



# **SOUTH CAROLINA**

## **CHAMBER OF COMMERCE**

# **BLUEPRINT 2035**

**A Roadmap for South Carolina's Economic Future**





# Blueprint 2025

## REGIONAL MEETING SCHEDULE



August  
**1**  
7:30 AM

**Central Savannah River Area**  
Newberry Hall | 117 Newberry Street Southwest  
Aiken, SC 29801

HOSTED BY: Aiken Chamber of Commerce

August  
**12**  
1:30 PM

**Upstate Region**  
Zentrum BMW | 1400 SC-101 | Greer, SC 29651  
HOSTED BY: One Spartanburg, Greenville Chamber,  
Greater Greer Chamber

August  
**21**  
11:30 AM

**Bluffton / Hilton Head Island**  
Culinary Institute of the South | 1 Venture Drive  
Bluffton, SC 29910  
HOSTED BY: Hilton Head Island-Bluffton Chamber, Greater  
Bluffton Chamber, Beaufort Regional Chamber, Jasper Co.  
Chamber of Commerce

August  
**26**  
10:30 AM

**Grand Strand Region**  
Horry Georgetown Technical College | 743  
Hemlock Ave | Myrtle Beach, SC 29577  
HOSTED BY: Myrtle Beach Area Chamber, Destination  
North Myrtle Beach, Conway Chamber, Georgetown  
Chamber

August  
**27**  
8 AM

**Catawba Region**  
The Gateway Conference Center | 3200  
Commerce Drive, #C | Richburg, SC 29729  
HOSTED BY: York Co. Regional Chamber, Lancaster Co.  
Chamber, Chester Co. Chamber, Charlotte Regional  
Business Alliance

September  
**3**  
7:30 AM

**Midlands**  
Harbison Theatre | 7300 College Street Irmo, SC 29063  
HOSTED BY: Columbia Chamber, Lexington Chamber,  
Cayce/West Columbia Chamber, Chapin Chamber

September  
**8**  
12:30 PM

**Charleston Metro**  
Charleston Metro Chamber | 4922 O'Hear Ave., Ste. 101  
North Charleston, SC 29405  
HOSTED BY: Charleston Metro Chamber, Summerville /  
Dorchester Chamber, Berkeley Co. Chamber, Mt. Pleasant  
Chamber, Tri-County Regional Chamber

September  
**9**  
11:30 AM

**Pee Dee Region**  
SiMT | 1951 Pisgah Road | Florence, SC 29501  
HOSTED BY: Greater Florence Chamber, Greater Hartsville  
Chamber





# Thank you to the investors supporting the development of *Blueprint 2035*





# Agenda

Opening	5 mins
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Our Approach	5 mins
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Our Initial Findings	25 mins
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Discussion	20 mins
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Next Steps & Close	5 mins
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# Our Approach





# Where We Are Now

## Timeline

2025							
Project Stages	Month						
	May	Jun	Jul	Aug	Sept	Oct	Nov
Stage 1: Project Inception & Information Exchange							
Stage 2: Global and Policy Context							
Stage 3: Data Assessment and Benchmarking							
Stage 4: Engagement							
Stage 5: Approaches Elsewhere							
Stage 6: Report Development						Draft Report	Final Report



# Focus Group Discussion

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# Instructions





# Icebreaker

## Which South Carolina Quarterback Will Have the Better Season?



Cade Klubnik  
Clemson Tigers



LaNorris Sellers  
South Carolina Gamecocks

Icebreaker

# Which South Carolina Quarterback Will Have the Better Season?





# Our Initial Findings

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# Our Initial Findings

## Global Issues – South Carolina Impacts

### Global Shifts

Emerging economies |  
China as superpower |  
Foreign Direct Investment | Tariffs

