

# CENTRAL MIDLANDS

Comprehensive Economic Development Strategy



# 2022-2027



Newberry • Fairfield • Richland • Lexington

# Acknowledgements

Central Midlands Council of Governments (CMCOG) would like to thank the many individuals and organizations that contributed to the development of this report. This project would not have been possible without the participation, feedback, and support from the following agencies, organizations, and community partners:

- US Economic Development Administration
- CMCOG Board of Directors and CEDS Committee
- Midlands Workforce Development Board
- Fairfield County Economic Development
- Newberry County Economic Development
- Richland County Economic Development
- Lexington County Economic Development
- City of Columbia Economic Development
- SC Office of Minority Affairs
- Brookland Lakeview Empowerment Center
- Benedict College
- Midlands Technical College
- Midlands Business Leadership Group
- Central SC Alliance
- I-77 Alliance
- Midlands Utility Round Table
- Alianza Latina of the Midlands
- Congaree Biosphere Region Advisory Council
- Irmo Chapin Recreation Commission
- Fairfield Forward
- City of Columbia Food Policy Committee
- West Columbia - Cayce Food Policy Coalition
- SC Food Policy Council/Grow Local SC
- Midlands Local Food Collaborative

## About Central Midlands Council of Governments (CMCOG)

Created in 1969, CMCOG is a regional planning organization, which provides a forum in which local officials can work to resolve issues that transcend their own political boundaries. CMCOG currently consists of 16 member governments and serves in excess of 760,000 people in the counties of Fairfield, Newberry, Richland and Lexington.

CMCOG works to develop area-wide plans and programs for addressing a wide range of issues that collectively affect local governments such as: regional urban & rural transportation planning; environmental and land use planning; community and economic development; workforce development; and aging services. CMCOG Staff also provides a wide variety of research, planning and technical assistance to local governments, writes and administers a variety of grants, and serves as the Metropolitan Planning Organization, Area Agency on Aging/Aging & Disability Resource Center, Long Term Care Ombudsman, Workforce Development Organization, and EDA designated Economic Development District (EDD) for the Central Midlands region. As the EDA designated EDD, CMCOG is responsible for developing, updating, and adopting a regional Comprehensive Economic Development Strategy (CEDS).

**Adopted by the CMCOG Board on December 8, 2022**

# Contents

- 1 Introduction, 4
- 2 Regional Summary, 8
- 3 SWOT Summary, 22
- 4 Action Plan, 24
- 5 Appendix



# Introduction

**T**

he United States Economic Development Administration (EDA), which is part of the US Department of Commerce, is charged with leading the federal economic development

agenda for the country by promoting innovation and regional collaboration as a means for increasing global competitiveness and building diversified and resilient regional economies. EDA accomplishes this goal by making strategic regional investments that foster job creation, leverage public and private resources, foster innovation, increase competitiveness, promote environmental sustainability, and strengthen underserved communities. To ensure development of a diversified grant portfolio that helps communities to grow, prosper, and become more resilient, EDA has defined the following investment priorities:

- Equity
- Recovery & Resilience
- Workforce Development
- Manufacturing
- Technology-Based Economic Development
- Environmentally-Sustainable Development
- Exports and Foreign Direct Investment

EDA grant applications should demonstrate alignment with one or more of these investment priorities in order to be considered for funding under the competitive grant process.

## What is a CEDS?

EDA promotes regional collaboration by designating local economic development districts (EDD) which are then required to create and maintain a comprehensive economic development strategy (CEDS). The CEDS is designed to be an inclusive, strategy driven planning process that defines a regional vision for economic growth and resilience and identifies local priorities for future investment. The CEDS is an ongoing planning process that must be revisited annually and updated every five years.

The last CEDS plan for the Central Midlands EDD, which includes Fairfield, Newberry, Richland, and Lexington counties, was adopted in 2017. The document presented here represents the 2022-2027 five year update. Per EDA guidelines the 2022-2027 CEDS includes the following elements:

- Summary background of the regional economy, including socio-economic trends, an inventory of natural and cultural resource assets, and an assessment of economic conditions
- Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis
- Regional goals and objectives
- Performance measurement framework

These elements were developed through a collaborative planning process that included coordination with representatives from local governments, community organizations, private sector partners, and other ongoing local and regional planning processes.

## CEDS Strategy Committee

The CEDS Strategy Committee, which helps to guide the ongoing CEDS planning process, includes representatives from a broad range of public and private sector partners intended to represent the main economic interests of the region. Per EDA guidelines, the committee included involvement from the private sector, the economic development community, higher education, workforce development, and community groups. Ongoing outreach efforts and engagement also ensure geographic representation across the four county EDD.

## Coordination and Synthesis with Other Plans

A primary goal of the CEDS planning process is to take into account, integrate, and leverage other planning processes. Such coordination efforts help to reduce the duplication of efforts, foster inter-agency/organizational collaboration, and recognize the economic development work already being done at the regional and local level. The 2022-2027 Central Midlands CEDS was developed by ensuring consistency with existing local and regional economic development plans, and directly engaging with ongoing planning processes. Some key regional and local planning projects that were directly integrated with the CEDS are summarized on the following page.

## EDA Programs/Funding Opportunities

EDA strives to meet their investment priorities by making funding available to local and regional partners through the following programs:

- Public Works and Economic Adjustment
- Trade Adjustment Assistance for Firms
- University Center Economic Development
- Regional Innovation Strategies
- Planning, Research, and Technical Assistance
- Economic Development Integration

In addition to these regular funding programs, EDA also allocates funding for disaster recovery and resilience. In response to the Coronavirus Pandemic, EDA made CARES Act and ARRA funding available to communities through a wide range of new and innovative competitive grant programs designed to assist with economic response and recovery. In order to be eligible for EDA funding, projects should demonstrate consistency with the goals and objectives of the CEDS. For more information visit the EDA website at [www.eda.gov](http://www.eda.gov).

## MBLG Regional Competitiveness Initiative



The Midlands Business Leadership Group (MBLG), is an organization composed of over fifty (50) corporate leaders who convene regularly to work on issues critical to the Midlands region. Each year MBLG produces the Midlands Regional Competitiveness Report, which evaluates the competitiveness of the Columbia Metropolitan Statistical Area (MSA) in relationship to nine other metropolitan areas across the Southeastern United States. The report, developed in partnership with research economists at the University of South Carolina, measures economic competitiveness based the following five evaluation metrics:

- Talent
- Innovative Capacity
- Entrepreneurial & Business Environment
- Industry Clusters
- Livability

The report compares the Columbia MSA to the peer MSAs of Raleigh, NC; Greenville-Anderson-Mauldin, SC; Knoxville, TN; Charleston, SC; Greensboro-High Point, NC; Winston-Salem, NC; Augusta-Richmond County, GA-SC; Lexington-Fayette, KY; and Tallahassee, FL. According to the 2021-22, the Columbia MSA continues to rank high for entrepreneurial and business environment, but lags behind peer communities on talent, innovative capacity, industry clusters, and livability. In early 2022, MBLG created a new Midlands Regional Competitiveness Council to identify and implement strategies for improving on each of these competitiveness metrics. Major focus areas for MBLG include improving river access from the Lake Murray Dam to the 12,000 Year History Park in Cayce; and developing a coordinated system of landscaped gateways to the Columbia area.

## The Congaree Biosphere Region



Congaree National Park, located in Lower Richland County, is the only national park within South Carolina. It includes the largest tract of old-growth bottomland hardwood forest in the United States. The beauty and value of Congaree National Park and the surrounding landscape and communities are recognized by the international Man and the Biosphere Program (MAB). Originally recognized in 1983, the Congaree Biosphere Region (CBR) is one of 28 sites in the U.S. Biosphere Network and 738 sites in the World Network of Biosphere Reserves. Long, rich, and complex cultural legacies in the CBR encompass native American traditions, African American history and culture, and colonial and Revolutionary war history, as well as outdoor recreation opportunities, agriculture, forestry, and more.

