2023-2027
Comprehensive Economic Development Strategy

Annual Performance Report
November 2026

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APPALACHIAN COUNCIL OF GOVERNMENTS

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

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State and Regional Partners

Alliance Pickens
Anderson County Office of Economic Development
Cherokee County Development Board
Greenville Area Development Corporation
Oconee Economic Alliance
One Spartanburg, Inc.
SC Department of Commerce
SC Department of Employment & Workforce
Ten at the Top
Upstate SC Alliance

The Appalachian Council of Governments is very appreciative of the support our agency and communities have received from the US Economic Development Administration (EDA). During the performance period, ACOG managed $28.5 million dollars in EDA grant funding for 4 projects in the region that will support economic development for years to come.

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INTRODUCTION

Planning for a THRIVING, RESILIENT Region

About the SC Appalachian Council of Governments

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

Background and Purpose of the Comprehensive Economic Development Strategy

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

In December 2022, the 2023-2027 Comprehensive Economic Development Strategy for the SC Appalachian Region was approved by the EDA with effective dates of January 1, 2023—December 31, 2027. The 2026 Annual Performance Report will provide an update of economic conditions and evaluate performance measures related to the six economic development priorities established in the 2023-2027 CEDS. The period covered by this report is July 1, 2025—June 30, 2026.

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2026 CEDS Advisory Committee

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2026 REGIONAL OVERVIEW

Demographic Profile

The six counties of the SC Appalachian region are home to an estimated 1.45 million residents, having increased in population slightly over 2025. Greenville County remains the most populous with nearly 40% of the region's residents while Spartanburg County experienced the highest year-over-year growth at a rate of 5.62%. The median age of residents in the region remains 39.9, just below that of South Carolina at 41.2 and slightly above the US at 39.6. When examining the region's population by age group, it is very much in line with that of South Carolina and the US; however, the region remains less diverse than the state and the nation despite some small increases in racial and ethnic minority groups in recent years.

	ACOG Region	South Carolina	United States
Population			
Total	1,448,528	5,507,425	343,528,394
Male	49.2%	49.0%	49.7%
Female	50.8%	51.0%	50.3%
2026-2031 Compound Annual Growth Rate	1.45%	1.30%	0.61%
Age			
Under 18 Years	21.1%	20.4%	20.7%
18 to 24 Years	9.6%	9.2%	9.4%
25 to 34 Years	13.0%	12.5%	13.7%
35 to 44 Years	12.6%	12.6%	13.3%
45 to 54 Years	11.9%	11.8%	12.0%
55 to 64 Years	12..%	12.5%	12.0%
65 Years and Over	19.3%	21.0%	19.0%
Prime Working Age (25-54)	37.5%	37.0%	38.9%
Median Age	39.9	41.2	39.6
Race & Ethnicity			
White	70.0%	63.0%	59.7%
Black or African American	15.3%	24.0%	12.5%
American Indian and Alaska Native	0.5%	0.5%	1.2%
Asian	2.2%	2.0%	6.5%
Native Hawaiian and Other Pacific Islander	0.1%	0.1%	0.2%
Some Other Race	5.0%	3.9%	8.9%
Two or More Races	7.0%	6.5%	11.0%
Hispanic or Latino (of any race)	9.6%	7.9%	19.9%

Source: Esri Business Analyst, 2026

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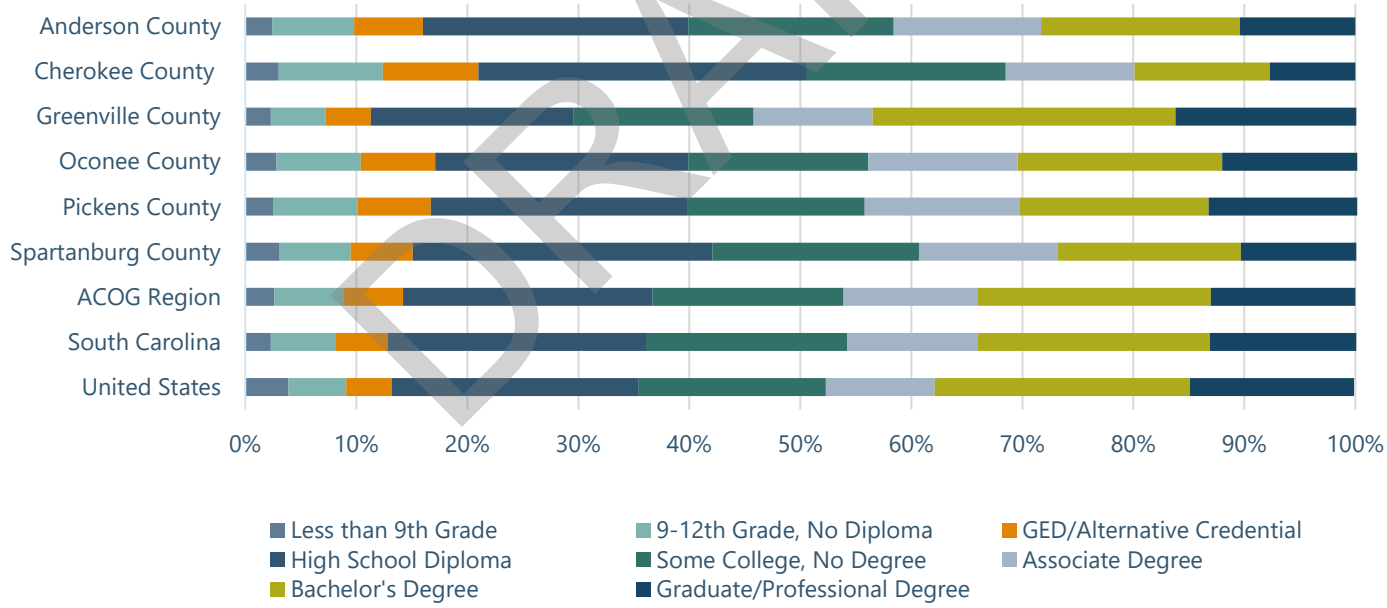
Educational Attainment

Educational attainment across the ACOG region improved slightly in 2026. Up 0.7% over 2025, 91.2% of residents have a high school diploma (including equivalency) or above. The number of residents in the region with a bachelor's degree or higher has decreased 0.1% to 34%. Greenville and Pickens Counties were the exception to decreases around the region posting a 0.7% and 0.9% percent gain in the number of residents with a bachelor's degree or higher, respectively; this is on par with collective gains nationally. Greenville County's educational attainment remains the highest in the region with 92.8% of residents having a high school diploma or above and 43.6% of residents holding a bachelor's degree or higher.

Educational attainment is intricately linked to employment as expected growth rates for occupations vary by the education and training required. While overall employment in the ACOG region is projected to grow 1.1% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 1.4% per year, those requiring a bachelor's degree are forecast to grow 1.4% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 1.3% per year. Those jobs requiring some college but no degree are expected to see the least amount of growth while those requiring a master's degree are expected to see the most growth. (*JobsEQ, Q1 2026*).

