

KERSHAW COUNTY ECONOMIC DEVELOPMENT STRATEGIC PLAN 2012



insite
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Kershaw County retained InSite Consulting, a site selection and economic development consulting firm based in Greer, South Carolina, to develop an economic development strategic plan for the community. The purpose of the project was to guide the efforts of a customized plan for Kershaw County and its stakeholders that determined the best and most reasonable strategies, initiatives, methods, and techniques to encourage capital investment, create jobs in desired sectors, and stimulate sustainable economic growth throughout the county. The scope of services included a leadership alignment meeting, community perceptions / SWOT assessment from internal and external perspectives, organizational benchmarking, extensive desktop analysis and research, exhaustive community visits, development of strategic initiatives, implementation schedule and a final report and presentation.

The purpose of an economic development strategic plan is to provide a comprehensive blueprint for economic development success. This is a "working plan" that houses a check-list / step-by-step guide of initiatives that can actually be implemented, along with a suggested prioritized approach. With the proper strategy, the unique assets of Kershaw County can be leveraged to recruit quality jobs benefiting all stakeholders. As a part of this study, the InSite team conducted an organizational benchmarking analysis of five communities similar in size to Kershaw County. Those benchmarked communities included Sumter County, SC; Greenwood County, SC; Orangeburg County, SC; Lincoln County, NC; and Barrow County, GA. Best practices recommendations are provided throughout this study and the comprehensive analysis is provided under separate cover in an Excel format. Key findings of the analysis illustrate the immediate need for KCED to staff and implement a comprehensive Business Retention and Expansion program (BRE) and increase funding for economic development. KCED has the fifth lowest budget of the analyzed communities and is one of only two benchmarked communities that do not have a BRE program.

It is important to note that although Kershaw County has been aggressive in their past economic development efforts, the county must utilize the following working plan to push forward and enhance initiatives that have lain dormant in an incomplete state. Based on our research, the consulting team's work experience, target sector analysis, community-level SWOT methodology, and resulting target market sector list, the following economic development strategic initiatives will lead Kershaw County's future economic development efforts, beginning with a solid foundation and producing sustainable results:

SECTION 1.0 - ORGANIZATIONAL STRATEGIES

Local leaders must strongly commit to the efforts of economic development in both resource allocation and plan execution to reach short-and long-term goals. The following recommended strategies will further enhance the capabilities of the economic development program:

1.1: BUDGET

- Based on our benchmarking of best practices for economic development programs, the Kershaw County Economic Development Program should have a budget of approximately \$620,000
 - Maintain the existing dedicated tax stream funding for economic development. This is a best practice and must be continued. In our benchmarking analysis, only two of six communities, including Kershaw County, utilized this type of secure public sector funding mechanism.

1.2: PERSONNEL

- The number one priority for a new staff position must be the addition of a business retention manager. The Business Retention and Expansion (BRE) manager's sole responsibility will be the implementation of the new BRE program (as outlined further in this document).
- Enhance the existing office manager's position by adding marketing and communications responsibilities to the job description
- Create and fund a formalized, consistent year-round internship program with either USC or Central Carolina Technical College to conduct research and assist with maintaining and updating the economic development website, available site and buildings database, target company database, research and other functions as necessary

1.3: STRUCTURE

- Utilize the existing Kershaw County Committee of 100 501(c) 3 structure to increase funding for economic development. The existing Committee of 100 members pay \$125.00 in dues which only generates \$11,000 annually. The program of work and governing structure for the Committee of 100 may require comprehensive restructuring and realignment before embarking on raising additional funds for the economic development program. The consulting team recommends targeting 12 – 15 private sector entities at a \$10,000 annual membership level. Potential contributors may include utility companies, banks, engineering firms, construction companies, attorneys, existing companies, towns, etc. Each contributor would be provided a Committee of 100 board seat. The potential \$150,000 additional funds would be utilized exclusively for marketing and business development purposes. (The Laurens County Development Corporation, SC, utilizes this structure and raises approximately \$120,000 annually in private contributions for economic development to assist with the \$360,000 budget they receive from the county. Laurens County, SC, population is approximately 66,000 people). Key steps in this process include:
 - Step 1: Determine whether the path forward is restructuring the existing Kershaw County Committee of 100 or merging the Committee of 100 with the existing KCED office thereby creating a new 501(c) 3 organization
 - Step 2: Present Kershaw County's new economic development strategic plan and program of work to a target group of potential investors individually (entities most likely to contribute first)
 - Step 3: Once two or three supporters/champions have committed, present the economic development vision to a large group of potential investors and explain how they can help diversify the local economy. Utilize the new champions to deliver the message.

1.4: PERFORMANCE MATRIX

InSite recommends utilizing the strategic plan implementation guide as a checklist for accountability and performance measure. Local economic development programs are put in place to assist in a company's decision making process, not in determining it. The only element of the decision making process economic development can control is making sure they have all the elements in place to create success. And there is no crystal ball that indicates when and where a company will locate, nor the investment they will make.

Local communities have no ultimate control over why a company locates or did not locate in an area. So assigning numbers to performance would be an arbitrary process. Economic development efforts cannot be held accountable to the decision making process that is not in their control. What they can be held accountable for is the work put in place on a strategic plan that assists in creating an environment for new job growth and capital investment.

1.5: COUNTY-WIDE BRAND / IDENTITY

- Develop a comprehensive and cohesive community brand for business
- KCED develop in-house three community brand ideas with assistance from InSite
- Retain an economic development-focused marketing firm to assist with finalizing the brand for production and communication purposes (brochures, website, etc.)
- The brand should be concise and based upon the region's assets such as interstate access, educated work force, proximity to the state capital, proximity to major companies like Boeing, etc.
- Although the messages will vary between KCED and the newly developed Kershaw County Tourism Department, create brand linkages, as appropriate, through use of similar colors, etc.

SECTION 2.0 - PROGRAM OF WORK STRATEGIES

2.1: BUSINESS RETENTION AND EXPANSION PROGRAM

In discussing the importance of a dedicated, formalized business and retention program (BRE), the following should be emphasized: competing states are targeting Kershaw County's existing companies; a large percentage of closures arise from mergers and acquisition, consolidations, restructuring, and planned relocations - some of which can be minimized with a solid BRE plan; and a true program legitimizes the commitment to local companies. Considering the fact that, nationally, roughly 80 percent of all new jobs and capital investment are created by existing companies, InSite recom-

mends the following strategies for Kershaw County for a dedicated business retention and expansion program. The strategies and program language include:

COMMITTEES AND ASSOCIATIONS

Existing Industry Committee

The Existing Industry Committee, comprised of local companies, is a committee dedicated to the retention and expansion of existing industry in Kershaw County. This committee:

- Meets throughout the year (quarterly) to refine and improve current programs, develop new programs, and discuss new ideas and opportunities pertaining to existing industry and the business retention program
- Serves as a rapid response team that assists existing companies with small and large emergencies
- Will be capable of addressing everything from regulatory issues to a potential facility closing

Manufacturing Managers Association (MMA)

KCED manages all operations of the Manufacturing Managers Association (MMA). Members must be comprised of only the top management (General Management) of private sector business and industry (including large commercial and distribution operations) in Kershaw County. The MMA will provide these leaders with the opportunity to foster working relationships between and among industry and at the same time work together to better the community. The MMA should meet on an every-other month schedule. During these lunch meetings, members will discuss industrial issues ranging from labor relations, to incentive legislation to facility planning.

Human Resource Managers Association (HRMA)

KCED manages all operations of the HRMA. Members must be comprised of only the top management (Human Resources) of private sector business and industry (including large commercial and distribution operations) in Kershaw County. The HRMA will provide these leaders with the opportunity to foster working relationships between and among industry and at the same time work together to better the community. The MMA should meet on an every-other month schedule. During these lunch meetings, members will discuss industrial issues ranging from ergonomics to OSHA regulations to labor needs and availability.

SERVICES AND PROGRAMS

Incentive Grants Facilitation

KCED is to coordinate and assist with all state and federal grant applications pertaining to existing companies within Kershaw County. KCED will be on-hand to walk an existing company through the federal and state grant process from beginning to end. Beginning with assistance filling out the application to presenting the grant request to the appropriate governing bodies, KCED's role will be to there to make the process smooth and simple for existing industry. There should be no limit to the services provided to existing companies. KCED will utilize the numerous allies that collectively work together to make Kershaw County the natural place for industry to thrive. From the Employment Security Commission to Central Carolina Technical College, to the city and county, to utility companies and many more, KCED will mobilize the abundance of resources to aid in assisting the industrial base. Examples of assistance to Kershaw County companies:

- Fast track permitting – develop permitting process upfront
- Employment issues
- Procurement information
- Utility issues
- Liaison to Kershaw County officials and departments
- Provide information and contacts to the cities and county
- Provide information and contacts to state and federal departments
- Incentive grants
- Public hearing presentations

- Prepare press releases and communication assistance

Existing Industry Directories

KCED will maintain and provide an online Manufacturers and Distributors Directory, Top 50 Employer Directory, and Recent Announcements Summary for the county

Existing Industry Recognition Event

KCED will continue hosting an annual existing industry appreciation event. A suggestion for an inclusive and up-to-date type of event is a family day for executives and their families. This type of event is considered a best practice for industry appreciation events. The day would include cookout, games, mobile recreational units, water sports, etc.

Visitation Program

Annual visits and tours of Kershaw County industrial facilities provide an opportunity for the Kershaw County Economic Development staff to establish and maintain rapport and solid working relationships with existing businesses. It further fosters a better understanding of businesses and their products. The insight and information received during company visits can be used to identify supplier linkages, create new intra-county business relationships and increase KCED's understanding of the Kershaw County business community. Most important, it provides the company with the opportunity to learn more about KCED's commitment to retaining and assisting the existing industries. Through the annual visitation program, KCED will give special attention to any management change within the industry and include contacting headquarters of existing companies to schedule a visit when traveling near their location.

Communication Program

KCED will communicate with local companies via email blast on a bi-monthly basis. Email blast topics range from legislative updates, to new announcements, to available buildings within the county. This consistent communication helps maintain a close business relationship with Kershaw County companies.

Milestone Achievement Awards

KCED will present Milestone Achievement Awards each year to manufacturers and distributors as well as significant office operations located in Kershaw County. The purpose of the award is to recognize and thank local industry for their past, present and future commitment to the community. Manufacturers and industries operating in the County are eligible for the award. Awards will be presented to companies on their fifth year anniversaries (5, 10, 15, 20, etc.). Milestone Achievement Awards will be presented during an annual luncheon in honor of the recipients.

