The local economy affects every aspect of community life – from jobs and taxes to environmental quality. A healthy economic climate fosters greater income potential for Kershaw County residents, a supportive environment for business and industry to succeed, and increased fiscal stability of local governments to maintain and expand community services and infrastructure. A balanced and diversified economy can also help Kershaw County, its municipalities, and its residents and employers successfully weather economic downturns.

The Economic Element of the Comprehensive Plan focuses on the components of the economy in Kershaw County, its municipalities, and the surrounding Santee Lynches and Central Carolina regions to include labor force characteristics, an analysis of income and wealth characteristics and distribution, commuting patterns, educational attainment and workforce development, occupational outlook, existing business and industry, market forces, realized and untapped economic assets, diversity of the economic base, the related economics of public health, and economic recruitment strategies. These factors, along with an assessment of current economic trends, form the basis for recommendations designed to contribute to a healthy economic climate in Kershaw County.

The Element provides a platform for local officials to identify the types of employment desired and the general location where such opportunities should be directed, while ensuring the distribution of economic benefits to residents throughout the County. The Element also examines the role of the County and its municipalities within the context of the regional and statewide economy.

Economic diversity is a vital component in achieving community sustainability. The ability of residents to live near their places of work and the provision of goods and services locally are major factors in a successful economy. The intent of this Element is to foster the development of a sound economic base for Kershaw County that offers a wide range of employment opportunities for residents, supports the economic competitiveness of existing and future employers, promotes a highly trained and educated workforce, complements the County's rich cultural and natural resource base, and strengthens the overall health and quality of life for all residents.

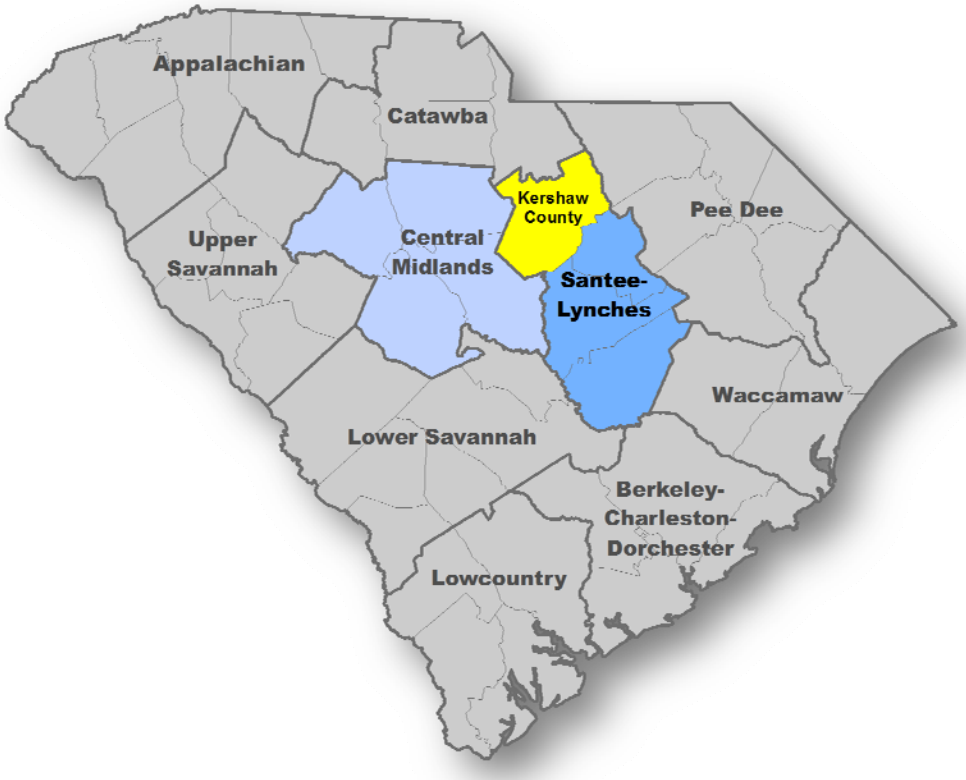
A. REGIONAL ECONOMIC CONTEXT

Kershaw County is situated at the intersection of multiple and sometimes overlapping planning, economic development, and service delivery regions of the central region of South Carolina (Map 4-1). The County is traversed east-to-west by the I-20 corridor that links the Columbia Metro region to Atlanta to the west and Florence and the I-95 corridor to the east. Together with Clarendon, Lee, and Sumter Counties, Kershaw County is part of the Santee Lynches planning region for transportation, transit, aging services, community development and housing, and workforce development programs. For purposes of industrial recruitment and economic development activity, Kershaw County is a member of the Central SC Alliance along with Calhoun, Clarendon, Fairfield, Lexington, McCormick, Newberry, Orangeburg, and Richland

Counties, and the City of Columbia. For workforce development and job training and placement services, the County is within both the four-county Central Carolina Technical College service area and the Santee Lynches Workforce Investment Area that includes Clarendon, Lee, and Sumter Counties. Kershaw County is also part of the Columbia Metropolitan Statistical Area (MSA) that was expanded in 2003 to include Lexington, Richland, Calhoun, Fairfield, and Saluda Counties.

The Santee Lynches region stretches from Kershaw southeast to Sumter County. The region is home to a population of more than 223,400 and a combined labor force of 93,260. The neighboring Central Midlands region to the west is home to a population of nearly 725,000 and a workforce of more than 370,700. Kershaw County has a population of 62,342 with an active civilian labor force of more than 29,300.

Map 4-1. Kershaw County State and Regional Location Map



B. INCOME AND WEALTH

Early economic activity in the area began in the mid-eighteenth century with the arrival of English traders from the coast to the western fringes of the colony. Now the modern-day county seat, Camden was established as the oldest inland city in South Carolina. As part of the Fredericksburg Township, this network of early frontier settlements was designed to protect the colony's coastal residents from Indian attack. Camden provided a significant trading link

between the settled coastal areas and the backcountry. This advantageous trading location soon became a strategic military outpost for both the British and the Americans, with numerous Revolutionary War battles fought in the Camden area. As part of the political reorganization of the former colonies after the War, Kershaw County was carved out of Claremont, Fairfield, Lancaster and Richland counties in 1791.

The rise of large-scale plantation agriculture for cotton farming in the early nineteenth century brought new wealth to the area, along with a winter influx of wealthy northerners. Although Camden thrived as the population, economic and cultural center of the region, additional smaller settlements populated areas along rivers and roads connecting the area with Charleston and Columbia. However, it was the expansion of rail service into the region by the late-nineteenth century that stimulated the growth of new towns and communities including Lugoff, Elgin, Cassatt, DeKalb, and Bethune. The histories of these communities are further detailed in the *Cultural Resources Element*.

Agriculture continued to dominate the State and local economy into the twentieth century. The general economic decline of southern agriculture following the First World War was compounded when the Great Depression swept the nation. However, the Second World War and post-war population growth ushered manufacturing to the forefront of the State's mid-century economy.

Kershaw County is now home to global companies such as Haier America, Hengst, INVISTA, Mancor Carolina, Medtronic, Suominen Corp, TB Kawashima, and WeylChem US. The continued recruitment of new domestic and international employers – coupled with the expansion of existing industries, tourism, retail businesses, health care services, higher education, agribusiness and equine activities – will significantly strengthen the tax base and increase the number and quality of job opportunities available to Kershaw County residents.

Kershaw County leaders recognize that economic development is more than job creation. A well-designed economic development strategy raises the standard of living and increases the assets and income levels of local residents. In addition to employment rates, companion measures of economic health include the property tax base, sales revenue, diversity of employment sectors, banking deposits, capital investment, per capita and household income levels, educational attainment, and cost of living.

1. <u>Property Tax Base</u>

Property taxes are the leading source of revenue for local governments. Building a competitive economy in Kershaw County and its municipalities includes optimizing property values. Kershaw County has experienced increased development, with most new population, employment, and housing growth concentrated within the corridor extending from the City of Camden westward through the Town of Elgin along U.S. Highway 1 and Interstate 20 into Richland County.

There are three elements to South Carolina's property tax system: (1) the tax rate; (2) the assessment ratio; and (3) the property value. Assessment ratios applied to manufacturing, commercial, and other classes of real property are based on classifications and rates established by the State of South Carolina and are listed in Table 4-1. For residential uses, the assessment ratio is 4.0% for owner-occupied, principal residences and 6.0% for other non-principal residential uses. Residential owner-occupied properties are also exempt from school property taxes. A tax rate of 6.0% applies to other real estate such as commercial properties and agricultural real property owned by corporations, while private agricultural properties are assessed at 4.0%. Manufacturers pay a tax rate of 10.5% for real and personal property. The assessment ratio for all other businesses is 6.0% for real property and 10.5% for personal property. Although the State sets the assessment rates, only local governments levy property taxes. There are no taxes on inventories, intangibles, or pollution control equipment.

Table 4-1. South Carolina Real Property Assessment Rates, 2016

Property Type	Tax Rate
Manufacturing and Utility	10.5%
Residential Real Estate (Owner-Occupied)	4.0%
Commercial and Residential (Non-Owner-Occupied)	6.0%
Agricultural Real Property (Corporate)	6.0%
Agricultural Real Property (Private)	4.0%
All Other Personal Property	10.5%

Source: 2016 Property Tax Report, S.C. Association of Counties

The tax rate is generally reflected in mills or the millage rate. A mill is a unit of monetary value equal to one tenth of a cent, or one thousandth of a dollar and is assessed at the rate per $1,000 of assessed value. For example, a tax rate of 200 mills translates into a tax of $200 per $1,000 of assessed value. In general terms, the appropriate tax or millage rate for a taxing entity is reached by dividing the assessed value of all property to be taxed by the revenues needed to be generated by the property taxes. Therefore, if an area is densely populated or includes major tax contributors the millage rate is likely to be lower than in an area with sparse development and few industries or major commercial businesses. Because individual property taxes are determined by multiplying the fair market value of the property by the assessment ratio and then by the tax rate (millage), the millage rate is a determining factor in how high taxes will be on properties within Kershaw County and its municipalities.

In 2007, the South Carolina Legislature limited local government spending by placing a cap on the millage rates set by local governments. The cap is tied to a formula based on the Consumer Price Index and population growth within the jurisdiction. The FY 2016-17 millage rate cap for Kershaw County was 0.84%, preceded by a cap of 2.51% in FY 2015-16. The FY 2016-17 cap for the Town of Bethune was 0.70%, 0.89% for the City of Camden, and 3.77% for the Town of Elgin.

South Carolina offers a homestead exemption for residents who are age 65 and older, blind, or have a permanent disability. The exemption from local property taxes applies to the first

$50,000 of value on the primary residences of qualified property owners. Beginning in 2007, the State also exempted residential owner-occupied properties from the school property tax. The County's base millage rate for 2016 was 76.40 with a value of one mil at $224,960. This base rate covers county operations and debt service. The City of Camden has a millage rate of 97.10. The Kershaw County School District also exacted an additional, overlapping millage of 227.10 countywide. Additional mills not included in the County base are in place for special districts that include fire, sewer, and solid waste collection.

Table 4-2. Tax Millage Rates, 2016

Jurisdiction	2016 Millage Rate
Kershaw County - Base Millage	.07640
City of Camden	.09710
Town of Bethune	N/A
Town of Elgin	N/A
Kershaw County School District	.22710

Source: 2016 Property Tax Report, S.C. Association of Counties

The value of the property tax base impacts the ability of the County and its municipalities to provide vital services and facilities and to make the necessary public investments to encourage private investment. Table 4-3 compares the most recent value of a mil among Kershaw and surrounding counties. Richland has the highest value at more than $1.4 million, while Lee County has the lowest value per mil at only $32,400.

Table 4-3. Comparative Value of One Mil, 2016

County	2016 Value of One Mil
Chesterfield County	$ 115,000
Darlington County	236,124
Fairfield County	126,954
Kershaw County	**224,960**
Lancaster County	299,488
Lee County	32,400
Richland County	1,473,000
Sumter County	295,000

Source: 2016 Property Tax Report, S.C. Association of Counties

The County's total assessed value increased by a more than $20 million since 2008 to exceed $228 million in 2015. The total appraised value of the County' tax base is $1.86 billion (*S.C. Index of Taxpaying Ability*, 2016). Property taxes comprise slightly more than $8 million, or 54%, of the annual tax revenue to support County government. Annual tax collections by type and percentage for Kershaw County are shown in Table 4-4. Although the proportion of the County property tax base attributed to owner-occupied housing is 6% higher than the State average, the commercial/rental tax value is 11% lower than the statewide average. Kershaw County also exceeds the state average in assessed values for personal vehicles, utilities, and manufacturing.

Table 4-4. Annual Property Tax Base by Category in Kershaw County, 2015

Base Category	Ratio	Assessed Value	% of County Total	Statewide Average %
Total		$ 228,399,270	100%	100%
Owner-occupied	4%	90,021,780	39%	33%
Agricultural (Private)	4%	2,433,340	1%	1%
Agricultural (Corporate)	6%	517,100	>1%	>1%
Commercial/Rental	6%	56,668,306	25%	36%
Personal Vehicles	10.5%	27,107,933	12%	9%
Other Personal	10.5%	2,635,250	1%	1%
Business Personal	10.5%	5,544,130	2%	3%
Manufacturing	10.5%	14,070,140	6%	4%
Fee-in-Lieu	4% -10.5%	10,263,981	5%	5%
Motor Carrier	10.5%	1,282,830	>1%	>1%
Utility	10.5%	17,674,810	8%	7%

Source: Local Government Finance Report and Index of Taxpaying Ability, S.C. Department of Revenue, 2017

An industrial property tax abatement is available to qualified manufacturing businesses that make a minimum capital investment in Kershaw County. This incentive provides a five-year property tax abatement from county ordinary operating taxes at the rate of .0764 in 2016. The abatement of municipal taxes is at the discretion of each municipality. Figure 4-1 uses an example formula from the South Carolina Department of Commerce to illustrate how the abatement can apply to an industrial property in Kershaw County. The example also assumes that the property is located within the City of Camden.

Figure 4-1. Sample County Industrial Property Tax Abatement Formula

Fair Market Value of Property	$ 50,000,000
State Assessment Ratio for Manufacturing	x 10.5%
Assessed Value	$ 5,250,000
Millage Rate (County Base + City Millage + School District Millage)[1]	x .4006
Property Tax	$ 2,103,150
County Abatement ($5,250,000 x .0764)	- $ 401,100
Property Tax After Abatement	$ 1,702,050

[1]Rate based on 2016 data and does not include other special fees or millage rates that may apply.
Sources: S.C. Department of Commerce and 2016 Property Tax Report, S.C. Association of Counties

In addition to temporary tax incentives, the overall business tax structure of the State can impact economic competitiveness. South Carolina ranks 37th nationally in terms of its overall business tax climate, trailing all other southeastern states including neighboring North Carolina (11), Georgia (36) and Florida (4), as well as Tennessee (13), Alabama (32), Mississippi (28), and

Virginia (33). However, the State ranks 15th for favorable corporate tax structure, 31st for sales taxes, and 26th for property taxes *(2017 State Business Tax Climate Index)*. There is no sales tax on manufacturing equipment, industrial power, or materials for finished products. The absence of state property taxes and no local income taxes help minimize operating costs for employers in the County.

2. Taxable Sales

Other key indicators of community wealth include taxable sales in the form of revenues from retail sales, the local option sales tax, and accommodations and admissions taxes. The State of South Carolina has established a statewide base sales tax of 6%, with an additional 1% added to the accommodations tax rate. The base sales tax is applied to the retail sale, lease, or rental of tangible personal property.

Supplemental taxes can be added by South Carolina local governments based on community needs and voter approval to include the Local Option, School District, Transportation, Capital Projects, Tourism Development and Education Capital Improvement tax. Kershaw County has an additional 1% Local Option sales tax in effect, collecting $5.6 million in FY 2014 and ranking among the top ten in collections for South Carolina counties with a Local Option Sales Tax (LOST) in effect. The City of Camden and the Towns of Bethune and Elgin have a 7% base sales tax rate. As of March 2017, Kershaw County will add an Education Capital Improvement tax to bring the base rate up to 8%. Sales of unprepared food are exempt from the new tax. Five of the six adjacent counties have a base tax of 8%. Lancaster, Lee and Sumter combine the local options with a Capital Projects tax, while Chesterfield has enacted a Local Option and School District tax and Richland has both the Local Option and Transportation taxes in place.

The level of taxable sales generally reflects the overall state of the economy, which can influence purchasing decisions. Net taxable sales include automobiles, food, and merchandise. However, consumer money spent on gasoline, accommodations, and admission fees are not included in net taxable income statistics. Kershaw County had nearly $1.1 billion in gross retail sales and more than $333 million in net taxable sales in FY 2014. The County ranked 23rd highest among all South Carolina counties in net taxable sales.

Travel and tourism revenue represents a growing industry in South Carolina, generating more than $12.5 billion each year in travel related spending by an estimated 29.8 million visitors annually. Tourism spending directly impacts retail trade, foodservice, recreation, lodging, and transportation. Tourism supports one in ten jobs in South Carolina, with the greatest workforce impact in the foodservice and lodging sectors.

State data also reveals that each dollar spent by tourists generates 18.6 cents in salary and wages and 3.1 cents in local government revenue. Locally, Kershaw County benefitted from nearly $49 million in expenditures related to travel and tourism in 2014, ranking 24th highest among South Carolina counties in total travel expenditures. Traveler generated local tax

revenues in the County, including accommodations and admissions taxes, exceeded $2 million. There were more than 312,000 visitors to the County in 2014.

Admissions taxes are collected at a rate of 5% of the paid admission for any amusement venue for which an admission fee is being charged. These venues include night clubs, sporting events, amusement parks, golf courses, movie theaters, bowling alleys, concerts, and health clubs. Admissions taxes collected countywide totaled $26,618 in FY 2014, the most recent data available. An additional 2% state sales tax is imposed on the gross proceeds from the rental of rooms, lodging, and sleeping accommodations. Accommodations tax collections within Kershaw County totaled $140,450 in FY 2016.

3. Bank Deposits

The presence of financial institutions and growth in personal bank deposits are also key indicators of individual wealth and economic independence. Kershaw County has nine FDIC-insured commercial banks offering 14 branch locations, as well as multiple locations with limited mobile services. FDIC-insured commercial bank locations serving County residents include branches of Bank of America, First Citizens Bank & Trust, First Community Bank, First Palmetto Bank, Heritage Community Bank, Synovus Bank, TD Bank, Sandhills Bank, and Wells Fargo. Only one of these banks, First Palmetto, is headquartered in the County. Nine of these branches are located in and near the City of Camden, two in Elgin, two in Lugoff, and one in Bethune. The total value of bank deposits in Kershaw County exceeded $702,630,000 in 2016.

4. Commercial and Industrial Land Uses

The availability of desirable land for industrial and commercial purposes is necessary for economic growth. For planning purposes, industrial land areas are those used to manufacture, assemble, process, or fabricate goods and/or to store (warehouse) or transport goods. Examples include manufacturing plants, industrial parks, truck terminals, and warehouses. Countywide, there are approximately 3,576 acres currently in industrial use. This represents less than 1% of the land area in Kershaw County (Table 4-5).