Educational Attainment for the Population 25+: 2026



Source: Esri Business Analyst, 2026

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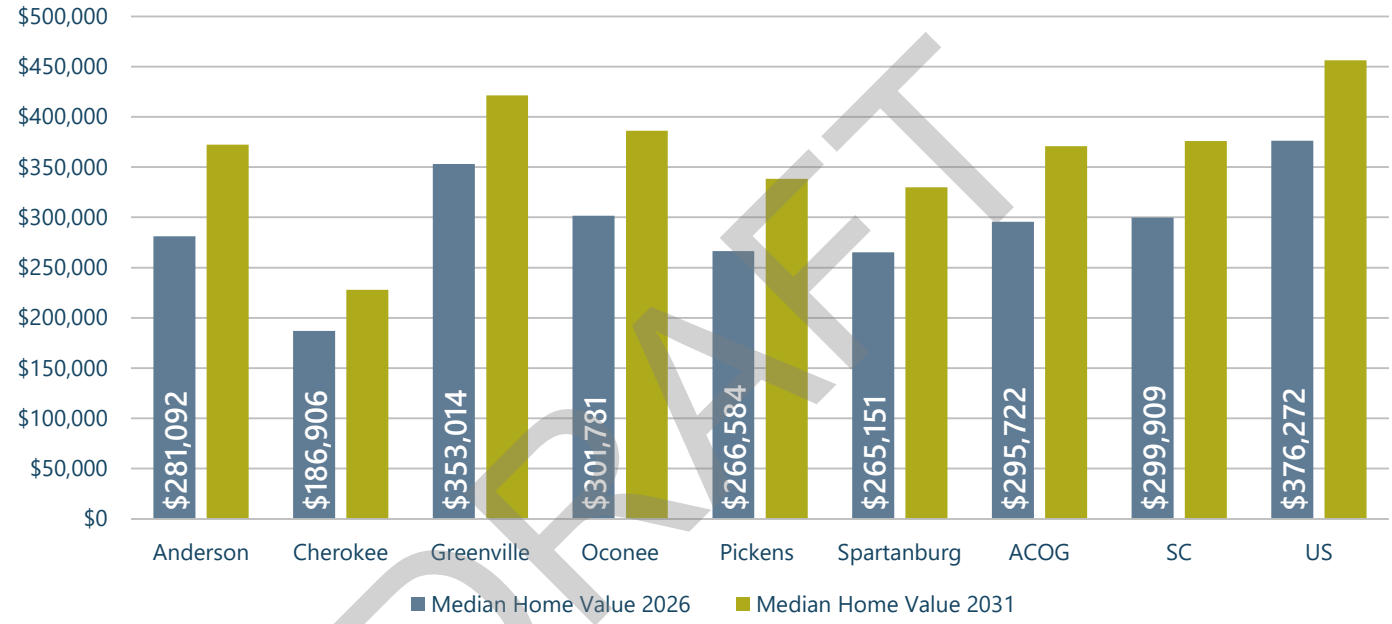
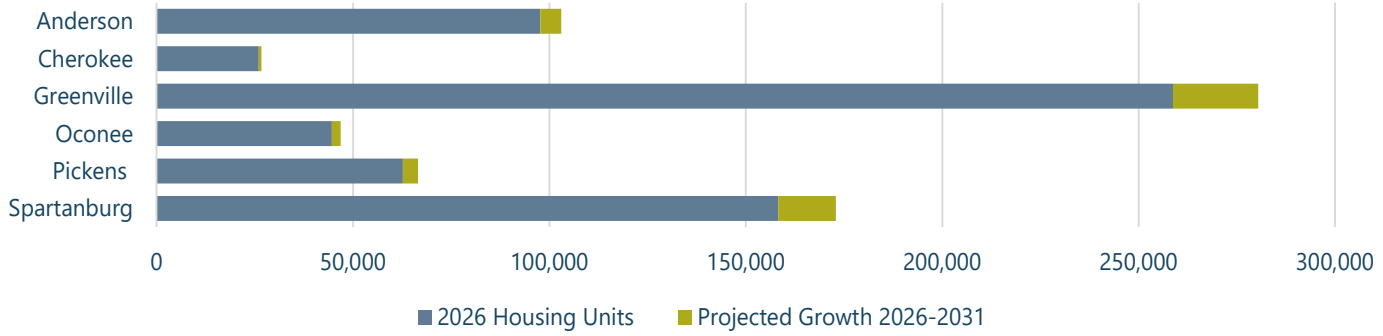
Housing

Housing costs continue to increase across the region, however the rate of increase has slowed substantially. The year-over-year change in median home value was 1.4% in 2026 compared to 5.7% the year before, and almost 18% in 2024. Greenville County has the region's most expensive housing market while Cherokee County is the most affordable with median home prices being $353,014 and $186,906 respectively. The number of housing units in the region is estimated to be 648,000 and is expected to increase by 7.45% over the next five years.