SUPPORTING BRE EFFORTS AND PROGRAMS

- Develop a comprehensive business resource guide accessible online and in printed format to distribute to all local companies / industries. The guide may include:
 - Brief description of the Business Retention Program and its mission
 - Contact information for local economic development office
 - Introduction to and explanation of the new existing business website tab
 - Pre-employment training programs
 - Overview of available incentives
- Develop a public relations strategy around getting the word out about local company / industry successes such as contract awards, safety achievements, new employees hired, capital investment spent, etc. This strategy would include local, regional, state and national exposure.
- Create a dedicated website tab for local companies to access important information about incentives, permitting, training and available site and building information
- Concentrate on a vertical marketing element of the BRE program. Call on existing company executives / management to assist with lead development for target businesses. Solicit and mine leads from these organizations housing suggestions for suppliers, etc. that could potentially relocate to service their market or even other divisions of their company.

- Provide a brief introduction of the County's BRE program during the project management phase of recruiting new companies to the area

2.2: PRODUCT AND INFRASTRUCTURE STRATEGIES

Historically, Kershaw County has been extremely successful in product development initiatives. The county's aggressiveness in developing industrial and business parks along I-20 has resulted in numerous success stories including Target, Haier and Accuride. Kershaw County understands that in order for a community to create a successful economic development program, they must first have available, viable quality sites and buildings for prospective companies. Without fully infrastructured product in a community, an economic development program will not attract quality companies. Having available product and enhancing a community's physical attributes assures the ability to attract new business and provide options for existing industry to expand. Our team evaluated Kershaw County's product from the perspective of a site selection consultant conducting a site evaluation and found most of the product to be in an "incomplete" state, negatively impacting marketability. The following recommendations concentrate primarily on key improvements to existing parks, greenfield sites and viable existing buildings:

CONDER MEGA SITE

A 1,500 acre certified site with all utilities on site and CSX rail service located near the Hwy. 601 and I-20 interchange. It is worth noting there is a unionized facility at the main entrance of the Conder Mega Site which is a significant weakness when viewing the site with clients. Our recommendations with regard to this site's marketability:

Making it Marketable

- Rebrand the site and give it an identity, to include being a mega park vs. mega site – brand the park with a name that helps position it better during online searches and presentations (i.e. terms like South Carolina, Carolinas, interstate, rail, fully-infrastructured – example: Central South Carolina Mega Park, A Fully Infrastructured, Rail-Served Park)
- Develop covenants for the park
- Develop a preliminary conceptual plan illustrating subdividing the site in two large tracts
- Develop a new marketing piece for the site. Highlight rail access information, fully infrastructured and excess capacities on the site flyer. Make the marketing piece accessible via the website.
- Create a dedicated Conder website – the website should include a Google earth aerial view, detail excess capacities, illustrate regional workforce numbers, and provide all site certification documents via password
- Invite all utility service providers (Duke Energy, SC Power Team / Fairfield Electric Cooperative, and SCE&G) individually for a comprehensive site and community overview
- Provide directional signage to the site and create entrance signage at the site

Enhance the Sale

- Begin all community visits with this property as the focus at Target's facility (conference room). Have a senior-level executive conduct the community welcome. Perform the entire community orientation and overview at the Target offices, to include PowerPoint presentation and refreshments. In addition, produce an electronic overview of the site clearly delineating all utilities, roads and rail service; provide all documents in hard copy and on a flash drive; and make all documents accessible via password on a protected project website
- Imperative local site visit participants: local company executives (1 – 2 individuals); Executive Director for KCED; electric utility provider representative; only one state project manager; and only one region project representative
- Always show this site via helicopter – it is virtually impossible to get a feel for the site without an aerial tour. More importantly, it shows poorly from the ground. Always have the prospects helicopter takeoff from the Target facility. Participants (in addition to the client) for helicopter tour: Executive Director for KCED and electric utility provider representative only

WATEREE EXECUTIVE PARK

A 25 acre Class "A" business park located on I-20 at the Exit 87 interchange with one tenant, Kershaw Health. Although the interior of the business park itself is well maintained, the general area of the business park's location does not show like a Class "A" park. This park will not compete in a competitive Class "A" business park site search compared with neighboring Columbia and other cities. Although a Class "A" business park is the right idea for this interchange, the work is not yet done. There are several items that must be improved for this park to have future success.

Making it Marketable

- Expand the park – protect the future integrity of the Exit 87 interchange – this is a must
 - Develop a planning overlay district for the Exit 87 interchange
 - Control property surrounding the park on both sides of the interstate via options, marketing agreements, etc.
- Rebrand the site and give it an identity to help position it better during online searches and presentations (i.e. terms like South Carolina, Carolinas, fully-infrastructure – example: Central South Carolina Executive Park, A Pad-and Permit-Ready Park)
- Improve the condition of the property between Whiting Way and the interstate
- List on CoStar / LoopNet, an online real estate listing service. Real estate companies conduct searches on the CoStar service and the park must be identified during such a real estate search. Ensure the park is identified within the Columbia MSA.
- Create a forgivable loan / grant program for the land. As new companies meet specific job creation and capital investment milestones, a portion of the land cost would be forgiven over a 3 – 5 year time frame.
- Market this site as a Columbia location
- Market as a Permitted Business Ready Site. Currently there is a pad-ready site in the park associated with the "Virtual Spec Building". Recommend focusing on the graded pad-ready site versus the Virtual Spec Building angle.
- Develop a new high-end marketing piece or update the existing one for the park. Highlight the proximity to Columbia; large, highly educated available workforce; fiber optic availability; and permitted, pad-ready site. Make this brochure accessible on the website.
- Develop a regional / real estate company database
- Develop a real estate commission policy to encourage greater activity from the real estate community
- Invite regional and national brokerage firms to a lunch and learn and / or webinar to outline Wateree Executive Park's new real estate commission policy
- Invite the SC Power Team, regional alliance, and SCDOC to a lunch and learn about the park's new initiatives
- Offer build-to-suit services in the park. Meet with 2-3 developers to discuss their potential interest and approach to build-to-suit and / or development options within the park.
- Offer multi-tenant opportunities in the 5,000 SF – 10,000 SF range. Select a site within the park and develop a conceptual drawing and rough budget estimate for developing a 10,000 SF multi-tenant facility. Discuss with developer potential partnerships to develop flex space in the park.

Enhance the Sale

- Begin all community visits with this property as the focus at Verizon's call center or Blue Cross Blue Shield's (BCBS) facility (conference room) on the outskirts of Kershaw County. Have a senior-level executive conduct the community welcome. Perform the entire community orientation and overview at the BCBS offices, to include PowerPoint presentation and refreshments (always). In addition, produce an electronic overview of the site clearly delineating all utilities and transportation access; provide all documents in hard copy and on a flash drive; and make all documents accessible via password on a protected project website. Then put the prospects on a van, take them to the park and show them first-hand how easy the drive is from Columbia to Kershaw County.

- Imperative local site visit participants: local company executives (1 – 2 individuals); Executive Director for KCED; electric utility provider representative; only one state project manager; and only one region project representative
- Have a tent (if possible) and table(s) on the actual, proposed site to review the site and park layouts. Include bottled water as refreshment.

STEEPLECHASE INDUSTRIAL PARK

A 133 acre industrial park located at Hwy. 521 with visibility on I-20. Tenants include Haier America, Hengst and Accuride. There is also a 75,000 SF Spec. building located in the park. This industrial park shows the best of all Kershaw County's available product.

Making it Marketable

- Update Steeplechase marketing piece. Highlight interstate visibility; fully infrastructured; and excess capacities. Make this marketing piece accessible on the website.
- Develop new signage at the park's Hwy. 521 main entrance
- Speculative Building – pave small parking area in front of building. Pour 6" reinforced concrete floor slab inside the building. The Spec Building should show well during a competitive building search and has been improved with recent exterior painting. However, the paved parking and new floor slab will dramatically improve the marketability of the building.
- Connect Steeplechase with Central Carolina Technical College's new campus via CCTC's main entrance road
- Rename the park. Give it a dominant identity that would make sense to the audience and where they would be locating their facility

Enhance the Sale

- Begin all community visits with this property as the focus at Haier's facility (conference room). Have a senior-level executive from Haier conduct the community welcome. Perform the entire community orientation and overview at the Haier offices, to include PowerPoint presentation and refreshments (always). In addition, produce an electronic overview of the site clearly delineating all utilities and transportation access; provide all documents in hard copy and on a flash drive; and make all documents accessible via password on a protected project website.
- Imperative local site visit participants: local company executives (1 – 2 individuals); Executive Director for KCED; electric utility provider representative; only one state project manager; and only one region project representative
- Have a tent (if possible) and table(s) on the actual, proposed site to review the site and park layouts. Include bottled water as refreshment.

CENTRAL CAROLINA TECHNICAL COLLEGE CAMPUS

This 41 acre campus is located on Hwy. 521 and houses the Kershaw County Economic Development office. The CCTC facility and the KCED office are Class "A" facilities. However, Kershaw County left this project in a half-finished state and the CCTC campus desperately needs an identity, to be upgraded and better maintained. The CCTC / KCED campus is a showpiece for the community, but the poor entrance road signage and landscaping does not project a professional business image.

Making it Marketable

- Repave and improve landscaping on Century Boulevard. Eliminate tractor trailer parking along Century Boulevard.
- Upgrade entrance landscaping to provide a campus-type environment
- Develop a new marketing piece for the site. Highlight on-site training facility; interstate access; and all utilities. Make this marketing piece accessible on the website.
- Create new park signage for the main entrance (off Hwy. 521) that is commensurate with the existing CCTC facility
- Connect the campus, via CCTC main entrance road, with Steeplechase Industrial Park. A road connecting the two developments provides a second access route for Steeplechase and allows KCED to market the location of CCTC employee training within both parks.

- Master plan and brand the campus (focus on on-site training). Master plan the campus to include a variety of site parcels that can accommodate compatible companies to the CCTC. Recommend including walking trails and park features to enhance the existing college campus and provide a quality amenity for relocating companies.
- Lobby state and local officials to install a traffic signal at the Hwy. 521 main entrance. The lack of a traffic signal will be a major concern for new companies and CCTC students.

Enhance the Sale

- Begin all community visits with this property as the focus at the KCED / training facility (conference room). Have a senior level executive from an existing industry conduct the community welcome. Perform the entire community orientation and overview at the economic development offices, to include PowerPoint presentation and refreshments (always). In addition, produce an electronic overview of the site clearly delineating all utilities, roads and transportation access; provide all documents in hard copy and on a flash drive; and make all documents accessible via password on a protected project website.
- Imperative local site visit participants: local company executives (1 – 2 individuals); Executive Director for KCED; electric utility provider representative; only one state project manager; and only one region project representative
- Have a tent (if possible) and table(s) on the actual, proposed site to review the site and park layouts. Include bottled water as refreshment.

