

# South Carolina Industry Analysis

# 2016

An examination of  
information on South  
Carolina's Industries





The Business Intelligence Department (BID) of the South Carolina Department of Employment and Workforce (SCDEW) publishes the *2016 South Carolina Industry Analysis*. Data collected from sources throughout South Carolina and the United States form the basis of the information and analyses provided in this publication.

About SCDEW and BID:

The Business Intelligence Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

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Table of Contents

**Executive Summary** ..... 6

**Introduction**..... 7

**Industry Gross Domestic Product (GDP)** ..... 8

**South Carolina Real GDP by Industry** ..... 8

**South Carolina Industry Change in Real GDP** ..... 8

**Industry Employment and Wages**..... 12

**Industry Location Quotients**..... 12

**Characteristics of Industry by Firm Size** ..... 12

**Comparison of Industry Employment, Turnover, and Earnings**..... 13

**Industry Employment Projections** ..... 13

**Top Occupations by Industry Sector** ..... 13

**Regional Industry Projections** ..... 21

**Selected Industry Descriptions** ..... 24

    Construction: NAICS 23 ..... 24

    Manufacturing: NAICS 31-33 ..... 24

    Real Estate and Rental and Leasing: NAICS 53..... 25

    Professional, Scientific, and Technical Services: NAICS 54 ..... 25

    Administrative and Support and Waste Management and Remediation Services: NAICS 56. 25

    Other Services (except Public Administration): NAICS 81 ..... 26

**Required Language**..... 26



**List of Figures**

Figure 1- United States and South Carolina Gross Domestic Product (GDP)..... 9

Figure 2 - South Carolina Industry Real Gross Domestic Product..... 10

Figure 3 - South Carolina Industry Real GDP Annual Percent Change ..... 11

Figure 4 - South Carolina Employment and Wages, 2015 ..... 14

Figure 5 - South Carolina Industry Location Quotients..... 15

Figure 6 - South Carolina Average Beginning of Quarter Employment by Firm Size..... 16

Figure 7 - South Carolina Industry Employment Turnover ..... 17

Figure 8 - South Carolina Industry Average Monthly Earnings..... 187

Figure 9 - South Carolina Industry Average Quarterly Employment..... 18

Figure 10 - South Carolina Industry Employment Projections, 2014-2024 ..... 19

Figure 11 - South Carolina's Top Five Occupations by Industry Sector ..... 20

Figure 12 – South Carolina Region Map ..... 231

Figure 13 – South Carolina Industry Employment Projections by Region, 2012-2022.....23

## Executive Summary

South Carolina's Gross Domestic Product (GDP) reached \$198.7 billion in 2015 compared to the U.S. figure of \$17.8 trillion. The top three industry sectors in the state in GDP terms are Manufacturing; Finance, Insurance and Real Estate; and Professional and Business Services. The state's economy grew from \$161 billion in 2009 to \$177 billion in 2015 in real dollars. Industry growth was mixed over the period, but Health Care and Social Assistance; Accommodation and Food Services; and Wholesale Trade trended upward.

The average annual salary for South Carolina's wage and salary workers in 2015 was \$42,001 with the Utilities industry having the highest average annual salary. Industries having a competitive advantage in the state with strong location quotients include Manufacturing and Accommodation and Food Services. Over half of jobs in a 4-quarter period spanning 2014 and 2015 were in firms with over 500 or more employees and 18 percent were in firms with fewer than 20 employees. A comparison of employment turnover and earnings shows that high turnover and low wages go together in some industries.

South Carolina's economy is projected to grow by 169,000 jobs or 8.26 percent in the 10-year period from 2014 to 2024. These latest industry projections show that Health Care and Social Assistance is estimated to expand by nearly 40,000 jobs, while Administrative and Support and Waste Management is anticipated to grow over 26,000 jobs. All major private industry sectors are expected to gain, while Government is expected to shrink slightly.

Top occupations in terms of employment for each industry give insight into the actual work activities being performed. For example, Team Assemblers and Machinists compose top positions in the Manufacturing industry. Customer Service Representatives are among the top occupations in seven industry sectors.

Industry employment projections on a regional level show that the Upstate region should have the largest future employment, followed by the Central region. Construction and Health Care and Social Assistance are expected to have strong growth in every region. Manufacturing in the Upstate is projected to remain the largest single industry sector in any region.