In May 2021, Central Midlands Council of Governments, South East Rural Community Outreach, and Congaree National Park established the CBR Advisory Council with the mission to “foster a future that celebrates, values, and sustains the rich natural and cultural legacies of the SC Midlands in concert with opportunities to promote healthy, vibrant, and prosperous communities.” The CBR Advisory Council is a non-regulatory, voluntary landscape collaborative, working to promote sustainable and inclusive community and economic development opportunities that celebrate the natural and cultural heritage of the local landscape.

CMCOG, the Department of Defense, Office of Local Defense Community Cooperation (OLDCC), and area military installations, conducted a series of planning and feasibility studies to identify opportunities to guide land use development around the installations by directly connecting compatible conservation and “working” land uses with military readiness priorities. These studies have been coordinated with a larger effort by the Midlands Area Joint Installation Consortium (MAJIC) to pursue a Federal Sentinel Landscape designation for the areas between Fort Jackson, McEntire JANGB, Shaw AFB, and the Congaree National Park. The U.S. Departments of Agriculture, Defense, and Interior established the Sentinel Landscapes Partnership to better serve areas of the United States where working and natural lands converge with national defense facilities.

CMCOG and the Irmo Chapin Recreation Commission (ICRC), completed a planning and feasibility study for the construction of a 10.5 mile multi-use pathway along the north side of the Lower Saluda River from the Lake Murray dam, through Saluda Shoals Park, to the Saluda Riverwalk. Since the completion of this study in May 2021, ICRC has secured funding to design and construct all three phases of this project with financial commitments from EDA, the State of South Carolina, Lexington County, and CMCOG/COATS. Once complete, this regionally significant project will provide bike and pedestrian connectivity from the Lexington and Irmo areas to downtown Columbia, West Columbia, and Cayce. This expansive riverfront greenway network will serve as an anchor for the regional outdoor recreation and tourism economy, and will complement other regionally significant outdoor recreation and tourism projects such as the Palmetto Trail, the Congaree Biosphere, and the 12,000 Year History Park. In addition, CMCOG continues to support regional and local bike and pedestrian planning throughout the region.

Other key planning resources that were directly consulted as a part of the planning process include:

- County Economic Development Plans
- Local Government Comprehensive and Strategic Plans
- I-77 Alliance Strategic Economic Plan
- Central SC Alliance Guides, Profiles, and Studies
- SC Council on Competitiveness Cluster and Initiative Profiles
- Regional / State Workforce and Innovation Opportunity Act (WIOA) Plans
- CMCOG 2021 Regional Hazard Mitigation Plan
- COATS 2050 Long Range Transportation Plan
- Lower Richland Tourism Study
- Self-Sufficiency Standard for South Carolina 2020
- Local Food Policy Councils/Grow Local SC

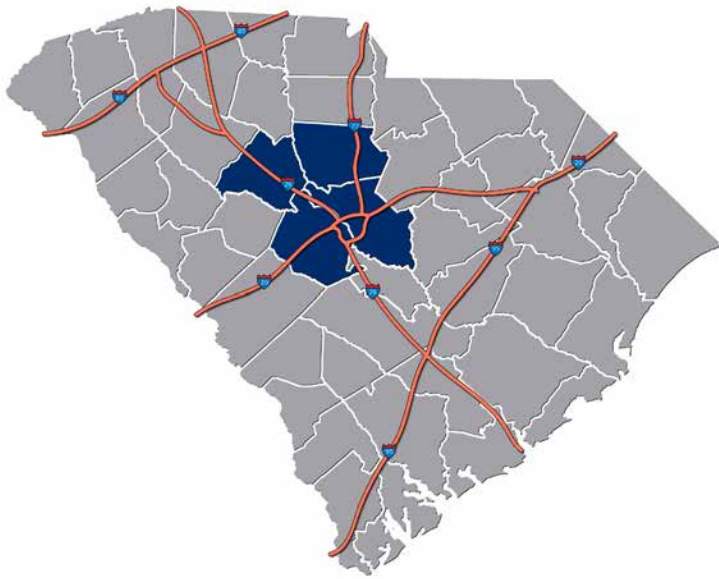
## Fort Jackson McEntire Joint Land Use/Sentinel Landscape Initiative

## Regional Bike, Pedestrian, Trail, and Greenway Planning

## Other Regional and Local Plans



# Regional Summary



Focus On:

## COMMUNITY

**L**ocated near the geographic center of the state, the Central Midlands Economic Development District (EDD) consists of Fairfield, Newberry, Richland, and Lexington Counties. The region is approximately equidistant between the Blue Ridge Mountains and the Atlantic Ocean, and is bisected by two major river systems, the Broad and Saluda, which converge in downtown Columbia. The four county region has a diverse and resilient economy, a rich natural and cultural heritage, and a growing population that is projected to exceed 800,000 by the year 2035. The following regional summary highlights key trends related to growth and development, natural and cultural resources, infrastructure assets, and the regional economy and workforce.

### Growth and Development

Like many parts of the Southeastern United States, the Columbia Metropolitan area continues to be a hotspot for growth and development. Since the 1970s urban and suburban growth has spread outward from the city center transforming small rural towns into booming bedroom communities. Northeast Richland County, the Irmo-Chapin area, and the Town of Lexington consistently absorb the largest share of regional population growth. In recent years, however, downtown Columbia has experienced a residential and commercial resurgence, highlighted by the Bullstreet development, Main Street revitalization, and a boom in new student housing. Other historic business districts around the region, such as Newberry and Lexington, are also experiencing a renaissance, and are transforming themselves into vibrant, mixed use, regional activity centers. Despite the rapid pace of growth in Richland and Lexington Counties, it is important to recognize that much of the Central Midlands region remains rural in nature and has not experienced the same level of residential and commercial development over the last several decades.