Median Home Values: 2026 & 2031



Projected Housing Unit Growth: 2026 & 2031



Source: Esri Business Analyst, 2026

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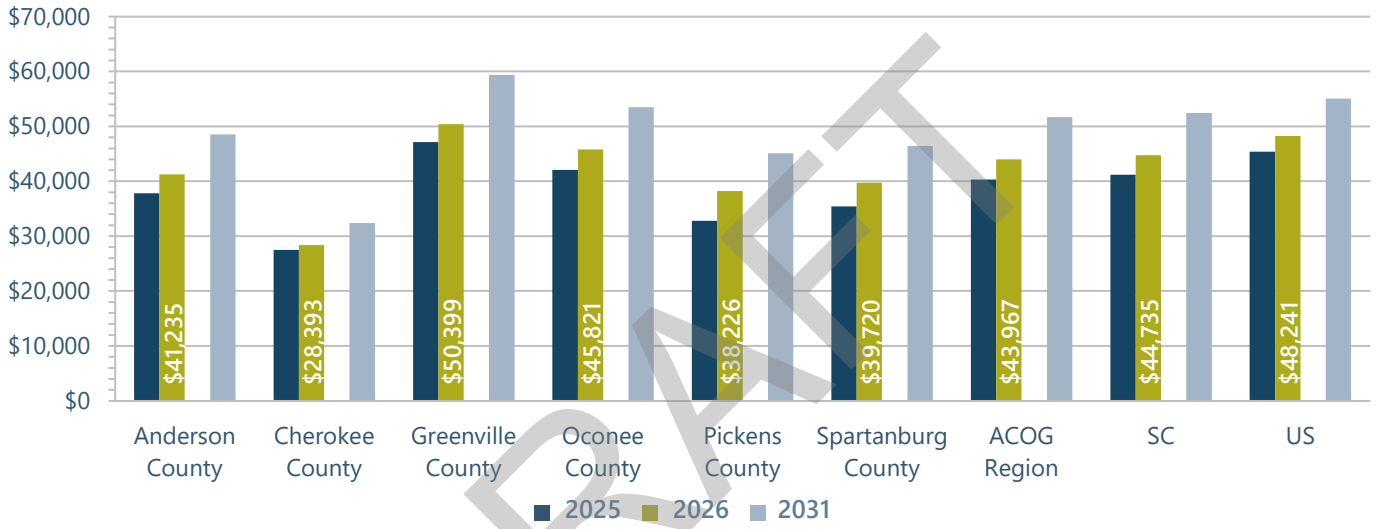
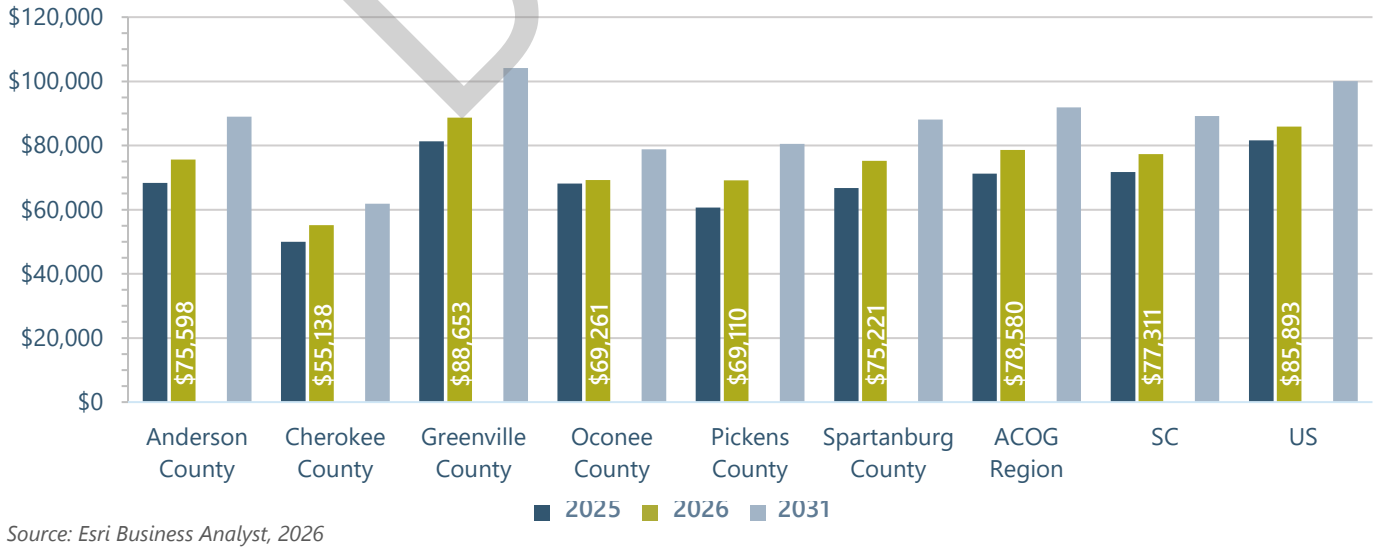
Income

Between 2025 and 2026, both per capita and median household income increased in every county in the region. The largest gains by percentage were seen in Pickens County; per capita income rose 16.6% while median household income was up 14%. Overall, 2026 per capita income in the ACOG region is an estimated $43,967 and is projected to increase 17.6% by 2031 to $51,686 while median household income is $78,580 with a projected increase of nearly 17% by 2031. Regional median household income has improved relative to that of South Carolina, while per capita income remains below that of the state; however, the nation outpaces all.

Per Capita Income: 2025, 2026, & 2031



Median Household Income: 2025, 2026, & 2031



Source: Esri Business Analyst, 2026

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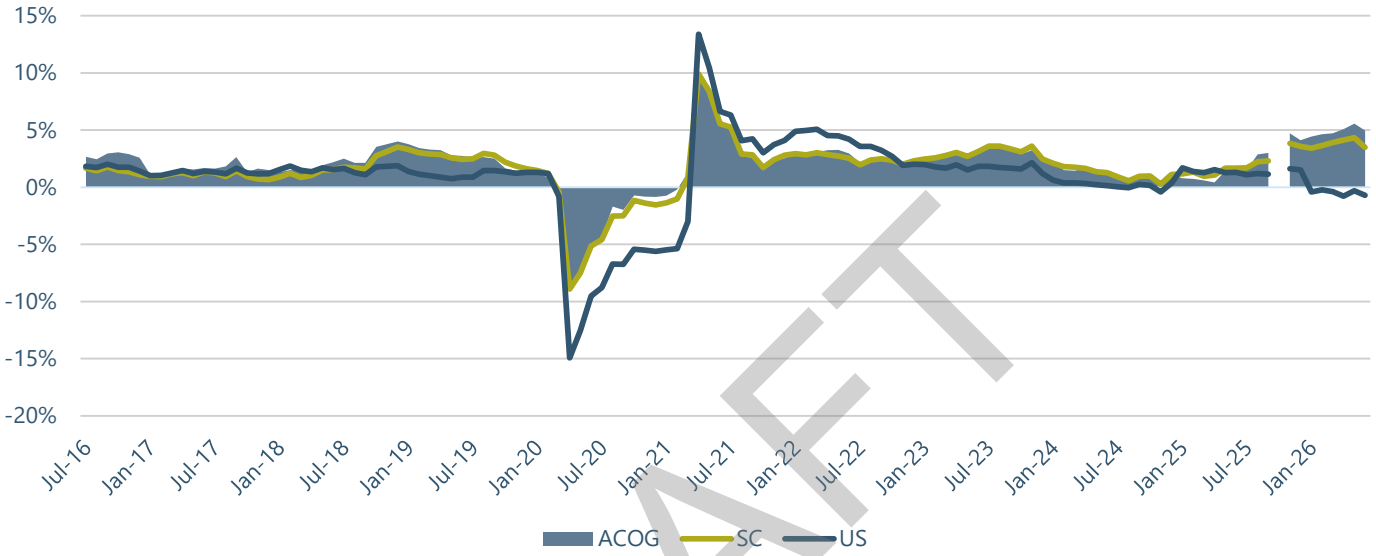
Employment Trends

Total employment across the ACOG region was 692,940 as of June 2026. This represents an increase of 4.9% year over year.