### Demographics & Society

Aging population | Net migration | Tourism

### Technology

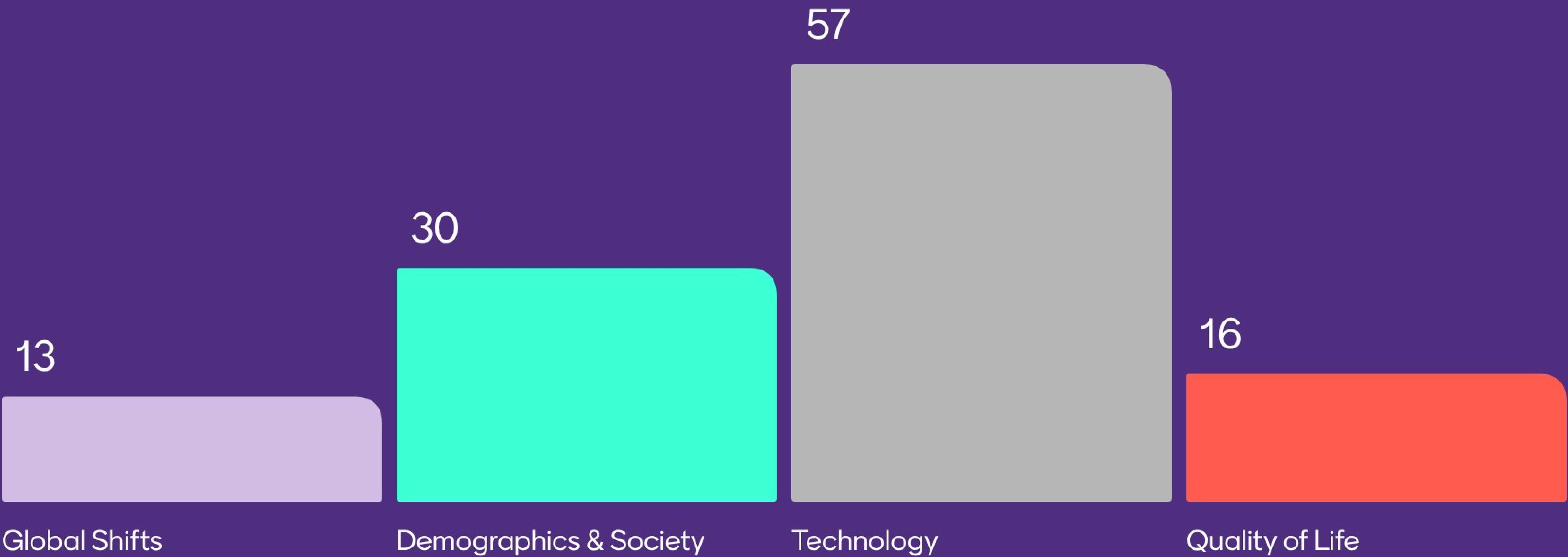
AI & Automation | Digital disruption |  
Metaverse | Data importance

### Quality of Life

Natural resources | Healthy living |  
Work-life integration



Which trend do you feel will have the greatest impact on South Carolina's economic growth over the next 10-20 years?



# Our Initial Findings – Benchmarking

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# Our Initial Findings

## Benchmarking

### Economy

**GDP growth of +4.2% between 2023 and 2024,**  
supported by a diversified, export-oriented industrial  
base.

Ranked **10th in the Economy category** in CNBC's 2025  
*Top States for Business* rankings.

# Our Initial Findings

## Benchmarking

### Demographic Changes

Population grew by over **90,000 people** last year - the **third-fastest-growing state in the US.**

**Ranked #1 on the U-Haul Growth Index**, marking the highest net gain of one-way moves.



# Our Initial Findings

## Benchmarking

### Tax System

In 2024, **more than two-thirds** of the state's tax revenue stemmed from **personal income** taxes (34.1%) and **general sales** taxes (35.7%).

South Carolina ranks **33rd** in the nation on the Tax Foundation's **2025 State Tax Competitiveness Index**.

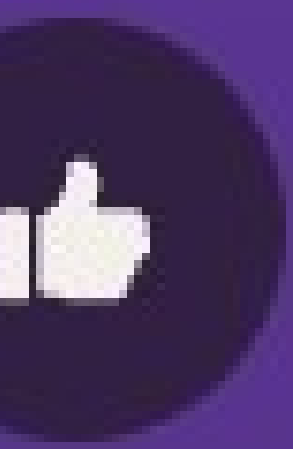
# Our Initial Findings

## Benchmarking

### Foreign Direct Investment

**Highest US concentration of FDI jobs – 9.8 % of workforce employed by international companies.**

**6th nationally for net US company relocations between 2019–2023 - major success in domestic business migration.**





# Our Initial Findings

## Benchmarking

### Education & Workforce

**“Critical needs” jobs make up 45% of South Carolina’s workforce, but only 29% of residents have the skills to fill them.**

**Rural unemployment remains higher than urban levels with the gap persisting despite overall state job growth.**

# Our Initial Findings

## Benchmarking

### Healthcare

**6 in 10 adults** have at least one **chronic disease**.

**32% of rural** hospitals are vulnerable to **closure**.

Infant mortality surged by **12% in 2021**, rising from **6.5 to 7.3 deaths per 1,000 live births**, well above the US rate (~5.6).



# Our Initial Findings

## Benchmarking

### Infrastructure

9,490 bridges, **6.2% of which were structurally deficient** in 2024.

**41% of roads** are in **poor or fair** condition.

Ranks **23rd** in BroadbandNow's annual rankings of internet coverage, speed and availability.

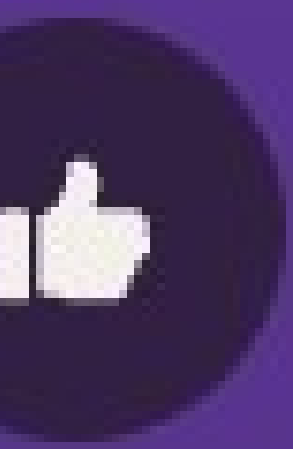
# Our Initial Findings

## Benchmarking

### Regional Difference

**Ranked 39th** for quality of life in CNBC's 2025 *Top States for Business*, weighed down by healthcare access, education attainment, and public safety.

**Greenville ranked 4th** in the U.S. News & World Report's 2024 *Best Places to Live*, with Charleston, Myrtle Beach, and Spartanburg also in the top 60 cities.