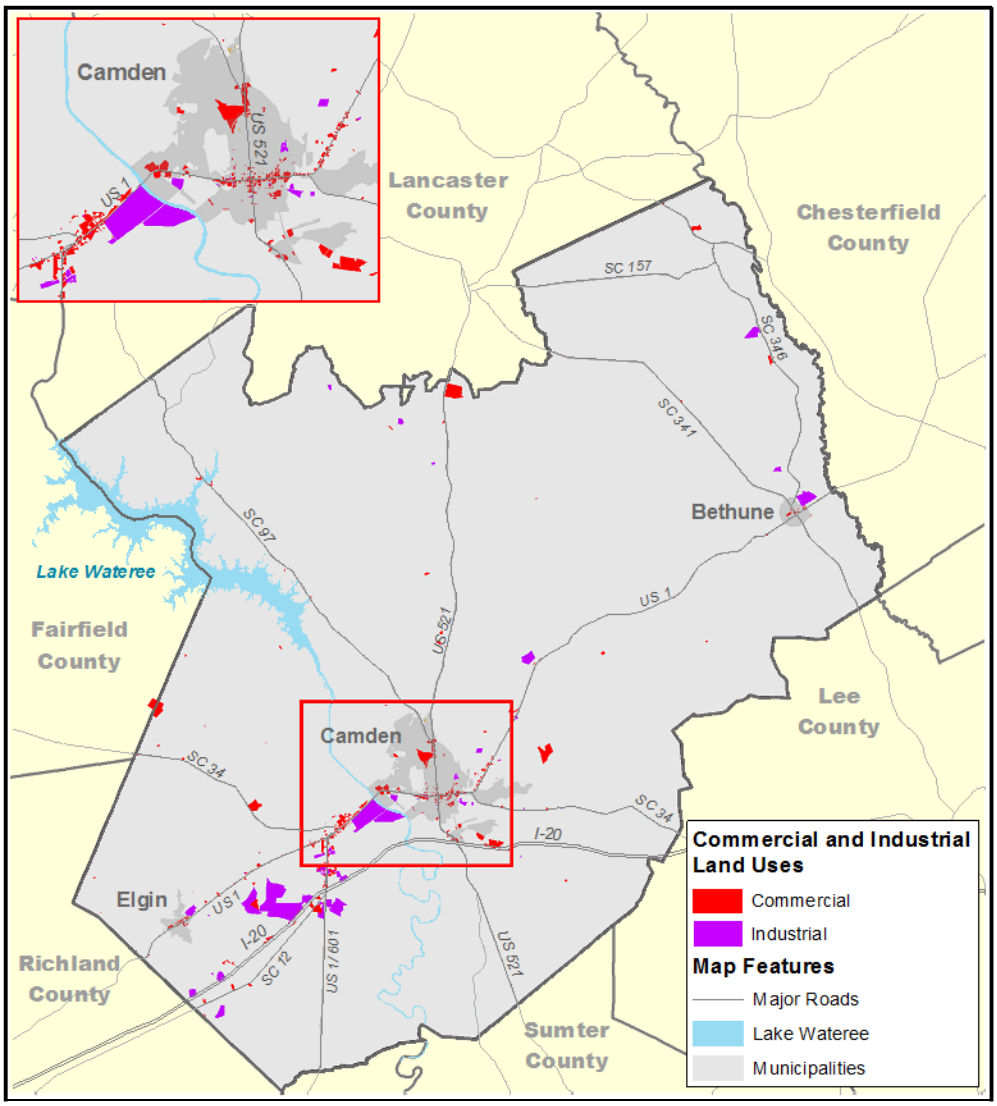
Table 4-5. Existing Industrial and Commercial Land Use, Kershaw County and Municipalities

Location	Industrial		Agricultural/Forestry		Commercial	
	Acres	%	Acres	%	Acres	%
Kershaw County	3,575.5	0.77%	377,602.7	81.4%	2,691.6	0.58%
City of Camden	9.4	0.14%	162.4	2.4%	420.5	6.24%

Source: Kershaw County Information Services Department, 2017

Most of the industrial uses in the County are located along U.S. Highways 1, 521, 601 and Interstate 20 between Camden and Elgin (Map 4-2). Three of the County's industrial employers are located in Bethune.

Map 4-2. Existing Industrial and Commercial Land Use in Kershaw County, 2016



Source: Kershaw County Information Services Department, 2016

Commercial land areas are used to conduct business, trade activities, administrative activities, professional activities or services, or personal services. Examples of commercial uses include establishments for retail sale or wholesale of goods and services, restaurants, entertainment facilities, administrative or professional offices, gas stations, grocery stores, hair stylists, dry cleaners, furniture stores, clothing stores, car sales, law offices, doctor offices, CPAs, real estate offices, hotels/motels, lumber sales, private gyms, post offices, and nursery or garden centers. Commercial land uses account for a small percentage of the County's land area at less than 1%, or 2,692 acres. Commercial uses are primarily concentrated in and surrounding the City of Camden along U.S. Highways 1 and 521, and along the I-20 corridor that runs westward to Richland County. Small concentrations of commercial uses are also found in the towns of Bethune and Elgin and in the Lugoff Community.

5. Capital Investment

Industrial capital investment is an important contributor to the local economy, yielding more tax revenue per investment dollar to schools and local governments than residential and commercial development. The economic multiplier for manufacturing industries is typically much higher than for retail, health services, and personal business services. These capital investments include equipment, buildings, and land.

Efforts to recruit new employers to the County have targeted industries in life science and medical, agribusiness and food processing, advanced materials, advanced manufacturing, automotive, and distribution. Kershaw County has also experienced diversified industrial growth through international investment in facilities and job creation. The County is now home to facilities of companies based in Canada, Germany, China, Japan, Finland, and Ireland. From 2009 to 2016, new and expanded manufacturing capital investment in Kershaw County surpassed $320 million and yielded 1,010 new jobs (Table 4-6). The largest number of jobs was created by Haier America in 2015 with 410, while the County's highest annual capital investment also occurred in 2015 with $80 million by INVISTA.

Table 4-6. Kershaw County Economic Development Announcements, 2009-2017*

Year	Company	Product	Type	Capital Investment	Jobs
2017	Weylchem	Organic Chem	Expansion	$ 13,000,000	0
2017	Roy's Wood Products	Wood products	Expansion	2,500,000	0
2016	Protective Packaging	Packaging	Expansion	2,500,000	0
2015	Suominen Corporation	Nonwovens	Expansion	55,500,000	25
2015	Haier America	Refrigerators	Expansion	72,000,000	410
2015	INVISTA	Polymers/Fibers	Expansion	80,000,000	20
2015	Target Distribution Center	Distribution	Expansion	0	100
2014	Hengst of North America	Automotive	Expansion	8,000,000	20
2013	WeylChem US	Organic Chem	Expansion	10,800,000	49
2012	Accuride	Auto Wheels	Expansion	8,730,000	25
2012	Diversified Information Technologies	Doc Storage	New	5,000,000	25
2012	INVISTA	Polymers/Fibers	Expansion	20,000,000	50
2011	INVISTA	Polymers/Fibers	Expansion	5,000,000	10
2010	TB Kawashima USA	Auto Textiles	Expansion	9,000,000	50
2010	Confidential	Not Available	Expansion	10,000,000	40
2010	Confidential	Not Available	Expansion	10,000,000	140
2009	TB Kawashima USA	Auto Textiles	Expansion	750,000	12
2009	Shawmut Corporation	Auto Laminate	New	1,500,000	19
2009	Confidential	Not Available	Expansion	6,500,000	15

Source: Kershaw County Economic Development Office, 2017

6. Employment Centers

The County's list of top employers includes K-12 education, manufacturing, local government, and agribusiness (Table 4-7). Although the list of major employers is topped by the County School District, manufacturers comprise more than half of the list that features producers of food, advanced materials and textiles, medical supplies, consumer appliances, and metal products. INVISTA leads the manufacturers as the County's second largest employer with 1,100 employees. Three of the top employers are engaged in agribusiness including forest products, poultry processing, and egg production. These 13 private manufacturers and agribusinesses contribute more than 3,300 jobs to the local employment base. Kershaw County government is the only other public employer within the top 15.

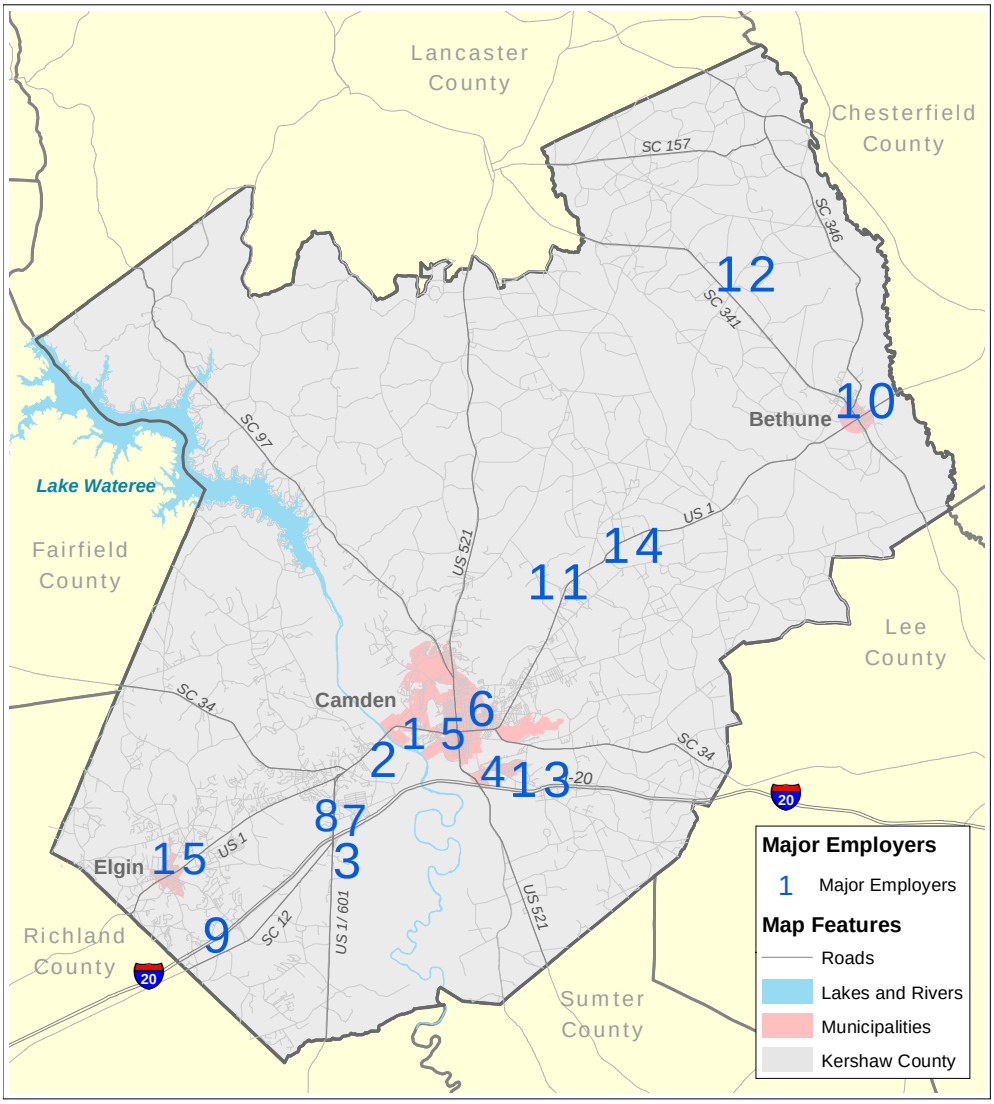
Table 4-7. Major Employers in Kershaw County, 2017

Rank	Employer	Employees	Location	Sector/Product
1	Kershaw County School District	1,442	Camden	PK-12 Education
2	INVISTA	1,100	Lugoff	Manufacturing - Advanced Materials, Textiles (Nylon Carpet Fiber)
3	Target Distribution Center	515	Lugoff	Warehousing and Retail Distribution
4	Hengst of North America	245	Camden	Manufacturing - NA Headquarters, Motor Vehicle Filters
5	Kershaw County Government	250	Camden	Local Government
6	(Medtronic)	177	Camden	Manufacturing - Medical Surgical Gauze
7	TB Kawashima	160	Lugoff	Manufacturing - Automotive Fabric
8	Mancor	209	Lugoff	Manufacturing - Metal Products
9	WeylChem US	172	Elgin	Manufacturing - Specialty Chemicals
10	Suominen Corporation	130	Bethune	Manufacturing - Nonwoven Aerospace & Medical Textiles
11	Canfor Southern Pine	177	Camden	Agribusiness - Wood Products (Lumber)
12	Cal-Maine Foods	100	Bethune	Agribusiness - Food Processing (Eggs)
13	Haier America	150	Camden	Manufacturing - Refrigerators, Freezers
14	Prestage Farms	160	Cassatt	Agribusiness - Poultry Production
15	HBD/Thermoid	75	Elgin	Manufacturing - Automotive Components

Source: Kershaw County Economic Development Office, 2017

Map 4-3 depicts the location of the County's major manufacturing and non-manufacturing employers by numbered rank as listed in Table 4-7. Six of these employers are located in and near the City of Camden, four in the Lugoff community, two in the Town of Elgin, two in the Town of Bethune, and one in the Cassatt community.

Map 4-3. Major Employers in Kershaw County, 2017



Source: Kershaw County Economic Development Office, 2017

7. Income

Income can be assessed through a variety of indicators that include per capita income, total personal income, poverty levels, living wage indicators, and earnings. ***Per capita income*** is an income average computed for each individual in the population. Per capita income in Kershaw County increased from $18,360 in 2000 to $21,851 in 2014. Statewide per capita income was higher at $24,222 and much higher nationwide at $28,555 for 2014. The income growth for local residents at 19% also trailed the State and national growth rates of 28.9% and 32.8%, respectively.

Table 4-8. Per Capita Income, 2000 and 2014

Location	2000 Census	2014 ACS	$ Increase	% Increase
Kershaw County	$ 18,360	$ 21,851	$ 3,491	19.0%
City of Camden	23,037	31,352	8,315	36.1%
Bethune	18,879	20,730	1,851	9.8%
Elgin	N/A	24,513	N/A	N/A
South Carolina	18,795	24,222	5,427	28.9%
United States	21,587	28,555	6,968	32.3%

Sources: U.S. Census Bureau, 2000 Census and 2010-2014 American Community Survey

Total personal income (TPI) includes three distinct income sources: net earnings by place of employment; interest, dividends and rent; and government transfer receipts. Government benefits include retirement and Social Security disability insurance benefits, medical benefits from Medicare and Medicaid, unemployment insurance compensation, veterans' benefits, and federal education and training assistance. Kershaw County had a total personal income of $2,256,098,000 that ranked 21st highest statewide in 2014. Kershaw County had a ***per capita personal income*** (PCPI) of $35,720 in 2014. The Kershaw PCPI ranked 13th highest among the 46 counties at 97% of the State average of $36,677 and 78% of the national average of $46,049.

Poverty level data is based on thresholds established by the Federal government that are linked to changes in the cost of living and the Consumer Price Index (CPI). An individual is described as living in poverty when he/she has insufficient resources to meet basic living expenses including the costs of food, shelter, clothing, transportation, and health care. The percentage of Kershaw County residents living in poverty is 18%, slightly below the percentage of impoverished State residents at 18.3%, but higher than the national poverty rate of 15.6%.

Low and moderate income (LMI) households are those households with incomes below 80% of median family income. As detailed in the *Housing* and *Population Elements*, 41% of Kershaw County residents are considered to be in LMI households, compared to 39% of South Carolinians. The City of Camden has the highest percentage of LMI residents among the County's municipalities at nearly 42%, followed by the Town of Bethune at 36.8% and the Town of Elgin at only 22.4%.

The ***Basic Family Budget Calculator*** developed by the Economic Policy Institute estimates the minimum income needed to cover basic living expenses to provide a secure, yet modest standard of living. Under the EPI model, a family of four living in the Columbia Metro area that includes Kershaw County would need an annual income of $58,165 – or a monthly income of $4,847 – to adequately provide for basic housing, food, transportation, child care, taxes, and health care costs. The same family living in the more rural areas of the County would need $54,913 in annual income – or a monthly total of at least $4,576 – to cover monthly living costs.

Living wage indicators have been developed by Massachusetts Institute of Technology (MIT) researchers to determine the cost of living within communities in each state. The underlying living wage values are based on 2016 dollars using the CPI. The living wage estimate for families living and working in Kershaw County provides the full-time hourly rate that a resident must earn to support a family for typical expenses such as food, child care, transportation, medical, and housing costs. (Table 4-9). The model assumes that an individual is employed full-time at 2,080 hours annually. Based on this formula, the head of household for a typical family of four in the County would have to make approximately $22.06 an hour to support the family's basic needs for housing, medical, child care, transportation, and food.

Table 4-9. 2016 Living Wage Estimates for Kershaw County

Annual Expense	Household Size					
	1 Adult	1 Adult 1 Child	1 Adult 2 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children
Food	$ 3,011	$ 4,431	$ 6,652	$ 5,521	$ 6,864	$ 8,844
Child Care	0	4,055	5,907	0	0	0
Medical	2,240	5,839	5,639	4,836	5,639	5,608
Housing	5,844	7,512	7,512	6,324	7,512	7,512
Transportation	4,290	8,467	9,593	8,467	9,593	11,299
Other	2,146	3,894	4,682	3,894	4,682	5,290
Annual Income						
Required Annual After-Tax Income	$ 17,531	$ 34,197	$ 39,985	$ 29,042	$ 34,291	$ 38,553
Annual Taxes	3,090	6,466	7,623	5,407	6,485	7,337
Before Tax Income Required	20,621	40,664	47,609	34,449	40,776	45,891
Living Wage (Hourly)	***$ 9.91***	***$ 19.55***	***$ 22.89***	***$ 16.56***	***$ 19.60***	***$ 22.06***
Poverty Wage	5.00	7.00	10.00	7.00	10.00	11.00
Minimum Wage	7.25	7.25	7.25	7.25	7.25	7.25

Note: All models assume one working adult.
Source: Living Wage Calculator, MIT, 2017

The ***average annual wage*** is computed by dividing total annual wages by annual average employment. The annual average wage for local workers was $37,788, placing Kershaw County 20th highest among South Carolina counties. However, the average annual wage in Kershaw County is $4,213 lower than the State average and $15,149 below the national average (Table 4-10).

This average wage data can be influenced by work stoppages, labor turnover, retroactive payments, seasonal factors, and bonus payments, as well as the ratio of full to part-time workers in a community. Kershaw County workers also have a lower weekly wage at $696 than residents statewide at $804.

Table 4-10. Comparison of Average Annual Wage - Kershaw and Adjacent Counties, 2016

Location	Average Annual Wage	% National Average	State Rank
Chesterfield County	$ 35,755	68%	29
Darlington County	44,684	84%	7
Fairfield County	62,215	118%	1
Kershaw County	**37,788**	**71%**	**20**
Lancaster County	43,249	82%	10
Lee County	34,191	65%	35
Richland County	44,636	84%	8
Sumter County	35,281	67%	32
South Carolina	42,001	79%	N/A
United States	52,937	100%	N/A

Source: County Profiles, S.C. Association of Counties, 2016

As detailed in Table 4-11, the highest average annual wages in Kershaw County are generated in Management of Companies and Manufacturing. The County's wage exceeds both regional and state annual wages for Management, while trailing statewide and Columbia MSA wages for Manufacturing. Local employees in Arts, Entertainment and Recreation have a significantly higher annual wage than their counterparts statewide and in the region.

