corporate & professional services, and food & beverage manufacturing, and 2) the development of economic development plans to leverage the unique assets of communities in the region. To that end, the following strategies are suggested:

- Market the region to both out-of-state and international companies who would contribute to the success of the existing clusters in the region.
- Pursue strategies to build on cross linkages and convergences among clusters.
- Support research and development initiatives that target regional clusters.
- Support development of and funding for business retention and expansion programs in each county to ensure continued success of existing industry.
- Ensure available business incentives are aligned with local and regional economic development goals.
- With county and regional economic developers, routinely review and update cluster analyses.
- Encourage asset-based economic development planning throughout the region and support those efforts with grant-writing and technical assistance.
- Identify and leverage unique assets in the region.



PRIORITY ONE INDICATORS

- Number of economic development announcements
- Amount of announced capital investment
- Number of announced jobs
- Layoffs and closures
- Job growth by industry & cluster
- Amount of foreign direct investment (FDI)

Announced Capital Investment & Job Creation, Jan 2023 –Jun 2023

County	Company	Type	Capital Investment	Jobs
Spartanburg	Milo's Tea Company	New	\$130,000,000	103
Greenville	GE Appliances (GEA), a Haier company	New	\$50,000,000	45
Greenville	Erchonja Corp.	New	\$6,700,000	51
Greenville	Yanfeng	New	\$600,000	14
Spartanburg	TIME Bicycles (TIME)	New	\$6,500,000	105
Oconee	BorgWarner	Existing	\$42,700,000	122
Pickens	FN America, Inc.	New	\$33,000,000	176
Oconee	Meyn America, LLC	New	\$10,800,000	25
Greenville	Ortec	Existing	\$11,500,000	20
Pickens	Sulzer Pumps Solutions, Inc.	Existing	\$5,300,000	25
Greenville	Verdeco Recycling	New	\$43,000,000	79
Cherokee	Gaffney Bakery, LLC	New	\$96,000,000	260
Oconee	Itron	Existing	\$28,500,000	100
Spartanburg	Pan Technology, Inc.	New	\$7,200,000	72
Greenville	Sage Parts Plus, Inc.	New	\$1,727,750	73
Greenville	Lima One Capital	Existing	\$51,478,500	300
Spartanburg	Hammer-IMS	New		
Greenville	Garver	New	\$925,000	100
Greenville	Timberlab	New	\$9,900,000	67

- Between January and July 2023, ACOG region economic development offices announced 19 projects totaling \$536 million in capital investment and 1,737 new jobs. Of that, \$99.7 million and 285 jobs were due to foreign direct investment in the region.
- The SC Department of Employment and Workforce announced 2 closures and 3 layoffs in the region with a total of 512 jobs lost.



ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY TWO

Develop a highly-skilled workforce through education, training, and talent recruitment.

Talent shortages are among the biggest threats to successful economic development in the region. To address the current and future needs of businesses in the region, it is critical to support workforce development, retention, and recruitment. The following strategies represent a multi-pronged approach:

- Foster collaboration among workforce development entities, institutions of higher education, and private industry.
- Encourage apprenticeship and certificate programs to upskill existing workers and expand opportunities for economic mobility.
- Identify opportunities for partnerships with neighboring economic development districts/organizations and workforce development entities to enhance the skills of and resources for workers throughout the laborshed.
- Support innovative strategies to develop and retain talent to support industry clusters and other high-growth industries.
- Develop a comprehensive list of workforce development resources and tools available in the region and identify opportunities to improve navigation thereof for both employers and workers.
- Encourage industry engagement with students, parents, and educators in K-12 schools.
- Identify barriers to workforce participation and develop solutions to expand access to employment.
- Support and amplify talent attraction marketing campaigns.
- Assist employers with identifying opportunities to attract nontraditional workers.
- Strengthen partnerships between businesses and non-profit organizations engaged in workforce development.