GOVERNOR'S HILL INDUSTRIAL PARK

A 210 acre industrial park campus located just off of I-20. This industrial park shows as a greenfield site versus an industrial park. Governor's Hill has no water service to the park which is a fatal flaw during a competitive site search.

Making it Marketable

- Prioritize the wetlands restoration project for the park
- Prioritize extension of water service to the park
- Be prepared with the following details with regard to water service: how far it is from the site; how long it will take to get it to the site; how much it will cost; and who will pay for the extension of service
- Develop a comprehensive park master plan
- Create a main entrance road with signage for Governor's Hill
- Develop at least one pad-ready site
- Develop a new marketing piece for the site. Highlight interstate access and large tract availability. Make this marketing piece accessible on the website.

Enhance the Sale

- Begin all community visits with this property as the focus at Haier's facility (conference room). Have a senior-level executive from Haier conduct the community welcome. Perform the entire community orientation and overview at the Haier offices, to include PowerPoint presentation and refreshments (always). In addition, produce an electronic overview of the site clearly delineating all utilities and transportation access; provide all documents in hard copy and on a flash drive; and make all documents accessible via password on a protected project website.
- Imperative local site visit participants: local company executives (1 – 2 individuals); Executive Director for KCED; electric utility provider representative; only one state project manager; and only one region project representative
- Have a tent (if possible) and table(s) on the actual, proposed site to review the site and park layouts. Include bottled water as refreshment.

EMANUEL SITE

A greenfield industrial site with all utilities and CSX rail service located on Hwy. 1 in Lugoff.

Making it Marketable

- Secure a marketing agreement with the owners of the site outlining sale price and terms
- Run the Emanuel Site through the site certification process
- Develop a new marketing piece for the site. Highlight direct rail access and fully infrastructured. Make this marketing piece accessible on the website.

AVAILABLE BUILDINGS

Kershaw County has five available industrial buildings ranging in size from 75,000 SF – 164,000 SF for either sale or lease. The current inventory of available buildings is a strength for the county. The county should invest in a building assessment program to highlight the marketable strengths, identify their weaknesses, and how to improve their marketability. Kershaw County should continue their successful development of speculative buildings in the future. Steeplechase Speculative Building recommendations were outlined previously in the Steeplechase Industrial Park section of this document.

2.3: ENTREPRENEURIAL AND SMALL BUSINESS PROGRAM

Empowering and supporting small business and entrepreneurial efforts should be a critical element of the area's sustainable economic development goals. Small businesses and entrepreneurs are primary mobilizers of resources for the local economy and are stabilizing factors in society as a whole. They are a source of innovation in services, products and technologies. These entities provide a tremendous employment base for all thriving communities.

The mission of KCED will not include executing an entrepreneurial and small business program. InSite recommends this important effort be served jointly by the City of Camden's Economic Development Department and the Kershaw County Chamber of Commerce, the more appropriate entities to execute this type of program of work.

2.4: MARKETING

TOOLBOX

Throughout our interviews with local leadership, the need for a community identity was mentioned on a regular basis. Although the Kershaw County region is known for its history and equine industry, there is a lack of identity from a business perspective. A community's identity and "marketing toolbox" is critical to the success of any economic development program. These elements of the economic development strategic plan are considered key items that will assist in the communication of the location assets of Kershaw County. In that light, we recommend the following initiatives:

Sales Materials

- Develop new Industrial and Business Park brochures for Wateree Executive Park, Conder Mega Site, Steeplechase Industrial Park, CCTC Campus, and Governor's Hill Industrial Park. All park information should be available on the website.
- Develop a one page, front and back profile of taxes and incentives
- Develop a one page, front and back existing industry testimonial piece
- Develop a comprehensive prospect notebook for companies when they visit the community. The prospect notebook would include the following:
 - General Community Overview
 - Education
 - Labor Force
 - Utilities
 - Quality of Life
 - Transportation
 - Incentives
 - Sites / Buildings (listing excess capacities)
 - Major Employers
 - Target Industries
 - Contact Us

- Utilize regional population and workforce numbers on all marketing / promotional / collateral materials
- Emphasize regional education attainment in all marketing efforts

Website

Site selection consultants and prospective companies utilize web searches during the early phases of a site search. In a 2011 Corporate Executive's Survey conducted by DCI, corporations listed information on available incentives, workforce statistics, demographic information and a directory of available buildings and sites as the four most important areas for an economic development website. With those four categories in mind, our consulting team conducted a KCED website review. Overall, the KCED website is effective and easy to navigate. General recommendations for improvement follow:

- While conducting a search on Google for "economic development in South Carolina," the KCED website was listed on the third page of the search results. When "Site Selection in South Carolina" is googled, the KCED site does not appear on the first five pages. Work with your website provider to improve position on search engines including key words such as Columbia, South Carolina, Camden, Site Selection, Economic Development, Department of Commerce, Central South Carolina, Manufacturing, Available Sites, Available Buildings, Equine, etc.
- Provide an "Incentives" tab on the homepage. Include worker training information within this section.
- In the "Labor & Employment" section, include regional labor force numbers as the primary focus: Include MSA education attainment for high school and bachelor's degrees – Both are above U.S. and SC averages.
- Separate business / industrial parks from the "Sites & Buildings" tab. The majority of online searches will be more interested in business and industrial parks versus stand-alone industrial sites. Add a drop down menu for "Office Buildings".
- Add a "Featured Building" section on the homepage. Profile a new quality available building every month.
- Provide a Kershaw County location map highlighting interstate access on the homepage and the "County Profile" page
- Provide an industrial park location map
- Post the new prospect notebook (as outlined in the "Sales Materials" section of this report) online
- Develop a BRE tab for existing companies. The dedicated business retention tab within the KCED website is designed to give companies an immediate mechanism to gain pertinent information on a variety of subjects. The section would also include comprehensive information on available incentives; pre-employment training; financial assistance; database of all programs offered to business and industry by your area colleges and universities; real estate assistance; and local contacts.
- Add a Kershaw County location map to the "Transportation" page
- Remove the School District link and report card located in the "Education" section
- Remove all links except links to Kershaw County municipalities and Kershaw County tourism
- Expand "Recreation" section to include information on Myrtle Beach, Charleston and Hilton Head
- Dedicate a tab to the Equine Industry including a brief history and local economic impact to the region – tie in that business owners can enjoy the "horse lifestyle" with an ideal Kershaw County business location
- Develop a secure project management portal that is dedicated to new and expansion projects

TARGET MARKETING ANALYSIS

With regard to the target marketing analysis, InSite's layered analysis was developed from research, local focus groups, interviews, surveys, national consulting expertise and a proactive focus on enhancing Kershaw County's business recruitment and retention efforts. The InSite Consulting team conducted one-on-one personal interviews, surveys, and focus group meetings with more than 55 local business, government, and community leaders to obtain information and perceptions on a wide variety of issues including business and political climate, transportation and utilities, education and labor, and visions for the future. The consulting team visited Kershaw County on many occasions and extensive community evaluations were conducted just as a prospective company would conduct a site selection search. The evaluation criteria included availability of quality sites and buildings, suitable water and wastewater systems, regional

labor force, secondary education, quality of life, business climate for industry, workforce training, availability of higher education, and other business recruitment factors. As a supplemental decision-making resource, an economic snapshot was taken of Kershaw County and surrounding counties (Calhoun, Fairfield, Lexington, Richland and Saluda) and can be found in the Appendix of this document. This analysis included the compilation of data such as labor, population, demographics, education, transportation, recreation, housing, crime, healthcare, ambiance and climate.

The comprehensive target sector methodology analyzed projected growth industries in the U.S. and SC; historical new company announcements in Kershaw County and the region; regional location quotients - a mathematical ratio used to measure the concentration of an industry in one location relative to its concentration in another location, in this case, the United States. LQs are useful for assessing the size and presence of an industry cluster in a given area. LQs greater than 1.00 indicate that a region has a well-developed industry sector - i.e. the higher the LQ, the stronger the industry. However, one should keep in mind that the higher the LQ, the greater an area's dependence on that particular industry.

The InSite team recommends a sound fundamental approach to marketing and resulting job recruitment. This approach must begin with recommended targets based on your location strengths matched with projected growth industries. The first phase of identifying the markets and associated "gaps" resides in the following pages. Kershaw County's recommended target markets are broken out into two categories: primary and future. The primary target markets are those that Kershaw County should concentrate on immediately and are best suited for success. The future target markets are those that Kershaw County should consider after significant program and product initiatives have been identified and implemented. All target market sectors are provided at the four digit NAICS level providing more specific and reliable targets. The target marketing analysis provided the following results:

Primary Markets

- Kershaw County's Existing Companies (BRE Program)
- Wood Product Manufacturing: 321
 - Veneer, Plywood, and Engineered Wood Product Manufacturing: 3212
- Plastics and Rubber Products Manufacturing: 326
 - Plastics Product Manufacturing: 3261
- Transportation Equipment Manufacturing: 336
 - Motor Vehicles Parts Manufacturing: 3363
 - Aerospace Product and Parts Manufacturing: 3364
- Food Manufacturing: 311
 - Grain and Oilseed Milling Food Manufacturing: 3112
 - Fruit and Vegetable Preserving and Specialty Food Manufacturing: 3114

Future Markets

- Insurance Carriers and Related Activities: 524
 - Insurance Carriers: 5241
 - Agencies, Brokerages, and Other Insurance Related Activities: 5242
- Professional, Scientific and Technical Services: 541
 - Computer Systems Design and Related Services: 5415
 - Management, Scientific, and Technical Consulting Services: 5416

Target Market Matrix

InSite Consulting Target Industry Study					
Kershaw County					
Target Industry Matrix					
Priority Targets	NAICS Definition	US Projected Growth '10-'20	SC Projected Growth '10-'20	Kershaw County Region .5 < LQ < 1.0	Kershaw County Region LQ > 1.0
112	Animal Production and Aquaculture				x
311	Food Manufacturing		x		x
321	Wood Product Manufacturing	x	x	x	
326	Plastics and Rubber Products Mfg.		x		x
332	Fabricated Metal Product Manufacturing		x		x
336	Transportation Equipment Manufacturing		x		x
517	Telecommunications		x		x
524	Insurance Carriers and Related Activities		x		x
541	Professional, Scientific and Technical Services	x	x	x	
561	Administrative and Support Services	x	x		x
PRIMARY TARGETS					
FUTURE TARGETS					

TARGET MARKET RECOMMENDATIONS AND DESCRIPTIONS: PRIMARY MARKETS

Kershaw County’s recommended target markets are identified within two categories: primary and future. The following section gives a description of the target, supporting information with regard to its selection, and the “gap” to success for implementation.