# Our Initial Findings

## Benchmarking

### Economy

Foreign Direct Investment

Demographic Changes

Tax System

Education & Workforce

Infrastructure

Healthcare

Regional Differences

# Our Initial Findings – Priority Sectors

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# Our Initial Findings

## Identifying your opportunity industries

Each industry is evaluated based on the following factors:

Factor	Definition
1. Specialization	Is the industry more important to SC? <i>i.e. does it account for a bigger share of total jobs than the US average?</i>
2. Relative Growth	Is the industry growing faster in SC than the US?
3. Employment Scale	The total number of jobs in the industry
4. Export Intensity	The value of exports by the industry
5. Wage Level	Average wages per job

# Our Initial Findings

## Identifying your opportunity industries

Below are the emerging industries resulting from our research to-date, subject to change pending completion of research

Category	Description	Example Identified Industries
"Invest Boldly" Sectors	<i>These industries show high specialization, growth, employment scale, exports and wages. They are foundational to SC's economic strategy.</i>	<ul style="list-style-type: none"><li>• Advanced Manufacturing</li><li>• Natural Resources &amp; Rural Enterprise</li><li>• Infrastructure &amp; Core Services</li><li>• Consumer Goods &amp; Retail</li><li>• Business, Finance &amp; Innovation Services</li><li>• Health &amp; Wellbeing</li></ul>
Strategic Emerging Sectors	<i>These industries may not yet rank highly but they are 'up-and-coming' and important to South Carolina's future growth.</i>	<ul style="list-style-type: none"><li>• Energy &amp; Advanced Manufacturing Transitions</li><li>• EV, Battery &amp; Electronics Supply Chain</li><li>• Materials &amp; Product Innovation</li><li>• Consumer Product Reinvention</li></ul>





Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Energy

Energy innovation

Energy

Advanced  
manufacturing

Agriculture.

Supply Chain  
Management

Healthcare

Health and wellbeing

Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Data centers

Tourism

Manufacturing and  
finance

Advanced  
manufacturing

Power production and  
data centers

Healthcare  
Manufacturing Energy

Manufacturing

Healthcare



Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Healthcare Education  
Manufacturing

Health care

Auto manufacturing and  
supporting industries

Technology Agriculture

Manufacturing health  
and wellness energy

Advanced  
manufacturing, aging  
population services

Technology

Healthcare

Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Manufacturing Energy

Advanced Manufacturing

Energy

Education workforce development healthcare

Technology

Advanced manufacturing, data centers

Energy

Automotive AI



Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Technology—  
Healthcare

Healthcare

Advanced  
Manufacturing  
Healthcare

Healthcare

Industrial and mfg

Automotive and  
manufacturing

Healthcare

Industrial and energy

Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Technology, energy

Distribution

Robotics, Healthcare

Healthcare

Advanced  
manufacturing.  
Healthcare. Energy.

Energy

Mining

Manufacturing



Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Advanced  
manufacturing

Tourism

Energy, healthcare, AI

Technology

Power Compute  
Advanced  
Manufacturing

Heavy manufacturing

Energy

Tourism

Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Manufacturing, energy,  
technolgy

Health cRe

Technology Innivation

Water and energy

Life Sciences

Health care

Education

Manufacturing with  
focus on automotive



Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

EV, Energy,  
Manufacturing,  
Workforce Dev

Technology - such as  
data centers

Healthcare

Manufacturing

Mfg

Advanced manufacturing  
Battery and ev Energy  
generation Healthcare

Energy Healthcare  
Education

Technology

Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Manufacturing Health  
care

Data center  
construction and all the  
infrastructure to support

Data centers

Workforce housing  
access

Manufacturing, Energy ,  
Work Force  
Development

Healthcare, education &  
workforce

Healthcare

AI in all sectors,  
advanced  
manufacturing



Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Data centers and power  
management

Energy Automotive tech  
Technology

Education work force

Energy

Technology

Data centers

Advanced  
Manufacturing

Tourism

Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Auto

Health care

Technology

Manufacturing

Energy, life science,  
infrastructure beyond  
roads

Tech

Advance Manufacturing

Football



Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Connectivity, internet  
and data center

Data centers and the  
infrastructure to support

Manufacturing

That AI stuff

Life Science

Mfg - logistics

Life Sciences

Housing & workforce

Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

Renewable energy

Tourism if the features of the state can be highlighted.