Year Over Year Percent Change in Employment, July 2016—June 2026



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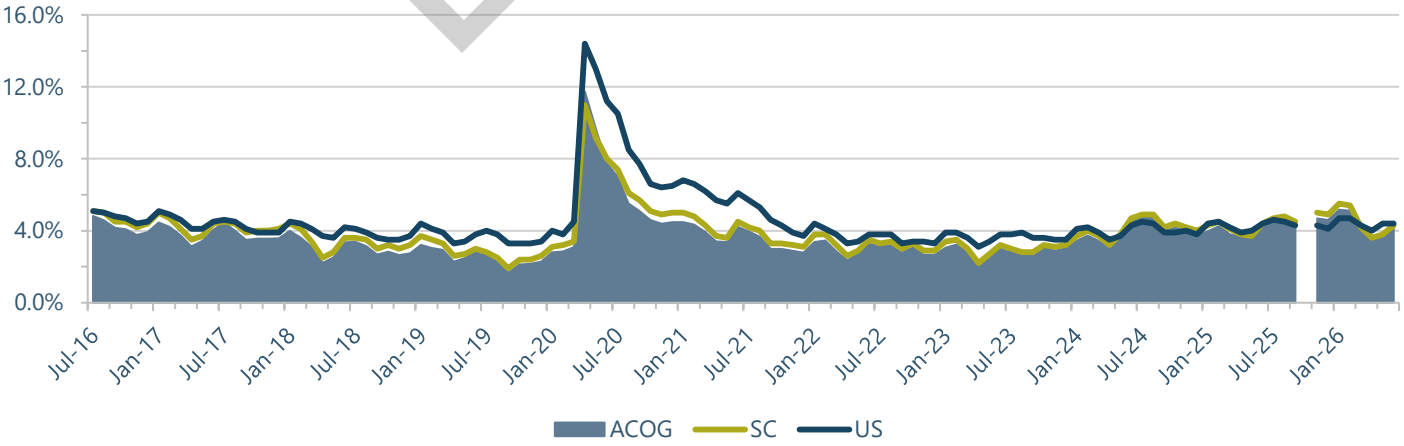
As of June 2026, the ACOG region's unemployment rate was 4.1%, just below that of both South Carolina and the US at 4.3% and 4.4% respectively. ACOG and South Carolina's unemployment rates have both fallen, while the United States' has remained the same.

Unemployment by Month, July 2016—June 2026



Source: US Bureau of Labor Statistics

Industry Snapshot

The largest industry sector in the ACOG region is Manufacturing, employing 103,369 workers. The next-largest sectors in the region are Health Care and Social Assistance (93,445 workers) and Retail Trade (73,678). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Manufacturing (LQ = 2.01), Retail Trade (1.15), and Administrative and Support and Waste Management and Remediation Services (1.12).

Sectors in the region with the highest average wages per worker are Management of Companies and Enterprises ($116,265), Utilities ($102,229), and Finance and Insurance ($97,137). Regional sectors with the best job growth (or most moderate job losses) over the last 5 years are Health Care and Social Assistance (+14,513 jobs), Accommodation and Food Services (+10,733), and Professional, Scientific, and Technical Services (+8,530).

Over the next five years, employment across the six counties is projected to expand by nearly 37,480 jobs. The fastest growing sector in the region is expected to be Health Care and Social Assistance with a +1.6% year-over year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+7,712 jobs), Manufacturing (+4,155), and Accommodation and Food Services (+3,628).

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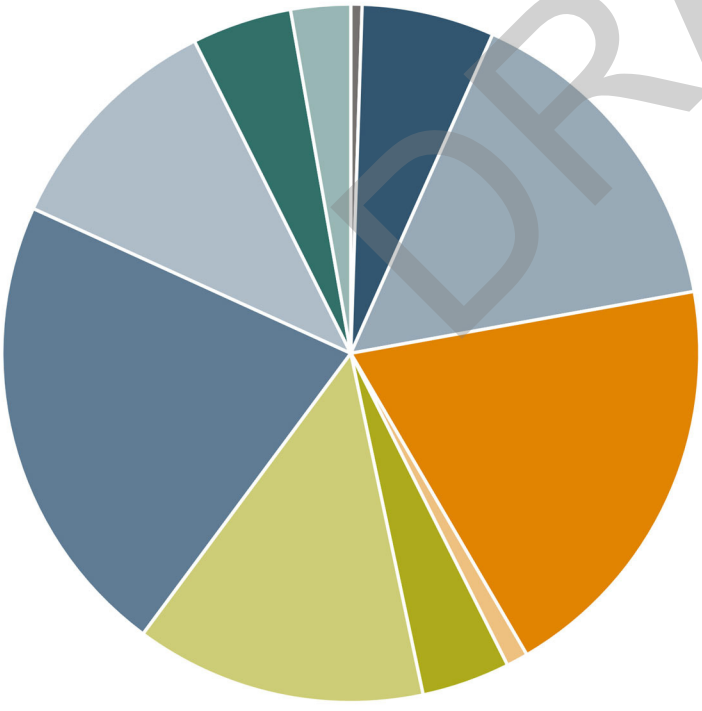
Employment by Industry (NAICS Supersectors): 2026



Education and Health Services: 21.6%

Trade, Transportation, and Utilities: 19.4%

Manufacturing: 15.5%

Professional and Business Services: 13.5%

Leisure and Hospitality: 10.8%

Construction: 6.1%

Other Services (except Public Administration): 4.6%

Financial Activities: 4.1%

Public Administration: 2.8%

Information: 1.0%

Natural Resources and Mining: 0.5%

Source: JobsEQ, Q1 2026

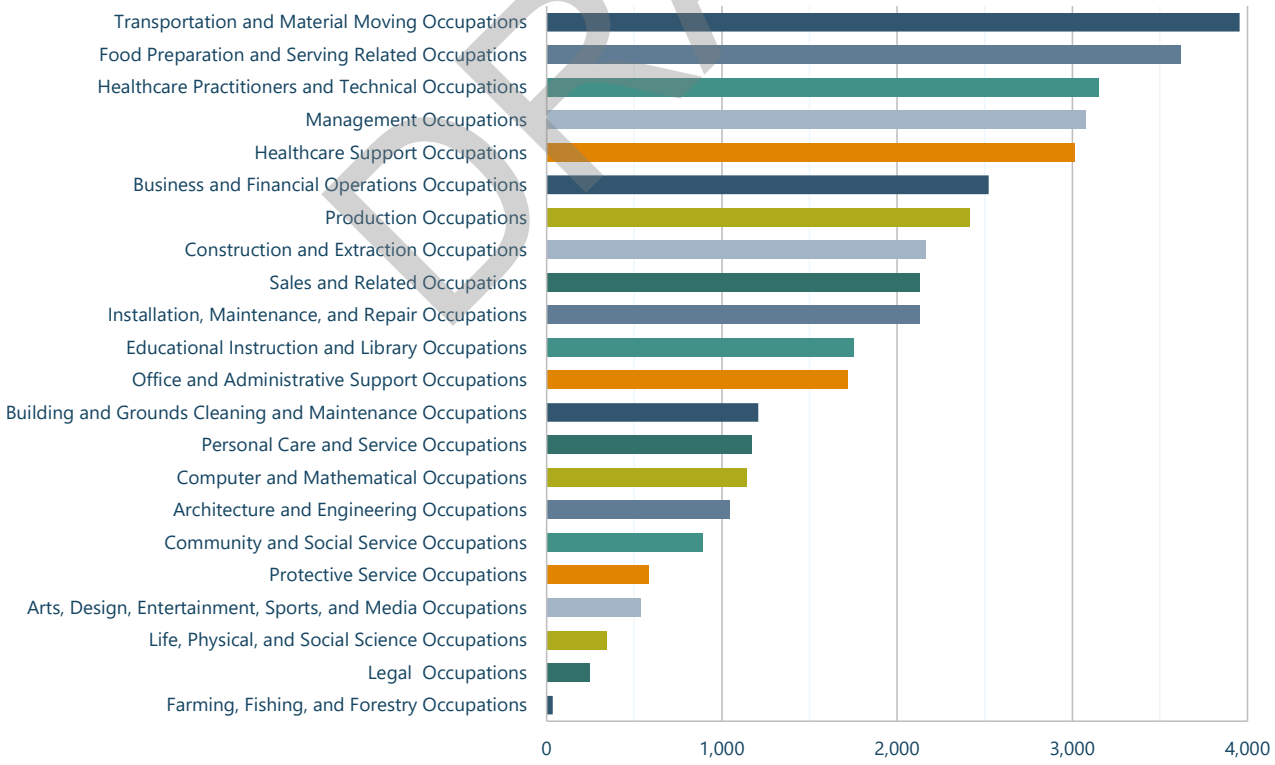
Occupation Snapshot

The largest major occupation group in the ACOG region is Office and Administrative Support Occupations, employing 75,523 workers. The next-largest occupation groups in the region are Production Occupations (67,107 workers) and Sales and Related Occupations (63,441). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Production Occupations (LQ = 1.89), Architecture and Engineering Occupations (1.31), and Installation, Maintenance, and Repair Occupations (1.15).