Table 4-11. Comparison of Average Annual Wage by Industry, 2016

Industry	Kershaw County	Santee Lynches	Columbia MSA	South Carolina
Accommodation and Food Services	$ 13,416	$ 13,416	$ 15,392	$ 17,004
Administrative & Waste Management Service	36,244	30,784	31,148	33,332
Agriculture, Forestry, Fishing and Hunting	32,448	30,732	32,864	33,280
Arts, Entertainment, and Recreation	27,820	19,864	18,200	18,616
Construction	36,400	40,144	46,124	48,152
Finance and Insurance	43,316	45,084	60,840	60,476
Health Care and Social Assistance	43,108	39,000	48,412	46,176
Information	41,392	39,988	54,600	54,392
Management of Companies and Enterprises	77,012	65,780	62,764	72,176
Manufacturing	49,244	47,112	58,292	57,460
Other Services (except Public Administration)	24,544	24,544	31,564	31,252
Professional, Scientific & Technical Services	44,980	51,168	62,868	65,000
Public Administration	30,784	38,012	42,692	42,380
Real Estate and Rental and Leasing	27,040	27,300	39,676	40,560
Retail Trade	26,988	25,168	27,456	26,676
Transportation and Warehousing	36,192	40,404	38,844	41,236
Utilities	48,568	49,972	73,476	79,300
Wholesale Trade	40,820	47,060	63,440	62,192

Source: S.C. Department of Employment & Workforce, Quarterly Census of Employment and Wages, 2016

Construction wages in the County are below regional and state averages, as are Finance, Public Administration, and Professional and Scientific Services. The County also lags behind the regional and state averages for Real Estate and Leasing, Transportation and Warehousing, Utilities, and Wholesale Trade. The Accommodation and Food Services industry yielded the lowest average annual wages in the County at only $13,416. At nearly $50,000, the average Manufacturing sector job in Kershaw County offers more than three times the average annual wage of an Accommodation and Food Services sector job.

Local average wages by sector are particularly relevant when considering the minimum living wage estimates previously provided in Table 4-9. County economic development strategies should consider the need to provide a balanced sector mix to ensure adequate earnings opportunity for Kershaw County residents. Although the services sector represents a growing segment of the national and local economy, these jobs often offer lower pay and fewer benefits than many other sector employment opportunities.

Another important indicator of income is the number of taxpayers in the community receiving the Earned Income Tax Credit (EITC). Participation in the EITC is linked to the degree of residents in lower wage jobs in a community and is intended to benefit low-income taxpayers as a wage supplement. EITC-eligible taxpayers are most likely to work in the retail trade, health care, accommodation and food services, manufacturing, and construction sectors.

In South Carolina, 53% of those applying for the credit have no more than a high school diploma and 35% also receive food stamps or SNAP benefits. The average EITC filer has an Adjusted Gross Income of only $14,018. Most of the State's filers work in the Retail Trade (15%) and Accommodations and Food Services (14%) sectors. In South Carolina for tax year 2014, nearly half a million residents qualified for the EITC, receiving nearly $1.3 billion in credit receipts. In Kershaw County, 6,040 filers claimed the credit, with an average credit receipt of $2,556. More than 840 City of Camden residents qualified and received over $2.1 million in EITC credits. Bethune and Elgin had 41 and 124 filers, respectively. The Town of Bethune had an average EITC credit per filer at $2,563, the highest of the County's municipalities (Table 4-12).

Table 4-12. Earned Income Tax Credit Filings and Receipts, Tax Year 2014

Tax Data	# of Tax Returns Receiving EITC	Total EITC Received	Average EITC Credit Per Filer
Kershaw County	6,040	$ 15,435,769	$ 2,556
City of Camden	844	2,147,255	2,544
Town of Bethune	41	105,077	2,563
Town of Elgin	124	301,807	2,434
South Carolina	491,378	1,250,706,730	2,545

Source: EITC Interactive, Brookings Institute, 2017

C. WORKFORCE

The labor force is the number of residents employed and those seeking employment and available for work. This number represents the combined pool of workers potentially available to employers. Employers require access to a qualified workforce to survive and grow, making the composition and size of a community's labor force one of the most critical factors in building and maintaining a successful and strong economy.

Information on the population base and labor force characteristics can provide insight into the ability of Kershaw County and its municipalities to attract and retain sound employers, as well as adapt to changing global economic trends. An understanding of the County's labor base requires an examination of the number of underemployed and unemployed, education and skill levels, youth approaching employment age, residents who are able but are not participating in the labor force, population growth, and commuting patterns.

A healthy economy requires a stable and growing population. Population growth in Kershaw County and its municipalities is fueled by many factors including the economic climate for jobs creation and capital investment, the residential market, fuel prices, and population demographics. The Kershaw County population grew from 52,647 residents in 2000 to 61,697 in 2010, a growth rate of 17.2% that was more than 2.5 times greater than the Santee Lynches region. State projections indicate that the Kershaw County population will exceed 74,800 by 2030. The four-county Santee Lynches Workforce Investment Area (WIA) is home to a population of more than 223,400 and a combined labor force of 93,260. With an active workforce that exceeds 29,500 residents, Kershaw County comprises nearly a third (32%) of the Santee Lynches regional civilian labor force. The neighboring Central Midlands region to the west is home to a population of nearly 725,000 and a workforce of more than 370,700. The larger nine-county Central SC Alliance economic development region that includes Kershaw County has a combined population of more than 975,000 that is projected to surpass one million by 2021, with a workforce of 469,000.

1. Unemployment and Underemployment

The unemployment rate reflects the number of individuals who are without work and are actively seeking work. Unemployment rates for Kershaw County have averaged higher than statewide unemployment for each of the last six years. Figure 4-2 compares ten-year unemployment trends for the County, Santee Lynches Region, Columbia MSA, South Carolina, and the United States. The economic recession prompted a sharp rise in the County's unemployment to a record rate of 10.8% in 2009 that has been followed by a gradual decrease over the last six years to 6.0% by 2015. This pattern mirrors regional, state, and national unemployment trends over the same period. The County has consistently run at or below the State rate and well under the Santee Lynches regional jobless rate, while trending closer to the historically lower Columbia MSA rate.

Figure 4-2. Comparison of 10-Year Unemployment Rate Trends

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
KC	6.3	5.3	6.5	10.8	10.4	9.6	8.4	6.7	6.4	6
SL	7.7	6.8	8	12.3	12.7	12.4	10.8	8.8	7.3	6.8
CMSA	5.6	5	5.9	9.1	9.3	9.1	8	6.7	5.8	5.5
SC	6.5	5.6	6.9	11.7	11.2	10.3	9.1	7.6	6.4	6
US	4.6	4.6	5.8	9.3	9.6	8.9	8.1	7.4	6.2	5.3

Source: U.S. Bureau of Labor Statistics, 2017

Reported job losses due to layoffs and closures in the County totaled 503 from 2009 through 2016 (Table 4-13). The greatest number of mass job losses occurred in 2012 with the elimination of 150 jobs through the closure of the South Carolina Yutaka plant in Lugoff. This was preceded by the termination of 147 jobs two years earlier in 2010 and 140 jobs in 2009.

Table 4-13. Kershaw County Mass Job Losses, 2009 to 2016

Year	Type and # Jobs Impacted		Total
	Layoff	Closure	
2009	100	40	**140**
2010	16	131	**147**
2011	0	0	**0**
2012	0	150	**150**
2013	0	0	**0**
2014	0	0	**0**
2015	0	0	**0**
2016	66	0	**66**
Total	**182**	**321**	**503**

Source: Kershaw County Economic Development Office, 2016

The most recent data published by the S.C. Department of Employment and Workforce (SCDEW) reveals that among Kershaw County workers filing unemployment claims in 2016, more than 40% only had a high school degree and one quarter (25%) had attended, but not

completed, college. Almost half of these jobless residents were between 25 and 40 years old, while one-quarter were between the ages of 41 and 55 years. Well over half of unemployment claimants were minorities.

Another key workforce concern is *underemployment*. A declining manufacturing sector and a growing dependence on retail and service sector employment can translate into lower wage job opportunities that rely on fluctuating demand and are susceptible to economic downturns. Many of these jobs are part-time or temporary and lack key benefits such as health insurance. It is likely that in an increasingly service driven economy and a prolonged economic recovery, there will be many more members of the workforce who are underemployed. As much as 11% of the State's active labor force is estimated to be underemployed.

A sluggish economy has also contributed to a growing number of *discouraged workers* who are defined by the Department of Labor as individuals not in the labor force, but who want and are available for work. These residents are excluded from the official unemployment rate if they have not searched for work in the preceding four weeks. *Involuntary part-time workers* are another growing segment of the workforce. These workers are employed less than 35 hours per week, but want to work full time and are available to do so. In most cases, their work hours have been reduced or they work in a part-time job. When these groups are factored in, the State's official unemployment rate in 2015 would have increased to nearly 10%.

On a positive note, unemployment and underemployment are two contributing factors to the potential pool of qualified labor for new businesses looking to locate in the County. Underemployed workers are often the first to respond to new job opportunities with new and expanding industries, and often have more skills than their jobs require.

2. <u>Education and Skills</u>

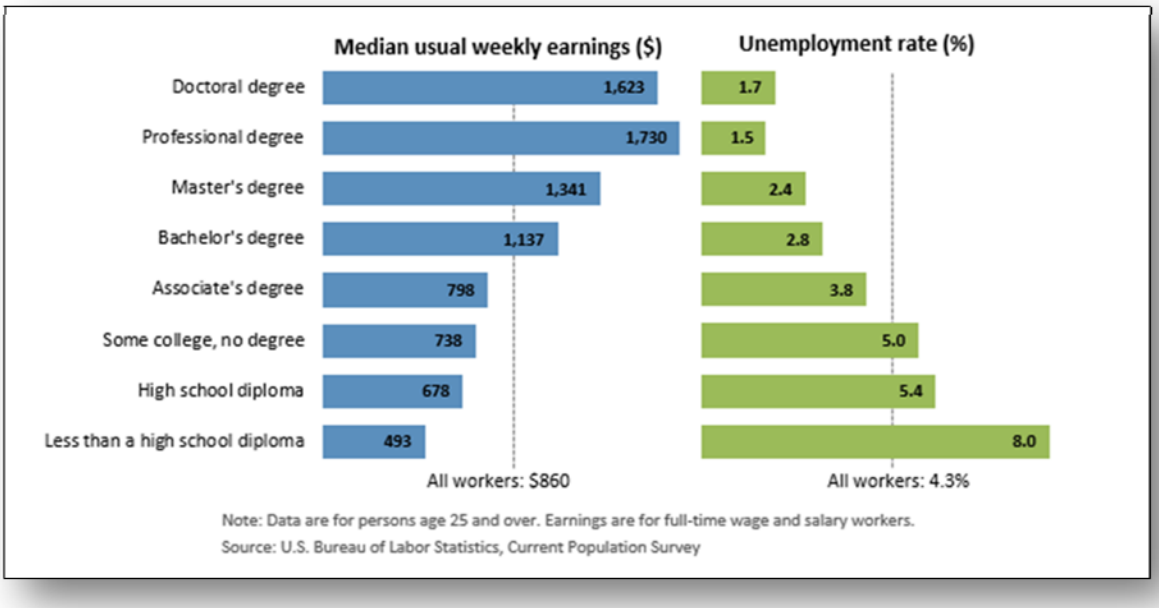
Education has long been a community priority among Kershaw residents. An educated and skilled workforce is integral to building a strong local economy. Local educational attainment levels relative to State and national levels provide an important indicator of the long-term economic competitiveness of Kershaw County and its municipalities. Efforts to attract and retain employers in the community will continue to be impacted in part by the educational attainment levels of area residents. By continuing to increase the educational levels of residents and encouraging postsecondary training, Kershaw County can build prosperous and sustainable communities and attract new and rewarding job opportunities.

Educational attainment is a key indicator of current and future earnings potential. US Department of Labor data indicates that the median lifetime earnings for a college graduate with a bachelor's degree is nearly $1 million greater, or 84% more, than that of a person with only a high school diploma. In a typical working lifetime, a high school graduate will earn $1.3 million for a lifetime of work; a college graduate with an associate degree will earn $1.7 million and $2.3 million with a bachelor's degree; a graduate degree holder will earn $2.5 million; and

an individual with an advanced professional degree, such as a doctor or lawyer, can earn an average of $4.4 million.

As illustrated in Figure 4-3, the national median weekly earnings in 2015 were $493 for a person without a high school diploma, compared to $678 for a worker with a high school diploma and $798 for an associate degree holder. Individuals with a bachelor's degree or higher had weekly median earnings of $1,137 per week. Unemployment is also generally lower for individuals with higher educational attainment. At the national level, residents with no high school diploma experienced a 2015 unemployment rate of 8.0% that is almost triple the rate for adults with a bachelor's degree at only 2.8%. Individuals with a high school diploma, but no college, had an unemployment rate of 5.4%.

Figure 4-3. Earnings and Unemployment Rates by Educational Attainment, 2015



In South Carolina, a worker with less than a high school diploma makes an average annual wage of $18,563, compared to a high school graduate or GED holder who earns $25,698. In Kershaw County, the annual earnings gap between a high school dropout ($19,905) and a high school graduate ($27,342) averages even higher at $7,437. A South Carolinian with some college or an associate degree earns an average of $31,274, while income with a bachelor's degree averages $43,712. Kershaw County residents with an associate degree or some college earn an annual average of $32,480, while those with a four-year degree average $42,351. A State resident with a graduate or professional degree has an annual average income of $53,814. County residents with post-graduate degrees average $49,583 *(American Community Survey, 2011-2015*).

A recent study by the Georgetown University *Center for Education and the Workforce* estimated that by 2018, nearly two-thirds of all new job openings in the United States will require some form of postsecondary education or training. State studies also reflect this need for advanced

education, revealing that two-thirds of the incumbent workforce in South Carolina now needs a minimum of 14 years of education to be successful in an increasingly technology-driven economy, with nearly 80% of all jobs requiring skill levels beyond high school.

Nearly 16% of Kershaw County residents age 25 and over did not graduate from high school (Table 4-14). This is slightly higher than the 15% of South Carolinians who are not high school graduates. The percentage of County residents who lack a high school education dropped by 8.7% from 2000 to 2014. More than one-third (34%) of County adults have earned a high school diploma, but have not attempted college. Kershaw residents lag behind adults statewide in postsecondary degree completion. While 20% of Kershaw adults have earned a bachelor's degree or higher, more than a quarter (25%) of residents statewide have earned at least a four year degree. Nearly 29% of County residents have achieved a college education with an associate degree or higher, compared to 34% of South Carolinians.

Table 4-14. Educational Attainment, 2014

	Kershaw County		South Carolina	
Educational Attainment	**#**	**%**	**#**	**%**
Population 25 Years and Over	**42,648**	***100.0%***	**3,163,095**	***100.0%***
Less Than 9th Grade	2,169	*5.1%*	164,938	*5.2%*
9th to 12th Grade, No Diploma	4,563	*10.7%*	308,689	*9.8%*
High School Graduate/GED	14,543	*34.2%*	948,245	*30.0%*
Some College, No Degree	9,076	*21.4%*	663,550	*21.0%*
Associate Degree	3,628	*8.5%*	276,035	*8.7%*
Bachelor's Degree	5,595	*13.2%*	511,586	*16.2%*
Graduate/Professional Degree	2,894	*6.8%*	290,052	*9.2%*

Source: U.S. Census, 2010-2014 American Community Survey

College readiness and postsecondary enrollment and completion among County residents will become increasingly critical in local economic development efforts. Kershaw County residents who lack advanced postsecondary training will be increasingly limited to lower-wage, lower-tech employment that offers limited security, benefits, and advancement opportunities. In addition to lower earnings for the individual without a high school diploma, low educational attainment can have an adverse financial impact on the community in the form of higher criminal justice and public safety costs, increased social support payments, higher health care costs, decreased tax revenues, and weakened community engagement.

A 2013 study of job growth and education requirements by Georgetown University's *Center for Education and the Workforce* estimates that by 2020, two-thirds (65%) of all new job openings in the United States will require some form of postsecondary education or training. In South Carolina, 62% of new job openings will require college and advanced training after high school. The same study reveals that current educational attainment does not meet this demand at the national and state levels, with only 60% of Americans and 55% of South Carolinians achieving the advanced education and training needed.

Statewide studies also reflect the need for advanced education, revealing that two-thirds of the South Carolina's incumbent workforce now needs a minimum of 14 years of education to be successful in an increasingly technology-driven economy, with nearly 80% of all jobs requiring skill levels beyond high school.

Recent reports, including the *2012 State of the Workforce Report* and the *2015 Economic Analysis for South Carolina*, note a significant demand shift during the last few decades from a low-skilled to a higher-skilled workforce. Most of the State's top 100 jobs require middle-level skills and three-quarters (74%) of all top jobs are out of reach for low-skilled workers. Middle skill jobs are those that require more than a high school diploma and less than a four-year degree. Examples of middle skill occupations include registered nurses, dental hygienists, electrical technicians, auto mechanics, and legal secretaries. In addition to formal training, employers are placing a greater emphasis on soft skills that include: professionalism and work ethic; oral and written communication, teamwork, and collaboration; and critical thinking and problem solving.

Educational achievement and skill proficiency levels among the local workforce strongly influence employer interest in locating to the area, as well as productivity and satisfaction with the workforce for existing employers. The path to educational achievement and job readiness starts in the K through 12 school system. Public schools are a vital community resource in attracting new employers and in preparing residents for a knowledge-based, global economy.

Kershaw County is served by a single school district that operates a total of 19 schools with a combined enrollment of more than 10,600 students. In addition to 11 elementary schools, four middle schools and three high schools, the Kershaw County School District provides facilities for the Applied Technology Education Center (ATEC), as well as alternative and adult education. As summarized in Table 4-15, the average district wide per pupil expenditure was $9,250. District eligibility for free and reduced price school lunches at 57% is below the State average. Student eligibility for the gifted and talented program is 17.4%, while almost 11% of District students have a documented disability.

Table 4-15. Kershaw County School District Student Profile, 2016

School District	Total Enrollment	Per Pupil Spending	% Free/ Reduced Lunch	% Gifted Talented	% Students w/Disabilities
Kershaw County	10,633	$ 9,250	56.8%	17.4%	10.9%
South Carolina	753,485	10,617	57.6%	N/A	N/A

Source: Kershaw County School District Report Card, S.C. Department of Education, 2016

Considerable focus has been placed on raising high school graduation rates over the last decade. While a focus on raising graduation rates is warranted, it is no longer the end goal of public education. Strengthening the college and career readiness of high school graduates is an emerging factor in state and local economic competitiveness. Graduation must be accompanied by concurrent efforts to raise college readiness as demonstrated by additional measures of

student achievement such as SAT and ACT college readiness scores, Advanced Placement (AP) or dual enrollment course participation and pass rates, and postsecondary enrollment rates.

The school system offers advanced and extended learning opportunities that include Advanced Placement and dual enrollment courses, career and technology education, virtual classes, and work-based learning. One-fifth of Kershaw County high school students participate in AP courses that offer college-level instruction. The local District also partners with Central Carolina Technical College (CCTC) to offer dual enrollment opportunities for high school students to gain both high school and college credit before graduation. Currently, 29 courses are available to County students for dual credit. Students must meet minimum SAT and ACT score requirements and have parental and guidance office approval to participate in these courses. Dual enrollment courses transfer to any state technical college or public university in South Carolina and can be taken at no cost to the student if minimum credit hours are met per semester. These extended learning programs give many local students a head start on postsecondary attainment and help reduce the total costs associated with college.

Table 4-16 details selected college and career performance data for the Kershaw County School District relative to high school SAT/ACT exam scores, state-mandated *End of Course Test* (EOCT) pass rates, graduation rate, and percentage of high school seniors eligible for the *Legislative Incentive for Future Excellence* or LIFE scholarships. The LIFE scholarship is a merit-based program established to assist South Carolina students in attending postsecondary institutions within the State. Although the 2016 on-time graduation rate for Kershaw County high school students was above the State average, LIFE eligibility for County graduates is 14% lower than the State average, while the local postsecondary enrollment rate trails by more than 10%. Approximately half of Kershaw County public high school students took the SAT in 2016, posting a composite SAT score average of 1398. This average was below both the State and national score averages of 1446 and 1453, respectively.