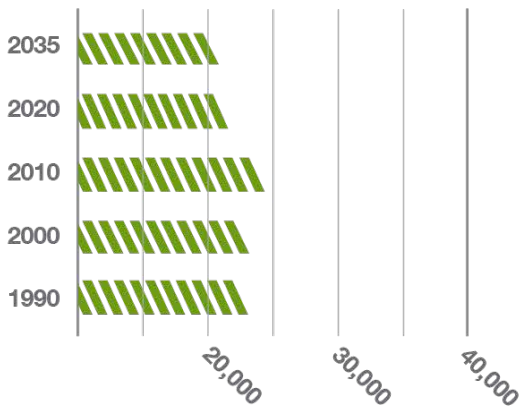
Population 18  
and Under  
**22%**

Population 65  
and Older  
**14%**

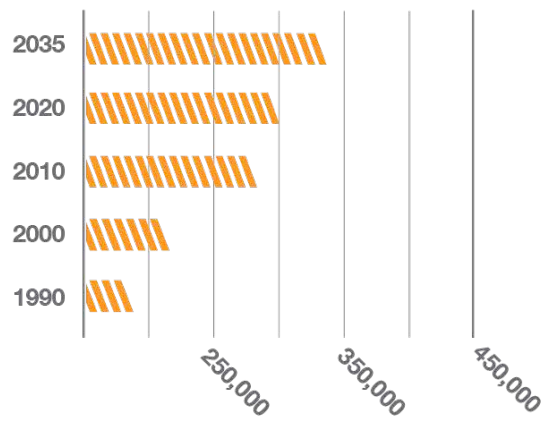
Median Age  
**36.6**

Source: U.S. Census Bureau, 2016 - 2020 American Community Survey

**FAIRFIELD COUNTY**



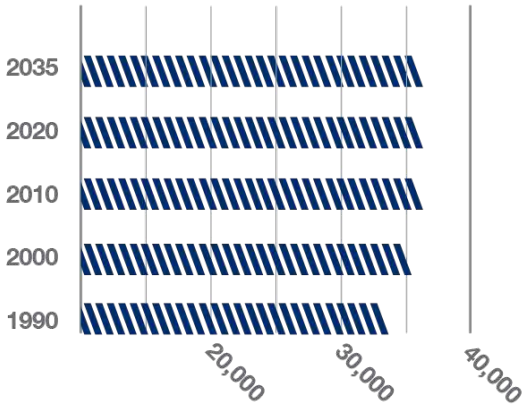
**LEXINGTON COUNTY**



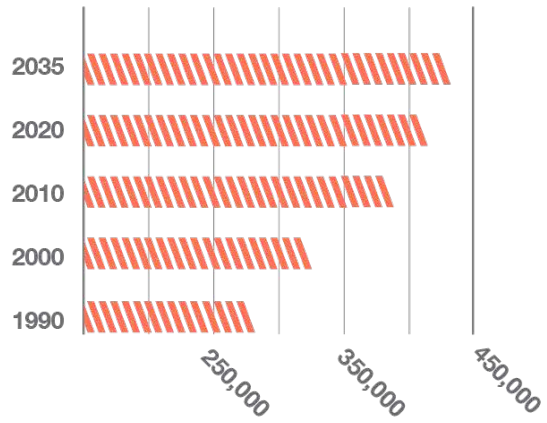
2020  
**768,805**  
Census

2035  
**812,267**  
Projection

**NEWBERRY COUNTY**



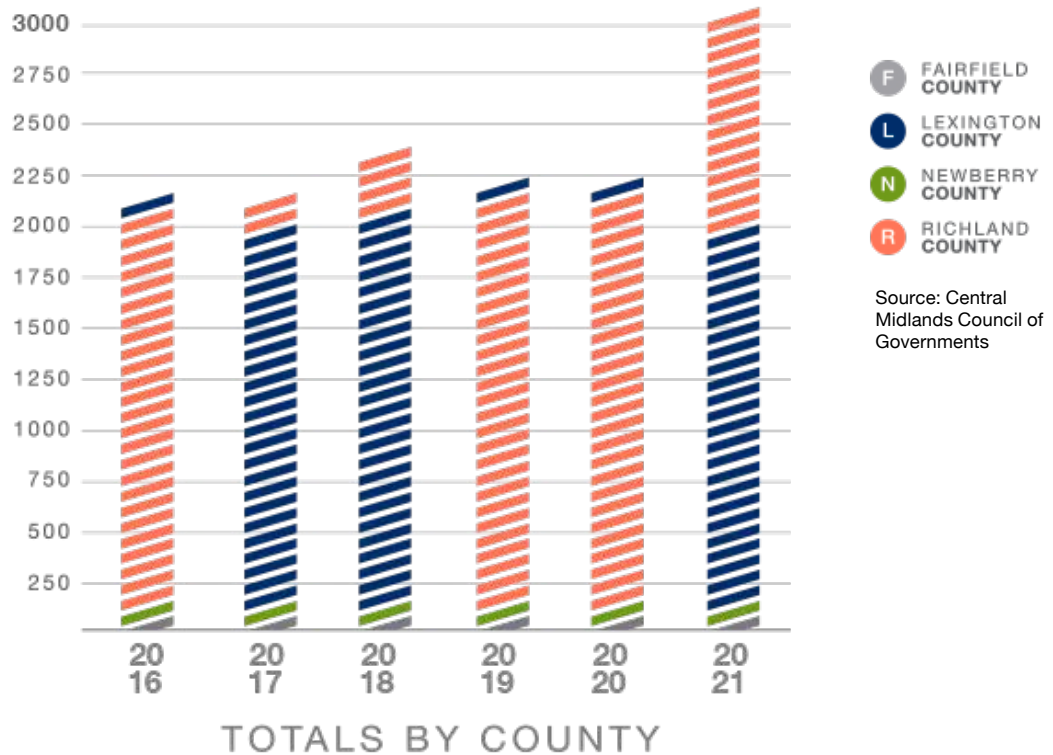
**RICHLAND COUNTY**



Source: 2020 Census; SC RFA 2035 Population Projection



# RESIDENTIAL BUILDING PERMIT TRENDS



The entire region, however, will likely be impacted in some capacity by the level of growth that is expected to take place over the next thirty years. By the year 2035, the entire region is expected to have a population of 812,267 people, which is a 15% (51,925) increase from the 2010 decennial census population.

As would be expected, the age demographics for the region are reflective of the urban and rural divide, with the urban counties having a much larger population of younger and middle age residents, while the rural areas have a much larger aging population. The region as a whole is expected to see substantial growth in this age cohort over the next thirty years as retirees continue to migrate into the Southeastern United States. Needed investments in services and infrastructure to accommodate this aging population will continue to play an important role in regional planning and economic development initiatives.

As the regional population grows, it is also becoming more diverse. Since the 2010 Census each County in the region has seen an increase in racial and ethnic diversity with 5.8% of residents identifying as a race

other than white or African American. Based on the 2020 American Community Survey 5-Year estimates, Hispanics or Latino's (of any race) comprise 5.6% of the region's population, and approximately 59,000 or 8.13% of residents 5 years and older speak a language other than English, 4.4% of which primarily speak Spanish.

## Housing

The demand for new housing continues to rise across the Central Midlands region, particularly in the high growth areas of Richland and Lexington counties. In 2021, over 5,000 residential building permits were issued at an estimated value of \$1.2 billion. Steady growth in building permits since 2011 indicates long term sustained recovery from the 2008 recession. The COVID-19 pandemic did not cause a slow down in building permit activity as the region saw some of the highest numbers and values of permits issued in recent years. On average, about 71.3% of households own their home versus renting. This number has seen a slight decline over the last several decades.

Richland and Lexington Counties  
Average Monthly Rent

**\$960**

12%  
Increase  
Over 5  
Years

Fairfield and Newberry Counties  
Average Monthly Rent

**\$747**

**50%**  
Cost Burdened  
Renters

**23%**  
Cost Burdened  
Owners

**54%**  
Cost Burdened  
Renters

**26%**  
Cost Burdened  
Owners

Median home values and rents have been on the rise, but continue to be slightly below the state average, and in some cases are significantly lower than other comparable market areas across the country. The median household income has also remained steady showing very little growth when adjusted for inflation. These numbers, averaged for the region, are comparable to SC as a whole, but significantly less than the US. Affordable housing is an ongoing challenge across the region with 52% of renters and 25% of homeowners being cost burdened, which is defined by HUD as occupants that spend more than 30% of their income for housing costs.

**Income and Poverty**

Since 2000, the region has seen a steady increase in families below the federal poverty level with the highest percentage in Fairfield County and the lowest percentage in Lexington County. The current regional poverty rate is 14.8%. On average, 9.5% of the total population is considered to be food insecure with the highest insecurity rates found in Fairfield and Richland counties. Approximately 5.68% of households do not have access to a vehicle and 33.7% have access to only one vehicle, with some of the highest rates occurring in rural areas with limited access to public transportation. According to the United Way of the Midlands Self – Sufficiency Standards for South Carolina, in order to make ends meet (e.g., pay for housing, child care, food, healthcare, transportation, etc.), a family of 2 adults with 2 school age children would need to make approximately \$50,989 a year, which is higher than the median household income of \$48,143. This data underscores the importance of regional planning and inclusive economic development initiatives that increase equitable access to food, transportation, affordable housing, and living wage employment opportunities.

MEDIAN HOME  
VALUE





Photo credit: Experience Columbia SC

## Natural and Cultural Resources

The preservation and long term sustainability of regional natural and cultural resources provides a significant asset for economic development and should be a top priority. In addition to supporting area businesses, a clean and attractive natural environment with an abundance of art, culture, and recreational resources is essential for attracting and retaining a skilled workforce, promoting tourism, and ensuring that the region maintains a reputation as one of the best places to live and do business.

Water is a uniquely abundant resource for the Central Midlands region and supports a wide range of commercial, recreational, and industrial activity. The three rivers which converge in downtown Columbia are now being recognized as an important asset. A renewed focus on a clean, accessible river system promises to serve as a major selling point for the region for years to come. Much work still needs to be done, however, as 25% of the water quality monitoring stations in the region are impaired and do not support their designated use. Water quality issues not only impact aquatic life, but also have implications for regional water and sewer providers, as well as for recreational users.

The region's land base is both biologically diverse and economically viable. It supports South Carolina's only national park and a strong agricultural sector that thrives through a rich heritage and renewed emphasis on local foodways. Protecting critical habitat, preserving working land uses such as farming and forestry, and promoting outdoor recreation and tourism, are important and essential objectives with great economic development potential. According to Experience Columbia, tourism has a significant economic impact on the region, generating \$2.4 billion annually, generating \$120 million in state and local taxes, and creating 21,000 jobs. As outdoor recreation and heritage tourism sectors of the economy grow, they should continue to be supported by public and private entities alike in order to sustain this growth and create new economic opportunities, especially in rural areas. Projects like the Lower Saluda Greenway, which was awarded an EDA grant in 2022, have a significant impact on the local and regional economy, and serve as a long term catalyst for sustainable growth and development.