Life Sciences

Healthcare, technology, life sciences, and energy

Life Sciences

Healthcare

Housing and workforce

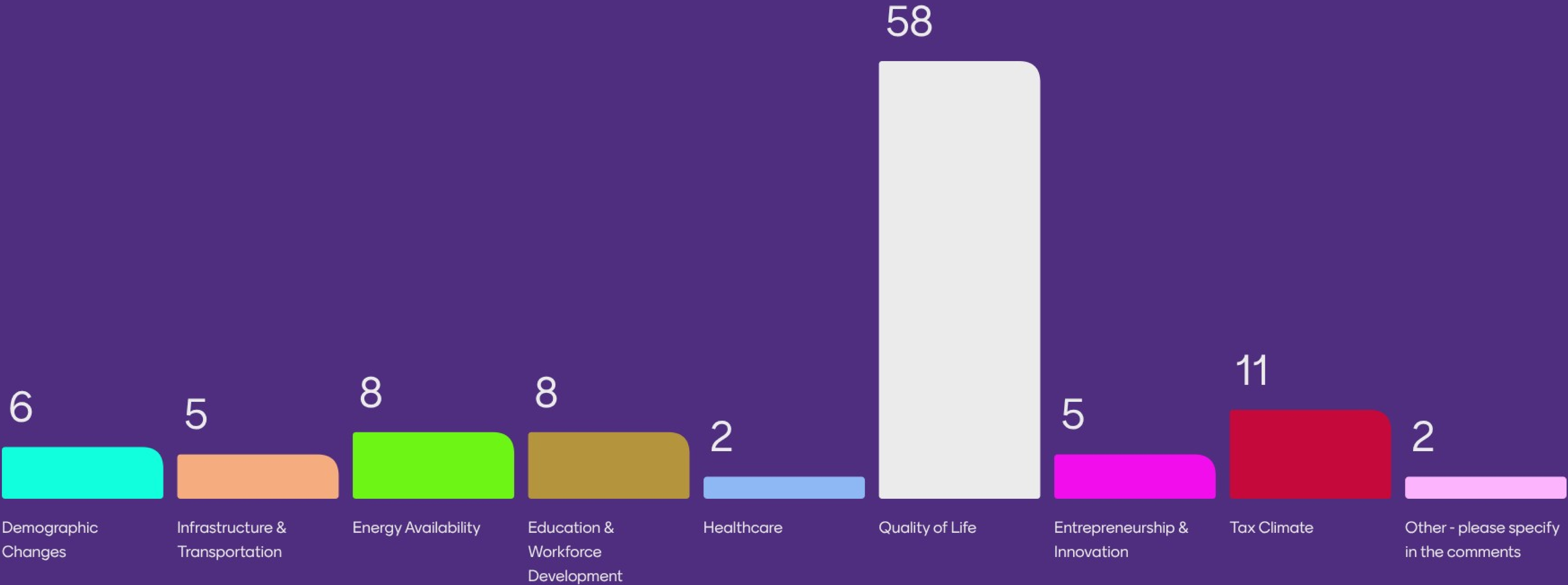
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Which sectors do you feel will offer the greatest opportunity for South Carolina in the next 10-20 years?

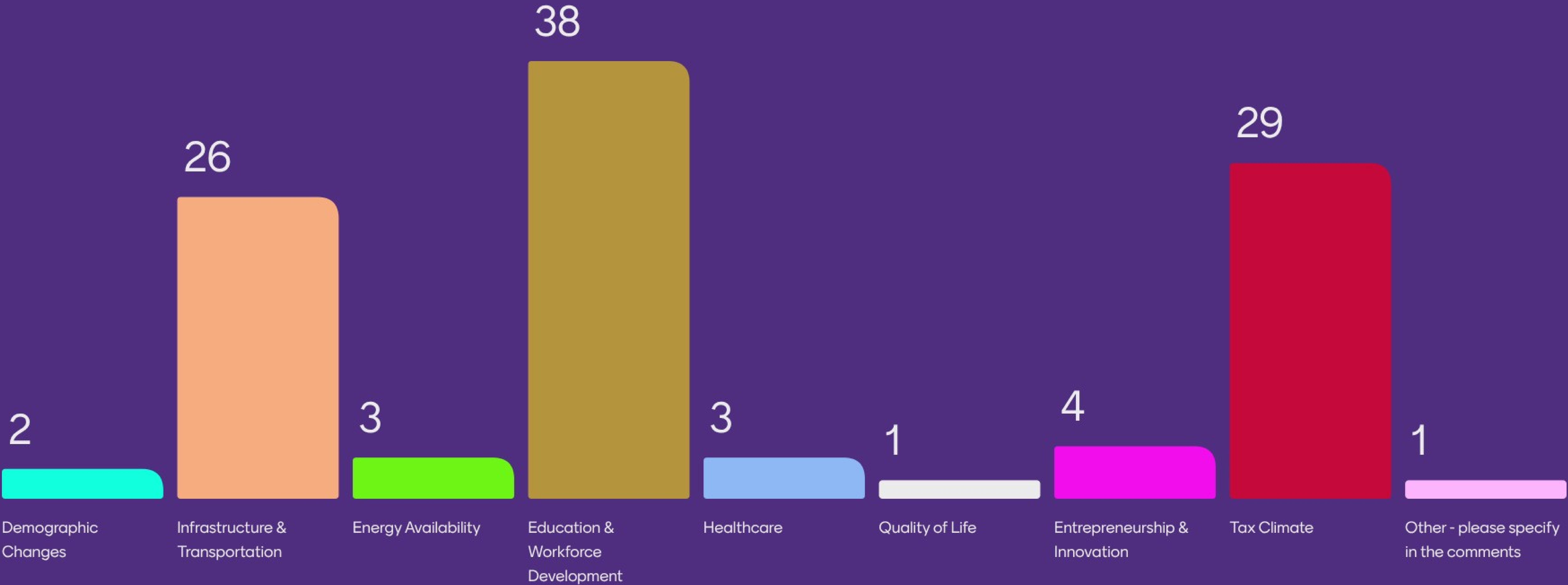
Quality of life

Where do you feel South Carolina has the greatest competitive advantage over other states (e.g., what is attracting companies to come here)?