Table 4-16. Comparison of Selected High School Performance Measures, 2016

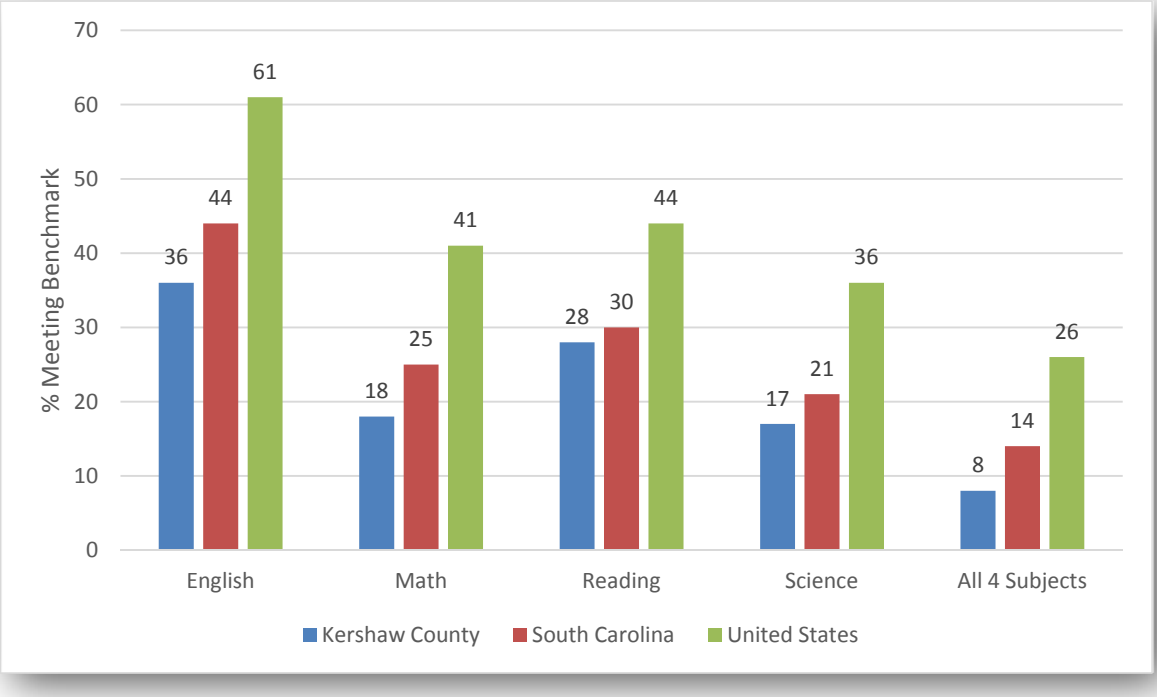
School District	SAT[1]	ACT[1]	EOCT Pass Rate[2]	4-Year Grad Rate	% LIFE Eligible	Postsecondary Enroll Rate[3]
Kershaw School District	1398	17.7	80.8%	83.1%	22.5%	60.2%
South Carolina	1446	18.2	77.3%	82.6%	36.7%	70.7%

[1]Composite score for public school students; [2]All 4 subjects; [3]Enrolled in a 4 or 2-yr college by fall after graduation

Source: 2016 School Report Cards, S.C. Department of Education

Composite ACT exam scores for County students were also lower than the state and national score averages of 18.2 and 20.8. Figure 4-4 compares the college readiness of County seniors with graduates in the State and nation using the College Readiness benchmarks of the ACT. Although County and state scores lagged the national averages, it is noted that 2016 scores reflect a near doubling of statewide participation rates among high school seniors from prior years from 62% in 2015 to 100% in 2016. This increase is due to the adoption of the ACT as part of the State's standardized assessment for high school students. End of Course Test (EOCT) pass rates for Kershaw County students were slightly higher than the statewide pass rate.

Figure 4-4. Students Meeting ACT College Readiness Benchmarks by Subject, 2016



Source: ACT Score Reports, 2016

3. <u>Existing and Projected Employment by Sector</u>

The occupation of employed residents provides an overview of the local and regional economy and insight into individual earnings potential. Approximately 60% of the County's population aged 16 and older are participating in the labor force. Of the Kershaw County residents currently in the workforce, 77% are private wage and salary workers, 17.5% work in federal, state and local government, and 5.2% are self-employed.

The latest available statewide industry employment projections cover the ten-year period from 2012 to 2022. All industry sectors are projected to increase, with the exception of State and Federal Government. Health Care and Social Assistance employment will advance to the top, with Retail Trade falling to second statewide. The Manufacturing and Accommodation and Food Services sectors will hold third and fourth place, respectively.

The overall ten-year job growth rate within the four-county Santee Lynches Workforce Investment Area (WIA) is projected to approach 10.4%, slightly lower than the neighboring Central Midlands region, but well ahead of the statewide rate. The regional increase in job openings for the Santee-Lynches is projected to be strongest within the Construction sector at nearly 28.8%, followed closely by Health Care and Social Assistance at 28.5%, generally mirroring the trend in the Central Midlands region. The Professional, Scientific and Technical Services sector ranks third highest in job growth at 23%. This sector includes accounting, legal,

architectural, engineering, design, computer design, consulting, scientific, and advertising. The Administrative and Support industry is the only other sector to have a projected growth rate over 20%. The growth rates are lowest for the Government and Information industries at only 3% or less. The Government sector is projected to post a negative growth rate in the Midlands region and statewide. Table 4-17 compares the projected growth rates by industry in the Santee Lynches and Midlands Workforce Investment Areas (WIA) from 2012 to 2022.

Table 4-17. Comparison of Labor Market Outlook by Industry to 2022*

Industry	% Increase 2012-2022		
	Santee Lynches	Midlands	South Carolina
Health Care and Social Assistance	28.50%	25.47%	16.71%
Construction	28.79	28.07	13.79
Educational Services	9.43	12.24	6.67
Administrative and Support and Waste Management	20.32	19.55	17.40
Retail Trade	6.49	8.03	4.92
Accommodations and Food Services	8.97	9.11	9.94
Manufacturing	4.04	3.33	3.55
Professional, Scientific and Technical Services	23.21	25.19	12.47
Other Services (Except Government)	10.60	11.25	4.71
Government	2.69	-0.73	-0.27
Finance and Insurance	10.84	6.96	4.73
Wholesale Trade	10.11	6.25	5.04
Transportation and Warehousing	4.79	14.23	11.61
Arts, Entertainment and Recreation	10.71	13.24	7.32
Real Estate and Rental and Leasing	10.87	16.67	6.73
Management of Companies and Enterprises	11.00	12.60	4.50
Information	3.11	6.61	2.06
Utilities	7.95	11.99	0.19
Mining, Quarrying, Oil and Gas Extraction	N/A	12.87	7.71
Agriculture, Forestry, Fishing and Hunting	N/A	12.43	2.70
All Jobs	**10.37**	**11.80**	**8.26**

Source: S.C. Department of Employment and Workforce, Industry Projections, 2017

State data on current employment by industry group reveals that Manufacturing is the leading employment sector in Kershaw County, employing 3,266 in 2016. Retail Trade ranks second with a workforce of nearly 2,800, followed by Health Care and Social Assistance with more than 2,100 employees. More than 1,600 jobs are provided by the Accommodation and Food Services sector. The lowest sector employment is found in Management of Companies, Real Estate Rental and Leasing, and Utilities, all at fewer than 100 jobs.

Manufacturing is also the dominant industry in the Santee Lynches region, accounting for more than 10,400 jobs. Within the region, Health Care and Social Assistance ranks a close second at 10,432 jobs, while Retail Trade provides more than 9,100 jobs. Educational Services comes in

fourth with an employment base of 6,700, followed closely by Accommodation and Food Services at 6,300. The fewest jobs are found in the Management, Utilities, Real Estate and Rental, and Information industries, all with fewer than 400 jobs.

State labor market projections for the Santee Lynches WIA that includes Kershaw County show continued growth in health care occupations such as sonographers, physical therapists, home health aides, nurse practitioners, dental hygienists, and physician assistants. As detailed in Table 4-18, regional occupational forecasts are strongest for health care professions, with the health care sector comprising eleven of the top twenty high growth fields. Four construction related occupations are listed. Information technology and education and social services round out the top twenty. Average annual earnings potential for these high growth professions range from a low of $17,881 for child care workers to a high of $98,330 for physician assistants.

Table 4-18. High Growth Occupations in the Santee Lynches WIA Region, 2012 to 2022

Occupation	% Growth 2012-2022	Average Salary
Home Health Aides	54%	$18,800
Physician Assistants	43%	98,330
Diagnostic Medical Sonographers	39%	55,590
Physical Therapist Aides	38%	22,584
Helpers-Electrician	38%	22,836
Nurse Practitioners	36%	94,791
Dental Hygienists	35%	39,611
Personal Care Aides	35%	20,494
Medical Secretaries	32%	27,954
Physical Therapists	32%	81,792
Substance Abuse and Behavioral Counselors	32%	35,527
Cabinet Makers and Bench Carpenters	32%	20,025
Cost Estimators	31%	58,703
Medical Assistants	30%	27,025
Surgical Technologists	30%	37,037
Computer Network Architects	29%	78,874
Medical and Health Services Managers	29%	78,779
Carpenters	19%	44,814
Logisticians	28%	66,487
Child Care Workers	28%	17,881

Source: S.C. Department of Employment and Workforce, Occupational Projections, 2017

Employment declines by occupation within the Santee Lynches region through 2022 are expected to be greatest for data entry, postal and mail workers, meter readers, textile machine operators, computer operators, and printing press operators.

4. Commuting Patterns

The *employment-residence* (E-R) *ratio* is a measure of the total number of workers working in an area, relative to the total number of workers living in that area. An E-R ratio of greater than 1.00 occurs when there are more persons working in an area than living there. The employment-residence ratio for Kershaw County is 0.76 with a daytime population loss of 9.8%, or more than 6,000 persons, indicating that the County is a net exporter of labor to other counties (Table 4-19). The City of Camden's overall E-R ratio of 2.42 indicates that there are more persons working in the City than living there, making the City a net importer of workers. The daytime population of the City increases by more than 4,160 persons (60%) as workers commute in from neighboring areas. These ratios reflect the role of the City of Camden as the economic center for the County, as well as the employment pull of the neighboring Midlands region.

Table 4-19. Daytime Population and Employment Residence Ratios, 2014

Employment-Residence Ratio Factor	City of Camden	Kershaw County	South Carolina
Total resident population	6,931	62,342	4,727,273
Total workers working in area	7,087	19,372	1,986,242
Total workers living in area	2,927	25,474	2,022,019
Estimated daytime population	11,091	56,240	4,691,496
Daytime population change due to commuting	4,160	-6,102	-35,777
% Daytime population change due to commuting	*60.0%*	*-9.8%*	*-0.8%*
Workers who lived and worked in same area	4,103	13,575	1,438,243
% Workers who lived and worked in same area	*140.2%*	*53.3%*	*71.1%*
Employment Residence (E-R) Ratio	**2.42**	**0.76**	**0.98**

Source: U.S. Census Bureau, 2010-2014 American Community Survey

Data on worker commuting patterns is provided in Table 4-21. More than half (52%) of the County's workforce lives and works in the County. The statewide average for residents who live and work in the same county is 71%. However, less than 2% of Kershaw County residents work outside the State, compared to 5% of South Carolinians. For the more than 12,590 Kershaw County residents who travel outside the County for work, more than two-thirds commute to Richland County employers, followed by workers commuting to Lexington, Lancaster, and Sumter Counties. These outgoing commuters offer a potential labor pool for new and expanding industries and businesses, as additional or better job opportunities are created closer to home.

More than 5,340 workers from surrounding counties travel to employers in Kershaw County. Richland County residents lead the influx of in-commuters, followed by workers from Lee, Sumter, Lancaster, and Darlington Counties. Table 4-20 lists the county of origin for workers commuting into Kershaw, as well as the destination of local commuters.

Table 4-20. Workers Commuting into/from Kershaw County - Top 10 Counties, 2013

Commuters into County		Commuters out of County	
County of Residence	**Commuters**	**County of Employment**	**Commuters**
Kershaw County	13,099	Kershaw County	13,099
Richland County	1,484	Richland County	8,594
Lee County	867	Lexington County	971
Sumter County	724	Lancaster County	884
Lancaster County	558	Sumter County	703
Darlington County	443	Chesterfield County	234
Lexington County	291	Darlington County	212
Florence County	257	Lee County	182
Fairfield County	245	Fairfield County	125
Chesterfield County	173	Florence County	122
Total	**18,443**		**25,690**

Source: U.S. Census Bureau, 2009-2013 American Community Survey

The Census Bureau defines the mean travel time to work as the average travel time to work for workers who do not work at home. Given that the commute time to and from work can affect the worker's productivity and quality of life, communities with shorter travel time to work could be more attractive to potential new residents. The mean travel time to the workplace for Kershaw County residents is 28.5 minutes, compared to a commute average of 23.9 minutes for State residents. More than 46% of County workers travel 30 minutes or more to their jobs, compared to the nearly 22% who have a travel time of less than 15 minutes. More detailed data on worker travel times, mode of travel, and commuter data are provided in the *Transportation Element*.

D. ECONOMIC DEVELOPMENT

Bolstered by a growing population, a workforce development emphasis, direct Interstate access, expanded access to higher education, and strong tourism assets, Kershaw County is well-positioned for continued economic development growth. The County offers a comparably low cost of doing business including factors such as low taxes and utility rates, as well as a generally lower cost of living. As a right-to-work state, South Carolina ranks among the nation's least unionized states. Kershaw County features a low unionization rate of less than 1.0%.

State and local jurisdictions can go even further in creating a positive business climate through the offer of tax incentives that help employers hold down operating costs and realize a return-on-investment, the provision of infrastructure, the promotion of higher educational attainment among residents, and the availability of low to no-cost specialized workforce development and training programs. Local governments can also streamline development review and permitting processes to facilitate clear communication of expectations and regulations; ensure the consistent enforcement of codes, ordinances, and regulations; and promote the protection of

existing and future business operations through sound planning for infrastructure and compatible land use.

1. Incentives

Public investments and incentives, when part of a well-planned development strategy, can provide an attractive business climate and increase private investment. In addition to a low corporate income tax rate, the State of South Carolina and Kershaw County provide multiple tax incentives to businesses to encourage economic growth. Because the State does not tax real or personal property, property tax incentives are implemented in conjunction with each county. There is no State or local tax on inventories or intangibles. Among the strongest incentives available to State and local economic developers are the jobs tax credit, the fee-in-lieu of property taxes, and job development and retraining credits.

The State's 46 counties are ranked by the S.C. Department of Revenue each year in one of four tiers, with Tier I including the highest ranked counties and Tier IV including the lowest. Rankings are based on employment rates and per capita income. Kershaw County is currently ranked among eleven counties in the second tier. This ranking is used by the State to determine the amount of jobs tax credits allocated to eligible employers in each county, with the larger credit amounts going to counties with the greatest need. The 2017 jobs tax credit amount for Kershaw County is $2,750.

The ability to offer many of these incentives depends on the formal approval of the S.C. Department of Revenue and local city and county councils. In addition to the incentives listed in Table 4-21, the wide range of tax credits available to employers includes credits for hiring displaced workers, conservation and habitat management, child care, textile mill and abandoned retail sites revitalization, minority businesses, recycling facilities, and energy conservation and renewable energy improvements.

Access to capital is another requisite for economic development. Although most business lending is leveraged through the private sector banking system, government can provide gap financing programs and loan guarantee programs, as well as facilitate angel and venture capital networks that pair private investors with employers. Angel investors are typically individual or small groups of investors that provide smaller amounts of capital in an early stage of business development, while venture capital investors are active with larger investments in the subsequent growth and market expansion phase of a company's development. Together with incentives, these tools can help communities take a proactive role in fostering economic investment, job creation, and desirable growth.

Table 4-21. State and Local Business Incentives

Available Incentives by Type	Authority	
	State	Local
Statutory Incentives		
Job Tax Credit	✓	
Economic Impact Zone Credit	✓	
Corporate Headquarters Credit	✓	
Research & Development Tax Credit	✓	
Sales Tax Exemption	✓	
Corporate Income Tax Credit	✓	
Investment Tax Credit	✓	
5-Year Property Tax Abatement		✓
Property Tax Exemptions	✓	
Discretionary Incentives		
Job Development Credit	✓	
Job Retraining Credit	✓	
Economic Development Set-aside Program	✓	
Rural Infrastructure Fund	✓	
Port Volume Increase Fund	✓	
Tourism Infrastructure Development Grants	✓	
Municipal Economic Development		✓
Discretionary Property Tax Incentives		
Fee-In-Lieu of Taxes (FILOT)		✓
Super Fee-In-Lieu of Taxes (FILOT)		✓
Special Source Revenue Credit		✓
Manufacturers Warehouse Property Tax		✓
Other Discretionary Incentives		
Small Business Jobs Tax Credit	✓	
Expedited Permitting		✓
Multi-County Industrial Park	✓	✓
Infrastructure Development		✓
Certified Industrial Sites	✓	✓
Workforce Development and Training		
Regional Workforce Advisors	✓	
readySC™	✓	
Apprenticeship Carolina	✓	
Certified Work Ready Community	✓	

Source: 2017 S.C. Business Incentives Guide, S.C. Department of Commerce

2. Workforce Development

Local officials in communities throughout the Palmetto State consistently cite workforce development as the leading challenge in development efforts. The availability of a trained and highly skilled workforce is a major consideration in business location decisions for most employers. The emphasis of State, regional and local economic recruitment efforts to attract

higher-wage, higher-tech employers also requires a better-educated and more technologically proficient workforce. This shift makes advanced education and training a requisite to achieving higher incomes and an improved quality of life. For residents who are trying to pull out of the cycle of dependence, finding a job with adequate earnings to support a family is a daunting challenge. Without advanced training, residents with minimal education will increasingly be restricted to less secure, minimum wage jobs with little opportunity for advancement.

The quality of the workforce is the long-term key to attracting and retaining employers and raising income levels in Kershaw County. A combination of real and perceived lack of skills among residents can hamper recruitment of new employers as well as the expansion of existing ones. The economic future of the County hinges in large part on the ability of the community to meet changing workforce development requirements by improving access to training and raising resident proficiency in the core skill areas of mathematics, technology, communication, and writing.

Employment and training resources are offered by State and local providers in Kershaw County through the K-12 school system, the technical college system, adult education, and specialized workforce training and job placement programs. Expanded access to training resources has contributed to the educational attainment and employability of Kershaw County residents.

South Carolina's K-12 school systems play an increasingly important and active role in the career preparation and choice of students under the State's *Education and Economic Development Act* (EEDA). The Act mandated a shift toward expanding the exposure of middle and high school students to career information and opportunities, offering hands-on, career-oriented learning experiences, and creating an early educational pipeline between K-12 schools, higher education, and the workplace. Kershaw County middle school students receive early exposure to high-growth employment fields and are required to select a "career cluster" for high school. This pivotal decision greatly impacts subsequent course selection, the assignment of internships and job shadowing, and other aspects of their academic experience through high school graduation.

The ***Kershaw County School District (KCSD)*** offers diverse academic and elective programs in its middle and high schools. All 20 District schools are wireless and connected by a high-speed wide area network. Students and staff have full-time Internet access in classrooms, libraries and computer labs, including distance learning opportunities. Kershaw County was the first school district in South Carolina to provide individual wireless personal computing devices to all high school students through an $8 million i-CAN initiative. In addition to Advanced Placement coursework that can lead to college credit, the District also maintains ***Dual Enrollment*** articulation agreements with Central Carolina Technical College, allowing qualified high school students to earn college credit for completion of specified technical courses at the high school level. Dual credit options for the Kershaw campus range from Biology and Spanish to College Algebra and English Composition. Dual enrollment courses enrich and extend the high school curriculum and provide introductory college coursework.