Kershaw County’s Existing Companies

It is imperative that Kershaw County implement a comprehensive Existing Business Program focused solely on the retention and expansion of existing companies in Kershaw County. This new program will be dedicated to the long term success of local companies by becoming a great resource for Kershaw County’s businesses.

Supporting Information

- Majority of a community’s new jobs and investment is created by existing businesses (approximately 80%)
- Cost effective target
- An effective business retention and expansion program assists with the recruitment of new companies to the county

“Gaps” to Success for Implementation

- Budget for and implement a fully staffed, comprehensive BRE program whose sole purpose is devoted specifically to executing the above mentioned Business Retention and Expansion program of work

Veneer, Plywood and Engineered Wood Product Manufacturing: 3212

This industry group comprises establishments primarily engaged in one or more of the following: (1) manufacturing veneer and/or plywood; (2) manufacturing engineered wood members; and (3) manufacturing reconstituted wood products. This industry includes manufacturing plywood from veneer made in the same establishment or from veneer made in other establishments, and manufacturing plywood faced with nonwood materials, such as plastics or metal.

Establishments primarily engaged in:

- Manufacturing veneer and further processing that veneer into wood containers or wood container parts in the same establishment - are classified in Industry 32192, Wood Container and Pallet Manufacturing

- Manufacturing prefabricated wood buildings or wood sections, and panels for buildings - are classified in Industry 32199, All Other Wood Product Manufacturing; and Manufacturing solid wood structural members, such as dimension lumber and timber from logs or bolts in sawmills - are classified in Industry 32111, Sawmills and Wood Preservation

Parent Sectors of 3212:

- 32 - Manufacturing
- 321 - Wood Product Manufacturing

Sub-Sectors of 3212:

- 32121 - Veneer, Plywood, and Engineered Wood Product Manufacturing

Also called:

- Fabricated structural wood members manufacturing
- Laminated structural wood members manufacturing
- Medium density fiberboard (MDF) manufacturing
- Oriented strandboard (OSB) manufacturing
- Particleboard manufacturing
- Plywood manufacturing
- Reconstituted wood sheets and boards manufacturing
- Roof trusses, wood, manufacturing
- Veneer mills
- Waferboard manufacturing

Supporting Information

- Ample available industrial product including Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site
- Existing wood product manufacturing industry presence with a regional LQ (Location Quotient) of 0.92
- 30% U.S. projected employment growth rate over the next ten years
- 24% South Carolina projected employment growth rate over the next ten years
- Quality industrial rail sites

"Gaps" to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site

Plastics and Rubber Products Manufacturing: 3261

Industries in the Plastics and Rubber Products Manufacturing subsector make goods by processing plastics materials and raw rubber. The core technology employed by establishments in this subsector is that of plastics or rubber product production. Plastics and rubber are combined in the same subsector because plastics are increasingly being used as a substitute for rubber; however the subsector is generally restricted to the production of products made of just one material, either solely plastics or rubber.

Many manufacturing activities use plastics or rubber, for example the manufacture of footwear, or furniture. Typically, the production process of these products involves more than one material. In these cases, technologies that allow disparate materials to be formed and combined are of central importance in describing the manufacturing activity. In NAICS, such activities (the footwear and furniture manufacturing) are not classified in the Plastics and Rubber Products Manufacturing subsector because the core technologies for these activities are diverse and involve multiple materials.

Within the Plastics and Rubber Products Manufacturing subsector, a distinction is made between plastics and rubber products at the industry group level, although it is not a rigid distinction, as can be seen from the definition of Industry 32622, Rubber and Plastics Hoses and Belting Manufacturing. As materials technology progresses, plastics are increasingly being used as a substitute for rubber; and eventually, the distinction may disappear as a basis for establishment classification.

In keeping with the core technology focus of plastics, lamination of plastics film to plastics film as well as the production of bags from plastics only is classified in this subsector. Lamination and bag production involving plastics and materials other than plastics are classified in the NAICS Subsector 322, Paper Manufacturing.

Parent Sectors of 3261:

- 32 - Manufacturing
- 326 - Plastics and Rubber Products Manufacturing

Sub-Sectors of 3261:

- 32611 - Plastics Packaging Materials and Unlaminated Film and Sheet Manufacturing: Establishments primarily engaged in —
 - Laminating plastics sheet (except for packaging) - are classified in Industry 32613, Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing;
 - Manufacturing plastics blister and bubble packaging - are classified in Industry 32619, Other Plastics Product Manufacturing; and
 - Coating or laminating combinations of plastics, foils and paper (except plastics film to plastics film) into film, sheet or bags - are classified in Industry 32222, Paper Bag and Coated and Treated Paper Manufacturing.
- 32612 - Plastics Pipe, Pipe Fitting, and Unlaminated Profile Shape Manufacturing: Establishments primarily engaged in —
 - Manufacturing plastics hose - are classified in Industry 32622, Rubber and Plastics Hoses and Belting Manufacturing;
 - Manufacturing noncurrent carrying plastics conduit - are classified in Industry 33593, Wiring Device Manufacturing;
 - Manufacturing plastics plumbing fixtures - are classified in Industry 32619, Other Plastics Product Manufacturing; and
 - Manufacturing plastics film, plastics unlaminated sheet, and plastics bags - are classified in Industry 32611, Plastics Packaging Materials and Unlaminated Film and Sheet Manufacturing.
- 32613 - Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing: Establishments primarily engaged in —
 - Manufacturing plastics film, plastics unlaminated sheet, and plastics bags - are classified in Industry 32611, Plastics Packaging Materials and Unlaminated Film and Sheet Manufacturing;
 - Coating or laminating nonplastics film, sheet, or bags with plastics - are classified in Industry 32222, Paper Bag and Coated and Treated Paper Manufacturing; and
 - Manufacturing plastics bags - are classified in U.S. Industry 326111, Plastics Bag Manufacturing.
- 32614 - Polystyrene Foam Product Manufacturing: This sector is also called:
 - Coolers or ice chests, polystyrene foam, manufacturing
 - Cups, polystyrene foam, manufacturing
 - Dinnerware, polystyrene foam, manufacturing
 - Foam polystyrene products manufacturing
 - Food containers, polystyrene foam, manufacturing

- Ice buckets, polystyrene foam, manufacturing
- Ice chests or coolers, polystyrene foam, manufacturing
- Insulation and cushioning, polystyrene foam plastics, manufacturing
- Jugs, vacuum, polystyrene foam plastics, manufacturing
- Plates, polystyrene foam, manufacturing
- Polystyrene foam packaging manufacturing
- Sheet (i.e., board), polystyrene foam insulation, manufacturing
- Shipping pads and shaped cushioning, polystyrene foam, manufacturing
- Thermal insulation, polystyrene foam, manufacturing
- **32615 - Urethane and Other Foam Product (except Polystyrene) Manufacturing:** This sector is also called:
 - Cushions, carpet and rug, urethane and other foam plastics (except polystyrene), manufacturing
 - Foam plastics products (except polystyrene) manufacturing
 - Ice buckets, urethane or other plastics foam (except polystyrene), manufacturing
 - Ice chests or coolers, urethane or other plastics foam (except polystyrene) manufacturing
 - Insulation and cushioning, foam plastics (except polystyrene), manufacturing
 - Jugs, vacuum, foam plastics (except polystyrene), manufacturing
 - Packaging, foam plastics (except polystyrene), manufacturing
 - Polyurethane foam products manufacturing
 - Seat cushions, foam plastics (except polystyrene), manufacturing
 - Shipping pads and shaped cushioning, foam plastics (except polystyrene), manufacturing
 - Urethane foam products manufacturing
- **32616 - Plastics Bottle Manufacturing:** Plastic bottles
- **32619 – Other Plastics Project Manufacturing:** Establishments primarily engaged in —
 - Manufacturing plastics film, plastics unlaminated sheet, and plastics bags - are classified in Industry 32611, Plastics Packaging Materials and Unlaminated Film and Sheet Manufacturing;
 - Manufacturing plastics pipes, pipe fittings and plastics profile shapes (except films, sheet, bags) - are classified in Industry 32612, Plastics Pipe, Pipe Fitting, and Unlaminated Profile Shape Manufacturing;
 - Laminating plastics profile shapes, such as plate, sheet and rod, - are classified in Industry 32613, Laminated Plastics Plate, Sheet (except packaging) and Shape Manufacturing;
 - Manufacturing polystyrene foam products - are classified in Industry 32614, Polystyrene Foam Product Manufacturing;
 - Manufacturing foam products (except polystyrene) - are classified in Industry 32615 Urethane and Other Foam Product (except Polystyrene) Manufacturing;
 - Manufacturing plastics bottles - are classified in Industry 32616, Plastics Bottle Manufacturing;
 - Manufacturing plastics furniture parts - are classified in Industry 33721, Office Furniture (including Fixtures) Manufacturing;
 - Assembling plastics components into plumbing fixture fittings, such as faucets, - are classified in Industry 33291, Metal Valve Manufacturing; and

- Manufacturing rubber floor mats and rubber treads - are classified in Industry 32629, Other Rubber Product Manufacturing.
- Illustrative examples include: Inflatable plastics boats manufacturing; Plastics bowls and bowl covers manufacturing; Plastics cups (except foam) manufacturing; Plastics dinnerware (except foam) manufacturing; Plastics gloves manufacturing; Plastics hardware manufacturing; Plastics or fiberglass plumbing fixtures (e.g., toilets, shower stalls, urinals) manufacturing; Plastics siding manufacturing; Plastics trash containers manufacturing; Resilient floor coverings (e.g., sheet, tiles) manufacturing

Supporting Information

- Existing plastics and rubber products manufacturing industry presence with a regional LQ (Location Quotient) of 1.75
- 30% South Carolina projected employment growth rate over the next ten years
- Ample available industrial product including Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site
- Quality industry rail sites
- Excellent interstate access

"Gaps" to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site

Motor Vehicle Parts Manufacturing: 3363

Parent Sectors of 3363:

- 33 - Manufacturing
- 336 - Transportation Equipment Manufacturing

Sub-Sectors of 3363:

- 33631 - Motor Vehicle Gasoline Engine and Engine Parts Manufacturing: This industry comprises establishments primarily engaged in manufacturing and/or rebuilding motor vehicle gasoline engines, and engine parts, whether or not for vehicular use. Establishments primarily engaged in —
 - Manufacturing wiring harnesses and other vehicular electrical and electronic equipment - are classified in Industry 33632, Motor Vehicle Electrical and Electronic Equipment Manufacturing;
 - Manufacturing transmission and power train equipment - are classified in Industry 33635, Motor Vehicle Transmission and Power Train Parts Manufacturing;
 - Manufacturing radiators - are classified in Industry 33639, Other Motor Vehicle Parts Manufacturing;
 - Manufacturing steering and suspension components - are classified in Industry 33633, Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing;
 - Manufacturing parts for machine repair and equipment parts (except electric) on a job or shop basis - are classified in Industry 33271, Machine Shops;
 - Manufacturing rubber and plastic belts and hoses without fittings - are classified in Industry 32622, Rubber and Plastics Hoses and Belting Manufacturing; and
 - Manufacturing stationary and diesel engines - are classified in Industry 33361, Engine, Turbine, and Power Transmission Equipment Manufacturing.
 - Illustrative examples include: Carburetors, all types, manufacturing; Crankshaft assemblies, automotive and truck gasoline engine, manufacturing; Cylinder heads, automotive and truck gasoline engine, manufacturing; Fuel injection systems and parts, automotive and truck gasoline engine, manufacturing; Manifolds (i.e., intake and exhaust), automotive and truck gasoline engine, manufacturing; Pistons and piston rings manufacturing; Pumps (e.g., fuel, oil, water), mechanical automotive and truck gasoline engine (except power steering), manu-

facturing; Timing gears and chains, automotive and truck gasoline engine, manufacturing; and Valves, engine, intake and exhaust, manufacturing

- **33632 - Motor Vehicle Electrical and Electronic Equipment Manufacturing:** Establishments primarily engaged in —
 - Manufacturing automotive lamps - are classified in Industry 33S11, Electric Lamp Bulb and Part Manufacturing;
 - Manufacturing batteries - are classified in Industry 33S91, Battery Manufacturing;
 - Manufacturing electric motors for motor vehicles (including electric vehicles) - are classified in Industry 33S31, Electrical Equipment Manufacturing;
 - Manufacturing railway traffic control signals and passenger car alarms - are classified in Industry 33429, Other Communications Equipment Manufacturing; and
 - Manufacturing car stereos - are classified in Industry 33431, Audio and Video Equipment Manufacturing.
 - Illustrative examples include: Alternators and generators for internal combustion engines manufacturing; Automotive lighting fixtures manufacturing; Coils, ignition, internal combustion engines, manufacturing; Distributors for internal combustion engines manufacturing; Electrical ignition cable sets for internal combustion engines manufacturing; Generators for internal combustion engines manufacturing; Ignition wiring harness for internal combustion engines manufacturing; Instrument control panels (i.e., assembling purchased gauges), automotive, truck, and bus, manufacturing; Spark plugs for internal combustion engines manufacturing; Windshield washer pumps, automotive, truck, and bus, manufacturing
- **33633 - Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing:** This industry comprises establishments primarily engaged in manufacturing and/or rebuilding motor vehicle steering mechanisms and suspension components (except springs). Illustrative examples include:
 - Rack and pinion steering assemblies manufacturing
 - Shock absorbers, automotive, truck, and bus, manufacturing
 - Steering columns, automotive, truck, and bus, manufacturing
 - Steering wheels, automotive, truck, and bus, manufacturing
 - Struts, automotive, truck, and bus, manufacturing
 - Alternate Titles: Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing; Automotive, truck and bus steering assemblies and parts manufacturing; Automotive, truck and bus suspension assemblies and parts (except springs) manufacturing; Power steering hose assemblies manufacturing; Power steering pumps manufacturing; Rack and pinion steering assemblies manufacturing; Shock absorbers, automotive, truck, and bus, manufacturing; Steering boxes, manual and power assist, manufacturing; Steering columns, automotive, truck, and bus, manufacturing; Steering wheels, automotive, truck, and bus, manufacturing; Struts, automotive, truck, and bus, manufacturing; and Wheels, steering, automotive, truck, and bus, manufacturing
- **33634 - Motor Vehicle Brake System Manufacturing:** This industry comprises establishments primarily engaged in manufacturing and/or rebuilding motor vehicle brake systems and related components. Establishments primarily engaged in manufacturing rubber and plastics belts and hoses without fittings are classified in Industry 326220, Rubber and Plastics Hoses and Belting Manufacturing. Illustrative examples include:
 - Brake cylinders, master and wheel, automotive, truck, and bus, manufacturing
 - Brake drums, automotive, truck, and bus, manufacturing
 - Brake hose assemblies manufacturing
 - Brake pads and shoes, automotive, truck, and bus, manufacturing
 - Calipers, brake, automotive, truck, and bus, manufacturing
 - Alternate titles include: Motor Vehicle Brake System Manufacturing; Air brake systems and parts, automotive, truck, and bus, manufacturing; Brake and brake parts, automotive, truck, and bus, manufacturing; Brake caliper assemblies, automotive, truck, and bus, manufacturing; Brake cylinders, master and wheel, automotive, truck,

and bus, manufacturing; Brake discs (rotor), automotive, truck, and bus, manufacturing; Brake drums, automotive, truck, and bus, manufacturing; Brake hose assemblies manufacturing; Brake lining, automotive, truck, and bus, manufacturing; Brake pads and shoes, automotive, truck, and bus, manufacturing; Brake shoes and pads, asbestos, manufacturing; Calipers, brake, automotive, truck, and bus, manufacturing; Cylinders, master brake (new and rebuilt), manufacturing; Hydraulic slave cylinders, automotive, truck, and bus clutch, manufacturing; and Vacuum brake booster, automotive, truck, and bus, manufacturing

- **33635 - Motor Vehicle Transmission and Power Train Parts Manufacturing:** This industry comprises establishments primarily engaged in manufacturing and/or rebuilding motor vehicle transmission and power train parts. Illustrative examples include:
 - Automatic transmissions, automotive, truck, and bus, manufacturing
 - Axle bearings, automotive, truck, and bus, manufacturing
 - Constant velocity joints, automotive, truck, and bus, manufacturing
 - Differential and rear axle assemblies, automotive, truck, and bus, manufacturing
 - Torque converters, automotive, truck, and bus, manufacturing
 - Universal joints, automotive, truck, and bus, manufacturing
 - Alternate titles include: Motor Vehicle Transmission and Power Train Parts Manufacturing; Assembly line rebuilding of automotive, truck, and bus transmissions; Automatic transmissions, automotive, truck, and bus, manufacturing; Axle bearings, automotive, truck, and bus, manufacturing; Clutches and clutch facings, asbestos, manufacturing; Constant velocity joints, automotive, truck, and bus, manufacturing; Differential and rear axle assemblies, automotive, truck, and bus, manufacturing; Drive shafts and half shafts, automotive, truck, and bus, manufacturing; Gears (e.g., crown, pinion, spider), automotive, truck, and bus, manufacturing; Joints, universal, automotive, truck, and bus, manufacturing; Pressure and clutch plate assemblies, automotive, truck, and bus, manufacturing; Scattershield, engine, manufacturing; Torque converters, automotive, truck, and bus, manufacturing; Transaxles, automotive, truck, and bus, manufacturing; Transmissions and parts, automotive, truck, and bus, manufacturing; and Universal joints, automotive, truck, and bus, manufacturing
- **33636 - Motor Vehicle Seating and Interior Trim Manufacturing:** This industry comprises establishments primarily engaged in manufacturing motor vehicle seating, seats, seat frames, seat belts, and interior trimmings. Establishments primarily engaged in manufacturing convertible tops for vehicles and those manufacturing air bags are classified in U.S. Industry 336399, All Other Motor Vehicle Parts Manufacturing. Alternate titles include:
 - Aircraft seats manufacturing
 - Automobile seat covers manufacturing
 - Automobile seat frames, metal, manufacturing
 - Automobile trimmings, textile, manufacturing
 - Motor vehicle interior systems (e.g., headliners, panels, seats, trims) manufacturing
 - Motor vehicle seats manufacturing
 - Motor vehicle seats, metal framed, manufacturing
 - Motor vehicle trimmings manufacturing
 - Railroad seating manufacturing
 - Seat belts, motor vehicle and aircraft, manufacturing
 - Seats for public conveyances, manufacturing
 - Seats, railroad, manufacturing
 - Tire covers made from purchased fabric
 - Transportation equipment seating manufacturing

- **33637 - Motor Vehicle Metal Stamping:** This industry comprises establishments primarily engaged in manufacturing motor vehicle stampings, such as fenders, tops, body parts, trim, and molding. Establishments primarily engaged in manufacturing stampings and further processing the stampings - are classified according to the process of the specific product made; and manufacturing stampings (except motor vehicle) - are classified in U.S. Industry 332116 Metal Stamping. Alternate titles include:
 - Job stampings, automotive, metal, manufacturing
 - Metal motor vehicle body parts stamping
 - Moldings and trim, motor vehicle, stamping
 - Motor vehicle metal bumper stampings
 - Motor vehicle metal parts stamping
 - Motor vehicle metal stampings (e.g., body parts, fenders, hub caps, tops, trim) manufacturing
 - Stamping metal motor vehicle body parts
 - Stamping metal motor vehicle moldings and trims
- **33639 - Other Motor Vehicle Parts Manufacturing** This industry comprises establishments primarily engaged in manufacturing and/or rebuilding motor vehicle parts and accessories (except motor vehicle gasoline engines and engine parts, motor vehicle electrical and electronic equipment, motor vehicle steering and suspension components, motor vehicle brake systems, motor vehicle transmission and power train parts, motor vehicle seating and interior trim, and motor vehicle stampings). Illustrative examples include: Air bag assemblies manufacturing; Air-conditioners, motor vehicle, manufacturing; Catalytic converters, engine exhaust, automotive, truck, and bus, manufacturing; Mufflers and resonators, motor vehicle, manufacturing; Radiators and cores manufacturing; and Wheels (i.e., rims), automotive, truck, and bus, manufacturing. Establishments primarily engaged in —
 - Manufacturing motor vehicle gasoline engines and engine parts - are classified in Industry 33631, Motor Vehicle Gasoline Engine and Engine Parts Manufacturing;
 - Manufacturing motor vehicle electrical and electronic equipment - are classified in Industry 33632, Motor Vehicle Electrical and Electronic Equipment Manufacturing;
 - Manufacturing motor vehicle steering and suspension components - are classified in Industry 33633, Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing;
 - Manufacturing motor vehicle brake systems - are classified in Industry 33634, Motor Vehicle Brake System Manufacturing;
 - Manufacturing motor vehicle transmission and power train parts - are classified in Industry 33635, Motor Vehicle Transmission and Power Train Parts Manufacturing;
 - Manufacturing motor vehicle seating and interior trim - are classified in Industry 33636, Motor Vehicle Seating and Interior Trim Manufacturing;
 - Manufacturing motor vehicle stampings - are classified in Industry 33637, Motor Vehicle Metal Stamping; and
 - Manufacturing air-conditioning systems and compressors (except motor vehicle air-conditioning systems) - are classified in Industry 33341, Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing.