Source:  
U.S. Census Bureau,  
2016 - 2020 American  
Community Survey



## Median Household Income

HOURLY  
**\$18.84**  
Self Sufficiency  
Standard for One Adult  
with a Preschooler  
**\$38,548**  
ANNUAL

Source:  
United Way  
Association of SC,  
The Self-Sufficiency  
Standard for South  
Carolina 2020

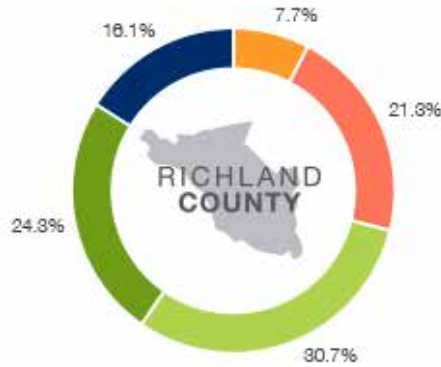
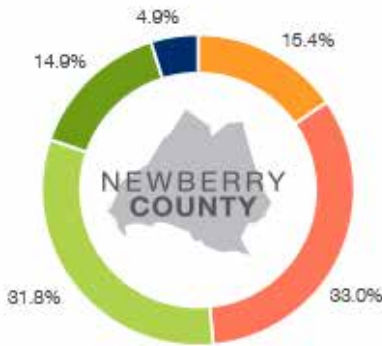
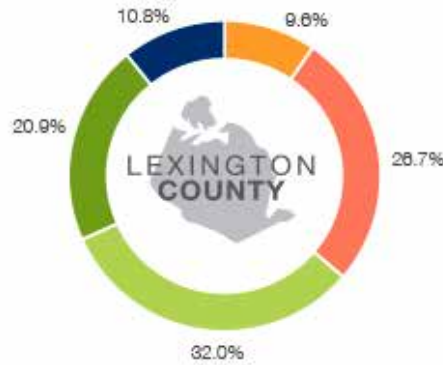
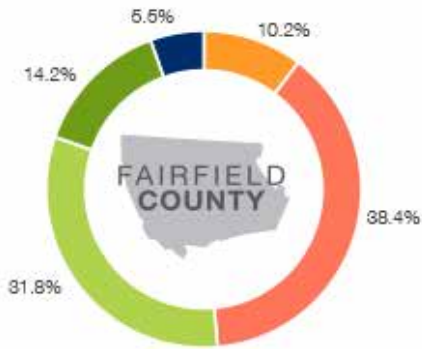
Focus On:

# WORKFORCE AND EDUCATION

## Regional Summary

Since 2010, the region has added an estimated 34,000 people (civilian population 16 and over) to the labor force with a 64% participation rate. This increase in the labor force has largely been a result of population growth in Richland and Lexington Counties as the population in the labor force has slightly decreased in Newberry and Fairfield Counties. During this same time frame, the seasonally adjusted unemployment rate has dropped by 7% from an all-time high of 9.8% in 2009 to 2.8% in 2022. The regional unemployment rate peaked at 8.2% during the height of the pandemic but made a strong recovery over the last two years. Despite the record low regional unemployment rates, Fairfield County's 2021 annual unemployment rate of 5.8% is still well above the regional, state, and national average.

Because of the existing educational infrastructure in all four counties, the region is relatively strong in terms of educational attainment. Approximately 24.5% of the population 25 to 64 years old only have a high school diploma, while 22.2% have a bachelor's degree, and 13% have a postgraduate degree. The region is well endowed with a number of quality institutions of higher education serving a student body of 52,734. Each of these institutions have an essential role to play in workforce development and training, as well as community and economic development initiatives. These anchor institutions can leverage their influence, purchasing power, research capabilities, and community reach to affect positive change and create inclusive economic development opportunities. Benedict College, one of the region's two Historically Black College and Universities (HBCUs), is developing innovative and transformative programs, including an EDA funded project, to support, grow, and remove barriers for small, minority, and women owned businesses (SWMBEs), marginalized workers, and at-risk student populations.