The District operates the ***Applied Technology Education Campus (ATEC)*** as the center for technology education in Kershaw County. ATEC provides students from the three district high schools with technical and academic skills for 16 ***Career and Technology Education (CATE)*** majors. Programs of study range from health sciences and human services to manufacturing and information technology. ATEC students can explore career interests, train for a specific career, gain employability skills, and prepare for postsecondary education. County students can also learn about careers, specific job skills and other workplace expectations by participating in work-based opportunities such as job shadowing and internships. Participation in the District's ***Work-Based Learning*** program must be coordinated and supervised through a teacher, career counselor, and the KCSD Education Economic Development coordinator. While job shadowing is available to all students in grades 9-12, internships are restricted to juniors and seniors.

The ***Kershaw County Adult Education (KCAE)*** program prepares local students to obtain the High School Equivalency (GED). Qualified students can also pursue an alternative high school diploma track through ***VirtualSC***, the State's virtual education alternative. Adult Education also provides a career readiness certificate using the ***WorkKeys*** test and instruction.

To help future Kershaw County graduates prepare for productive futures, the public and private sectors have partnered to create the ***Central Carolina Scholars***. Launched in 2011 as an economic development tool, the program provides free tuition assistance for eligible public and private high school graduates from Sumter, Clarendon, Kershaw and Lee counties. Students must graduate from high school on time with a minimum GPA of 2.0 and complete federal aid forms. Scholars can attend for up to two years in any one of CCTC's programs of study. In addition to CCTC, community and corporate partners include employers, the Clarendon, Kershaw, Lee and Sumter County School Districts, private high schools, the cities of Camden and Sumter, and the Clarendon, Kershaw, Lee and Sumter County Councils. The partnership attests to the shared regional goal of increasing economic growth in Kershaw and neighboring counties with a skilled and educated workforce.

Kershaw County is also home to two post-secondary campus sites of ***Central Carolina Technical College*** (CCTC), one of 16 public, two-year colleges that comprise the S.C. Technical Education System. The College serves a four-county service area from its main campus in Sumter, as well as through satellite campuses in each of the four counties. The Kershaw County Downtown campus of Central Carolina Technical College is located in downtown Camden in the Kershaw County Government Center. The Kershaw County Campus is located just off of Interstate 20 and U.S. Highway 521 in the Steeplechase Industrial Park. A $10 million, 40,000 square foot expansion of this campus is scheduled for completion by the end of 2017. The addition will include classroom space, along with training and incubation space for start-up businesses. Both campus locations offer complete Associate of Arts and Associate of Science degree programs on site, along with both credit and continuing education courses. Full student support services are currently provided at the Downtown campus.

CCTC operates under an open-door admissions mandate, providing a key entry point into higher education for many low-income, first generation, disabled, and other non-traditional student

populations. The College has an enrollment of approximately 3,700 students in 50 programs of study ranging from Environmental Engineering Technology and Computer Technology to Criminal Justice Technology and Nursing. Kershaw County residents comprise nearly one fourth (23%) of the total CCTC student enrollment. Twenty-eight percent of Kershaw County's 2015 high school graduates registered at CCTC and the number continues to rise.

CCTC programs lead to degrees, diplomas, and certificates designed for direct job placement, as well as associate degrees designed for transfer to four-year colleges and universities under the Statewide Articulation Agreement. The College also delivers short-term continuing education courses, professional and career advancement programs, and customized training for business, industry, health care, and government agencies, as well as noncredit courses for personal enrichment. CCTC partners with several four-year institutions for transfer programs, including Columbia College, Francis Marion University, Morris College, St. Leo University, and Webster University, and the Bridge program of the University of South Carolina.

In addition to the formal K-12 and higher education learning opportunities, the State also offers targeted training programs specifically tailored to the workforce development needs of business and industry. The internationally respected ***readySC™*** is a statewide training resource for new and expanding companies in South Carolina, with an estimated value per employee of $2,500 to $9,500. Under the oversight of the S.C. Board for Technical and Comprehensive Education, *readySC™* offers tailored employee recruitment, screening, and training for these businesses at little or no cost to the company. Short-term training is customized to meet the specific needs of employers and is conducted on-site as needed. Since its launch in the early 1960s, *readySC™* has trained more than 2,600 workers for Kershaw County employers using this successful workforce development model. Participating employers include Accuride Wheel End Solutions, Canfor Southern Pine, Covidien, the Dana Corporation, Haier America (GE Appliance), Hengst of North America, Inc., INVISTA, TB Kawashima, Suominen Corp, Target, and WeylChem. In Kershaw County, the *readySC™* program is accessed through the local campuses of Central Carolina Technical College.

The South Carolina Technical College System and the Department of Commerce launched the ***Apprenticeship Carolina™*** program in 2007 as a statewide, coordinated approach to the promotion and support of registered occupational apprenticeships. The program provides supervised on-the-job training and related technical instruction (RTI). Registered apprenticeships have been established for nearly 1,000 occupations. Companies taking advantage of this program qualify for an income tax credit of $1,000 for each registered apprentice. Regional workforce investment funds can be leveraged for eligible expenditures including instruction, training, and wages, while trainees can also use lottery tuition assistance for apprenticeship programs. There are 851 registered apprenticeships statewide, with a monthly average of 120 active apprenticeships. Nearly 17,900 South Carolinians have completed the program to date.

South Carolina is also divided into twelve ***Workforce Investment Areas (WIA***) to meet the workforce development needs of employers and residents. Kershaw County is part of the four-

county Santee Lynches WIA region for workforce development planning and programs. The WIA region is anchored by comprehensive ***SC Works Centers*** that offer an array of human services and employment related programs. These one-stop centers serve residents in need of employment, job training, and career advancement services and also post job openings for local employers seeking potential job candidates. Kershaw County residents and employers are served through a one stop location in downtown Camden.

Kershaw County was certified as a ***South Carolina Work Ready Community (SCWRC)*** in 2015. ***WorkReady SC*** is an employee credentialing program based on the *ACT WorkKeys* assessment tool that focuses on core job skills such as communication, interpersonal skills, and problem-solving. The assessment is used in creating job profiles, in measuring skills levels of job applicants, and in identifying skill gaps of the existing and potential workforce. Participants must take and pass tests in applied math, reading or information comprehension, and locating information in order to earn the ***WorkReady SC Career Readiness Certificate***. South Carolina become the first fully certified state in the nation, with all 46 counties achieving certification. Certified counties such as Kershaw demonstrate to potential businesses that they can provide a skilled workforce. The SCWRC is a voluntary collaboration between economic development and business leaders, chambers of commerce, the education community, and the S.C. Workforce Development Board.

The educational attainment of residents and the availability of workforce development and training programs will become more important as the State and region continue to focus economic development strategies around specialty clusters and target industries. Economic clusters are defined and shaped around aggregations and concentrations of employers within a geographic region that have similar products, suppliers, and workforce skill requirements.

3. <u>Utilities</u>

Public investment in physical infrastructure and essential services – roads, water and sewer, stormwater drainage, utilities, recreation, education, and public safety – comprises a substantial share of public expenditures. Infrastructure, community facilities, and support services are in large part provided by local government and funded through taxes, fees, and State support. Such investments significantly influence and assist economic development efforts, with the location, timing and pace of new infrastructure impacting the ability of Kershaw County to service new and existing employers. To maximize the economic benefit of costly infrastructure investments, the County and its municipalities must develop and maintain a consistent and coordinated process for planning and prioritization of capital facilities and infrastructure needs. The County's infrastructure resources are described in greater detail in the *Community Facilities, Transportation,* and *Priority Investment Elements*.

Industrial and commercial development is largely dependent on available water and sewer service. Industrial recruitment efforts generally center on sites and communities where water and sewer are either already available or can be extended with reasonable expense. Conversely, areas without water and sewer service are not as attractive to new industrial and

commercial development. Along with ready access to major transportation routes, the availability of water and sewer is a major catalyst for economic development.

Many businesses and industries require the reliability and access to water that only a public utility can provide. Water service is provided to Kershaw County residents primarily by five water systems – Bethune Rural Water, the Town of Bethune, the City of Camden, the Kershaw-Lee County Rural Water Authority (also known as Cassatt Water), and the Lugoff-Elgin Water Authority. Groundwater accounts for almost one-quarter of the public water supply in Kershaw County. There are three public wastewater management providers in the County. The City of Camden provides wastewater treatment to customers within the City, as well as areas outside of the City northward along S.C. Highway 97 and eastward between U.S. Highways 1 and 521. Kershaw County provides wastewater treatment for customers in the West Wateree area that includes the Town of Elgin, the Lugoff community, and the U.S. Highway 1 corridor. Palmetto Utilities is authorized under the 2006 Upper Wateree Agreement with SCDHEC, Central Midlands COG, Santee-Lynches COG, Richland County, the City of Camden, and Kershaw County to provide wastewater treatment services to a large portion of the Midlands. The current Palmetto Utilities service area includes three residential subdivisions in the West Wateree area of Kershaw County. Details on service areas, design, and capacity for water and wastewater management facilities are provided in the *Community Facilities Element*. Water quality issues are further detailed in the *Natural Resources Element*.

Access to large capacity electric service, natural gas and other utilities is essential for most new and expanding industrial, commercial, and institutional employers. Electric service is supplied by a combination of municipal, investor-owned, and customer-owned providers that include Duke Energy, Fairfield Electric Cooperative, Black River Electric Cooperative, Lynches River Electric Cooperative, Tri-County Electric Cooperative, S.C. Electric & Gas Company (SCE&G), and the City of Camden. Natural gas is available from SCE&G. Telecommunications access is also requisite for businesses to compete beyond the regional and state levels in national and international markets. AT&T and TruVista are the primary telecommunications providers in the County. Local utilities are detailed in the *Community Facilities Element*.

4. <u>Transportation</u>

Commercial transportation is critical for business and industrial development in today's global economy. Demand responsive transportation services are increasingly important to gaining a competitive advantage in manufacturing and service-based industries. Although size and space needs for new businesses and industries can vary widely among employer types and sectors, an accessible transportation infrastructure that provides easy access to materials, supplies, and markets is a common requirement. As emphasized in *Vision Kershaw 2030*, the important role of industrial development in the County's economy makes freight mobility a high priority when considering transportation infrastructure investments. Depending on the specific needs of the employer, this infrastructure network can include interstates and highways, aviation facilities, rail service, and ports. Convenient connectivity to areas nationwide and overseas is an attractive incentive for businesses and industries. Additional detail on the transportation

resources in Kershaw County is presented in the *Priority Investment and Transportation Elements*.

Given its location in the center of the State, Kershaw County has an attractive intermodal freight network for employers that provides easy access to U.S. markets and suppliers, the Port of Charleston, and international air service. This network is largely defined by an extensive system of interstates and arterials. Kershaw County benefits from direct interstate frontage, as well as state and local road networks that provide easy access to neighboring cities and the region. The County has 22 miles of direct frontage on Interstate 20, with four interchanges. Access to I-95 is only 50 miles to the east in Florence, while I-77 and I-26 are located approximately 25 and 45 miles westward in Columbia, respectively. Many of the County's industrial, warehouse, and distribution facilities rely on these strong interstate connections for access to other markets such as Greenville, Charlotte, and Raleigh, or to the nearby ports of Charleston, Wilmington, and Savannah. Three four-lane, U.S. highways traverse the County. ***U.S. Highway 1*** has long provided an east-west link for Bethune, Camden, and the Lugoff-Elgin corridor. The ***U.S. Highways 601*** and ***521*** corridors provide vital north-south access through the County. These transportation corridors open employment and shopping opportunities to residents and provide workers with better access to employers.

Rail service offers a more cost-effective option for manufacturers that require bulk raw materials and shipment of finished products. Rail service in Kershaw County is provided by ***CSX Transportation***, which owns and operates an active freight line that traverses the County west to east between the Richland and Chesterfield County lines, paralleling U.S. Highway 1 through Elgin, Lugoff, Camden, and Bethune. The line is part of the larger Florence service lane, which is a strategic corridor for the southern freight market area. In addition to connecting to Columbia, the route also provides manufacturing connections to Florence, Raleigh, and the three major port facilities of Wilmington, Charleston, and Savannah.

The ***Kershaw County Airport at Woodward Field*** (CDN) was originally constructed in 1929 on 160 acres of land northeast of Camden. The general aviation airport now covers nearly 400 acres, with a 5,000 foot lighted runway and a 2,998 foot crosswind runway. Support services include the Camden Jet Center and Aircraft Maintenance Services that can accommodate the needs of smaller recreational aircraft as well as larger turboprops and business jets. The airport supports business related activities and a number of corporate flight departments. The facility primarily serves the general aviation community, with no scheduled commercial airline service.

Residents and businesses can also easily access domestic and international flight connections at three larger airports within a 100-mile radius of the County. The ***Columbia Metropolitan Airport*** (CAE) is located 33 miles and 45 minutes southeast of Camden in Lexington County. CAE serves more than one million passengers and 1.3 million tons of cargo annually. CAE offers 30 non-stop flights to 9 major airports daily and is the site of a UPS southeast regional air cargo hub. The ***Charlotte Douglas International Airport*** (CLT), located 85 miles north of Camden, is one of the nation's top ten busiest airports, providing international and domestic flights to

more than 44 million passengers each year. All three airports offer significant air freight capacity that includes large shipping distribution facilities.

Traditional port service for Kershaw County businesses is available through two South Carolina seaports at terminals in Charleston and Georgetown. The ***Port of Charleston*** is one of the top ten busiest container ports on the East coast and provides the primary port service for State businesses. The facility handles 1.12 million containers annually, while moving one million tons of non-containerized cargo. The port is 127 miles southeast of Kershaw County. The first ***South Carolina Inland Port*** opened in Greer in 2013, extending the Port of Charleston's reach more than 200 miles inland to the Upstate. Providing shippers with access to more than 95 million consumers within a one-day drive, the inland port boosts intermodal efficiency for international freight movements between the Port of Charleston and companies located across the Southeast. The Greer Port is the product of a partnership between the South Carolina Ports Authority and Norfolk Southern. The State recently announced plans to open its second Inland Port in Dillon near I-95, with construction of the first terminal beginning in 2017. The Inland Port Dillon will be served by CSX and offer overnight access to the Port of Charleston via mainline rail and Interstate. Inland Port Greer is two hours west of Camden, while Inland Port Dillon is only one hour east.

5. <u>Industrial Development Sites</u>

Adequate land area and suitable sites are necessary to provide space to accommodate new and expanding business and industry. Advance planning is needed to ensure the long-term availability of sites that minimize development constraints and potential conflict with surrounding uses. The identification and inclusion of commercial and industrial land in land use planning and zoning becomes more pressing as residential, institutional, and commercial growth escalates. Land targeted for industrial development should be provided with the necessary infrastructure in advance to attract new employers.

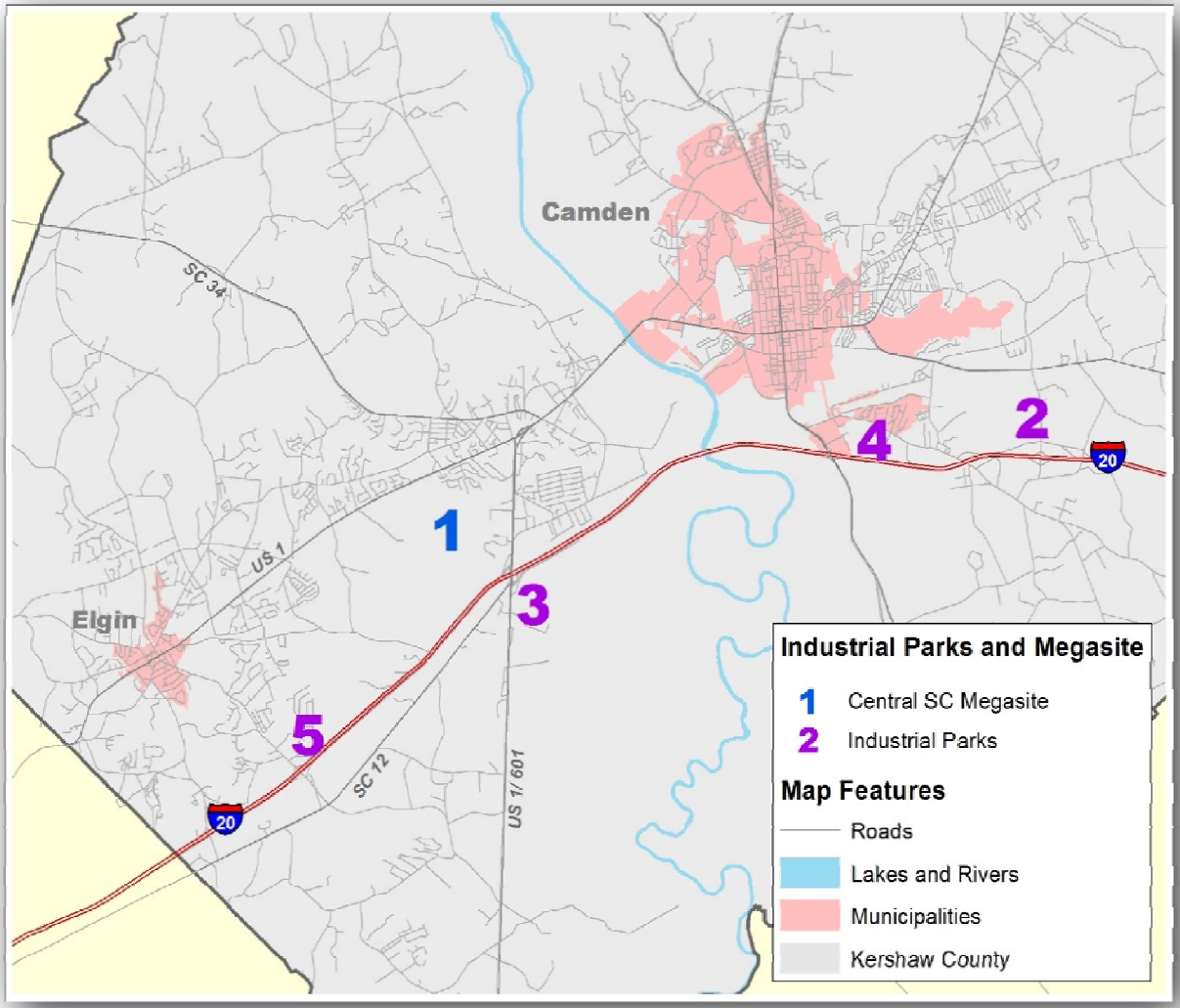
Industrial development is generally concentrated along the Interstate 20 corridor between Camden and Richland County. Economic development strategies in the *Vision Kershaw 2030* Plan emphasize the importance of a fully developed industrial corridor with complementing infrastructure to serve fully utilized industrial parks. The County currently has four industrial parks and five industrial sites available for new and expanding industries. In 2015, the County completed an *Economic Development Infrastructure Improvements Plan* for its four industrial parks that evaluated current conditions at each park and identified key infrastructure improvements, preliminary cost estimates, and schedules for completion. Recommended improvements included landscape, lighting, and signage construction, roadway improvements, entrance enhancement, design and construction of speculative buildings, and the clearing and grading of building pads. The County's Industrial parks and the Central SC Megasite are listed in Table 4-22 and shown in Map 4-4.