Supporting Information

- Existing transportation equipment manufacturing industry presence with a Kershaw County LQ (Location Quotient) of 3.5
- Recent closure of Yutaka Technologies, a manufacturer of disc brakes and suspension parts, represents over 100 potential trained employees within the automotive sector
- 20% South Carolina projected employment growth rate over the next ten years

- Ample available industrial product including Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site
- Ample available industrial buildings including the former Yutaka Technologies Building and the Steeplechase Spec Building
- Highly skilled workforce
- Excellent interstate access

"Gaps" to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park, and Emanuel Site
- Marketing push based upon available employees and the Yutaka facility

Aerospace Product and Parts Manufacturing: 3364

This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing complete aircraft, missiles, or space vehicles; (2) manufacturing aerospace engines, propulsion units, auxiliary equipment or parts; (3) developing and making prototypes of aerospace products; (4) aircraft conversion (i.e., major modifications to systems); and (5) complete aircraft or propulsion systems overhaul and rebuilding (i.e., periodic restoration of aircraft to original design specifications).

Parent Sectors of 33641:

- 33 - Manufacturing
- 336 - Transportation Equipment Manufacturing
- 3364 - Aerospace Product and Parts Manufacturing

Sub-Sectors of 33641:

- 336411 - Aircraft Manufacturing: This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing or assembling complete aircraft; (2) developing and making aircraft prototypes; (3) aircraft conversion (i.e., major modifications to systems); and (4) complete aircraft overhaul and rebuilding (i.e., periodic restoration of aircraft to original design specifications).
 - Establishments primarily engaged in manufacturing guided missiles and space vehicles are classified in U.S. Industry 336414, Guided Missile and Space Vehicle Manufacturing;
 - Establishments primarily engaged in the repair of aircraft (except overhauling, conversion, and rebuilding) are classified in Industry 488190, Other Support Activities for Air Transportation; and
 - Research and development establishments primarily engaged in aircraft R&D (except prototype production) are classified in Industry 541710, Research and Development in the Physical, Engineering, and Life Sciences.
 - Alternate titles include: Aircraft conversions (i.e., major modifications to system); Aircraft manufacturing; Aircraft overhauling; Aircraft rebuilding (i.e., restoration to original design specifications); Autogiros manufacturing; Blimps (i.e., aircraft) manufacturing; Developing and producing prototypes for aircraft; Gliders (i.e., aircraft) manufacturing; Hang gliders manufacturing; Helicopters manufacturing; Target drones, aircraft, manufacturing; and Ultra-light aircraft manufacturing.
- 336412 - Aircraft Engine and Engine Parts Manufacturing: This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing aircraft engines and engine parts; (2) developing and making prototypes of aircraft engines and engine parts; (3) aircraft propulsion system conversion (i.e., major modifications to systems); and (4) aircraft propulsion systems overhaul and rebuilding (i.e., periodic restoration of aircraft propulsion system to original design specifications).
 - Establishments primarily engaged in manufacturing guided missile and space vehicle propulsion units and parts are classified in U.S. Industry 336415, Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing;

- Establishments primarily engaged in manufacturing aircraft intake and exhaust valves and pistons are classified in U.S. Industry 336311, Carburetor, Piston, Piston Ring, and Valve Manufacturing;
 - Establishments primarily engaged in manufacturing aircraft internal combustion engine filters are classified in U.S. Industry 336312, Gasoline Engine and Engine Parts Manufacturing;
 - Establishments primarily engaged in the repair of aircraft engines (except overhauling, conversion, and rebuilding) are classified in Industry 488190, Other Support Activities for Air Transportation;
 - Research and development establishments primarily engaged in aircraft engine and engine parts R&D (except prototype production) are classified in Industry 541710, Research and Development in the Physical, Engineering, and Life Sciences; and
 - Establishments primarily engaged in manufacturing aeronautical instruments are classified in U.S. Industry 334511, Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing.
 - Alternate titles include: Aircraft engine and engine parts (except carburetors, pistons, piston rings, valves) manufacturing; Aircraft engine overhauling; Aircraft engine rebuilding; Aircraft turbines manufacturing; Developing and producing prototypes for aircraft engines and engine parts; Engines and engine parts, aircraft (except carburetors, pistons, piston rings, valves), manufacturing; Gas turbines, aircraft, manufacturing; Gasoline engine parts (except carburetors, pistons, piston rings, valves), aircraft, manufacturing; Gasoline engines, aircraft, manufacturing; Internal combustion engines, aircraft, manufacturing; Jet propulsion and internal combustion engines and parts, aircraft, manufacturing; and Rocket engines, aircraft, manufacturing
- **336413 - Other Aircraft Parts and Auxiliary Equipment Manufacturing:** This U.S. industry comprises establishment primarily engaged in (1) manufacturing aircraft parts or auxiliary equipment (except engines and aircraft fluid power subassemblies) and/or (2) developing and making prototypes of aircraft parts and auxiliary equipment. Auxiliary equipment includes such items as crop dusting apparatus, armament racks, inflight refueling equipment, and external fuel tanks.
 - Establishments primarily engaged in manufacturing aircraft engines and engine parts are classified in U.S. Industry 336412, Aircraft Engine and Engine Parts Manufacturing;
 - Establishments primarily engaged in manufacturing aeronautical instruments are classified in U.S. Industry 334511, Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing;
 - Establishments primarily engaged in manufacturing aircraft lighting fixtures are classified in U.S. Industry 336321, Vehicular Lighting Equipment Manufacturing;
 - Establishments primarily engaged in manufacturing aircraft engine electrical (aeronautical electrical) equipment are classified in U.S. Industry 336322, Other Motor Vehicle Electrical and Electronic Equipment Manufacturing;
 - Establishments primarily engaged in manufacturing guided missile and space vehicle parts and auxiliary equipment are classified in U.S. Industry 336419, Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing;
 - Establishments primarily engaged in manufacturing of aircraft fluid power subassemblies are classified in U.S. Industry 332912, Fluid Power Valve and Hose Fitting Manufacturing; Establishments primarily engaged in manufacturing of aircraft seating are classified in Industry 336360, Motor Vehicle Seating and Interior Trim Manufacturing; and
 - Research and development establishments primarily engaged in aircraft parts and auxiliary equipment R&D (except prototype production) are classified in Industry 541710, Research and Development in the Physical, Engineering, and Life Sciences.
 - Alternate titles include: Other Aircraft Parts and Auxiliary Equipment Manufacturing; Aircraft assemblies, sub-assemblies, and parts (except engines) manufacturing; Aircraft auxiliary parts (e.g., crop dusting, external fuel tanks, inflight refueling equipment) manufacturing; Aircraft control surface assemblies manufacturing; Aircraft fuselage wing tail and similar assemblies manufacturing; Aircraft propellers and parts manufacturing; Airframe

assemblies (except for guided missiles) manufacturing; Developing and producing prototypes for aircraft parts (except engines) and auxiliary equipment; Joints, universal, aircraft, manufacturing; Targets, trailer type, aircraft, manufacturing; Tow targets, aircraft, manufacturing; and Universal joints, aircraft, manufacturing

- **336414 - Guided Missile and Space Vehicle Manufacturing:** This U.S. industry comprises establishments primarily engaged in (1) manufacturing complete guided missiles and space vehicles and/or (2) developing and making prototypes of guided missile or space vehicles.
 - Establishments primarily engaged in manufacturing space satellites are classified in Industry 334220, Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
 - Research and development establishments primarily engaged in guided missile and space vehicle R&D (except prototype production) are classified in Industry 541710, Research and Development in the Physical, Engineering, and Life Sciences
 - Alternate titles include: Developing and producing prototypes for complete guided missiles and space vehicles; Guided missile and space vehicle manufacturing; Guided missiles, complete, assembling; Rockets (guided missiles), space and military, complete, manufacturing; and Space vehicles, complete, manufacturing
- **336415 - Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing:** This U.S. industry comprises establishments primarily engaged in (1) manufacturing complete guided missiles and space vehicles and/or (2) developing and making prototypes of guided missile or space vehicles.
 - Establishments primarily engaged in manufacturing space satellites are classified in Industry 334220, Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
 - Research and development establishments primarily engaged in guided missile and space vehicle R&D (except prototype production) are classified in Industry 541710, Research and Development in the Physical, Engineering, and Life Sciences
 - Alternate titles include: Developing and producing prototypes for complete guided missiles and space vehicles; Guided missile and space vehicle manufacturing; Guided missiles, complete, assembling; Rockets (guided missiles), space and military, complete, manufacturing; and Space vehicles, complete, manufacturing
- **336419 - Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing:** This U.S. industry comprises establishments primarily engaged in (1) manufacturing complete guided missiles and space vehicles and/or (2) developing and making prototypes of guided missile or space vehicles.
 - Establishments primarily engaged in manufacturing space satellites are classified in Industry 334220, Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
 - Research and development establishments primarily engaged in guided missile and space vehicle R&D (except prototype production) are classified in Industry 541710, Research and Development in the Physical, Engineering, and Life Sciences
 - Alternate titles include: Developing and producing prototypes for complete guided missiles and space vehicles; Guided missile and space vehicle manufacturing; Guided missiles, complete, assembling; Rockets (guided missiles), space and military, complete, manufacturing; and Space vehicles, complete, manufacturing

Supporting Information

- 20% South Carolina projected employment growth rate over the next ten years
- Boeing's new Charleston location
- Highly skilled workforce
- Existing transportation equipment manufacturing industry presence with a Kershaw County LQ (Location Quotient) of 3.5
- Excellent interstate access
- Ample available industrial product including Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site

- Ample available industrial buildings including the former Yutaka Technologies Building and the Steeplechase Spec Building

"Gaps" to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site

Non-Traditional Markets

Kershaw County's non-traditional sectors (groups or organizations that can generate or influence projects for the county) listed below should receive the same communication as all other Kershaw County primary sectors. This important target group can influence and generate projects and should not be overlooked in the marketing plan:

- Local Utilities
- Electric and Natural Gas Providers
- Central Carolina Technical College
- Site Selection Consultants
- Community Stakeholders and Leadership
- State of South Carolina
- SC Power Team
- Central Carolina Alliance
- Legislative Delegation
- Local City Councils
- City of Camden Economic Development Department
- Kershaw County Council
- Chamber of Commerce
- Kershaw County Tourism

Grain and Oilseed Milling Food Manufacturing: 3112

Based upon information published at naicscode.com, this industry group comprises establishments primarily engaged in milling of flour or meal from grains or vegetables, manufacturing of malt, wetmilling corn and other vegetables, crushing of oilseeds and tree nuts, and manufacturing breakfast cereals. This industry group also includes preparing flour mixes or dough's from flour milled in the same establishment; milling, cleaning, and polishing rice; refining and/or blending vegetable oils; manufacturing shortening and margarine; and blending purchased animal fats with vegetable fats.