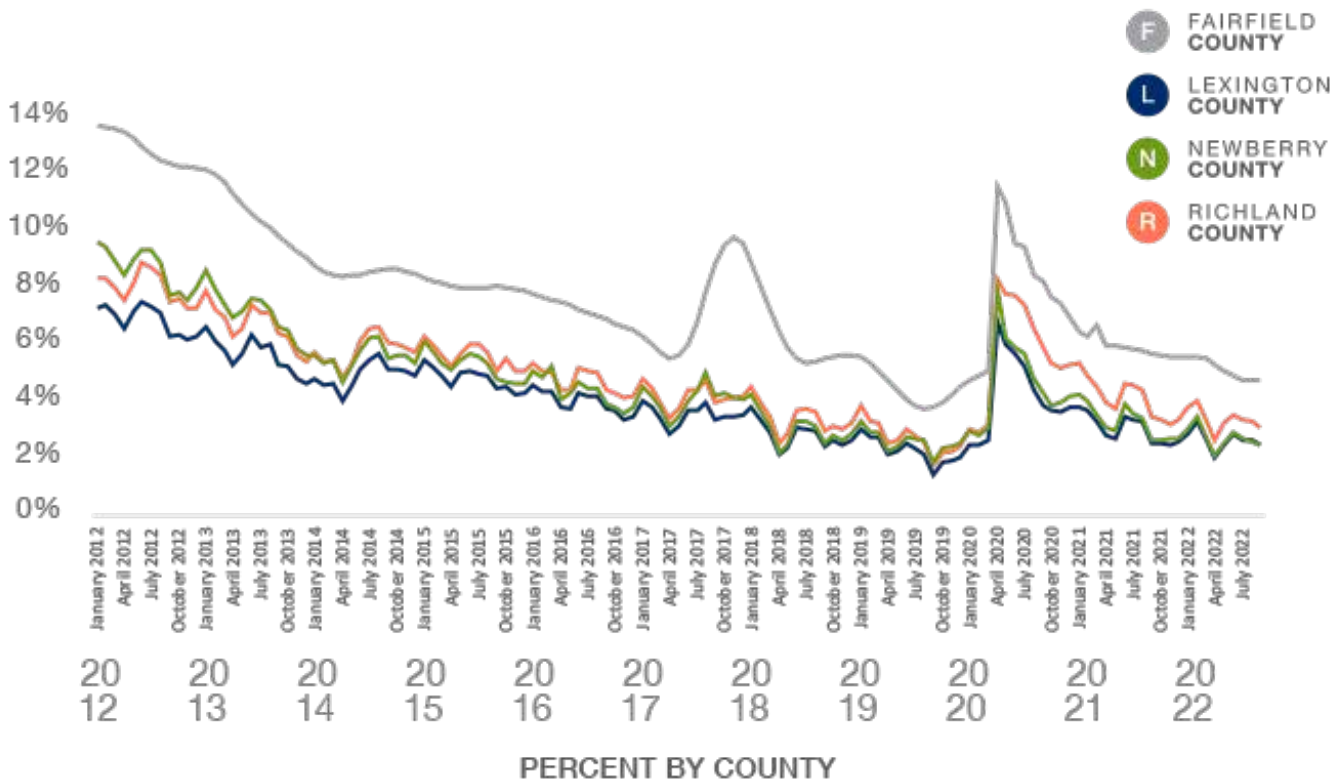
# HIGHEST EDUCATIONAL ATTAINMENT

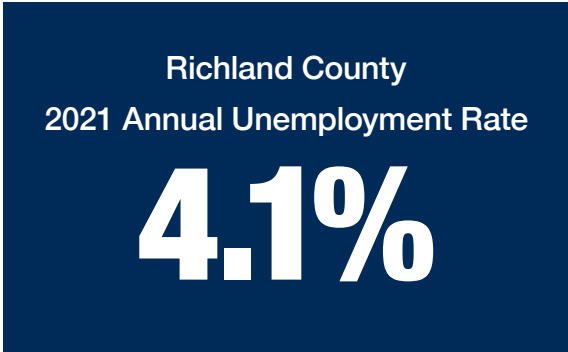
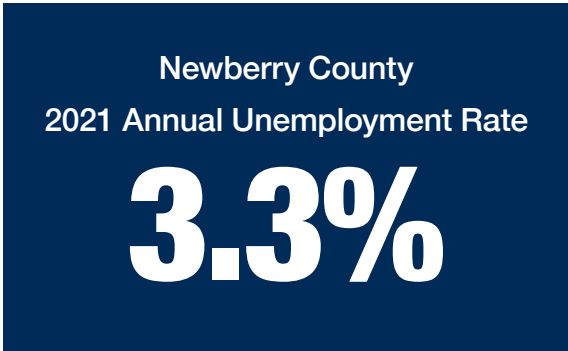
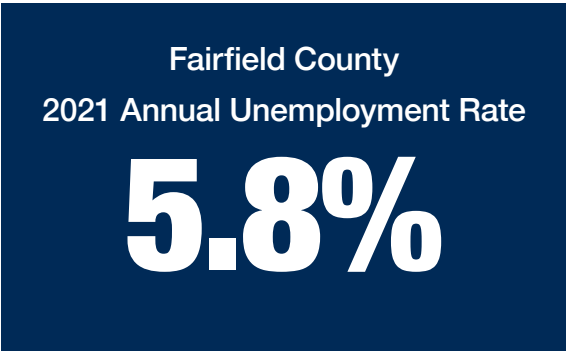
- <HIGH SCHOOL DIPLOMA
- HIGH SCHOOL DIPLOMA
- SOME COLLEGE OR ASSOCIATE'S DEGREE
- BACHELOR'S DEGREE
- GRADUATE OR PROFESSIONAL DEGREE

Sources:  
U.S. Census Bureau,  
2016 - 2020 American  
Community Survey

South Carolina  
Department of  
Employment and  
Workforce

## UNEMPLOYMENT TRENDS





Source: South Carolina Department of Employment and Workforce

<b>ALLEN UNIVERSITY</b>	▶	621
<b>BENEDICT COLLEGE</b>	▶	1,908
<b>COLUMBIA COLLEGE</b>	▶	1,389
<b>COLUMBIA INTERNATIONAL UNIVERSITY</b>	▶	2,338
<b>FORTIS COLLEGE</b>	▶	438
<b>MIDLANDS TECHNICAL COLLEGE</b>	▶	8,702
<b>NEWBERRY COLLEGE</b>	▶	1,242
<b>SOUTH UNIVERSITY</b>	▶	625
<b>UNIVERSITY OF SOUTH CAROLINA</b>	▶	35,471

INSTITUTIONS OF  
HIGHER EDUCATION  
2021  
ENROLLMENT

Source: National Center for Education Statistics

# Regional Summary

Focus On:

## INFRASTRUCTURE

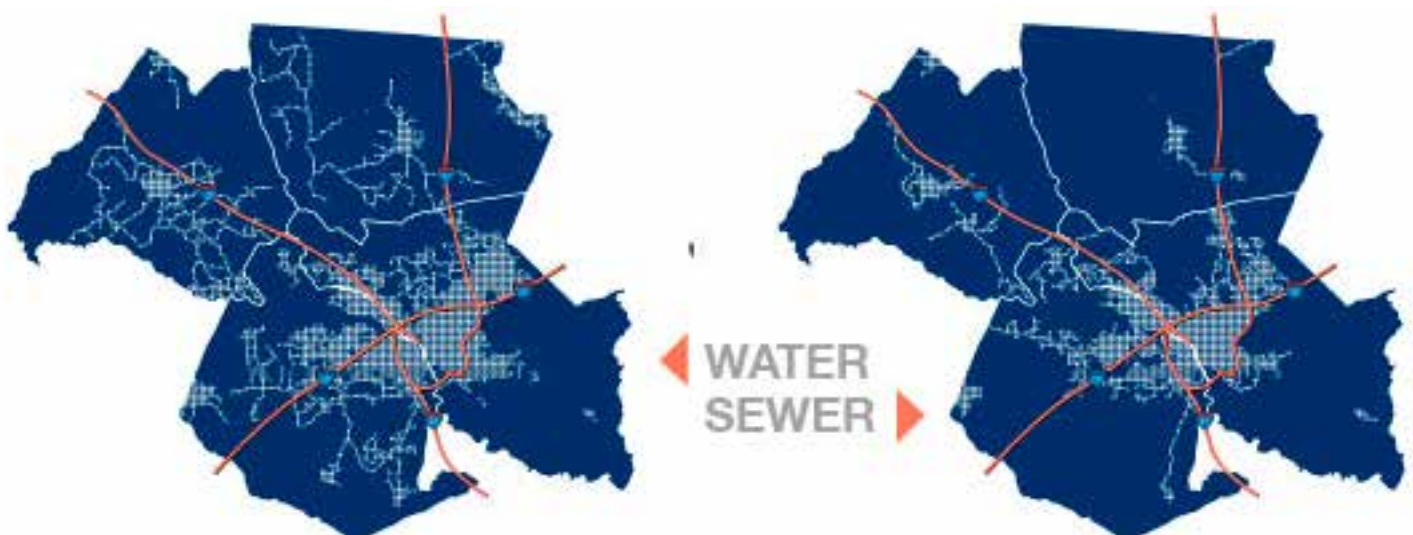
Investment in our regional infrastructure is a critical component of economic development that enhances the daily functioning of our community and provides the necessary ingredients for growth and prosperity. Because of the abundance of water resources, the region has been successful in developing an expansive water distribution and sewer collection system serving the urbanized area. The lack of centralized water and sewer in rural areas, however, continues to be a limiting factor for residential growth and industrial development. Fairfield County is working to expand water and sewer capacity with planned expansions of the Winnsboro water plant and the development of a new wastewater treatment plant to provide sewer service to the new industrial park megasite being developed on the I-77 corridor.

Broadband access, an important economic driver, also follows the urban-rural divide as it is abundant in the urban and suburban areas but limited in the two rural counties. Broadband infrastructure is currently being expanded across the state through a program being implemented by the SC Broadband Office. This project will have a significant impact on Fairfield and Newberry counties where service has been historically limited.

The region is served by a well-connected multi-modal transportation system consisting of highway, rail, bus

transit, and air infrastructure. Because of its location in the center of the state, the transportation network effectively connects the Columbia area to the port of Charleston and a number of other major metropolitan markets within the Southeastern United States. Despite the regional connectivity, peak hour congestion in the Columbia area is a major challenge with some of the hot spots consisting of the I-26/I-20 interchange and many of the region's primary thoroughfares connecting suburban areas with the interstate and downtown Columbia (e.g., US 378 and US 1). The Comet, which is the region's primary public transit system, provides fixed route bus service in the Columbia area with limited rural service connections to Newberry, Fairfield, and Sumter counties.

The region is poised to make significant investments in the regional transportation system in the coming years. The Richland County 1% penny sales tax, passed in 2012, is providing a steady stream of funding for road improvements, transit service, and bike, pedestrian, and greenway facilities. SCDOT also started construction on the \$2 billion Carolina Crossroads project designed to improve traffic flow along the I-26/I-20 corridors. The Comet is also poised to make significant investments in regional transit improvements as it begins implementing recommendations from the recently completed system improvement plan called "Reimagining the Comet."