Table 4-22. Central SC Megasite, Industrial Parks and Major Tenants in Kershaw County

#	Park	Acres	Area	Major Tenants	Location
1	Central SC MegaSite	1,426	Lugoff	None	1291 Commerce Drive
2	Governor's Hill Industrial Park	210	Camden	None	674 Mt. Olivet Road
3	Heritage Pointe Industrial Park	60	Lugoff	Target Distribution Center	746 Highway 601 South
4	Steeplechase Industrial Park	221	Camden	Haier America, Accuride, Hengst	Black River Road East
5	Wateree Executive Park	60	Lugoff	KershawHealth Urgent Care Center	2234 Whiting Way

Source: Kershaw County Economic Development Office, 2017

Map 4-4. Central SC Megasite and Industrial Parks, 2017



Source: Kershaw County Economic Development Office, 2017

The ***Central SC Megasite*** in Lugoff offers 1,426 acres of undeveloped land on U.S. Highway 601 adjacent to I-20 and direct rail service (Table 4-22 and Map 4-4). Extensive due diligence has been completed for the Megasite including a boundary survey, Cultural Resources Reconnaissance Survey, Geotechnical Exploration, Protected Species Assessment, Phase I and II Environmental Assessments, and a Wetlands Delineation and Determination.

Two parks have achieved certified site status from the S.C. Department of Commerce. The ***Governors Hill Industrial Park*** is a certified site north of I-20 near Camden at Exit 98 that offers 210 acres for industrial development. Completed reports for the park include a boundary survey, Cultural Resources Reconnaissance Survey, Geotechnical Exploration, Protected Species Assessment, Phase I Environmental Assessment, and Wetlands Delineation and Determination. Bolstered by the County's close partnership with Central Carolina Technical College, the 221-acre ***Steeplechase Industrial Park*** on U.S. Highway 521 is home to the expanding CCTC Kershaw County Campus and the Kershaw County Economic Development Office. Current park employers include international companies Haier America and Hengst North America. There are 129 undeveloped acres available in the park that has certified site status. The park also became the first in the State to receive the AT&T *Fiber Ready* designation and designation as a *Duke Energy Food & Beverage Certified Site*.

The 60-acre ***Heritage Pointe Industrial Park*** is located on the south side of I-20 at the U.S Highway 601 interchange. The Park is now home to the Target Distribution Center. The ***Wateree Executive Park*** on I-20 at the Exit 87 interchange in Lugoff consists of 60 acres, with almost 50 acres available for development in western Kershaw County. The KershawHealth Urgent Care Center is the sole occupant of the park at this time.

6. <u>Available Sites and Greyfields</u>

Sensible growth initiatives encourage the development of land closer to existing development, provide incentives for infill and the redevelopment of previously developed areas, and avoid encroachment of new development into areas that lack the necessary public facilities, services, and infrastructure. Vacant structures can range from former strip commercial centers to big box retail and abandoned mills. Often referred to as *greyfields*, these properties generally consist of a large structure with significant land area. These sites represent infill opportunities that do not require the expansion of new infrastructure and are convenient to existing transportation networks and housing markets.

The revitalization of existing built properties and the infill of new development on vacant lands within developed areas can produce substantial economic benefits and maximize existing infrastructure investments. Of the seven individual industrial properties in the County's inventory, two are buildings and four are undeveloped parcels, and one is a certified megasite. One parcel is near the City of Camden, while six properties including the two available buildings are located in the Lugoff area (Table 4-23).

Table 4-23. Available Industrial Properties in Kershaw County, 2017

Site/Building	Size	Type	Community	Location
SC Yukata	168,000 ft^2	Bldg	Lugoff	2 Business Parkway
West Jones Lane	89,366 ft^2	Bldg	Lugoff	185 West Jones Lane
Whiting Way Industrial	67 acres	Site	Lugoff	I-20 and U.S. Highway 601
Mt. Olivet Road Site	166 acres	Site	Camden	604 Mt. Olivet Road
Central SC Megasite	1,426 acres	Site	Lugoff	1291 Commerce Drive
Emanuel Site Parcel 1	265 acres	Site	Lugoff	1883 Highway 1 South
Emanuel Site Parcels 2 & 3	247 acres	Site	Lugoff	1883 Highway 1 South

Source: Kershaw County Economic Development Office, 2017

7. Environmental Considerations

The preservation of natural and environmental assets is an aspect of sound economic development that cannot be overlooked. Clean air and water are essential to a desirable quality of life and public health in Kershaw County. Air quality influences the public health, weather, quality of life, and economic potential of a community. The health and economic effects of air pollution can vary depending on the pollutant, as well as the concentration level and duration of exposure. Specific environmental impacts of air pollution include damage to vegetation and crops, increased corrosion of metals, and deterioration of stone and paint on buildings and vehicles. Air quality problems that trigger non-attainment measures can ultimately impede the recruitment of new industries and businesses to the area, resulting in reduced investment and employment opportunities. All South Carolina counties currently have attainment status with U.S. EPA national ambient air quality standards. Given the County's location adjacent to the highly urbanized Midlands region, it is important that local leaders continue to analyze and monitor the factors related to air quality and develop local solutions that ensure the County's long-range economic health and potential.

Kershaw County has abundant surface water resources that include Lake Wateree, the Wateree River, and numerous creeks and streams. These resources provide a critical natural habitat for countless numbers of plants and animals, as well as recreational opportunities and public water sources. At 13,864 acres, Lake Wateree is the largest water body in Kershaw County with 181 miles of shoreline. Both the Lake and the Wateree Hydroelectric Station are owned and managed by Duke Energy. The Wateree River flows southward from the Lake toward the City of Camden, while the Lynches River forms the County's northeastern border with Chesterfield County. The Little Lynches River flows into Kershaw County at its border with Lancaster County. Other major streams and creeks include Spears Creek, Big Pine Tree Creek, and Twentyfive Mile Creek. Most of the hydric and partially hydric soils are located in the southern and eastern edges of the County.

The quality of these water resources is integral to future economic development efforts. Ongoing water quality concerns include increased levels of sedimentation, bacterial and chemical contaminants, and turbidity, along with decreased levels of dissolved oxygen. Increased urbanization and population growth can contribute to rising levels of point source

and non-point source pollution. Growth will place even greater demand on the water supply and elevate the protection of both ground and surface water resources as a long-term priority. Detailed data on the water quality of Lake Wateree and the County's major rivers, streams, and creeks is provided in the *Natural Resources Element*.

Agriculture and forestry are also important components of the landscape and the economy of Kershaw County. These lands are critical natural resources, while providing valuable wildlife habitat, windbreaks, enhanced water quality, decreased ambient temperatures, groundwater recharge areas, stormwater and erosion mitigation, and open space. Eighty-two percent of the land area in Kershaw County is currently in use for agriculture or forestry.

Prime farmlands have the optimal combination of physical and chemical characteristics necessary to produce food, feed, forage, fiber, and oilseed crops. USDA soil data indicates that 12% of the County land area (57,584 acres) is prime farmland. Prime farmland soils produce high yields, minimize energy and economic resources, and cause the least environmental damage. Soils with a high water table or are subject to flooding can also qualify as prime farmland. These soils comprise 6.2% of the land area in Kershaw County, encompassing 29,304 acres of land. States also delineate soils that, while not designated as prime farmlands, may be farmlands "of statewide importance" for the production of food, feed, fiber, forage, and oilseed crops. Under current State criteria, more than a quarter (26%) of the land area of Kershaw County (123,388 acres) is considered to have soils of statewide importance to agriculture. Prime farmlands are located throughout the County, but are concentrated in southern Kershaw County, within and south of the City of Camden, and near water bodies, particularly along the Wateree River. These lands play an important role in the agricultural productivity of Kershaw County and the State. To preserve prime farmland, economic strategies should focus on areas suitable for growth and discourage intensive development in the County's environmentally sensitive areas.

8. <u>Energy Conservation</u>

Energy conservation influences all aspects of the local economy. A balanced discussion of energy use and conservation must include industrial and commercial interests, as well as large-scale institutional uses. Industrial and commercial uses account for well over half (58%) of all energy consumption in South Carolina. The industrial sector is the State's largest energy user at 45% of all energy consumed. The transportation sector consumes the second largest amount of energy at 28%, while commercial users consume 13%. Statewide, the industrial energy consumption per dollar of industrial output has decreased, signaling the benefits of energy conservation measures. General industrial reliance on natural gas, biomass, and electricity has increased, while petroleum and coal use has declined. Although the commercial sector continues to rely heavily on electricity as the primary energy source, energy use per dollar of GDP has also decreased statewide.

South Carolina Energy Office data shows that total energy expenditures exceed $22 billion statewide. Although South Carolina has the lowest industrial electric rates in the southeast,

energy efficiency measures can boost the bottom line for local businesses and industries and ultimately keep more dollars circulating in the Kershaw County economy. Unlike the typical utility bill payment that quickly exits the local economy with minimal community impact, employer investment in energy conservation measures can stimulate economic activity that ranges from contracts with local construction firms for facility modifications to the purchase and installation of new, energy-efficient equipment from local vendors. The resulting energy savings can increase productivity and profitability, with savings reinvested in business expansion and the addition of new jobs for local residents. Federal and State incentives are available to industrial and commercial businesses that make energy conservation investments (Table 4-24).

Table 4-24. Federal and State Energy Conservation Incentives for Businesses

Available Incentives	*Source*	
	Federal	*State*
Business Energy Investment Tax Credit (ITC)	✓	
Energy-Efficient Commercial Buildings Tax Deduction	✓	
Renewable Electricity Production Tax Credit (PTC)	✓	
Biomass Energy Tax Credit		✓
Solar Energy and Small Hydropower Tax Credit		✓

Source: S.C. Energy Office, 2016

9. Economic Development Strategies and Focus Areas

Over the last decade, South Carolina has increasingly shaped its economic development strategy around target industries as part of a long-term economic strategy that aims to foster growth and raise the State's per capita income to the national average. Potential clusters, targets, and specialty sectors have been identified in multiple State and regional studies. These targets are used to identify areas for collaboration across jurisdictional boundaries that combine public and private investment to promote growth within each region. Statewide economic growth potential is in the Advanced Manufacturing, Advanced Materials, Aerospace, Agribusiness, Automotive, Distribution & Logistics, Life Sciences, and Office and Shared Services sectors.

At the regional level, the Central SC Alliance has identified ten targeted sectors for the nine-county region that includes Kershaw County (Table 4-25). Kershaw County is poised to continue to benefit from the successful targeting of these industry segments by state, regional, and local economic developers. At the County level, the Kershaw County Economic Development Office seeks to build a vibrant economy by focusing on related industry targets. The County's *2012 Economic Development Strategic Plan* noted the strength of existing manufacturing sectors including Wood Products, Transportation Equipment, Plastics and Rubber Products, and Food. Potential growth sectors identified in the planning process included Insurance Carriers and Computer Systems Design and Related Services.

Table 4-25. Central SC Alliance Targeted Industries, 2017

Target	Strengths
Advanced Manufacturing	▪ Sector employs 10% of regional workforce ▪ 17% job growth in manufacturing statewide since 2011 ▪ Highest industry contributor to State GDP at 16.2% ▪ Manufactured products comprise over 97% of State's exports ▪ County's transportation equipment sector has high location quotient (LQ) of 3.5 ▪ Kershaw County industries include Mancor Carolina, Cogsdill Tool, Oak Mitsui, Eisenback, Midlands Tooling, and Wolfe Mechanical
Advanced Materials	▪ 45 companies in region, employing 5,000 ▪ Cluster includes metal working and fabrication, advanced textiles, and plastics ▪ Strong regional plastics and rubber products manufacturing industry LQ of 1.75 ▪ Local employers base includes TB Kawashima, INVISTA, DeRoyal Textiles, Suominen
Aerospace & Aviation	▪ More than 25 sector companies in region; 400 statewide ▪ 3,000 regional residents employed in aerospace sector; 50,000 statewide ▪ Annual statewide economic impact of $19 billion
Automotive	▪ Includes a wide range of companies supporting all aspects of automotive manufacturing - parts suppliers, assemblers, and raw material producers ▪ Annual statewide economic impact of more than $27 billion ▪ 58,000 employed statewide; 6,500 in region ▪ S.C. is currently national export leader of completed passenger vehicles and ranks 1st in production and export of tires ▪ County employers include Dana Corporation, HBD/Thermoid, Hengst
Food & Beverage	▪ 48 food processing facilities in region ▪ 12,000 employed regionally in sector ▪ Food manufacturing industry shows a strong presence with regional LQ of 1.5 ▪ County food processing industries include CalMaine Foods and Prestage Farms
IT & Office	▪ 22,000 employed in region's office and technology-intensive industries ▪ Strong insurance and related activities industry presence with regional LQ of 2.9 ▪ Regional LQ of 0.76 for emerging professional, scientific, and technical services industry shows room for growth
Light Manufacturing & Assembly	▪ Includes assembly of appliances, electronics, lawn equipment, bicycles ▪ More than 40,000 employed in region ▪ County transportation equipment manufacturing industry LQ of 3.5 ▪ County host first U.S. factory for Chinese appliance manufacturer Haier America
Pharmaceuticals & Biotech	▪ Region's health services cluster employs 73,000 ▪ More than 30 life sciences, pharmaceuticals & biotech facilities in region including bulk manufacturers, chemical processors, generic and proprietary drug makers, hygiene product producers and packagers, related R&D companies ▪ 165 life sciences companies operate in the State, employing 19,000 ▪ Local county sector base includes Medtronic and WeylChem
Transportation, Distribution & Logistics	▪ S.C. has one of the nation's fastest-growing container ports, 2 inland ports, 2,300 miles of rail, and over 41,000 miles of state-maintained highways ▪ 54,000 state residents are employed in sector ▪ County is home to Target Distribution Center

Table 4-25. Central SC Alliance Targeted Industries

Target	Strengths
Wood & Paper	▪ Timber is States' top harvested crop in value at $759 million ▪ Contributes $18.6 billion to state economy ▪ Region has more than 2.7 million acres of forestland ▪ 80 facilities in region employ nearly 5,300 ▪ Wood product manufacturing industry has regional LQ of 0.92 ▪ Local county sector employers include Canfor Southern Pine, Conner Industries, Protective Packaging, Roy's Wood Products, and Kapstone

Source: S.C. Department of Commerce; Central SC Alliance; and Kershaw County, 2017

The long term success of local companies in these sectors can fuel job creation and aid the recruitment of new employers. Up to 80% of new jobs and investment in a community is created by existing businesses. A comprehensive existing business program is vital in facilitating retention and expansion of existing companies in Kershaw County. In addition to these industrial sectors, the recent *Vision Kershaw 2030* study identified the need to support small business development, tourism, agribusiness, and the equine industry, as well as downtown development efforts in Bethune, Camden, and Elgin. A brief summary of assets and potential for growth of each of these local target sectors follows.

a. Agribusiness

The *Agribusiness* industrial cluster encompasses traditional agriculture and forestry production, as well as food and wood processing and ancillary support sectors. This diverse cluster contributes $41.7 billion to the state's economy and provides more than 210,000 jobs. With an annual output that exceeds 9% of the State total at $26 billion, the agribusiness sector ranks as the largest industry in the State, posting a 23% growth rate over the last decade.

Agriculture and forestry continue to be an integral part of the South Carolina and Kershaw County economy. Nearly five million acres statewide are part of more than 25,260 farms, representing more than a quarter of the State's land area. Kershaw County has 483 farms, with more than 82,870 acres, or nearly 18%, of the County's total land area in crop, pasture, and forest lands. The *USDA Census of Agriculture* showed a decrease from 499 farms in 2007, along with a concurrent decline by 2,650 acres in farmland. The average Kershaw County farm size is 172 acres, compared to a statewide average of 197 acres. The County has 216 farms that are smaller than 50 acres, with 33 farms 500 acres or larger. More than half (56%) of the County's farmland is in woodlands, 20% is in cropland, and 17% is in pasture. The remainder consists of farm infrastructure including ponds, roads, and buildings.

The countywide market value of agricultural products sold is $147 million, placing Kershaw at third highest among the State's 46 counties in total market value of products sold *(USDA Census of Agriculture)*. While the County ranked 40th out of the State's 46 counties in crop value, it led in the value of livestock, poultry, and related products with sales exceeding $142 million. Top crop items sold include forage crops such as hay and grass, corn for grain, soybeans, and wheat

for grain. Turkeys are the top livestock sold, with the County leading the State in turkey sales at nearly $1.8 million, followed by other poultry including layers, broilers, pullets, and quail. The average per farm market value of all products sold exceeds $304,680. Eighty of the County's farms receive government agricultural payments for a combined total of $499,000. This represents a five-year decline from the 140 local farms receiving government payments in 2007.

The overwhelming majority (89%) of all farms in South Carolina are organized as family-owned, sole proprietorships. Similarly, family-owned, sole proprietorships comprise 90% of all farms in Kershaw County. Seven percent, or 34 farms, are operated as partnerships. Only 3%, or 16 farms, are under corporate ownership. However, 14 of these are in family-held corporations. The industrial classification of the County's 483 farms is shown in Table 4-26. Animal production is the predominant type at 131 farms in the County, followed closely by the cultivation of other crops such as hay at 126 farms. Beef cattle ranching ranks third with 63 farms, with poultry and egg production coming in at fourth with 60 farms.

Table 4-26. Kershaw County Farms by Industrial Classification, 2012

Farm Type	Total Farms
Oilseed and grain	37
Vegetable and melon	13
Fruit and tree nut	15
Greenhouse, nursery and floriculture	18
Other crop (sugarcane, hay, and other crops)	126
Beef cattle ranching	63
Cattle feedlots	0
Dairy and milk	2
Hog and pig	1
Poultry and egg	60
Sheep and goat	17
Animal aquaculture and other animal production	131
Total farms	**483**

Source: 2012 Census of Agriculture, USDA National Agricultural Statistics Service

Opportunities to encourage expanded use of the County's traditional and non-traditional agricultural resources can create value-added production for local farm products. Fuel and energy costs make local producers more attractive as suppliers to regional markets. The continued growth in consumer interest and demand for organically grown produce and livestock also creates new markets for smaller farming operations. A 2013 joint study released by the South Carolina Departments of Agriculture and Commerce, *Making Small Farms into Big Business*, identified the development potential of *food nodes*. A *food production node* is a cluster of farms in close proximity to each other, working in collaboration and using common food production infrastructure. Strengthening these clusters of independent farms presents an opportunity for South Carolina communities to maintain a sustainable agriculture system and build local efficiencies in food trade.

The South Carolina Department of Agriculture, along with the Palmetto AgriBusiness Council and the Farm Bureau, implemented the *50 by 20 Plan* that calls for increasing the economic impact of the State's Agribusiness cluster to $50 billion by the year 2020. As part of this effort, a growing number of South Carolina farmers are looking beyond traditional agricultural markets to find new opportunities and markets that diversify their operations through agritourism. Agriculture-based tourism includes farm tours and field trips, farm to table dinners, on-the-farm restaurants with markets, on-farm workshops, festivals and u-pick operations. For example, Kershaw is one of eleven counties in the State participating in the annual *South Carolina Ag and Art Tour*. The free, self-guided farm tours highlight agricultural and food products, as well as cultural and artisan works. The June event is the largest free farm and art tour in the nation with more than 20,000 visitors participating since the event was launched in 2012. Kershaw County farms featured on the multi-day tour include Boykin Mills Farms, Kershaw County Farmers Market, Goat Daddy's, and Old McCaskill's Farm. The State Department of Agriculture offers multiple agribusiness initiatives to support the growth and sustainability of local farmers throughout the State through market expansion and increased profitability (Table 4-27).