Parent Sectors of 3112:

- 31 - Manufacturing
- 311 - Food Manufacturing

Sub-Sectors of 3112:

- 31121 - Flour Milling and Malt Manufacturing: Establishments primarily engaged in —
 - Preparing breakfast cereals from flour milled in the same establishment - are classified in Industry 31123, Breakfast Cereal Manufacturing;
 - Crushing soybeans or wet milling corn and vegetables - are classified in Industry 31122, Starch and Vegetable Fats and Oils Manufacturing;
 - Manufacturing prepared flour mixes or doughs from flour ground elsewhere - are classified in Industry 31182, Cookie, Cracker, and Pasta Manufacturing;

- Brewing malt beverages are classified in Industry 31212, Breweries;
- Mixing purchased dried and dehydrated ingredients with purchased rice - are classified in Industry 31199, All Other Food Manufacturing;
- Drying and/or dehydrating ingredients and packaging them with purchased rice - are classified in Industry 31142, Fruit and Vegetable Canning, Pickling, and Drying; and
- Manufacturing malt extract and syrups - are classified in Industry 31194, Seasoning and Dressing Manufacturing.
- **31122 - Starch and Vegetable Fats and Oils Manufacturing:** Establishments primarily engaged in —
 - Manufacturing table syrups from corn syrup and starch base dessert powders - are classified in Industry 31199, All Other Food Manufacturing;
 - Reducing maple sap to maple syrup - are classified in Industry 11199, All Other Crop Farming;
 - Milling flour or meal from grains and vegetables - are classified in Industry 31121, Flour Milling and Malt Manufacturing;
 - Wet milling corn to produce nonpotable ethyl alcohol - are classified in Industry 32519, Other Basic Organic Chemical Manufacturing;
 - Rendering or refining animal fats and oils - are classified in Industry 31161, Animal Slaughtering and Processing; and
 - Manufacturing laundry starches - are classified in Industry 32561, Soap and Cleaning Compound Manufacturing.
- **31123 - Breakfast Cereal Manufacturing:** Establishments primarily engaged in —
 - Manufacturing chocolate-coated granola bars from cacao beans - are classified in Industry 311320, Chocolate and Confectionery Manufacturing from Cacao Beans;
 - Manufacturing coffee substitutes from grain - are classified in Industry 311920, Coffee and Tea Manufacturing;
 - Manufacturing nonchocolate-coated granola bars and other types of breakfast bars - are classified in Industry 311340, Nonchocolate Confectionery Manufacturing; and
 - Manufacturing chocolate-coated granola bars from purchased chocolate - are classified in Industry 311330, Confectionery Manufacturing from Purchased Chocolate.

Supporting Information

- Existing food manufacturing industry presence with a regional LQ (Location Quotient) of 1.5
- 2% South Carolina projected employment growth over the next ten years
- Excellent US growth projections over the next 10 years
- Excellent interstate access
- Ample available industrial product including Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site
- Excess water and sewer capacity within available product

"Gaps" to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park, and Emanuel Site

Fruit & Vegetable Preserving & Specialty Food Manufacturing: 3114

This industry group includes (1) establishments that freeze food and (2) those that use preservation processes, such as pickling, canning, and dehydrating. Both types begin their production process with inputs of vegetable or animal origin.

Parent Sectors of 3114:

- 31 - Manufacturing
- 311 - Food Manufacturing

Sub-Sectors of 3114:

- 31141 - Frozen Food Manufacturing: Establishments primarily engaged in
 - Manufacturing frozen dairy specialties - are classified in Industry 31152, Ice Cream and Frozen Dessert Manufacturing;
 - Manufacturing frozen bakery products - are classified in Industry 31181, Bread and Bakery Product Manufacturing;
 - Manufacturing frozen seafood products - are classified in Industry 31171, Seafood Product Preparation and Packaging; and
 - Manufacturing frozen meat products - are classified in Industry 31161, Animal Slaughtering and Processing.
- 31142 - Fruit and Vegetable Canning, Pickling, and Drying Establishments primarily engaged in
 - Manufacturing canned dairy products - are classified in Industry 31151, Dairy Product (except Frozen) Manufacturing;
 - Manufacturing canned seafood soups and seafood products - are classified in Industry 31171, Seafood Product Preparation and Packaging;
 - Manufacturing canned meat products - are classified in Industry 31161, Animal Slaughtering and Processing;
 - Milling rice and packaging it with other ingredients or manufacturing vegetable flours and meals - are classified in Industry 31121, Flour Milling and Malt Manufacturing;
 - Manufacturing dry pasta and packaging it with other ingredients - are classified in Industry 31182, Cookie, Cracker, and Pasta Manufacturing;
 - Mixing purchased dried and/or dehydrated potatoes, rice, and pasta and packaging them with other purchased ingredients; mixing purchased dried and/or dehydrated ingredients for soup mixes and bouillon; and manufacturing canned puddings - are classified in Industry 31199, All Other Food Manufacturing;
 - Manufacturing dry salad dressing and dry sauce mixes - are classified in Industry 31194, Seasoning and Dressing Manufacturing; and
 - Manufacturing canned fruit and vegetable drinks, cocktails, and-ades - are classified in Industry 31211, Soft Drink and Ice Manufacturing.

Supporting Information

- Existing food manufacturing industry presence with a regional LQ (Location Quotient) of 1.5
- 2% South Carolina projected employment growth over the next ten years
- Excellent US growth projections over the next 10 years
- Excellent interstate access
- Ample available industrial product including Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site
- Excess water and sewer capacity within available product

"Gaps" to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Conder Mega Site, Steeplechase Industrial Park, Invista Site, Governor's Hill Industrial Park and Emanuel Site

TARGET MARKET RECOMMENDATIONS AND DESCRIPTIONS: FUTURE MARKETS**Insurance Carriers and Related Activities: 5241**

This industry group comprises establishments primarily engaged in underwriting (assuming the risk, assigning premiums, and so forth) annuities and insurance policies and investing premiums to build up a portfolio of financial assets to be used against future claims. Direct insurance carriers are establishments that are primarily engaged in initially underwriting and assuming the risk of annuities and insurance policies. Reinsurance carriers are establishments that are primarily engaged in assuming all or part of the risk associated with an existing insurance policy (or set of policies) originally underwritten by another insurance carrier.

Industries are defined in terms of the type of risk being insured against, such as death, loss of employment because of age or disability, and/or property damage. Contributions and premiums are set on the basis of actuarial calculations of probable payouts based on risk factors from experience tables and expected investment returns on reserves.

Parent Sectors of 5241:

- 52 - Finance and Insurance
- 524 - Insurance Carriers and Related Activities

Sub-Sectors of 5241:

- 52411 - Direct Life, Health, and Medical Insurance Carriers: Establishments primarily engaged in -
 - Reinsuring life insurance policies are classified in Industry 52413, Reinsurance Carriers;
 - Legal entities (i.e., funds, plans, and/or programs) organized to provide insurance and employee benefits exclusively for the sponsor, firm, or its employees or members are classified in Industry Group 5251, Insurance and Employee Benefit Funds; and
 - HMO establishments providing health care services are classified in Industry 62149, Other Outpatient Care Centers.
- 52412 - Direct Insurance (except Life, Health, and Medical) Carriers: Establishments primarily engaged in -
 - Reinsuring insurance policies are classified in Industry 524130, Reinsurance Carriers;
 - Legal entities (i.e., funds, plans, and/or programs) organized to provide insurance and employee benefits exclusively for the sponsor, firm, or its employees or members are classified in Industry Group 5251, Insurance and Employee Benefit Funds; and
 - Establishments primarily engaged in initially underwriting annuities and life insurance policies, disability income insurance policies, accidental death and dismemberment insurance policies, and health and medical insurance policies are classified in Industry 52411, Direct Life, Health, and Medical Insurance Carriers.
- 52413 - Reinsurance Carriers: Establishments primarily engaged in -
 - Initially underwriting annuities and life insurance policies, disability income insurance policies, accidental death and dismemberment insurance policies, and health and medical insurance policies - are classified in Industry 52411, Direct Life, Health, and Medical Insurance Carriers;
 - Initially underwriting various types of insurance policies (except life, disability income, accidental death and dismemberment, and health and medical insurance policies) - are classified in Industry 52412, Direct Insurance (except Life, Health, and Medical) Carriers; and
 - This sector is also called: Accidental and health reinsurance carriers; Life reinsurance carriers; Marine reinsurance carriers; Medical reinsurance carriers; Property and casualty reinsurance carriers; and Reinsurance carriers.

Supporting Information

- High education attainment – (Columbia MSA exceeds the state and national averages)
- Existing knowledge – based community
- Existing insurance and related activities industry presence with a regional LQ (Location Quotient) of 2.9
- 8% South Carolina projected employment growth rate over the next ten years
- Proximity to Columbia
- Highly – skilled workforce

"Gaps" to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Wateree Executive Park

Insurance Agencies and Brokerages: 5242

This industry group comprises establishments primarily engaged in (1) acting as agents (i.e., brokers) in selling annuities and insurance policies or (2) providing other employee benefits and insurance related services, such as claims adjustment and third party administration.

Parent Sectors of 5242:

- 52 - Finance and Insurance
- 524 - Insurance Carriers and Related Activities

Sub-Sectors of 5242:

- **52421 - Insurance Agencies and Brokerages:** This industry comprises establishments primarily engaged in acting as agents (i.e., brokers) in selling annuities and insurance policies. Establishments primarily engaged in underwriting annuities and insurance policies are classified in Industry Group 5241, Insurance Carriers. This sector is also called:
 - Agencies, insurance
 - Brokerages, insurance
 - Brokers' offices, insurance
 - Insurance agencies
 - Insurance brokerages
 - Life insurance agencies
- **52429 - Other Insurance Related Activities:** This industry comprises establishments primarily engaged in providing services related to insurance (except insurance agencies and brokerages). Establishments primarily engaged in —
 - Managing the portfolio assets (i.e., funds) of others - are classified in Industry 52392, Portfolio Management;
 - Acting as agents (i.e., brokers) in selling annuities and insurance policies - are classified in Industry 52421, Insurance Agencies and Brokerages; and
 - Providing actuarial consulting services - are classified in Industry 54161, Management Consulting Services.
 - Illustrative examples include: claims adjusting; insurance adjusting; and insurance plan administrative services

Supporting Information

- High education attainment – (Columbia MSA exceeds the state and national averages)
- Existing knowledge – based community
- Existing insurance and related activities industry presence with a regional LQ (Location Quotient) of 2.9
- 8% South Carolina projected employment growth rate over the next ten years

- Proximity to Columbia
- Highly – skilled workforce
- Great quality of life

“Gaps” to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Wateree Executive Park

Computer Systems Design and Related Services: 5415

This industry comprises establishments primarily engaged in providing expertise in the field of information technologies through one or more of the following activities: (1) writing, modifying, testing, and supporting software to meet the needs of a particular customer; (2) planning and designing computer systems that integrate computer hardware, software, and communication technologies; (3) on-site management and operation of clients' computer systems and/or data processing facilities; and (4) other professional and technical computer-related advice and services.