# PLANNED TRANSPORTATION INVESTMENTS

I-77, I-26, I-20 Widening  
Columbia Ave S-48  
Hard Scrabble Road SC 262  
Shop Rd Extension  
Agusta Hwy



3 Rivers Greenway Saluda Bridge  
3 Rivers Greenway Congaree Bridge  
Lower Saluda Greenway  
Gills Creek Greenway  
Smith/Rocky Branch Greenway



New Buses  
New Routes  
New Stops and Shelters  
Systemwide Changes

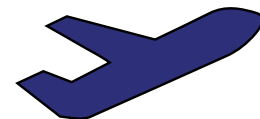


Carolina  
Crossroads  
**\$2b**

Interstate  
Widening Projects  
**\$404m**

Top Road  
Widening Projects  
**\$183m**

**CAE**



Source: Columbia Metropolitan Airport

Total Enplaned Passengers  
**2021: 170,271**  
**2020: 282,324**  
**2019: 671,414**

# Regional Summary

Focus On:

## ECONOMY

The region is fortunate to have a diversified economic base built on a foundation of anchor institutions such as the state government, higher education, healthcare, military installations, and a broad range of large private sector employers of regional and statewide significance. Overall the regional cluster portfolio is approximately 70% local and 30% traded. Some of the top overall (local and traded) industry clusters by location quotient include: public administration; utilities; finance and insurance; administration, education, and support services; accommodation and food service; retail trade, educational services, and manufacturing. Top manufacturing clusters include: electronic equipment, appliance, and components; plastics and rubber products; chemicals; paper and wood products; textiles, machinery, and food processing.

Some of the region's largest employers include state and local governments, higher education and local school districts, Prisma Health, Blue Cross Blue Shield, Lexington Medical Center, Dominion Energy, Amazon, Michelin, UPS, Samsung, Kraft-Heinz, and Nephron Pharmaceuticals. The insurance tech industry, and transportation, distribution and logistics, have historically been areas of competitive advantage for the region. The region is also developing significant competitive advantages in the Pharmaceutical, BioTech, and MedTech industries because of the influences of Nephron Pharmaceutical Corporation, which has recently expanded its operations to produce medical grade nitrile gloves; and the Medical University of SC which will be building a new state of the art facility at the Bull Street development in downtown Columbia. The construction, real estate, and development industry is also a significant sector of the economy. The construction industry alone provides approximately 5% of regional jobs and has some of the highest average wages for local clusters.

Agriculture and local food systems is an area of the regional economy that has the potential for future growth as the demand for local foods continues to increase. According to the Federal Reserve Bank of St. Louis' 2017 report: Harvesting Opportunity, there was a 223 percent increase in growth in local food demand over a 20-year span that far outpaced the average rate of sales growth in the U.S. agricultural sector. South Carolina is a prime food source for the Eastern Seaboard. However, despite the growing demand for local foods, over 90% of the food purchased by South Carolinians is sourced out-of-state. This data indicates a huge leakage in food purchases to out-of-region sources when demand indicates a potential for retaining much of the food chain dollars within the

### TOP 5 LARGEST PRIVATE EMPLOYERS

**PRISMA HEALTH**

▶ 15,000



10,900 ◀



▶ 7,893



3,066 ◀



▶ 2,500

## Competitive Advantages

Central Location  
Abundant Water Supply  
Stable Institutional Anchors  
Low Cost of Living  
Natural and Cultural Resources  
Infrastructure Access

regional economy. According to Utah State University Extension, more food purchased locally means more money will remain in the local community. On average, it is estimated that buying local keeps approximately 65% of your dollar within the community, whereas shopping at large chain stores keeps only 40%. Creating new linkages in the local food chain would build the regional economy that would increase the multiplier effect of each food dollar spent purchasing from local farms.

The region's military installations are another critical aspect of the regional economy with a combined total economic impact of \$6.6 billion. Statewide, the military economic impact is up 35% from 2019. Continuing and strengthening the ties between the installations and the region will strengthen the regional economy in the short term and ensure the long-term continuation of the military installations as a major regional economic engine.

The outdoor recreation and heritage tourism industries are also important target sectors because of the abundance of regional assets that have community and economic development significance for both rural and urban communities. Leveraging outdoor recreation and heritage tourism assets is an important means for supporting local economic development initiatives, revitalizing communities, and improving quality of life. The Congaree Biosphere is an important regional hub and anchor for this type of heritage based economic development. In 2021 the total economic output for Congaree National park was estimated at \$14.8 million and created 145 jobs. Regional planning efforts such as the Congaree Biosphere Region can help to ensure these economic impacts are equitably distributed within the local community and are effectively connected to similar efforts across the region. Fairfield County is also currently working on an initiative through the EPA to position itself as an outdoor recreation and heritage tourism destination.

Entrepreneurship and small business development is another important focus area for strengthening and diversifying the regional economy. The region has an abundance of existing small business development support programs ranging from technical college and university supported business incubators and accelerators, to private co-working and collaboration spaces, to local and state government supported small, minority, and women business enterprise (SWMBE) programs. SWMBE programs are essential for inclusive economic development, as significant barriers and inequities exist for SWMBEs, resulting in long-standing wealth and opportunity gaps. Supporting the growth and sustainability of SWMBE's is essential for local and regional economic recovery and resilience.



- Public Administration
- Utilities
- Finance and Insurance
- Admin, Ed., and Support Services
- Accommodation and Food Service



- Electronic Equipment, Appliances
- Plastics and Rubber Products
- Chemicals
- Paper
- Wood Products

## Strategic Target Sectors

- Advanced Manufacturing
- Aerospace and Aviation
- Arts, Outdoor Recreation, and Tourism
- Construction
- Entrepreneurship and SMWBE
- Healthcare/Health Sciences
- Information Technology
- Local Food Systems and Agriculture
- Pharmaceuticals, BioTech, MedTech
- Professional and Financial Services
- Public Service - Social Service
- Transportation, Logistics, and Distribution
- Wood and Paper Products

Focus On:

## RESILIENCE

Economic resilience is the ability to prevent, withstand, and quickly recover from any type of major disruption to the local or regional economic base. A disruption can be caused by the loss of a major employer, by a downturn in a specific industry or cluster, by a larger economic recession, or by a man made or natural disaster. In order for a region to be resilient, it must be able to adequately evaluate socio-economic risk and vulnerabilities, assess potential impacts, and build the institutional capacity to mitigate, respond, and recover from an event. Examples of strategies a community can adopt include, economic diversification, workforce resiliency, natural hazard mitigation (i.e., protecting critical economic and infrastructure assets), and regional coordination for pre and post disaster planning.

The Central Midlands region is fortunate to have a diversified economic base, increasing its ability to withstand and absorb a major disruption such as the 2017 loss of the new VC Summer Nuclear reactors and the 2020 COVID-19 pandemic. There remains, however, a need for regional coordination and collaboration in assessing and responding to the longer term impacts of these types of economic disruptions, especially for vulnerable populations who are disproportionately impacted by these events.

Natural hazard mitigation is an important component of resiliency planning, as it contends with how a population recovers from events such as . Analyzing the historical extent and impact of hazard events aids in determining the probability of recurrence. Combining this information with socioeconomic data such as income, ethnicity, age, property values, and available housing units provides a clearer picture as to the locations most vulnerable and which may require assistance with returning to regular economic function. Reactive, post-disaster relief is a critical component of resiliency that facilitates that return to regular economic function within communities. But proactive, hazard mitigation saves lives and property before an event occurs, reducing the need for post-disaster relief. According to a 2019 report by the National Institute of Building Sciences, Natural Hazard Mitigation Saves, every \$1 invested in federal hazard mitigation grants provides an estimated return of investment of \$6. Adopting updated building codes that improve overall natural hazard resiliency was estimated to provide a return of investment of \$11 per \$1 invested.



Each county in the Midlands contends with various natural hazards, each with different economic implications and ways to address them. Hazards such as tornadoes and hurricanes are highly visible events and immediate in their impacts to life and property, while hazards like drought and extreme heat or cold result in hard-to-track but expensive economic impacts and threaten vulnerable populations such as the elderly. According to the 2021 Central Midlands Hazard Mitigation Plan, in the time period between 1960 and 2018 natural hazards caused more than \$498 million in property loss and caused more than 400 casualties in the Central Midlands region. In the plan, the assessed building stock value in the region for these assets at risk were estimated at around \$85 billion.