Occupation groups in the ACOG region with the highest average wages per worker are Management Occupations ($125,000), Legal Occupations ($103,600), and Healthcare Practitioners and Technical Occupations ($98,000). The unemployment rate in the region varied among the major groups from 1.4% among Legal Occupations to 7.9% among Farming, Fishing, and Forestry Occupations.

Over the next five years, the fastest growing occupation group in the region is expected to be Healthcare Support Occupations with a +2.2% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Transportation and Material Moving Occupations (+4,165 jobs) and Food Preparation and Serving Related Occupations (+3,849). Over the same period, the highest separation demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (58,584 jobs) and Office and Administrative Support Occupations (43,076).

Five-Year Job Growth Forecast by Occupation Group: 2026-2031



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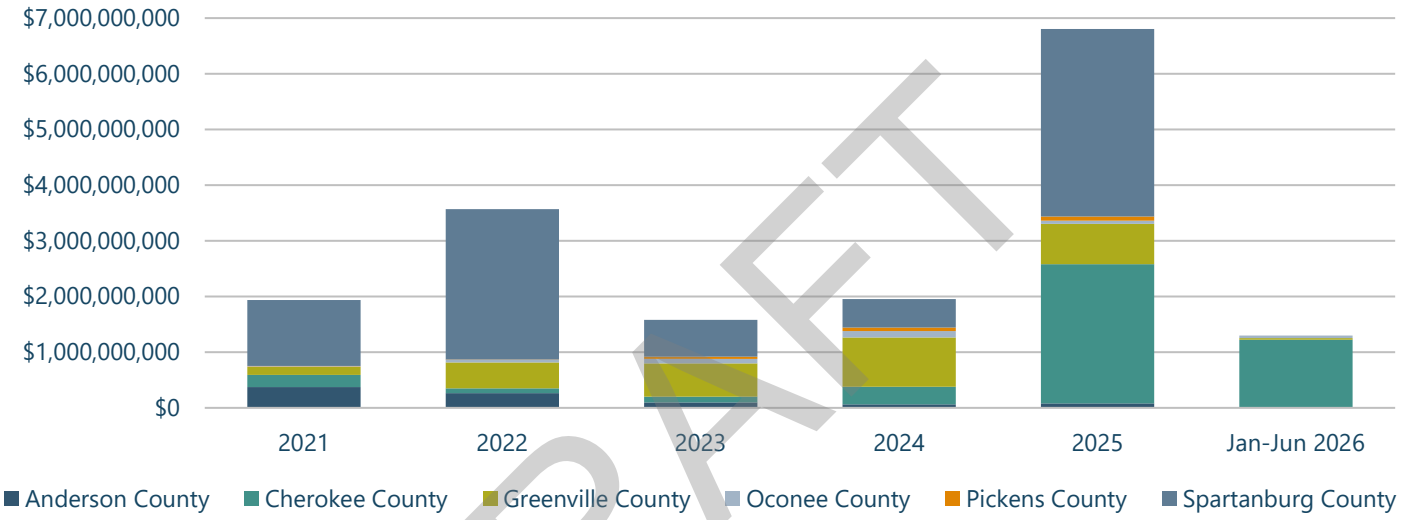
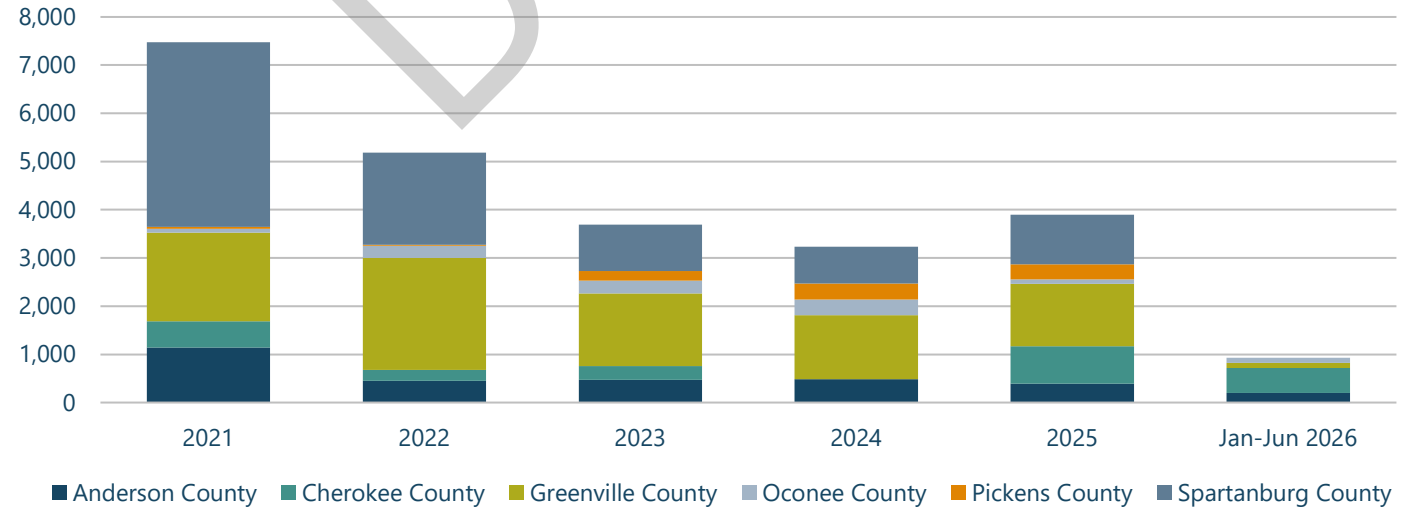
Capital Investment & Job Creation

From 2021-2025, ACOG county economic development offices announced nearly $16 billion in capital investment and the creation of 23,479 new jobs across the region. During the first half of 2026, another $1.3 billion in capital investment and 928 jobs were added. These announcements came from a mix of existing and new businesses from the US and abroad, and span a variety of industries including advanced materials, aerospace, automotive, biosciences, corporate and professional services, distribution, energy, and food and beverage manufacturing.