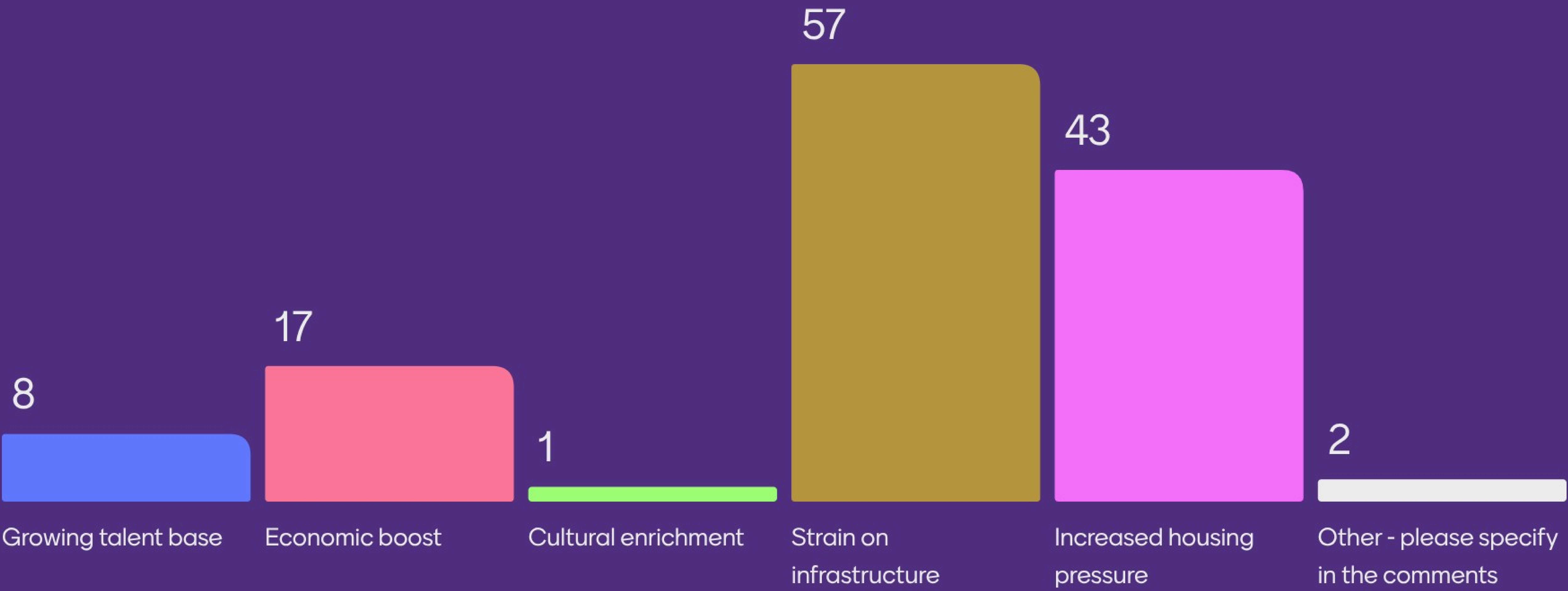




Where do you feel South Carolina has the largest weakness over other states (e.g., what is causing companies to go to other states)?