Continuous and collaborative long-term resiliency planning is needed in order for the region to adequately adapt to future changes in the frequency and variability of extreme weather events. Temperatures in the southeastern United States are projected to increase as a result of increased levels of greenhouse gases in the atmosphere. Climate models consistently project higher minimum (overnight) temperatures, and higher maximum (afternoon) temperatures. The number of extreme high heat days above 95 degrees will likely increase. Future changes in annual average precipitation are less certain as some models project higher annual precipitation, while others project decreases. However, heavy precipitation events could increase in frequency and intensity due to atmospheric water vapor increases. Despite possible increases in precipitation, increases in temperature can cause more evaporation and more rapid loss of soil moisture. When this happens in the midst of a dry spell, future droughts would be more intense. These changes will directly impact water quality and availability for the region as well as the natural and human systems that rely on this resource. Population growth in the region will increase competition for water and may also impact water quality due to land use change and decreased pervious surfaces near water bodies. In order to meet these challenges, the EDD should be prepared to serve as a source of information for resiliency planning and a facilitator for regional coordination and collaboration.

Food access, equity, and security is another important resilience related issue facing the region. A 2021 nationwide study by Feeding America analyzed the impacts of COVID-19 on food insecurity. The report concluded that people already impacted by food insecurity before the COVID-19 pandemic now face even greater hardship. These impacts would not be experienced equitably; every one in five African-Americans were estimated to suffer food insecurity versus one in nine for the white population. While food insecurity tends to impact rural counties more than urban ones, the report also suggests that the COVID-19 pandemic has worsened food insecurity regardless of location. In 2019, one out of every nine people were considered food insecure in urban counties versus one out of every eight in rural counties nationwide. For 2021, Feeding America estimates that this has worsened in urban counties, and now one in every eight individuals are considered food insecure, regardless of living in an urban or rural location.

# 9.5%

## Food Insecurity Rate

---

### Economic Impacts of Natural Hazards in the Midlands Since 1960-2018

Property  
Loss  
**\$498m**

Damage to  
Building Stock  
**\$85b**

Sources: Carolinas Integrated Sciences and Assessments; NOAA National Centers for Environmental Information, State Climate Summaries: South Carolina; An All Hazard Risk Assessment and Hazard Mitigation Plan for the Central Midlands Region of SC, 2021 Update

# SWOT Summary

## ▼ Strengths

- Interstate highway and freight rail connectivity
- Abundant arts, culture, recreation, and tourism resources
- Abundant water, land, and ecological resources
- Strong military presence with regional economic impact
- Diversified economic base with strong industry clusters
- Comparatively low cost of living
- Excellent higher education institutions with an economic impact
- Strong public and non-profit sector
- Strong sense of regional and local community
- Successful and adaptable workforce development programs
- Proximity and access to larger regional markets



- Low internal and external awareness of community assets and attractions
- Aging workforce and infrastructure
- High commercial and industrial tax rates
- Geographic disparities, historical disinvestment, and social equity concerns
- Lack of quality affordable housing
- Immature entrepreneurship ecosystem
- Confusion about regional economic development ecosystem
- Limited rural infrastructure, especially water and sewer capacity
- Lack of access to capital for SWMBE firms
- Lack of access to workforce supportive services such as childcare
- High percent of employment in low-wage sectors
- Small pool of companies with high growth potential



## ▲ Weaknesses

## Opportunities ▼



- Continued expansion and access to the greenway system
- Enhancement and coordination of regional marketing and branding efforts
- Streamlining of business licensing and permitting processes
- Reduce commercial and industrial property taxes
- Development of suitable sites and incentives for target sectors
- Infill development and community revitalization efforts
- Invest in improvements, expansion, and upgrades to aging infrastructure
- Expand water and sewer capacity in rural areas
- Better coordination between economic and workforce development organizations
- More programs to support workers and businesses with barriers to entry
- Increase access to capital and support services for SMWBEs
- Promote resilience planning, equity, and inclusive economic development



- Ongoing impacts from the COVID-19 pandemic
- Supply chain and workforce shortages in key sectors
- Inflation and rising costs of services, materials, and equipment
- Potential for recession and economic uncertainty
- Equitable access to healthy food, jobs, transportation, affordable housing
- Natural hazards, water quality, and impacts of climate change
- Not enough focus on existing business growth and retention
- Limited commercial flight options at CAE
- Lack of regional coordination in planning and development
- Pollutant loading and regulations for surface waters
- Lack of diversity in leadership and employment
- Loss of workforce age population, jobs, and essential services in rural areas
- Aging and retiring workforce with limited transition planning

## Threats ▲

**B**ased upon the regional summary, SWOT analysis, input from stakeholders, and review of assessment of other planning initiatives integrated into this document, several major goals emerged as regional priorities. These goals and their underlying strategies address systemic issues and opportunities which have the potential to transform local communities, create quality education and workforce development opportunities, improve regional infrastructure, strengthen the regional economy, and enhance the region's ability to mitigate, respond to, and recover from natural hazards and economic downturns.

## VISION

The Central Midlands will be a diverse, resilient, and creative region supported by a sustainable and inclusive environment for the development of a diversified economic base, a skilled workforce, and a high quality of life for all residents.

## GOAL 1: COMMUNITY

Support the health, sustainability, economic well-being, and quality of life for all residents, visitors, and businesses.

## GOAL 2: EDUCATION AND WORKFORCE

Provide high quality and accessible education, training, and workforce development opportunities.

## GOAL 3: INFRASTRUCTURE

Improve, expand, and maintain regional infrastructure.

## GOAL 4: ECONOMY

Strengthen, grow, and diversify the regional economy.

## GOAL 5: RESILIENCE

Strengthen the region's ability to mitigate, respond to, and recover from natural disasters, future pandemics, and economic downturns.

# GOAL 1: COMMUNITY

Support the health, sustainability, economic well-being, and quality of life for all residents, visitors, and businesses.

## Objectives:

Growth & Development	Housing	Regional Equity
<ul style="list-style-type: none"> <li>Promote and incentivize infill development, adaptive reuse, and neighborhood revitalization projects that leverage existing infrastructure and community assets</li> <li>Support regional and local gateway and commercial corridor revitalization projects</li> <li>Strengthen coordination around regional marketing and branding initiatives</li> <li>Protect, preserve, and promote the regions unique natural, cultural, arts, and outdoor recreational resources</li> <li>Support public health initiatives focused on healthy eating, active living, and reduction in chronic diseases</li> <li>Invest in local and regional park and recreation facilities</li> </ul>	<ul style="list-style-type: none"> <li>Increase and preserve access to safe and affordable housing across the region</li> <li>Promote regional communication and coordination around affordable housing projects, policies, and best practices</li> <li>Develop partnerships to expand minor home repair and rehabilitation programs low and moderate income communities</li> <li>Support education and outreach initiatives to better inform the public about the role and benefits of affordable housing initiatives</li> </ul>	<ul style="list-style-type: none"> <li>Prioritize place-based approaches for ensuring equitable growth and economic inclusion across the region with a focus on poverty reduction, equitable access to resources, and revitalization of low and moderate income communities</li> <li>Promote and incentivize development projects within designated opportunity zones</li> <li>Diversify and develop regional leadership for regional boards and commissions, including those of non-profits</li> <li>Increase public sector engagement and coordination with service providers, community, leaders, and stakeholder groups representing limited English proficiency (LEP) populations</li> <li>Support local food policy councils and initiatives to build a more resilient and equitable local food system</li> </ul>

## Indicators/Evaluation Metrics:

- Population estimates and projections
- Demographic data
- Building permits
- Home values
- Average rent
- Cost Burdened households
- Poverty rates
- Self-sufficiency standards
- Median income
- Water quality data
- Natural and cultural resource preservation trends
- Opportunity Zone Investments

# GOAL 2: EDUCATION AND WORKFORCE

Provide high quality and accessible education, training, and workforce development opportunities.