Capital Investment by County



Job Creation by County



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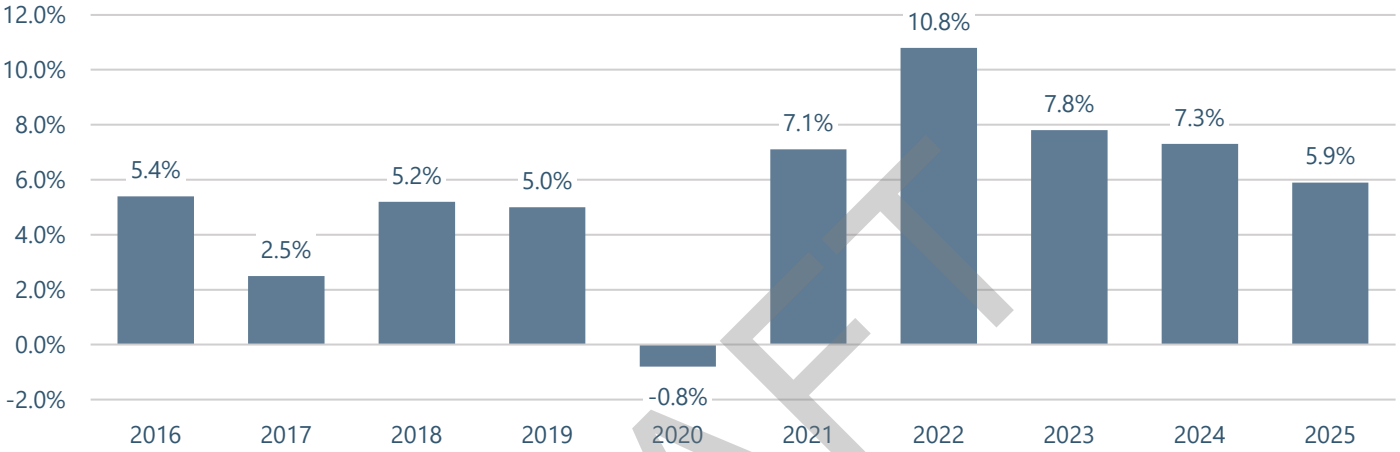
Sources: County Economic Development Offices and the Upstate SC Alliance

Gross Domestic Product

Gross Domestic Product (GDP) is the total value of goods and services produced by a region. In 2025, nominal GDP in the ACOG region expanded 5.9%. This follows growth of 7.3% in 2024. As of 2025, total GDP in the region was $94,128,598,000.

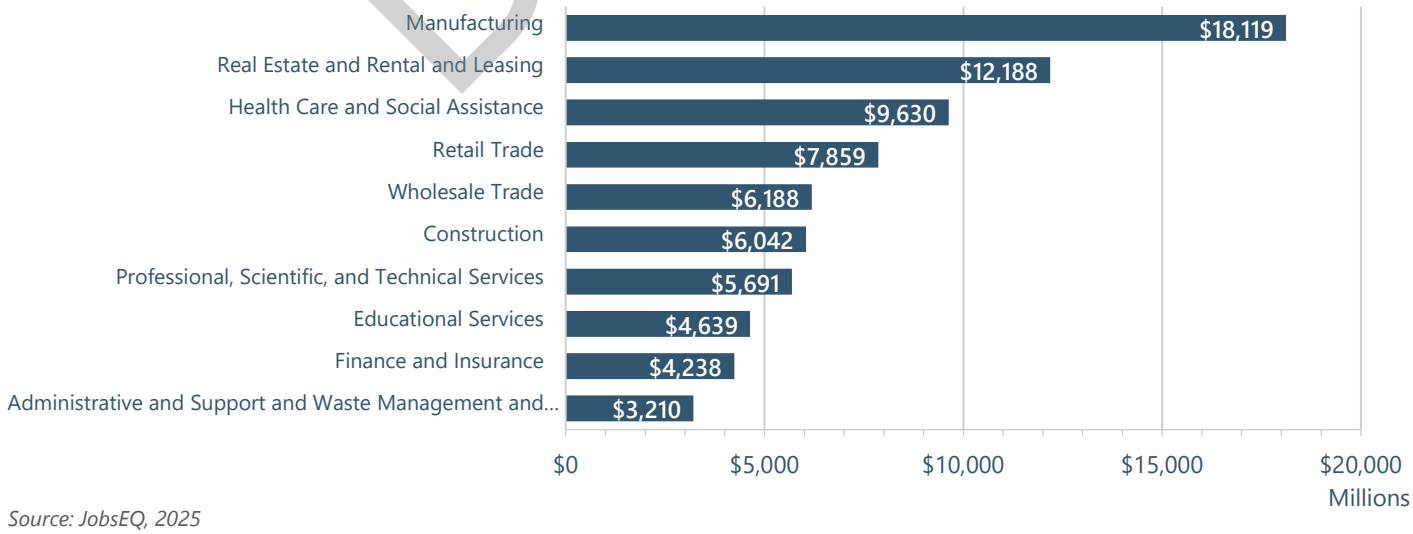
Year-Over-Year Percent Change in GDP: 2016-2025



Source: JobsEQ, 2026

Of the industry sectors in the ACOG region, Manufacturing contributed the largest portion of GDP in 2025, $18,119,157,000. The next-largest contributions came from Real Estate and Rental and Leasing ($12,187,521,000), Health Care and Social Assistance ($9,629,988,000), and Retail Trade ($7,858,683,000).

Gross Domestic Product (in $ millions): 2025



Source: JobsEQ, 2025

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ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY ONE

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

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

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

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PRIORITY ONE INDICATORS

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

◊ Between July 1, 2025 and June 30, 2026, ACOG region economic development offices announced 34 projects totaling nearly $2.5 billion in capital investment and 3,349 new jobs. Sixteen of those projects were the result of foreign direct investment in the region, contributing $352 million in capital investment and 1,167 jobs to the region.

◊ In 2025, the SC Department of Employment and Workforce announced 9 layoff and 5 closure events in the region with 1,823 jobs impacted. Between January and June of 2026, there were 5 layoff and 1 closure events announced impacting 1,701 jobs.

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Summary of Announced Capital Investment					
	2022	2023	2024	2025	Jan-Jun 2026
Anderson County	$260,786,000	$95,930,000	$61,300,000	$81,332,422	$11,500,000
Cherokee County	$87,100,000	$103,000,000	$319,050,000	$2,496,500,000	$1,211,600,000
Greenville County	$470,018,000	$596,112,050	$885,117,107	$725,000,000	$27,684,308
Oconee County	$43,000,000	$85,900,000	$114,500,000	$55,700,000	$44,550,000
Pickens County	$4,000,000	$38,300,000	$63,500,000	$77,700,000	$0
Spartanburg County	$2,702,250,000	$662,482,132	$509,282,944	$3,364,429,465	$0
ACOG Region	$3,567,154,000	$1,581,724,182	$1,952,750,051	$6,800,661,887	$1,295,334,308

Summary of Announced Job Creation					
	2022	2023	2024	2025	Jan-Jun 2026
Anderson County	452	472	489	394	202
Cherokee County	225	288	Not Disclosed	778	515
Greenville County	2,326	1,503	1,322	1,293	104
Oconee County	247	267	324	92	107
Pickens County	21	201	335	314	0
Spartanburg County	1,915	961	765	1,024	0
ACOG Region	5,186	3,692	3,235	3,895	928