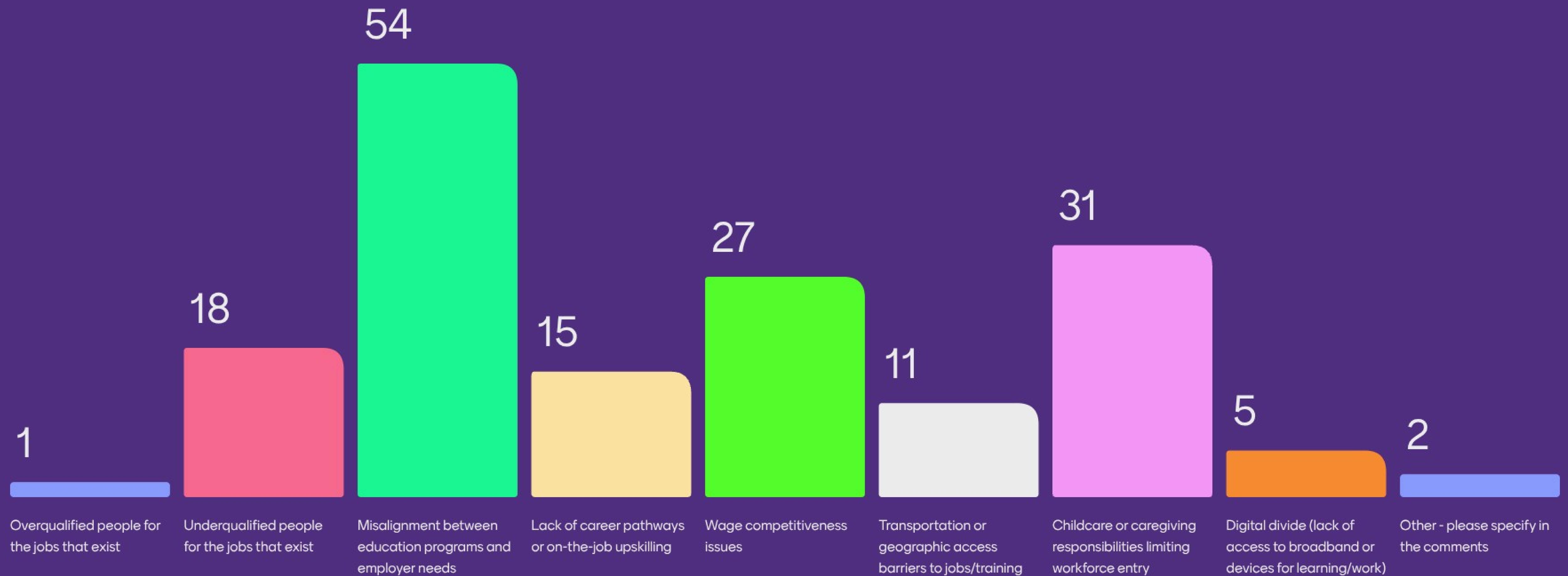


# What is the top impact you see as a result of South Carolina's population growth?

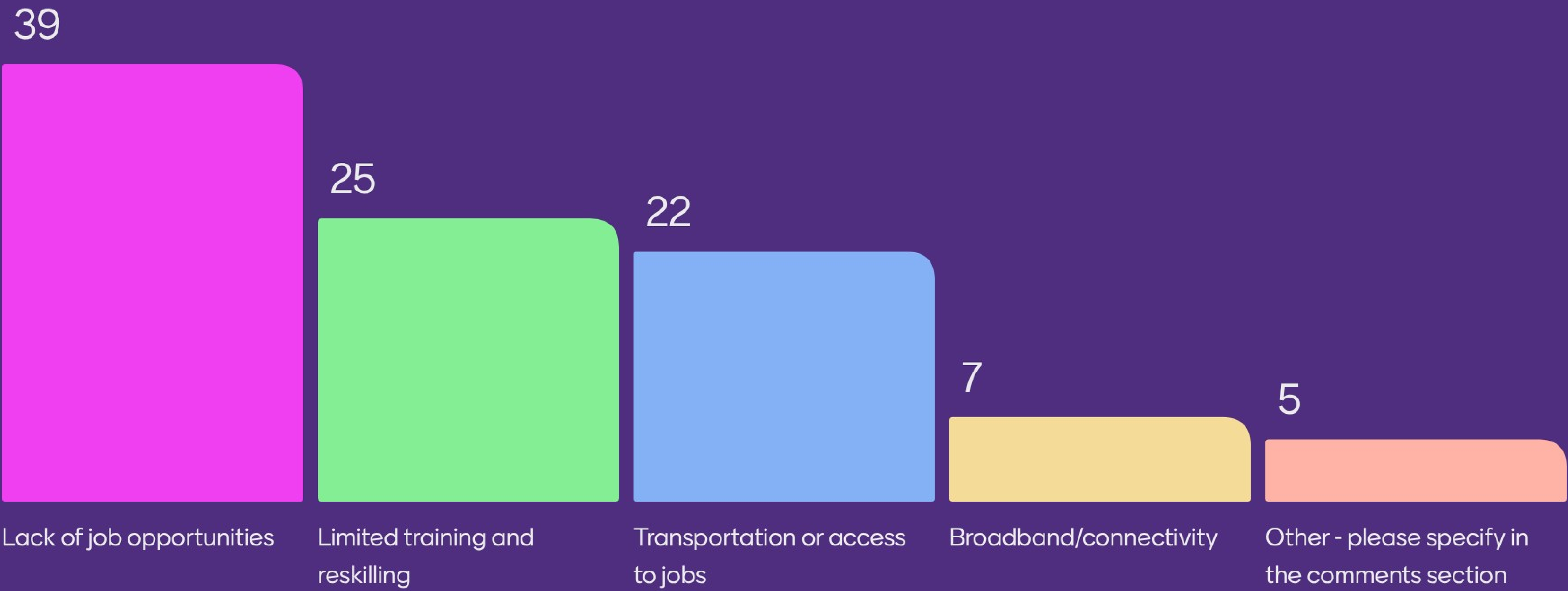




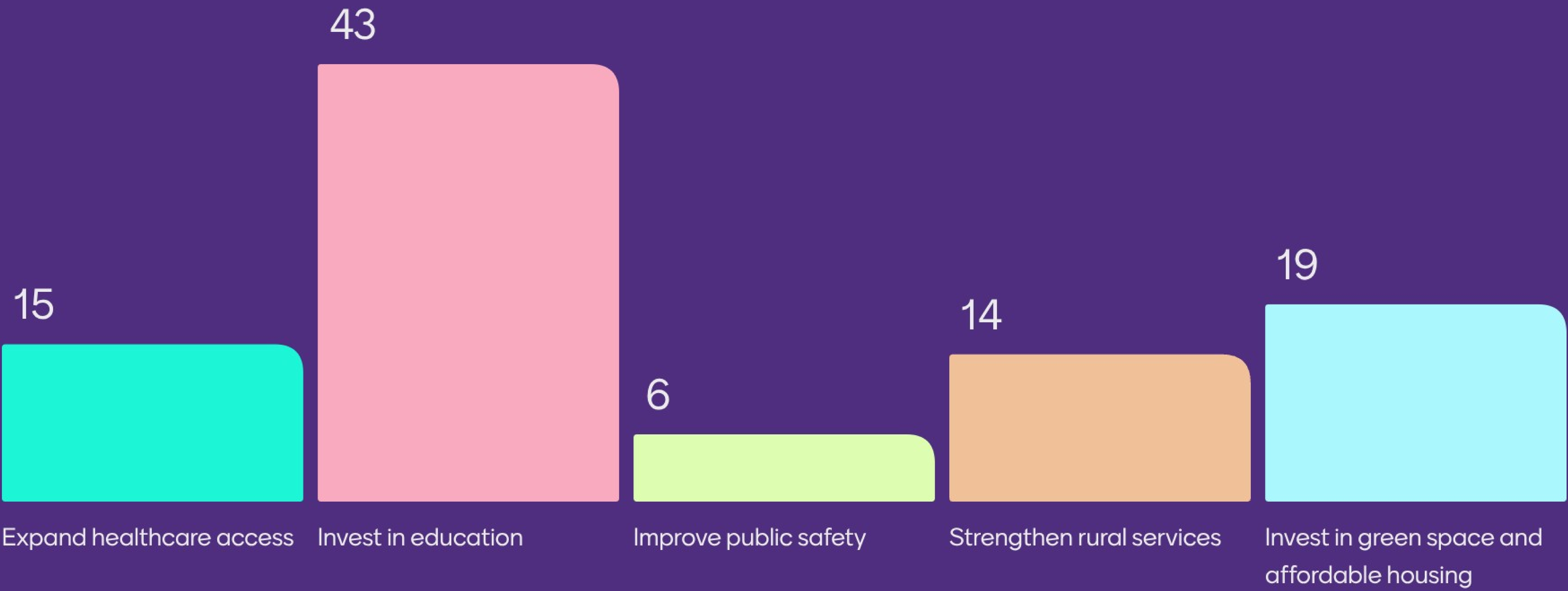
# What's the main issue driving the skills shortage?



# What do you see as the biggest challenge facing South Carolina's rural workforce today?



# What should be South Carolina's top priority to improve statewide quality of life?





# Broader Discussion

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# What is one thing the state can do to make it easier to do business in South Carolina?

Address tax structure

Permitting reform

Commercial property  
tax reform

Revisit Act 388

Tax reform

Infrastructure

Less regulation

Permitting reform

# What is one thing the state can do to make it easier to do business in South Carolina?

Worker compensation

Offer tax breaks and incentives

Invest in K-12 education

Revamp Tax Structure

Address taxes

Improved infrastructure

Remove Red Tape

Tax reform



# What is one thing the state can do to make it easier to do business in South Carolina?

Affordable housing

Lower taxes across the board both on citizens and business owners.

Incentives

Workforce development

Tax system

Small business generator

Workforce availability

Commercial property tax reform

# What is one thing the state can do to make it easier to do business in South Carolina?

Tax reform

Act 388 restructure

Compensation

Tax structure

Support workforce  
housing in proximity to  
jobs

Improve infrastructure

Tax

Streamline red tape

# What is one thing the state can do to make it easier to do business in South Carolina?

Permitting reform

Regulations

Commercial property  
taxes limiting growth in  
sectors

Easier lending for  
businesses

Workforce Housing

Tax Reform

More and better public  
transit and  
transportation

Eliminate state personal  
income tax



# What is one thing the state can do to make it easier to do business in South Carolina?

Infrastructure improvements and tax reform

Tax breaks for local businesses

Regulatory reform - permitting improvements

Less rules and regulations