Table 4-27. State and Local Agribusiness Initiatives

Initiative	Description
Agritourism Farms	There are 307 agritourism farms statewide, with 5 in Kershaw County. *Old McCaskill's* and *Dragoon Horse Farms* north of Rembert offer special events and activities. *Old McCaskill's* also offers direct sales, accommodations, and food services. *Annex 20* in Camden is a blueberry farm open by appointment. *Goat Daddy's Farm* in Elgin offers special events space, attractions and tours. *Leeland Farm* in Cassatt has direct sales of cut trees and special events in season.
Agritourism Passport Program	Visitors collect passport stamps at each participating farm to qualify to win Certified South Carolina items. In 2017, there are 49 participating farms, with two in Kershaw – Old McCaskill's and Goat Daddy's Farms.
Certified Roadside Market	Certification provides an additional outlet for farmers to market their products to the public. The State's network of 306 roadside markets are held accountable to State standards, encouraging markets to be reputable and offer a quality supply of S.C. farm products. There are four certified roadside market locations in Kershaw County – Old McCaskill's Farm, the Kershaw County Farmers Market, 521 Bait and Tackle, and the Camden City Market.
Certified South Carolina Grown Network	Cooperative effort among the S.C. Department of Agriculture and more than 1,870 producers, processors, wholesalers, retailers to encourage grocers and restaurants to buy and sell South Carolina grown produce and to raise consumer demand for locally produced products. The goal is for consumers to be able to easily identify, find, and buy Palmetto State products. There are currently 39 participating network partners in Kershaw County.
Community-Based Farmers Markets	Local markets provide fresh, wholesome foods to the nutritionally at-risk, while providing an additional market for small farmers. There are 137 markets statewide, with one in Kershaw County – the Kershaw County Farmers Market on 222 Broad Street in Camden.
Community Supported Agriculture (CSA)	CSA is an economic partnership linking consumers seeking fresh, safe food and farmers seeking stable markets for their crops. Members pledge regular payments in return for shares of produce throughout the growing season. Direct sales allow growers to receive better prices for their crops, boost financial security, and reduce the time and expense of marketing and distribution. Kershaw County does not have an active CSA farm.

Table 4-27. State and Local Agribusiness Initiatives, *Continued*

Initiative	Description
Homegrown by Heroes	Affords South Carolina farmers and/or agricultural producers who have served in any of the branches of the U.S. Military the ability to use the *Homegrown By Heroes* logo on their agribusiness signage and/or agriculture products. The designation serves as identification to prospective consumers that the products were locally grown and raised by a veteran.
Organic Certification	Clemson University certifies organic farming operations in the State in one of three certification categories of crops, livestock and processing.
S.C. Ag and Art Tour	Since 2012, the annual self-guided tour features farms located throughout the State. Kershaw County farms featured on the multi-day tour include Boykin Mills Farms, Kershaw County Farmers Market, Goat Daddy's, and Old McCaskill's Farm.
S.C. Conservation Bank	Protects wildlife habitat, natural and historic areas, farmland, watersheds and open space throughout the State. It encourages cooperation and innovative partnerships among landowners, state agencies, municipalities, and non-profit organizations. Participating landowners may sell property outright or enter into conservation easements. The Bank has spent an average of $1 million per year to protect farmland. There are currently six protected properties in Kershaw County totaling approximately 5,257 acres.
S.C. Farm to Institution Programs	Voluntary initiative to increase the number of farmers certified to provide locally grown products to institutions including schools and preschools, retail outlets and restaurants, and food banks. The State provides technical assistance mini-grants to preschools and school districts to implement the program. No *Farm to Preschool* or *Farm to Schools* grants have been awarded in Kershaw County to date.
SC Small Farms Program	Provides assistance to small family farmers through the dissemination of information, referrals, and counseling on issues including land retention, alternative land use, and community development. The focus is on assisting small farmers in meeting the challenges associated with retail marketing and in developing tailored solutions to their problems.
TODS Program	Agritourism and Tourist Oriented Directional Signage Program allows tourism and agritourism-oriented facilities to place directional signs in the highway right-of-way to promote agritourism and tourist-oriented facilities in rural areas

Source: S.C. Department of Agriculture, 2017

Strategies that protect agricultural uses and productive agricultural and forest lands are needed to foster and maintain profitable farms. The agribusiness strategy strongly complements revitalization efforts to strengthen existing urban centers in the County and reduce encroachment into prime farmlands. Recruitment efforts can also seek industries that use locally grown products or by-products for value-added production.

b. Equine Industry

The equine industry contributes $2.9 billion in annual revenue for South Carolina, with more than $29 million in Kershaw County. The County also leads the State in horse ownership. With an active equestrian history that reaches back more than century, Kershaw County has developed a unique identity within the popular equine industry. This identity is closely tied to facilities, traditions, and annual events that draw tens of thousands to the County.

The ***South Carolina Equine Park*** is a state-of-the-art facility designed to accommodate a full range of equine activities, breeds, and users. Opened in 2009, the Park is operated by the ***South Carolina Equine Promotion Foundation***. The Foundation promotes the horse industry in South

Carolina though the centrally located park in Camden. Situated on a 60 acre site on Cleveland School Road near Interstate 20, the Equine Park offers show rings, covered arenas, schooling areas, barns with stables, RV sites, concessions, and restrooms. An early economic study estimated the annual direct and indirect impact of the facility to exceed $22 million. Horse shows at the Park generate $1.3 million as visitors and participants spend money locally on food, lodging, fuel, and other needs.

Built in 1898, the ***Camden Polo Field*** is the second oldest field in the nation and has been designated as a National Landmark. The beginnings of the equine industry in Kershaw County can be traced to the development of Camden as a winter resort, with polo as the chief attraction. Although the sport declined during the second half of the 20th century, the Fine Arts Center of Kershaw County and the Camden Polo Club teamed to revive the sport in 2001. Today the Polo Field site on Polo Lane is held in perpetual trust by the Palmetto Conservation Foundation and is used for a variety of local events, including the ***Camden Cup Polo Weekend***. The Camden Cup continues the rich tradition of the historic sporting event among regional teams during the first weekend of May.

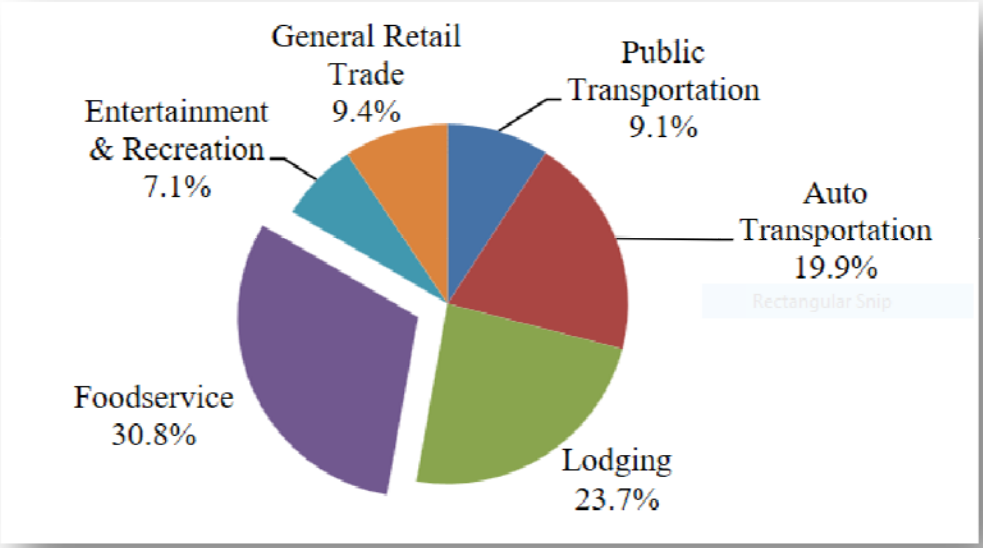
The ***Springdale Race Course*** is a 600-acre European style, Thoroughbred racehorse training center located on Knights Hill Road in Camden. The Course was donated with a maintenance endowment to the State of South Carolina by Marion duPont Scott. Today the course provides seasonal training facilities as well as an annual race. Growing crowds have been accommodated by an enlarged grandstand, expanded rail and infield parking, and a corporate terrace. In accordance with the original design, race patrons still enjoy a spectacular view of all fences in a pastoral setting. The course is also home to the ***National Steeplechase Museum***. The Museum chronicles the history of the sport and features a library, interactive exhibits, and trophy displays. The ***Carolina Cup Racing Association*** is the governing authority of the Springdale Race Course, owned by the State of South Carolina. The Springdale Race Course is home to the ***Carolina Cup***, a renowned steeplechase horseracing event. The Carolina Cup is held each spring and is attended by more than 70,000 fans from throughout the Southeast, making it one of the State's largest sporting events.

These venues attract additional year-round activities including horse breeding, training, racing, jumping, hunting, rodeo, dressage, and shows. This activity fuels the need for equestrian support services such as tack and supplies, veterinary care, barns, and training facilities. As a result, the County has developed a higher concentration of skilled workers to meet the specialized needs of the horse industry. The County is also linking its strong equestrian industry with its thriving arts and culture sector. The City of Camden joined cities such as Chicago, Santa Fe, and Vienna, Austria as one of only nine stops worldwide for the 2017 Winner's Tour of the ***EQUUS Film Festival***. Now in its fourth year, the New York-based festival invites equestrian-themed films, documentaries, videos, commercials, and shorts from around the world, along with cultural elements of fine equestrian art and literature. The Tour celebrates the award-winning artists and the arts that "pay artistic homage to the horse." The economic impact of these equestrian-themed venues is realized through direct and indirect spending that flows through the County, impacting restaurants, hotels, bed and breakfasts, and merchants.

c. Recreation and Tourism

The recreation and tourism sector plays an important role as a provider of jobs and income in many South Carolina communities, both large and small. The economic impact of tourism in South Carolina is significant, supporting one in ten jobs in the State. State tourism estimates for 2017 show that the Palmetto State draws 29.8 million visitors each year, with a fiscal impact of more than $1.8 billion in State and local tax revenues. Domestic travelers to the State spent more than $12.5 billion on transportation, lodging, food, entertainment, recreation, and incidentals. Food was the highest spending category at nearly 31% of all traveler expenditures, followed by lodging at 24% (Figure 4-5). More than 120,500 jobs are supported by tourism statewide, with over half of these (62,400 jobs) in the food services sector.

Figure 4-5. Domestic Travel Expenditures in South Carolina by Category, 2016



Source: Economic Impact on Travel on South Carolina Counties, SCPRT, 2016

Kershaw County has an annual visitor count of 318,000, ranking 24th highest among the State's 46 counties. The County benefitted from more than $50.6 million in travel and tourism related expenditures, with $2.3 million in local tax revenues in 2015. Tourism generated nearly $7.9 million in local payroll. This activity ranked Kershaw among the top half of South Carolina counties in total travel expenditures.

Tourism employment includes numerous sectors such as public and auto transportation, lodging, food service, entertainment and recreation, and general retail. Tourism-related jobs offer opportunities for residents with diverse skills and educational backgrounds, ranging from first-time job seekers to senior citizens and from part-time work to alternative work schedules. In addition to creating jobs, tourism provides new small business opportunities that enable Kershaw County to capitalize on its natural, recreational, and historic assets and grow these resources into key contributors to the local economy.

Kershaw County continues to grow in popularity as a tourism destination for cultural enrichment, recreation and sports, and entertainment. As outlined in the *Cultural* and *Natural Resources Elements*, Kershaw County has a wealth of natural and cultural assets that range from historic homes and battlefields to popular Lake Wateree. The County is part of the *Olde English District* tourism region that includes the seven counties of Chester, Chesterfield, Fairfield, Kershaw, Lancaster, Union, and York Counties. These communities are rich in American Revolutionary War and Civil War history. This rich cultural history and natural resource base offers additional potential. Rural communities with attractive cultural, scenic, and historical resources are among the fastest growing heritage tourism destinations. The smaller towns and communities throughout the County – Bethune, Boykin, Cassatt, Liberty Hill, Elgin, and Lugoff – also stand to benefit from continued development of the local heritage tourism market. Such tourism is an attractive economic development option for Kershaw communities because it preserves community character, instills local pride, promotes investment, and generates local employment opportunities.

As detailed in the previous sections, the County offers diverse recreational options that range from Lake Wateree and Goodale State Park to the Carolina Motorsports Park and the South Carolina Equine Park. County and municipal leaders recognize that success in the tourism sector can be better measured by spending per visitor than merely by the number of visitors. Led by the City's Tourism Development Director, Camden and Kershaw County are engaged in a partnership to promote tourism and attract visitors through a multi-channel statewide and national marketing campaign. Local tourism development efforts seek to capture a greater share of retail and tourist dollars by supporting existing tourist venues related to the area's history, agriculture, and equine sports identity, as well as providing opportunities to establish new tourist-related commercial operations. This can be accomplished by leveraging tourism assets that raise per capita tourism expenditures, attract and launch new businesses, improve the visitor mix, and broaden the tourism product. These efforts will strongly complement the County's overall economic development goals by diversifying the local economic base, enhancing and preserving the County's rich cultural and natural resource base, and providing increased job opportunities for area residents through the creation of locally-owned, small businesses.

d. Small Business Development

There are 400,000 active small businesses in South Carolina that employ 727,000 residents. A 2013 report by the Small Business Administration noted the strong impact of small businesses on the South Carolina economy. Although most of the State's small businesses have fewer than 20 employees, they comprise 97% of all employers and employ nearly half the State's private sector workforce. Small businesses also tend to be more diverse with higher levels of minority, veteran, and women ownership. The largest number of small businesses with fewer than 20 employees are engaged in retail trade, professional and technical services, accommodation and food services, construction, and other services.

While the Kershaw County Economic Development Office focuses on recruitment and retention of larger industry, small business and entrepreneurial development needs are supported jointly by multiple organizations including the Kershaw County Chamber of Commerce, the City of Camden Economic Development Department, and the Camden Business Alliance. The efforts of these groups, which range from networking and training to marketing assistance, are detailed in the *Organizations and Partnerships* section. The continued growth of the tourism and equine industries creates an attractive environment in the region for developing small businesses to serve these markets.

Small business development strategies must be an integral part of local economic development plans. More than half of the State's private sector employees work for small businesses. A distinct advantage of smaller firms is that they are locally-owned and typically employ residents within the local community, do business with other community-based firms, and reinvest profits within the community. Small business development can also provide alternative employment for residents impacted by downsizings and plant closures. The potential impact of small business development can be considerable, especially when considering that small businesses with less than 100 employees continue to employ the majority of workers in South Carolina. Such firms also tend to locate in existing facilities and utilize existing infrastructure, resulting in less capital investment on behalf of the local government to accommodate new businesses. Smaller firms are well-positioned to serve the larger corporations recruited to the region, opening new opportunities for small business start-ups.

e. Downtown Development

Economic development efforts in downtown districts typically focus on encouraging retention of existing businesses, facilitating the location of new businesses that strengthen the downtown, and promoting the revitalization and infill of commercial areas. Zoning is a common component in revitalization efforts, particularly to meet the need for districts that can accommodate a mixture of uses and densities. Also among the strategies to revitalize and strengthen these historic commercial centers are policies that preserve and promote the unique nature of the downtown area, along with its key buildings, streets, and public spaces. This includes the redevelopment of blighted structures and properties, as well as the installation of wayfinding signage that facilitates identification and access to neighborhoods and businesses.

Kershaw County has unique commercial areas in the City of Camden and the Towns of Bethune and Elgin. As the County seat, Camden provides a focal point for creating a vibrant arts and cultural destination that carefully weaves together business, residential, cultural and governmental uses. The City of Camden is part of the ***Mainstreet South Carolina*** program administered by the Municipal Association of South Carolina. Mainstreet communities adhere to the Main Street approach that is anchored on a genuine public-private partnership in planning and action, a concerted effort to change attitudes and turn negative opinions around, and a commitment of time and resources to focus on comprehensive revitalization efforts that are oriented to quality businesses in the downtown and neighborhood commercial districts.

The City of Camden seeks to create a welcoming, pedestrian-centered environment for visitors and residents. The City adopted Design Guidelines in 2014 to preserve the historic character of its residential and commercial built environment. The majority of the buildings in the central business district date from the late 19th and early 20th centuries, forming a compact and cohesive commercial district along Broad Street. The guidelines are for property owners planning exterior alterations and additions to, or the rehabilitation of existing buildings. They also apply to the design of new structures. Downtown historic structures that are income producing may be eligible for federal, state and local incentives. The *Federal Historic Preservation Tax Credit* encourages private investment in rehabilitating eligible historic properties such as offices, rental housing, and retail stores through the use of owner tax credits up to 20% of rehabilitation costs. The *South Carolina Historic Rehabilitation Incentives Act* matches the federal share for eligible properties with a 10% state income tax credit for owners of historic income-producing properties. State law also allows local governments to offer *Special Property Tax Assessments* for rehabilitated historic buildings.

In 2014, the City of Camden embarked on a strategic tourism, marketing and retail market analysis/development initiative. Current recruitment efforts for new and replacement businesses in the City's downtown are largely focused on small businesses, retail development, restaurants, and entertainment. Local government support can include financial incentives for qualifying businesses, physical site improvements, advertising, signage, and other marketing needs. To facilitate downtown economic activity, the City provides a one-stop center for new and existing businesses to get assistance with building permits, business license purchase and renewals. As noted in the Design Guidelines, rehabilitation and reuse of older buildings generally has a higher local economic multiplier than new construction, keeping more dollars in the community.

10. <u>Organizations and Partnerships</u>

The involvement of public and private organizations as economic development allies in the development process supports a sound economic growth strategy that addresses community needs and advances the County's economic vision. Economic allies include municipal, State, and County organizations involved in planning, finance, education and training, construction, utilities, and engineering, as well as related regional and State economic resources. A continued partnership approach to economic development will fuel Kershaw County's creation of a diverse economic base that provides a quality living environment and promotes sustainable economic and community development strategies.

The ***Kershaw County Economic Development Office*** (KCEDO) is responsible for recruiting new industry, retraining and growing existing companies, and promoting and marketing Kershaw County globally. The KCEDO staff provides industrial site, demographic and community information; hosts site and community tours; creates financial and tax incentive packages; and provides relocation support when needed. The office is also responsible for strategic initiatives focused on industrial product development (industrial parks, sites, and buildings), workforce development, training, and infrastructure improvements.

In addition to supporting KCEDO as its economic development arm, ***Kershaw County*** recently completed a comprehensive, countywide visioning process called ***Vision Kershaw 2030***. The plan provides a consensus framework for County investment with a focus on economic growth and development that builds upon county assets in manufacturing, agriculture and tourism. The County is also the source of key financial incentives such as property tax reductions, infrastructure, and utility incentives. Kershaw County and its municipalities also influence economic development through land use planning and regulation, permitting, site planning, grants, and coordination of utilities. The ***Kershaw County Planning and Zoning Department*** fast tracks industrial permits and works cooperatively with new and expanding industries.

The local government efforts of the KCEDO are supported by the ***Kershaw County Committee of 100***. Established in 1986, the Committee is a 501(c)(6) non-profit organization providing private sector resources to encourage and enhance economic development in the County through the attraction of new industry and expansion of existing companies. Governed by a nine member Board of Directors, the Committee provides marketing and special event funding for print and online materials, website and brand development, company announcements and groundbreakings, Industry Appreciation events, and annual meetings.

The ***Kershaw County Industrial Association*** is a forum for the on-going exchange of ideas and information among the County's industrial community. The Association sponsors monthly open-format lunch meetings that allow company representatives the opportunity to share concerns and issues about a wide range of topics.

The ***Kershaw County Chamber of Commerce*** is a private, non-profit organization that fosters a thriving business and professional community by organizing special events, promoting job retention and growth, providing educational and networking opportunities, and collaborating across the community to enhance the quality of life of area residents. With more than 450 members, the Chamber is the largest business organization in the area, representing a wide range of businesses. The ***Kershaw County Visitors Center*** is run by the Chamber as the designated welcome center for Kershaw County. The Center promotes the County as a tourism destination and assists hundreds of visitors each month with referrals to local attractions and events, accommodations, dining, and shopping.