Parent Sectors of 5415:

- 54 - Professional, Scientific, and Technical Services
- 541 - Professional, Scientific, and Technical Services

Sub-Sectors of 5415:

- **54151 - Computer Systems Design and Related Services: Establishments primarily engaged in —**
 - Selling computer hardware or software products from retail-like locations and providing supporting services, such as customized assembly of personal computers, - are classified in Industry 44312, Computer and Software Stores;
 - Wholesaling computer hardware or software products and providing supporting services, such as customized assembly of personal computers, - are classified in Industry 423430, Computer and Computer Peripheral Equipment and Software Merchant Wholesalers; and
 - Publishing packaged software - are classified in Industry 51121, Software Publishers; and Providing computer data processing services at their own facility for others - are classified in Industry 518210, Data Processing, Hosting, and Related Services.
 - Sector also called: Computer facilities management services; Computer hardware or software consulting services; Computer systems integration design services; Custom computer programming services; and Software installation services.

Supporting Information

- Emerging professional, scientific, and technical services industry presence with a regional LQ (Location Quotient) of 0.76
- 39% U.S. projected employment growth rate over the next ten years
- 29% South Carolina projected employment growth rate over the next ten years
- High education attainment – (Columbia MSA exceeds the state and national averages)
- Existing knowledge – based community
- Proximity to Columbia
- Highly – skilled workforce
- Great quality of life

“Gaps” to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Wateree Executive Park

Computer Systems Design and Related Services: 5416

Parent Sectors of 5416:

- 54 - Professional, Scientific, and Technical Services
- 541 - Professional, Scientific, and Technical Services

Sub-Sectors of 5416:

- 54161 - Management Consulting Services:
 - Establishments primarily engaged in providing a range of day-to-day office administrative services, such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics, are classified in Industry 56111, Office Administrative Services;
 - Establishments primarily engaged in administering, overseeing, and managing other establishments of the company or enterprise (except government establishments) are classified in Industry 55111, Management of Companies and Enterprises;
 - Government establishments primarily engaged in administering, overseeing, and managing governmental programs are classified in Sector 92, Public Administration;
 - Establishments primarily engaged in professional and management development training are classified in Industry 61143, Professional and Management Development Training;
 - Establishments primarily engaged in listing employment vacancies and in selecting, referring, and placing applicants in employment are classified in Industry 56131, Employment Placement Agencies;
 - Establishments primarily engaged in developing and implementing public relations plans are classified in Industry 54182, Public Relations Agencies;
 - Establishments primarily engaged in developing and conducting marketing research or public opinion polling are classified in Industry 54191, Marketing Research and Public Opinion Polling;
 - Establishments primarily engaged in planning and designing industrial processes and systems are classified in Industry 54133, Engineering Services;
 - Establishments primarily engaged in planning and designing computer systems are classified in Industry 54151, Computer Systems Design and Related Services; and
 - Establishments primarily engaged in providing financial investment advice services are classified in Industry 52393, Investment Advice.
 - Illustrative examples include: Actuarial, benefit, and compensation consulting services; Administrative and general management consulting services; Human resources and executive search consulting services; Marketing consulting services; and Process, physical distribution, and logistics consulting services.
- 54162 - Environmental Consulting Services: This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on environmental issues, such as the control of environmental contamination from pollutants, toxic substances, and hazardous materials. These establishments identify problems (e.g., inspect buildings for hazardous materials), measure and evaluate risks, and recommend solutions. They employ a multidisciplinary staff of scientists, engineers, and other technicians with expertise in areas, such as air and water quality, asbestos contamination, remediation, and environmental law. Establishments providing sanitation or site remediation consulting services are included in this industry. Establishments primarily engaged in —
 - Environmental remediation - are classified in Industry 562910, Remediation Services
 - Providing environmental engineering services - are classified in Industry 541330, Engineering Services
 - This sector is also called: Environmental consulting services; Sanitation consulting services; and Site remediation consulting services
 - 54169 - Other Scientific and Technical Consulting Services: Establishments primarily engaged in environmental consulting are classified in Industry 541620, Environmental Consulting Services. This industry comprises estab-

lishments primarily engaged in providing advice and assistance to businesses and other organizations on scientific and technical issues (except environmental).

- Illustrative examples: Agricultural consulting services; Biological consulting services; Chemical consulting services; Economic consulting services; Energy consulting services; Motion picture consulting services; Physics consulting services; Radio consulting services; Safety consulting services; and Security consulting services.
- This sector is also called: Other Scientific and Technical Consulting Services; Agricultural consulting services; Agrology consulting services; Agronomy consulting services; Biological consulting services; Chemical consulting services; Dairy herd consulting services; Economic consulting services; Energy consulting services; Entomology consulting services; Geochemical consulting services; Horticultural consulting services; Hydrology consulting services; Livestock breeding consulting services; Motion picture consulting services; Nuclear energy consulting services; Physics consulting services; Radio consulting services; Safety consulting services; and Security consulting services

Supporting Information

- Emerging professional, scientific, and technical services industry presence with a regional LQ (Location Quotient) of 0.76
- 39% U.S. projected employment growth rate over the next ten years
- 29% South Carolina projected employment growth rate over the next ten years
- High education attainment – (Columbia MSA exceeds the state and national averages)
- Existing knowledge – based community
- Proximity to Columbia
- Highly – skilled workforce
- Great quality of life

“Gaps” to Success for Implementation

- See Section 1.1, Product and Infrastructure Strategies, for comprehensive product improvement recommendations for the Wateree Executive Park

TARGET COMPANY DATABASE

Having specific, qualified, targeted companies is a critical element of the marketing tool box. Under separate cover, InSite will provide Kershaw County with a database that includes 100 companies chosen as a result of the target marketing analysis and non-traditional target companies (all defined in Section 2). After developing respective company profile criteria, we input those criteria into our InSite Master Database which was ultimately used to assemble a list of approximately 100 target company prospects. For the company contacts, we filtered the database to predict which companies matching Kershaw County's target profile criteria may relocate or expand within the next 12 to 18 months based upon the parameters listed below. The filtering process involved research to assist in predicting corporate behavior and includes:

- Total sales and employment size
- Geographic location
- Past / projected sales and employment growth
- Industry classification (NAICS)

We used experience and on-line databases to select the target companies within your target industry sectors that are experiencing changes, and these changes have a high correlation with a company's decision to relocate or expand operations. The initial database houses growth companies with the “potential” for expansion.

The company records within the database contain the following information:

- Company name and contact information

- Employment numbers
- NAICS Codes
- Business description
- Websites (if available)

INTERNAL COMMUNICATION

- Develop, maintain and update a database of entire internal / local audience (leadership, all government-related officials (to include school system), general public, universities and colleges, local and state media, etc.) and include them in the communication plan
- Develop a customized KCED email blast template for all communications
- Create a systemized economic development public relation strategy / internal communication schedule to create local buy-in and awareness. This schedule must include minimum monthly communication to your internal audience.
- Consistently communicate and promote; industry recruitment; existing industry initiatives and successes; entrepreneurial and small business developments
- Designate an Economic Development Resource Center (specific area - kiosk) within the City of Camden's Economic Development Department, the new Kershaw County Tourism office, and the Chamber of Commerce to house the economic development information package

EXTERNAL COMMUNICATION

This part of the plan incorporates a sequencing of communications to all established targets listed in Section 2.0 (includes target company database provided separately in an excel format and non-traditional targets) on a consistent basis and includes:

- Develop a schedule for sequencing of communications – when each effort will occur and what approach will be taken (direct mail, email, call, etc.)
- Include 2 Targeted Direct Mail Programs bi-annually. Initial mailings should be focused on the Steeplechase Spec Building. Both mailings would be sent to your target company database and non-traditional targets as identified in Section 2. The first mailing should include a Kershaw County introductory letter and the Spec Building brochure. The second mailing should include an update on the Spec Building and the Steeplechase Industrial Park brochure. Subsequent mailings may include incentive updates, company announcements, etc.
- Incorporate a bi-annual call program to the target company database - The call program must be outsourced to a business-to-business call center and would focus on obtaining email addresses from company executives within the target company database. Phone calls will be made to the entire target company database. The primary purpose of the phone call is to: 1) measure potential interest in Kershaw County as a business location, and 2) obtain the company executives email addresses for future correspondence. Based on the phone calls, company executives email addresses will be added to the database and those companies with no future interest will be eliminated from the database. The second call program will be to a newly researched target company database. Kershaw County may elect to conduct only one call program per year instead of two call programs. The call program will qualify a new target company database each time and based on the results of the calls would add the email contacts to the existing email contacts.
- Once email addresses have been obtained from company phone calls, a KCED customized email template will be developed (companies such as Constant Contact, Touchpoint, etc., can assist Kershaw County with email design). The email template will be used exclusively for all economic development communications.
- Implement an email marketing campaign. Execute a minimum of 4 customized e-mail blasts on a quarterly basis to the targets detailing available product, labor force and quality of life amenities. The email blasts will be sent your email contacts that were obtained during the call program in addition to your non-traditional targets. The majority of email marketing firms (mentioned above) provide online readership services that will allow KCED to track who is reading and responding to your economic development emails.

- Continual database management and continued target company research. Staff will update database as new companies are added and deleted from the program.
- At least once a year or on an as needed basis, either visit qualified (an established dialogue with a level of interest based on that communication) decision makers at their current location or invite them to visit your community. Decision makers are defined as senior-level company executives within your target companies. We recommend visiting with those companies that have either conducted a site visit to Kershaw County or that have a genuine interest in the community.
- In addition to target companies, all communications must also include site consultants, real estate companies, Central Carolina Alliance, the South Carolina Department of Commerce, utility companies and other appropriate economic development allies, to include the list of non-traditional targets
- Develop and maintain a regional, state and national media contact list and publicize county successes to those entities

SECTION 3.0 - CONCLUSION

Kershaw County's transportation access, combined with a highly educated work force, proximity to Columbia and the Port of Charleston, and a great quality of life provides a competitive business location in South Carolina and the Southeast. In order to continue diversifying the county's economy and create high wage jobs, Kershaw County must be visionary and proactive in enhancing their product development initiatives. Success depends on implementing a Business Retention and Expansion (BRE) program and greatly enhancing the county's current product offerings for business and industry.

SECTION 4.0 – APPENDIX

The following documents are included in the Appendix Section of this document:

- Implementation schedule
- Benchmarking
- Economic snapshot