## Objectives:

Education and Training	Supportive Services	Accessibility
<ul style="list-style-type: none"><li>• Support and strengthen development and coordination of training and apprenticeship programs with a focus on alignment with the workforce needs of target sectors</li><li>• Promote coordination/collaboration between higher education institutions on workforce development programming and economic impact initiatives</li><li>• Develop strategies for attracting and retaining workers, to include veterans and recent high school and college graduates</li><li>• Develop workforce training and certification pipelines for public, non-profit, and essential service sector jobs in high demand (e.g., water and sewer operators, public safety, healthcare, senior services, education, etc.)</li></ul>	<ul style="list-style-type: none"><li>• Identify gaps, needs, and barriers to essential workforce support services such as transportation, affordable housing, and quality childcare.</li><li>• Strengthen and expand essential workforce support services, high quality early childhood education, and life skills training opportunities</li><li>• Expand workforce opportunities for essential supportive service occupations such as childcare .</li></ul>	<ul style="list-style-type: none"><li>• Increase access to equitable education opportunities and support systems</li><li>• Increase workforce and soft skills development programs for vulnerable populations</li><li>• Identify gaps and barriers that limit employment for vulnerable populations and marginalized workers</li><li>• Support programs focused on removing barriers for small, minority, and women owned businesses (SWMBEs), at-risk student populations, and marginalized workers, to include veterans and formerly incarcerated individuals</li><li>• Expand adult education and reskilling programs to meet labor force demand and promote economic mobility</li></ul>

## Indicators/Evaluation Metrics:

- Employment and unemployment trends
- Occupation data
- Educational attainment
- College and University enrollment data
- Graduation and retention rates
- Inventory of apprenticeship and workforce development programs
- Number of apprenticeships and companies served

# GOAL 3: INFRASTRUCTURE

Improve, expand, and maintain regional infrastructure.

## Objectives:

Water and Sewer	Transportation	Energy and Digital Technology
<ul style="list-style-type: none"><li>• Improve water and sewer capacity in rural areas to support new industrial, commercial, and residential development to include development of a new WWTP in Fairfield County</li><li>• Replace and upgrade aging water and sewer infrastructure, including consolidation of small systems and septic tanks where appropriate</li><li>• Promote regional coordination in short and long term water and sewer planning, including updating the Central Midlands Regional 208 Plan</li><li>• Support watershed and basin level planning for water resource management</li><li>• Develop workforce training and certification pipelines for water and sewer utility operators</li></ul>	<ul style="list-style-type: none"><li>• Support improvements to the regional transit system to include recommendations from "Reimagining the COMET, and expansions of service in Cayce, West Columbia, and surrounding areas</li><li>• Identify opportunities for expanding transit service in rural areas</li><li>• Expand regional bike, pedestrian, and greenway facilities to include continued support for expansion of and connectivity with the three rivers/lower saluda greenway</li><li>• Invest in strategic road improvements using a variety of federal, state, and local funding mechanisms</li><li>• Support regional planning efforts to improve freight mobility, manage congestion, improve intercity passenger rail connectivity, and develop a new multi-modal transportation center in Columbia</li><li>• Identify transportation strategies for improving access to healthy foods, healthcare, and jobs</li></ul>	<ul style="list-style-type: none"><li>• Work with the SC State Broadband Office to expand and improve broadband access in rural areas</li><li>• Work with local governments, education providers, and non-profit organizations to narrow the digital divide by providing affordable and equitable access to digital technology, training, and literacy</li><li>• Strengthen IT workforce training and capacity in rural areas to supply local labor for new investments in digital technology</li><li>• Increase investments in alternative/green energy production and technology</li><li>• Grow the electric vehicle industry in SC to include support for manufacturing and expansion of the statewide charging station network</li></ul>

## Indicators/Evaluation Metrics:

- Water and sewer capacity and expansion projects
- Average commute time
- Traffic counts (AADT)
- Transit route and ridership data
- Investments in bike, pedestrian, greenway facilities
- Investments in road improvement projects
- Investments in alternative energy and electric vehicle projects
- CAE enplanement data

# GOAL 4: ECONOMY

Strengthen, grow, and diversify the regional economy.

## Objectives:

Competitive Advantages	Target Sectors	Entrepreneurship
<ul style="list-style-type: none"> <li>• Deepen regional coordination and collaboration among economic development organizations, higher education, local chambers of commerce, and visitor bureaus</li> <li>• Coordinate regional marketing to promote the region for both economic development and tourism</li> <li>• Support the work of the Midlands Regional Competitiveness Council and implement strategies for improving on competitiveness metrics</li> <li>• Promote use of a diversified economic development toolbox that includes municipal improvement, tax increment financing, and business development districts</li> <li>• Expand/improve/coordinate incentive programs to include review/revision of regional tax structure</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to pursue and support a diversified economic development portfolio with a mix of traded, blended, and local clusters and a focus on target sectors</li> <li>• Undertake and support target sector research, planning, and feasibility studies</li> <li>• Expand focus on existing business retention and expansion and recruitment of small to medium size corporate and R&amp;D offices</li> <li>• Invest in and leverage regional arts, entertainment, outdoor recreation, and tourism assets as catalysts for community and economic development, including support for the Congaree Biosphere, regional trails and greenways, and other related initiatives</li> <li>• Increase economic connections between regional military installations and communities</li> <li>• Develop a sustainable, accessible, local food system that supports local agriculture, stimulates demand for locally produced goods, decreases food insecurity, and reduces food waste</li> </ul>	<ul style="list-style-type: none"> <li>• Support entrepreneurship and small business development across the region with a focus on building capacity in rural areas and low and moderate income communities</li> <li>• Build small business capacity for the growth and creation of quality, living wage jobs by coordinating and expanding regional small business support programs, lending/funding opportunities, and worker cooperatives</li> <li>• Support development and growth of small business incubators, accelerators, and coworking spaces</li> <li>• Expanding pool of start ups by breaking down barriers to entry and building stronger sense of entrepreneurial community</li> <li>• Identify opportunities for leveraging the purchasing power of anchor institutions to support small businesses (e.g., development of an anchor institution collaborative)</li> </ul>

## Indicators/Evaluation Metrics:

- GDP, Consumer Price Index, Cost of Living
- Retail goods and service expenditures
- Tourism-related income and economic impact
- Target sector projects and investments
- Inventory of SMWBE programs
- Small business equity metrics
- Employment and industry data
- Public sector employment trends
- MBLG Regional Competitiveness Report

# GOAL 5: RESILIENCE

Strengthen the region’s ability to mitigate, respond to, and recover from natural disasters, future pandemics, and economic downturns.

## Objectives:

Natural Hazard Mitigation	Regional Coordination	Inclusive Economic Development
<ul style="list-style-type: none"> <li>Promote local adoption, implementation, and ongoing maintenance of the CMCOG Regional Hazard Mitigation Plan</li> <li>Support education and outreach initiatives for local officials and community partners regarding potential risks and mitigation measures for hazards with high probability of occurrence in the region (e.g., drought, heat, and flood)</li> <li>Support research, education, and outreach initiatives regarding the anticipated local impacts, risks, and vulnerabilities of climate change</li> <li>Evaluate effectiveness of disaster and pandemic recovery and support programs to help plan for future disruptions</li> </ul>	<ul style="list-style-type: none"> <li>Establish and convene resilience, recovery, and response committees for selected target sectors to include but not limited to: Small, Minority, and Women Business Enterprises (SWMBEs); local food systems; arts, outdoor recreation, and tourism; utilities; higher education; and workforce development.</li> <li>Work with local governments to evaluate natural hazard risks, social vulnerability, climate change, food access and equity, and inclusive development economic in the Resilience Elements of their comprehensive plans.</li> <li>Encourage/train local businesses to develop business continuity and preparedness plans</li> <li>Coordinate the development of a regional business emergency operations and recovery center</li> </ul>	<ul style="list-style-type: none"> <li>Adopt inclusive and equitable economic development practices as a foundation for economic resilience, response, and recovery initiatives</li> <li>Build SWMBE capacity for growth and development of living wage jobs by expanding access to capital, incentivizing development of affordable commercial space, and reducing barriers for participation in public contracting opportunities</li> <li>Incentivize economic development investments in low and moderate income communities and explore opportunities for using community benefit agreements</li> <li>Create education and outreach opportunities for SMWBES regarding entrepreneurial opportunities in high growth and target sectors</li> <li>Expand access to capital, support micro-lending programs, and establish more community development financial institutions</li> </ul>

## Indicators/Evaluation Metrics:

- Natural hazard occurrences by type
- Economic impact data
- Food access and equity metrics
- Inventory of industry specific networks/organizations/partnerships
- Number of new industry specific initiatives



Central Midlands Council of Governments  
236 Stoneridge Drive  
Columbia, SC 29210  
(803) 376-5390  
[www.centralmidlands.org](http://www.centralmidlands.org)



Photo credit: City of Newberry