More tax incentives  
Assist rural areas with revitalization

Invest in education

Tax reform Infrastructure  
Energy

Address taxes

# What is one thing the state can do to make it easier to do business in South Carolina?

Tax incentives

Improve the property tax code. Increase educational opportunities to align with workforce needs.

Revisit Act 388

Investment in k-12

State take over federal 404 permitting.

Lower dependency on personal income tax

Infrastructure

Act 388 restructuring

# What is one thing the state can do to make it easier to do business in South Carolina?

Less en regulation and  
help permitting  
processes

Career readiness focus

Support small business

Improve workforce skills

Act 388 restructure

Partner with the locals

Layout expectations for  
upcoming students  
within sectors

K-12 education to  
attract new business



# What is one thing the state can do to make it easier to do business in South Carolina?

Taxes

K-12 education

Workforce development

Tax reform

Workforce Development  
and education

Insurance

Convince citizens to  
shop local

Permits and ease of  
doing business

# What is one thing the state can do to make it easier to do business in South Carolina?

Affordable housing

Better Business  
investment funding

Transportation  
Infrastructure  
Improvements

Affordable housing for  
workers

Bring back Nikki Haley

Infrastructure

Business Tax (non-  
income) reform

Revisit Act 388

# What is one thing the state can do to make it easier to do business in South Carolina?

Infrastructure

Taxes

Energy Generation

Football

More grants for career education

Affordable housing

Invest in the educators.  
Those that have their boots  
on the ground!

Improve education and  
the tax climate for  
residents.



# What is one thing the state can do to make it easier to do business in South Carolina?

Supporting small businesses that are already here and established in the community vs bringing in new businesses

Healthcare reform

Improve safety

Reputation

Workforce Housing

Less regulations. Skilled workforce

Invest

In your view, what's the biggest risk to maintaining economic momentum in South Carolina?