PRIORITY TWO INDICATORS

- Labor market data
 - See pages 5-8
- Educational attainment

2023 Population 25+ by Educational Attainment			
	United States	South Carolina	ACOG Region
Less than 9th Grade	4.1%	2.7%	3.1%
9-12th Grade, No Diploma	5.5%	6.8%	7.4%
GED/Alternative Credential	4.1%	4.7%	5.4%
High School Diploma	22.9%	24.5%	22.8%
Some College, No Degree	17.7%	17.6%	17.3%
Associate Degree	9.5%	11.2%	11.4%
Bachelor's Degree	22.3%	20.5%	20.4%
Graduate/Professional Degree	13.9%	12.1%	12.3%

- Post-secondary enrollment
 - Fall 2022 enrollment was 79,229
- Number of apprenticeship and certificate programs
 - Staff will begin this research in 2024
- Per capita and median household income
 - 2023 per capita income: \$35,273 (*Esri Business Analyst, 2023*)
 - 2023 median household income: \$60,606 (*Esri Business Analyst, 2023*)
- Poverty rates
 - The most recent poverty rate available for the ACOG region was 13.4%, unchanged from the prior year. (*US Census Bureau ACS 5-yr Estimates, 2021*)
- Implementation of solutions to barriers to workforce participation
 - Staff will begin this research in 2024



ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY THREE

Build, maintain, and enhance physical infrastructure to support economic development success.

Physical infrastructure capacity plays an important role in regional economic development success. The ability to attract and retain both companies and people is largely predicated on the presence of adequate infrastructure. The following strategies will help address both existing and future infrastructure needs:

- Ensure critical infrastructure is adequate for existing and future industrial, commercial, and residential development.
- Modernize aging infrastructure that diminishes service capacity.
- Support multi-modal transportation planning initiatives that facilitate the movement of both people and goods.
- Improve existing highways and interchanges to decrease congestion and increase safety.
- Facilitate coordination among MPOs in the region.
- Support projects at Inland Port Greer and GSP International airport to increase the capacity for the movement of goods.
- Identify gaps in utility coverage for future large-scale industrial and office development and proactively plan for extension of service.
- Identify gaps in broadband and digital infrastructure and support initiatives to extend and improve coverage.
- Encourage construction of resilient infrastructure that has built-in redundancies and is less vulnerable to disruption.
- Identify opportunities for cross-jurisdictional coordination among service providers.



PRIORITY THREE INDICATORS

- **Amount of new public investment in water, sewer, and transportation infrastructure**
 - Staff is in the process of completing research for this indicator.
- **Amount of grant funding awarded for infrastructure projects**
 - The ACOG Grants Services department is managing \$69,746,376 in infrastructure project grants that were awarded in the first half of 2023.
- **Changes in level of service for major thoroughfares**
 - Staff is in the process of completing research for this indicator.



ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY FOUR

Cultivate a thriving, inclusive entrepreneurial community that encourages small-business development, innovation, and emerging industries & technologies.

Small businesses are an anchor of the regional economy. It is critical to support increased capacity building for entrepreneurship to ensure the pathway to starting a business is clear and that innovative entrepreneurs are able to operate in a supportive environment. To that end, the following strategies are recommended:

- Encourage the creation or expansion of entrepreneurial support programs to assist with market/business development, incubator development, mentoring, and supply-chain resiliency.
- Educate local elected and public officials about the importance of entrepreneur-friendly communities, highlighting the impact of small business.
- Identify and expand programs or strategies that increase access to capital for historically underserved communities.
- Engage the business community in entrepreneurial programs to create opportunities for entrepreneurs in the region to solve industry problems.
- Promote region-wide connectivity among entrepreneurial support programs and between those programs and the entrepreneurial community.
- Support business incubator, landing pad, and co-work spaces throughout the region.