Downtown revitalization and redevelopment is the focus of the ***City of Camden Economic Development Department***. The Department runs the City's Main Street program, as well as a one stop for businesses looking to locate in the City. Recruitment efforts are largely focused on the recruitment of niche retailers, restaurants, and office tenants. Support includes financial incentives for qualifying businesses, physical site improvements, advertising, signage, and other marketing needs. The ***Camden & Kershaw County Development Partnership*** promotes the cultural heritage and equine sporting lifestyle in Camden and Kershaw County, drawing visitors from around the state, country and world. In partnership with the County, the City uses ***Classically Carolina®*** as the designated marketing vehicle for promoting the City of Camden and Kershaw County as a tourist destination.

The ***Camden Business Alliance*** is an association of diverse businesses that collaborate around the shared goal of economic prosperity in Camden. Members include restaurants and retail stores, personal and professional service providers, arts and entertainment, museums and parks, and local government. The Alliance offers regular *Breakfast Before Hours* meetings to promote networking and collaboration.

The County also benefits from a strong regional economic development partnership between the County and seven of its neighboring counties and the City of Columbia through the ***Central South Carolina Alliance***. These jurisdictions jointly fund the Central SC Alliance in a team approach to regional economic growth that promotes capital investment and job creation to benefit both urban and rural areas of the region that form the midlands of South Carolina. The Alliance plays a coordinating role in the growth in domestic and international investment through market research, economic impact analysis, labor analysis, project administration, site identification, product development, community profiles, domestic and international marketing missions, incentive facilitation, new and existing industry assistance, corporate relocation assistance, and event coordination. Additional funding for the Alliance is provided by donations from private sector business partners.

Job training and re-training programs help attract and retain employers by providing a pool of skilled labor. The average American worker now changes careers more frequently, making career and skill development training more critical than ever. Kershaw County residents and employers have several workforce development programs in place that play a critical role in economic development. The Workforce Development Division of the ***Santee Lynches Council of Governments*** offers workforce development assistance for employers and job seekers in Clarendon, Kershaw, Lee and Sumter Counties. Working under the direction of the ***Santee Lynches Workforce Development Board***, the Division leverages *Workforce Investment Act* funds and other resources to operate a regional workforce development system in collaboration with partners that include the S.C. Department of Employment and Workforce, Central Carolina Technical College, and the S.C. Vocational Rehabilitation Department. Through the regional S.C. Works network, centers provide multiple services under one roof to help employers find qualified workers, while job seekers and incumbent workers can access employment and training services. Services include internet access, labor market information, resume writing assistance, job search workshops and placement services, adult education and literacy programs, senior employment assistance, veteran employment and training programs, community-based agency assistance, unemployment insurance, and skills assessment.

Kershaw County was recognized as a ***Certified Work Ready Community*** *in 2016*. The *ACT* initiative measures the quality and capability of a county's workforce through national certifications, workforce testing, and job profiling. Individuals are encouraged to earn a ***National Career Readiness Certificate*** through nationally recognized *WorkKeys* tests that include applied math, locating information, and reading for information. These tests assess real world skills considered critical to job success for many employers.

Central Carolina Technical College is one of 16 regional two-year colleges in the South Carolina State Technical College System. The comprehensive community college supports residents and employers in its four-county service area with a wide variety of technical degree and certificate programs in high-demand, high-growth occupations that range from health care to advanced manufacturing. CCTC currently serves Kershaw County through two campuses, with a major expansion and consolidation of facilities underway at the CCTC Kershaw County Campus. The College also coordinates the ***readySC™*** program that provides customized technical training for new and expanding industries in the region.

Current and potential small business owners and entrepreneurs in Kershaw County can find assistance at the ***South Carolina Small Business Development Center*** *(SBDC).* A network of 21 SBDC offices has been established across the State under a cooperative agreement with the U.S. Small Business Administration. The Center provides managerial and technical assistance to business start-ups to build, sustain, and grow small businesses; promote small business development; and enhance local economies by creating businesses and jobs. The Centers also offer specialized programs for Veterans, Women, and Young Entrepreneurs, as well as Export Assistance, Manufacturing Ventures Technology Commercialization, and Government Contracting. SBDC programs are supported with federal and state funds and are available to present or prospective small business owners for little to no cost. While there is no SBDC center in Kershaw County, there are centers in neighboring Richland, Sumter, and Chesterfield Counties.

The ***South Carolina Division of Small and Minority Business Contracting and Certification*** links minority and women-owned small businesses to State contracting and procurement opportunities. As part of its mission to promote the growth and development of small and minority-owned businesses as part of the free enterprise system, program services include one-on-one consultations, seminar training, potential vendor lists, participation reports, and dispute resolution. The ***South Carolina Innovation Hub*** is an online tool that provides individual entrepreneurs and businesses within the technology sector a platform to access resources and connect with one another. Start-ups can also turn to the ***South Carolina Research Authority*** for early-stage funding. The Authority's high-tech economic development arm, the ***South Carolina Launch*** program, can bridge that gap with acceleration assistance for fledgling companies.

E. GOALS, OBJECTIVES AND STRATEGIES FOR IMPLEMENTATION

The goals, objectives and strategies for implementation (GOIS) table summarizes the actions that will be undertaken in the coming decade to achieve to achieve the goals and objectives identified in the element. Element goals are broad based ideals that are intended to guide the future of the community, while an objective is a more specific elaboration of a goal that also provides direction. Together the goals and objectives outline the framework for the element and provide the basis for the more detailed and specific plan strategies. Each implementation strategy includes a listing of the agencies that will be accountable for the implementation of the strategy, as well as a time frame for the completion of the strategy.

Goals/Objectives/Strategies	Accountable Agencies	Time Frame for Completion
Goal 4.1. Increase the County's tax base through a thriving and diversified economy.		
Objective 4.1.1. Strengthen Kershaw County as an employment center.		
Strategy 4.1.1.1. Maintain economic incentives for new and expanding industry.	Kershaw County Economic Development Office (KCEDO), SC Commerce	On-going
Strategy 4.1.1.2. Maintain communication with existing business and industry to assess and receive input on the local business climate, public services, and potential areas for improvement.	KCEDO, Industrial Association	On-going
Strategy 4.1.1.3. Increase the inventory of industrial sites and buildings in Kershaw County including Certified Industrial Sites.	KCEDO, Central SC Alliance, SC Commerce	2020
Strategy 4.1.1.4. Recruit new industry to the County with higher than average County wages and demand outlook to include advanced materials, biosciences, automotive, energy, and distribution and logistics.	KCEDO, Central SC Alliance, SC Commerce	On-going
Strategy 4.1.1.5. Build upon existing industrial and business recruitment assets, investing in personnel and support facilities.	Kershaw County, KCEDO	On-going
Strategy 4.1.1.6. Support the Kershaw County Economic Development Office as the single, coordinated entity to represent the County and pursue industrial development with broad-based public and private representation.	Kershaw County, Committee of 100, Economic Development Allies	On-going
Objective 4.1.2. Strengthen the County's physical, digital, and capital connections to the global economy.		
Strategy 4.1.2.1. Implement the industrial park improvements outlined in the *2015 Economic Development Infrastructure Plan*.	Kershaw County, KCEDO	On-going
Strategy 4.1.2.2. Work toward a fully developed I-20 industrial corridor and associated infrastructure with fully utilized industrial parks.	Kershaw County, KCEDO, Kershaw County Planning	2026
Strategy 4.1.2.3. Determine priority needs for improving intermodal connections between roads, rail, and air that could enhance economic development opportunities and improve the functionality of existing and future industrial areas.	Kershaw County, KCEDO, SCDOT, CSX, Airport Commission	2026
Strategy 4.1.2.4. Identify and prioritize industrial road and utility (water, wastewater, and electricity) infrastructure maintenance and expansion needs.	Kershaw County, KCEDO, Kershaw County Planning	2023
Strategy 4.1.2.5. Support the safe and efficient movement of freight within and through the County with continued support and promotion of the Camden truck bypass project.	Kershaw County, SLRCOG	On-going
Strategy 4.1.2.6. Ensure installation of adequate signage and wayfinding for the truck route.	Kershaw County, Kershaw County Planning, City of Camden, SCDOT	2023
Strategy 4.1.2.7. Institute access management standards and land use regulations along the truck route to minimize curb cuts that can increase congestion and decrease freight mobility.	Kershaw County Planning, City of Camden Planning, SCDOT	2023

Goals/Objectives/Strategies	Accountable Agencies	Time Frame for Completion
Objective 4.1.2. Strengthen the County's physical, digital, and capital connections to the global economy *(Continued)*.		
Strategy 4.1.2.8. Identify strategic rail corridors for preservation and enhancement as a part of the state multi-modal plan update.	SCDOT, Kershaw County	2026
Strategy 4.1.2.9. Expand airport facilities, runways, and communications technology to allow for increased air travel and commerce.	Kershaw County, Airport Commission	On-going
Strategy 4.1.2.10. Inventory and extend broadband availability and access and explore benefits of *Certified Connected Community* status.	Kershaw County, Utility Providers, Telecommunication Providers	2026
Strategy 4.1.2.11. Invest in fire protection and public safety services to meet increased demand and protect economic investments.	Kershaw County, Municipalities	2023
Objective 4.1.3. Balance support for retention, expansion and recruitment of businesses.		
Strategy 4.1.3.1. Strengthen relationships and partnerships among the County, civic organizations, municipalities, educational institutions, service agencies, and the private sector to support economic development.	Kershaw County, KCEDO Chamber of Commerce, Committee of 100, Industrial Association, Kershaw County School District (KCSD), Central Carolina Technical College (CCTC)	On-going
Strategy 4.1.3.2. Maintain a formalized business retention program dedicated to existing industry in Kershaw County.	KCEDO, Kershaw County, Municipalities	On-going
Strategy 4.1.3.3. Conduct annual visits and tours of Kershaw County industrial facilities to establish and maintain rapport and solid working relationships with existing businesses.	KCEDO, Committee of 100, Industrial Association	On-going
Strategy 4.1.4.4. Identify new industrial site opportunities within each County planning area.	KCEDO, Kershaw County Planning	2026
Strategy 4.1.4.5. Develop and coordinate positive economic and business stories and marketing for local, regional, and national media outlets.	KCEDO, Municipalities	2020
Goal 4.2. Improve productivity and economic competitiveness of the Kershaw County workforce.		
Objective 4.2.1. Increase employer satisfaction in workforce readiness and productivity.		
Strategy 4.2.1.1. Maintain the County's status as a *Work Ready* Community.	KCSD, KCEDO	On-going
Strategy 4.2.1.2. Relate workforce development programs to economic development efforts and targeted industries.	KCEDO, CCTC, KCSD, Santee Lynches Workforce Development Board (WDB)	2020
Strategy 4.2.1.3. Encourage and facilitate businesses and industries to develop strong community relationships with K-12 and higher education, civic organizations, and service providers.	KCEDO, CCTC, KCSD, Committee of 100, Industrial Association	2020
Strategy 4.2.1.4. Organize and align job training and readiness programs to fill current and projected workforce needs and occupation demand.	CCTC, KCSD, KCEDO, Santee Lynches WDB	2020
Strategy 4.2.1.5. Provide robust apprentice and internship opportunities in a wide variety of County businesses and industries.	KCEDO, Employers, KCSD, CCTC	2023
Objective 4.2.2. Raise incomes and earnings potential of the County workforce.		
Strategy 4.2.2.1. Prepare Kershaw County graduates and residents for high demand, higher wage careers and occupations, equipping them with the training and education to apply their skills in a broad and diverse economy.	KCSD, CCTC	On-going
Strategy 4.2.2.2. Increase access to local employment opportunities that can reduce overall commuting distance and costs for residents.	KCEDO, Central SC Alliance, SC Commerce	2023
Strategy 4.2.2.3. Expand the Central Carolina Technical College campus in Kershaw County in conjunction with creation of a new Applied Technology Education Campus.	CCTC, KCSD, Kershaw County	2019

Goals/Objectives/Strategies	Accountable Agencies	Time Frame for Completion
Objective 4.2.2. Raise incomes and earnings potential of the County workforce *(Continued)*.		
Strategy 4.2.2.4. Establish defined career pathways for job sectors with existing and projected opportunities in sectors including advanced manufacturing, healthcare, public safety, entrepreneurship, retail business, and hospitality.	KCSD, CCTC	2023
Strategy 4.2.2.5. Leverage corporate giving by employers for academic, career and cultural enrichment programs that raise college and work readiness of County students.	Corporate & Community Foundations, CCTC, KCSD	2026
Goal 4.3. Build a robust agriculture and agribusiness sector.		
Objective 4.3.1. Protect and preserve prime agricultural and forest lands.		
Strategy 4.3.1.1. Encourage agricultural uses of fertile and prime farmland through protection of agricultural zoning districts.	Kershaw County Planning Commission	On-going
Strategy 4.3.1.2. Provide incentives, technical assistance, and streamlined permitting to support sustainable farm and forestry practices.	Kershaw County, Property Owners, Clemson Extension Service, USDA/SC Dept of Agriculture	On-going
Strategy 4.3.1.3. Support programs to educate landowners and provide innovations and markets in agricultural production and agribusiness that support diversification of crops and extension of growing seasons.	Kershaw County, USDA/SC Dept of Agriculture, CU Extension	On-going
Strategy 4.3.1.4. Minimize conflicts between new residential development and longstanding farming interests.	Kershaw County Planning Commission	On-going
Objective 4.3.2. Retain the County's position as a leading agricultural producer.		
Strategy 4.3.2.1. Explore the formation of an AgriBusiness Alliance.	Kershaw County, Municipalities, Chamber of Commerce	2026
Strategy 4.3.2.2. Promote the participation and expansion of local farmers markets, restaurants, Community Assisted Agriculture, agritourism, farm-to-school, and other related agri-businesses events and markets that benefit local small farms and producers.	Kershaw County, Municipalities, Local Farms Association, USDA, CU Extension, SC Dept. of Agriculture	2026
Strategy 4.3.2.3. Support local food-producing farms through the development of food processing and distribution centers.	KCEDO, USDA, CU Extension, SC Dept. of Agriculture	2026
Strategy 4.3.2.4. Encourage continued participation of local farms in annual AgriTourism Events, Certified Farmers Markets, and other marketing programs.	Municipalities, CU Extension, SC Dept. of Agriculture, Local Farms Association	On-going
Strategy 4.3.2.5. Maintain County youth access to future agricultural career recruitment and training programs such as 4-H, SC High School Rodeo, and FFA.	KCSD, CU Extension, SC Equine Park	On-going
Strategy 4.3.2.6. Build upon the investment in the Kershaw County Farmers Market to ensure a quality setting and venue.	Kershaw County, Local Farms, Kershaw County Farmers Market	On-going
Goal 4.4. Increase business and commercial activity in targeted areas.		
Objective 4.4.1. Strengthen downtown commercial districts.		
Strategy 4.4.1.1. Promote the development of downtown retail and commercial niche markets for the City of Camden and the Towns of Bethune and Elgin.	Municipalities, Kershaw County, Chamber of Commerce, Camden Economic Development	On-going
Strategy 4.4.1.2. Promote policies that preserve and promote the unique nature of downtowns, key buildings, streets and public spaces.	Municipalities, Kershaw County Planning, Mainstreet Camden, City of Camden Historic Landmarks Commission, Chamber of Commerce	On-going

Goals/Objectives/Strategies	Accountable Agencies	Time Frame for Completion
Objective 4.4.1. Strengthen downtown commercial districts *(Continued)*.		
Strategy 4.4.1.3. Identify and inventory commercial and industrial infill and greyfield sites throughout the County and prioritize for reuse and redevelopment.	Kershaw County Planning, KCEDO, Camden Economic Development, Municipalities, Camden Planning	2026
Strategy 4.4.1.4. Explore local incentives for location in existing properties and the use of infill properties such as tax or fee reductions or zoning incentives.	Camden Economic Development, Municipalities, Camden Planning, Mainstreet Camden	2023
Strategy 4.4.1.5. Limit access along new truck bypass route to minimize adverse impact on commercial revitalization efforts for downtown Camden.	Kershaw County Planning, Camden Economic Development, Camden Planning, SCDOT	2020
Objective 4.4.2. Foster a climate of entrepreneurial activity and small business success.		
Strategy 4.4.2.1. Support small business start-up and expansion and assist in clearing key steps in the development and start-up process to include permitting and inspections, licensing, and eligibility for State and local incentives.	Camden Economic Development, Small Business Development, Center (SBDC), Camden Planning, Mainstreet Camden	2023
Strategy 4.4.2.2. Establish and maintain local business incubation capabilities.	KCEDO, Camden Economic Development, Mainstreet Camden	2023
Strategy 4.4.2.3. Support economic development that leverages the assets and strengths of rural areas.	KCEDO, SC Dept. of Commerce	2023
Goal 4.5. Promote and enhance the County's cultural, historic and natural resources as economic assets.		
Objective 4.5.1. Leverage the growth of tourism as an economic sector.		
Strategy 4.5.1.1. Continue to build upon heritage tourism assets that include historic sites and towns of regional and national significance, State parks and forests, cultural attractions, family festivals and other venues, and diverse retail offerings.	City & County Tourism Agencies, Development Partnership, Camden Business Alliance	On-going
Strategy 4.5.1.2. Develop countywide promotion strategies for recreation, leisure, heritage, sports, and equine tourism opportunities.	City & County Tourism Agencies, Development Partnership	2023
Strategy 4.5.1.3. Expand youth sports tournaments and local festivals.	Municipalities, Kershaw County Recreation Department, City & County Sports Alliance	2023
Strategy 4.5.1.4. Develop specific marketing strategies for Lake Wateree, the Wateree River, Historic Camden, and Goodale State Park.	City & County Tourism Agencies	2023
Strategy 4.5.1.5. Incentivize development of a riverfront recreation, entertainment, and commercial district on the Wateree River between Lugoff and the City of Camden.	Kershaw County, Kershaw County Planning	2026
Strategy 4.5.1.6. Create incentives to attract additional lodging and conference center facilities.	City of Camden, Municipalities, Camden Planning and Economic Development Depts.	2023
Objective 4.5.2. Leverage the County's equestrian history and equine industry as an economic development engine.		
Strategy 4.5.2.1. Form a City of Camden and Kershaw County Equine Alliance.	Kershaw County, Municipalities, Carolina Cup Racing Assn., SC Equine Park Promotion Foundation	2026
Strategy 4.5.2.1. Recruit support services (including tack and supplies, Veterinary Care, barns, and training facilities) and promote SC Equine Park (SCEP), rodeos, and related events.	SC Equine Park Promotion Foundation, Carolina Cup Racing Association	On-going
Strategy 4.5.2.2. Promote the full range of equine activities: breeding, training, racing, jumping, hunting, rodeo, dressage, and show.	County Tourism Development, SC Equine Park Promotion, Foundation, Carolina Cup Racing Asson	On-going

Goals/Objectives/Strategies	Accountable Agencies	Time Frame for Completion
Objective 4.5.2. Leverage the County's equestrian history and equine industry as an economic development engine *(Continued)*.		
Strategy 4.5.2.3. Link the community arts and equine industry through forums such as the EQUUS Film Festival.	County Tourism Development, Fine Arts Center of KC	On-going
Strategy 4.5.2.4. Measure and promote economic impact of horse industry in Kershaw County.	Kershaw County, Municipalities, Carolina Cup Racing Association	On-going
Strategy 4.5.2.5. Maintain the strength and growth potential of the County's equine industry by identifying compatible land use opportunities that consider potential noise factors such as the airport.	Kershaw County Planning	2020