# What's one big policy change that will supercharge South Carolina's economy?

Impact fees for housing	Livable minimum wage	Repeal act 388 and fix commercial property taxes	388
No income tax	Tax reform and incentives	Remove individual income tax	OSHA



# What's one big policy change that will supercharge South Carolina's economy?

Tax reform

Education funding

Eliminate state tax

Minimum Wages

Address minimum wage

Drastically lower taxes

Reduce tax burden

Act 388 repeal

# What's one big policy change that will supercharge South Carolina's economy?

No income tax	Min wage	Train everyone in AI so they can create their own jobs	388
Tax reform	Rise Min wage	Act 388	Continue "Tort Reform "

# What's one big policy change that will supercharge South Carolina's economy?

Tax reform

Tax reform

Exempt childcare facilities from property tax

Incentives power production

Free higher education with corporate sponsors

No property taxes on childcare facilities.

Toss out Act 388 and start over

Interest Rate Impacts



# What's one big policy change that will supercharge South Carolina's economy?

No income tax

Tax reform

Eliminate Individual  
Income Tax

Tax reform

Removal of state income  
tax

No state income tax

Improved education

No income tax

# What's one big policy change that will supercharge South Carolina's economy?

Increase minimum wages

Tax reform

Reduce income tax

State supported student loan refinancing to incentivize younger, educated generations to move to SC

Pay teachers

Utilize local resources more

Eliminate state income tax

Personal income tax reform

# What's one big policy change that will supercharge South Carolina's economy?

Investing in  
infrastructure and  
housing and transit-

Funding for education

Livable wage and  
affordable housing

Real improvement in  
workforce skill

Free tuition for technical  
education

Restructure Act 388

Increase teacher pay

True tax reform and  
investment in education as  
well as infrastructure



# What's one big policy change that will supercharge South Carolina's economy?

Liveable minimum wage

Tax reform

Minimum wage

Prioritizing funding k-12 education

reduce taxes

Childcare supplements for all families

Pay educators MORE than a livable wage, make them COMPETE to educate our children

Income tax changes

# What's one big policy change that will supercharge South Carolina's economy?

Tax reform

Act 388

Funding education and  
university research

Tax reform

Focus on infrastructure.  
Roads and utilities.

Fully fund K12 education

Affordable housing

Increase Pay for  
Teachers and School  
Support Staff

# What's one big policy change that will supercharge South Carolina's economy?

Energy generation

We need more parents involved with their kids so they have a better foundation for education and work

Increase Innovation to increase workforce stability

K-12 Teachers increase salaries by 30%

Livable wage

Investment in education and infrastructure

Affordable housing

Create industry sector economic incentives



# What's one big policy change that will supercharge South Carolina's economy?

Montana has a great housing plan it's non bipartisan look into it

Legalize online sports gambling

Eliminate state income tax

No state taxes

Invest in education

# What are other states doing that you think South Carolina should do to boost its economy?

Legalize Weed

No star income tax

State funded education

Tax reduction

Eliminating state income tax

Host more cultural events

Affordable housing

Shorter permitting processes

What are other states doing that you think South Carolina should do to boost its economy?

Education funding

Affordable housing

Do not legalize weed

Tax change

Tri-share for child care

Minimum wage that  
supports living in state

Education funding

Legalize marijuana



## What are other states doing that you think South Carolina should do to boost its economy?

Eliminate tax on Social security benefits

Tax reform including reduction of state income tax

Lower commercial property taxes

Eliminate Income Tax

Increase funding tools for infrastructure

Investing more in education

Livable minimum wage

Data center construction

What are other states doing that you think South Carolina should do to boost its economy?

Eliminating income taxes.  
Some are floating the idea  
of eliminating property  
taxes.

Tax reform

Eliminating state income  
tax

Tax reform

Affordable housing

Affordability

Tax reform

Streamline permitting  
process

What are other states doing that you think South Carolina should do to boost its economy?

Housing overhaul

Support short line  
railroads

Tax rate adjustments

Eliminate state income  
tax

Address housing

Affordable housing

Affordable housing

Funding for economic  
development sites



# What are other states doing that you think South Carolina should do to boost its economy?

Eliminate state income tax

Infrastructure

Montana housing plan

Drivable roads

Rural Transportation investment

Lowering property taxes.  
Create better incentive tools for local governments.

Affordable housing near jobs

Investing in infrastructure and affordable housing and transit

# What are other states doing that you think South Carolina should do to boost its economy?

Incentives for modern manufacturing

Investment in infrastructure

Focus on the families

Increase workforce housing stock

Pay for education in critical needs sectors

Free 2 years at Tech Colleges for all student pathways Kentucky-Kees program

Better resource the gas tax

Secondary education, Tech schools

What are other states doing that you think South Carolina should do to boost its economy?

Senior care tax breaks

Nuclear energy

Housing reform

Improve roads!!!

Education alignment  
with future jobs

Fund short line railroads

Have thses type of forums  
with High schools to get  
ideas from the students

More football



# What are other states doing that you think South Carolina should do to boost its economy?

Provide a full paid maternity leave beyond 12 weeks.

Workforce

Adult Ed associated with Tech colleges

Property taxes

# Thank You

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