Sources: Upstate Alliance and County Economic Development Offices

Announced Capital Investment & Job Creation by County and Project
July 2025 –June 2026

County	Company	Type	Capital Investment	Jobs
Anderson County	TTI	Existing	$20,725,000	200
Anderson County	Sargent Metal	Existing	$10,507,422	69
Anderson County	SC Farm Bureau	Existing	$4,900,000	Not Disclosed
Anderson County	Advanced Metalworks	Existing	$10,500,000	69
Anderson County	Signature Foods USA	New	$11,500,000	202
Cherokee County	First Solar, Inc.	New	$330,000,000	600
Cherokee County	Pax Industries	New	$2,500,000	10
Cherokee County	Fenner Precision Polymers	New	$30,000,000	51
Cherokee County	Huwell US Inc.	New	$11,600,000	25
Cherokee County	USA Rare Earth	New	$1,200,000,000	490
Greenville County	Span-America	Existing	$20,000,000	Not Disclosed
Greenville County	Safe Industries	New	$50,000,000	80
Greenville County	DartPoints	Existing	$130,000,000	25
Greenville County	ARAN USA	Existing	$4,000,000	18
Greenville County	Vermeer Corporation	Existing	$28,000,000	100
Greenville County	Confidential Projects	Existing	$13,000,000	140
Greenville County	VacAero International	New	$5,831,700	16
Greenville County	United Composite Materials, LLC	New	$17,500,000	50
Greenville County	EquipmentShare	New	$4,352,608	32
Greenville County	Idealworks	New	Not Disclosed	Not Disclosed
Greenville County	GNQ Insilico	New	Not Disclosed	Not Disclosed
Oconee County	Ulbrich Specialty Wire Products	Existing	$5,000,000	15
Oconee County	Baxter Manufacturing	Existing	$15,700,000	36
Oconee County	Horton	Existing	$15,000,000	Not Disclosed
Oconee County	Mosdorfer, LLC	New	$44,550,000	107
Pickens County	Peabody Engineering, LLC	Existing	$9,200,000	20
Pickens County	ElringKlinger	Existing	$68,500,000	294
Spartanburg County	Advanced Ceramic Coatings, LLC	Existing	$27,829,302	72
Spartanburg County	Cooper-Standard Automotive	Existing	$15,973,865	Not Disclosed

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Announced Capital Investment & Job Creation, July 2025–June 2026 (continued)

County	Company	Type	Capital Investment	Jobs
Spartanburg County	Auria Solutions	Existing	$8,959,000	67
Spartanburg County	FabLogix	Existing	$9,800,000	150
Spartanburg County	Woodward Aerospace	New	$196,700,000	247
Spartanburg County	ZF Chassis Systems	Existing	$57,093,618	30
Spartanburg County	AVM Builder Supply	Existing	$5,700,000	40
Spartanburg County	Tindall Corp	Existing	$49,986,282	30

Sources: Upstate Alliance and County Economic Development Offices

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ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY TWO

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

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

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

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PRIORITY TWO INDICATORS

- **Labor market data**
  - ◊ See pages 6-8
- **Educational attainment**

2025 Population 25+ by Educational Attainment			
	ACOG Region	South Carolina	United States
Less than 9th Grade	2.6%	2.3%	3.9%
9-12th Grade, No Diploma	6.3%	5.8%	5.2%
GED/Alternative Credential	5.3%	4.7%	4.1%
High School Diploma	22.5%	23.3%	22.2%
Some College, No Degree	17.2%	18.1%	16.9%
Associate Degree	12.1%	11.8%	9.8%
Bachelor's Degree	21.0%	20.9%	23.0%
Graduate/Professional Degree	13.0%	13.2%	14.8%

Source: Esri Business Analyst, 2026

- **Post-secondary enrollment**
  - ◊ Fall 2024 enrollment in post-secondary institutions around the region was 81,095, up 3.4% over the previous year. Fall 2025 data not available as of October 2026.
- **Per capita and median household income** *(Source: Esri Business Analyst, 2026)*
  - ◊ 2026 per capita income: $43,967
  - ◊ 2026 median household income: $78,580
- **Poverty rates** *(Source: US Census Bureau, 2024 SAIPE Program. Data released in December 2025.)*
  - ◊ The most recent poverty rate available for the ACOG region was 12.2%, a 1.0% decrease from the prior year.
- **Number of apprenticeship and certificate programs**
  - ◊ As of October 2026, there are 190 companies and organizations across the ACOG region with apprenticeship programs registered with the US Department of Labor, a decrease of 5 from 2024.
  - ◊ In the 2024-25 academic year, 9,304 certificates and 2-year degrees were awarded to students attending institutions of higher education in the ACOG region.

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- **Implementation of solutions to barriers to workforce participation**
  - ◊ OneSpartanburg's 2025 workforce study, Talent Gap Analysis 2.0, identified childcare as a significant barrier to labor force participation for some segments of the workforce. When examining the child care cost burden as a percent of median household income, staff research found that 4 of 6 ACOG counties were at or above that of South Carolina and the United States.

2022-2025 Child Care Cost Burden as a Percent of Median HH Income				
	2022	2023	2024	2025
Anderson County	21.0%	21.0%	30.0%	32.0%
Cherokee County	24.0%	27.0%	37.0%	21.0%
Greenville County	16.0%	20.0%	24.0%	28.0%
Oconee County	16.0%	20.0%	23.0%	20.0%
Pickens County	20.0%	23.0%	23.0%	36.0%
Spartanburg County	20.0%	21.0%	32.0%	32.0%
South Carolina	20.0%	22.0%	28.0%	28.0%
United States	25.0%	27.0%	27.0%	28.0%

Source: County Health Rankings & Roadmaps

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ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY THREE