PRIORITY FOUR INDICATORS

- **Number of small businesses**
 - Nonemployer establishments: 102,802 (*US Census Bureau Table NS2000NONEMP, 2020*)
 - Employer establishments with less than 50 employees: 28,588 (*US Census Bureau Table CB2100CBP, 2021*)
- **Number of new patents**
 - The US Patent and Trademark Office has public records for 178 patents granted in the region in 2023.
- **Number of business incubator, landing pad, and co-work spaces**
 - 16+
- **Number of minority-owned businesses**
 - This number has proven difficult to obtain, however, the US Census Bureau's Annual Business Survey estimates the number of minority-owned businesses in the Greenville-Anderson-Mauldin, SC and Spartanburg, SC metro areas to be 2,673. (*US Census Bureau Table AB2000CSA01, 2020*)



ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY FIVE

Improve economic development capacity by increasing the quality and quantity of development-ready sites and buildings for businesses of all sizes.

While many factors play into a business' location decision, regions with a healthy inventory of available sites and buildings are better positioned to recruit new businesses and help existing businesses expand. The following strategies aim to increase the supply of sites and buildings across the region:

- Encourage public-private partnerships to facilitate product development.
- Market available sites to developers both within and outside the region.
- Provide grant-writing and technical assistance for due diligence studies, infrastructure extensions/improvements, hazard mitigation projects, etc. to increase speed to market.
- Assist local government partners with identification of potential industrial and office sites and redevelopment opportunities.
- Identify potential incubator and co-work space development opportunities.
- Research best practices for public investment in industrial development to share with interested local governments.
- Encourage the preservation of land for future industrial and commercial development.



PRIORITY FIVE INDICATORS

- **Number of sites and buildings marketed by economic development organizations**
 - At the end of June 2023, there were 386 sites and buildings actively marketed by EDOs.
- **Number of speculative buildings constructed**
 - As of Q2 2023, 3,153,699 square feet of industrial space was under construction.
- **Acres of land zoned for industrial uses**
 - Staff is in the process of completing research for this indicator.
- **Number of grant applications prepared for due diligence studies, infrastructure extensions/improvements, and hazard mitigation projects**
 - 2 applications totaling \$1,350,000 in grant funds and \$2,228,789 in total project costs were prepared in the first half of 2023.



ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY SIX

Create healthy, vibrant, resilient communities that increase the overall quality of life in the region.

The economic development success of the ACOG region would not be possible without the communities that make it a desirable place to live and work. The following strategies aim to plan for future growth, advance health and wellness, enhance quality of life, and ensure opportunities for all:

- Encourage local and regional land use planning that balances economic, social, and environmental considerations.
- Identify and share best practices for compact development from other high-growth regions with limited land availability.
- Support affordable housing programs to address the workforce housing shortage and overall housing costs.
- Promote access to quality healthcare and identify and address healthcare deserts.
- Increase access to healthy foods by supporting community gardens, farmers markets, community supported agriculture (CSAs), and similar initiatives.
- Support programs to allow seniors to age in place and remain active in their communities.
- Encourage inclusive community and economic development.
- Facilitate opportunities for collaboration among planners, emergency management professionals, and stakeholders and encourage coordination of plans.



PRIORITY SIX INDICATORS

- **Number of planning initiatives**
 - The first half of 2023 saw the introduction or adoption of over 20 planning initiatives throughout the region.
- **Number of residential building permits**
 - According to data from the US Census Bureau’s Building Permits Survey program, 9,837 single-family residential building permits were issued in 2022. This is a 24% decrease from 2021.
- **Affordable housing initiatives**
 - Staff is developing a database of affordable housing projects. At present, there are over 100 projects and programs across the region.
- **Food deserts – change over time**
 - Staff is in the research phase of mapping food deserts across the region.
- **Number of farmers markets and CSAs**
 - There are farmer’s markets and roadside stands in all six ACOG counties totaling 93 across the region.
- **Healthcare deserts – change over time**
 - Staff will begin the research and mapping for this indicator in 2024.

Grantee: SC Appalachian Council of Governments
Project Title: 2023 Comprehensive Economic Development Strategy (CEDS)
Annual Performance Report
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Five-Year CEDS Time Period: January 1, 2023—December 31, 2027