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

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

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

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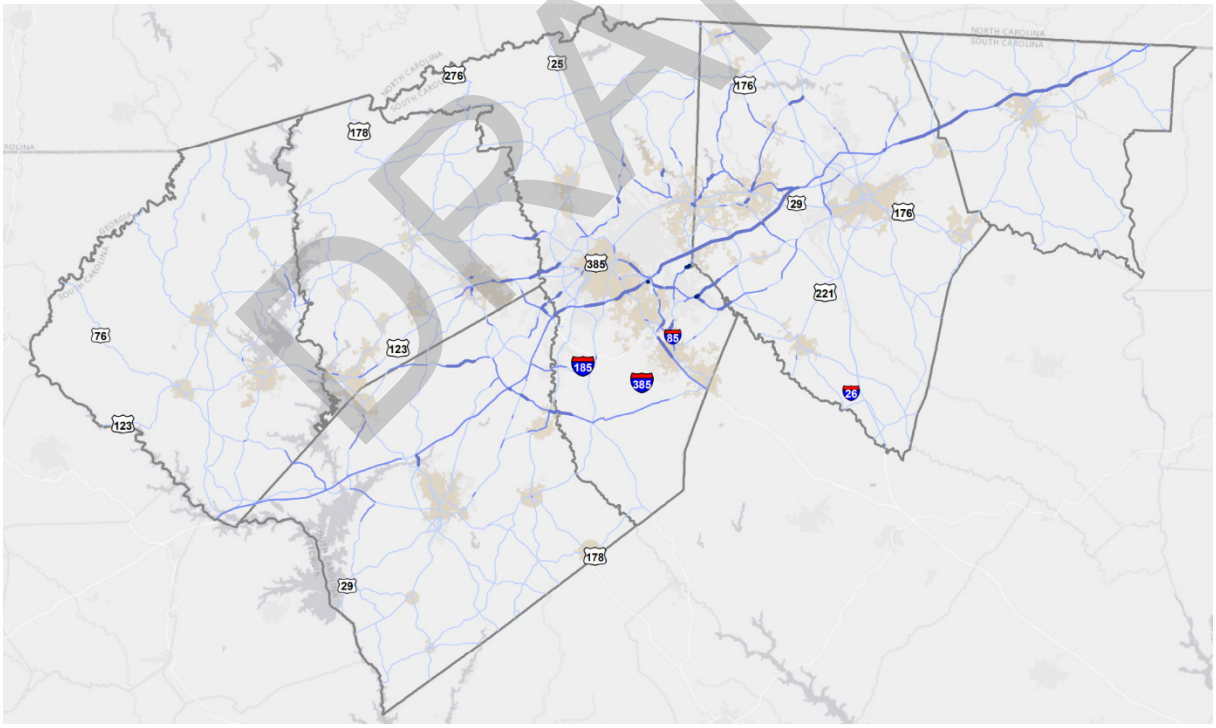
PRIORITY THREE INDICATORS

- **Amount of new public investment in water, sewer, and transportation infrastructure**
  - ◊ In 2023, the SC Rural Infrastructure Authority (RIA) awarded $352 million dollars to ACOG region communities via the SC Infrastructure Investment Program (SCIIP). These funds are being used for 50 water, sewer, and stormwater drainage improvement projects in all six ACOG counties. In addition, $4.1 million of RIA grants were awarded in FY 2025-26 to communities in the region for new infrastructure improvements.
- **Amount of grant funding awarded for infrastructure projects**
  - ◊ During FY 2025-2026, the ACOG Grant Services department also managed $28.5 million in Economic Development Administration (EDA) funding, $20.5 million in Appalachian Regional Commission (ARC) funding, and $10.9 million in Housing and Urban Development/ Community Development Block Grant (HUD/CDBG) funding; a total of $60 million for new regional infrastructure projects.
- **Changes in level of service for major thoroughfares**
  - ◊ The map below depicts primary highways by level of service (LOS), rated A (the most narrow lines and best LOS) through D (the most bold lines and lowest LOS).



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ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY FOUR

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

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

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

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PRIORITY FOUR INDICATORS

Number of small businesses

- Nonemployer establishments increased 9.3% between 2023 and 2024 to 129,673 across the region *(US Census Bureau Table NS2400NONEMP, 2024)*.
- The latest data available shows Ea total of 30,182 employer establishments in the region with less than 50 employees. This is an increase of 2.2% between 2022 and 2023. (US Census Bureau Table CB2300CBP, 2023; data for 2024 has not been released as of October 2026.)

Number of new patents

- The US Patent and Trademark Office has public records for 722 patents granted in the region in 2025 and 389 granted in the first two quarters of 2026. The latter represents a 35% increase over 2025.

Number of business incubator, landing pad, and co-work spaces

- There are 62 business incubator, landing pad, and co-work spaces across the region. This is an increase of 14 from 2025.

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ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY FIVE

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

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

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

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PRIORITY FIVE INDICATORS

Number of sites and buildings marketed by economic development organizations

- In 2026, economic development organizations across Anderson, Cherokee, Greenville, Oconee, Pickens, and Spartanburg counties were actively marketing 170 sites and nearly 220 buildings.

Number of speculative industrial buildings constructed

- As of Q2 2026, 4.4 million square feet of industrial space was under construction in the Greenville/ Spartanburg market, just over three times that of Q2 2025 (*Lee & Associates Industrial Market Report, Q2 2026*). After slowing in 2025, speculative industrial construction projects are again breaking ground, demonstrating a renewed confidence in the market. These projects generally fall into one of two size categories: 100,000 - 250,000 SF or 25,000 - 50,000 SF (*Colliers Q1 2026 Industrial Report*).

Acres of land zoned for industrial uses

- The six county economic development offices in the region are currently marketing about 36 industrial sites totaling 3,700 acres.
- Additionally, significant portions of all six counties remain unrestricted by traditional land use controls (zoning).

Number of grant applications prepared for due diligence studies, infrastructure extensions/ improvements, and hazard mitigation projects

- Three applications totaling $8 million in grant funds were submitted and awarded in FY 2024-25.

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ECONOMIC DEVELOPMENT PRIORITIES

PRIORITY SIX

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

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

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

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PRIORITY SIX INDICATORS

Number of planning initiatives

- In FY25-26, ACOG staff completed four comprehensive plans, two zoning ordinances, and one corridor study for communities within the region, and continues to work with five communities on six such planning documents. In addition, ACOG staff is providing contract or on-call current planning services in five municipalities and managing programs for two additional agencies.
- ACOG provides region-wide transportation planning through development of the 2045 Rural Long Range Transportation Plan and management of the Regional Travel Modeling Program.

Number of residential building permits

- According to data from the US Census Bureau's Building Permits Survey program, 11,327 single-family residential building permits were issued across the region in 2025. This is a 2.7% increase from 2024.

Affordable housing initiatives

- Ten additional affordable housing developments with nearly 1,000 units have been proposed since last years performance reporting period. These projects will utilize South Carolina Low Income Housing Tax Credit (LIHTC) and Multifamily Tax-Exempt Bond Financing Program funding.

Food insecurity – change over time

- In 2024, over 230,000 people in the ACOG region experienced food insecurity at some point in the previous year. Food insecurity rates by county ranged from 15.5% in Greenville County to 19.1% percent in Cherokee County. Every county in the region saw increases between 2023 and 2024. (*Feeding America, https://map.feedingamerica.org/county/2024/overall/south-carolina*)

Number of farmers markets and CSAs

- Agritourism Farms: 171
- Certified Roadside Markets: 43
- Certified SC Grown Members: 456
- Certified SC Products: 246
- Community Supported Agriculture (CSAs): 3
- Farmers Markets: 25

Healthcare deserts – change over time

- In Mapping Healthcare Deserts, a whitepaper funded by GoodRX, healthcare deserts are defined as areas where people lack access to six key healthcare services: pharmacies, primary care providers, hospitals, hospital beds, trauma centers, and low-cost health centers. As of the latest release of data (2025), there are three healthcare deserts in the ACOG region, down from six in the prior report (2021).

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Grantee:	SC Appalachian Council of Governments
Project Title:	2026 Comprehensive Economic Development Strategy (CEDS) Annual Performance Report
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Five-Year CEDS Time Period:	January 1, 2023—December 31, 2027