## Introduction

South Carolina's economy has rebounded well since the depths of the Great Recession. Interestingly, Mark Vitner, Wells Fargo's Senior Economist, gives a reason why. "The economic good fortune is largely due to an astonishing run of economic development that helped draw thousands of high-paying manufacturing jobs to the state. Much of this industrial development has come from overseas."<sup>1</sup>

Mr. Vitner's report highlights the progress of the state's Manufacturing industry. This report will highlight the state's overall economy, emphasizing the major industrial sectors from several perspectives. First is an examination of the state's industry GDP in current dollars. Next, industry trends in real dollar terms are discussed. Industry employment, wages, and location quotients as well as characteristics of industries by firm size follow. Then, a comparison of industry employment, turnover, and earnings gives additional insight into the state's economy. Employment projections and top industry occupations present more detail. A breakdown of industry projections by region shows how the state is expected to grow from a geographical point of view. Finally, selected industry descriptions explain work activities for specific sectors.

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<sup>1</sup> Mark Vitner, Wells Fargo Securities, "South Carolina in the Spotlight: February 2016"; <https://www08.wellsfargomedia.com/assets/pdf/commercial/insights/economics/regional-reports/sc-economic-update-02162016.pdf>, accessed August 16, 2016.

## Industry Gross Domestic Product

Gross Domestic Product is defined as the total market value of goods and services produced in the country. This metric is the primary means by which economists judge the strength of the economy. It is measured using two data elements -- current dollars or not inflation-adjusted and real dollars or inflation-adjusted dollars. In 2015, the nation's GDP in current dollars was \$17.8 trillion, and South Carolina's GDP was \$198.7 billion as shown in **Figure 1**. This statistic is often quoted in the media when it is stated that the U.S. has a \$17 trillion economy.

The private sector is responsible for the vast majority of output at well over 80 percent for the nation and the state. In terms of industry breakdown for the nation, the Finance, Insurance and Real Estate sector leads in size at 20.4 percent, followed by Professional and Business Services at 12.3 percent, and Manufacturing at 12.2 percent. For South Carolina, the top three industries are Manufacturing and Finance, Insurance and Real Estate each at 16.8 percent and Professional and Business Services at 10.4 percent. Government represents 12.4 percent of the economy in the nation, and 15.6 percent in the state.

## South Carolina Real GDP by Industry

Economists use real GDP, being adjusted for inflation, to analyze the trends in the economy over time. The table in **Figure 2** presents South Carolina's real GDP by industry sector from 2009 to 2015 in 2009 dollars along with trend charts for each industry. The year 2009 was the low point for the state's economy overall in the recent past as South Carolina has grown in real terms every year since. The state had a \$177 billion economy in 2015 in real dollars, growing from \$161 billion in 2009.

Some of the state's industries have been trending upward, such as Health Care and Social Assistance; Accommodations and Food Services; and Wholesale Trade, while the progress for others have been mixed, like Construction and Manufacturing. The Durable Goods segment of Manufacturing has seen strong growth, while the Nondurable Goods segment was lower in 2015 than in 2009.

## South Carolina Industry Change in Real GDP

Another way to analyze the trends in the economy is to view the percent annual change by industry as presented in **Figure 3**. As can be observed, the state's industries' real output fell by 3.7 percent from 2008 to 2009, but it increased thereafter. The percent change perspective makes it easier to see how up and down the recovery has been in the state. Only the Health Care and Social Assistance industry segment did not see negative change over the period from 2008 forward, carrying the Education and Health Care sector. Some of the swings from one year to the next have been great. For example, the Finance and Insurance industry grew by 18.3 percent from 2008 to 2009 but fell by over five percent the next year. The Administrative and Waste



Services industry trended in the opposite direction over the same timeframe as the Finance and Insurance industry by falling 6.0 percent in 2009 and growing by 16.3 percent in 2010.

**Figure 1**

**United States and South Carolina Gross Domestic Product (GDP), 2015**

Industry	United States	Percent of Total	South Carolina	Percent of Total
<b>All industry total</b>	<b>\$17,830,307</b>	<b>100.0%</b>	<b>\$198,714</b>	<b>100.0%</b>
<b>Private industries</b>	<b>\$15,623,406</b>	<b>87.6%</b>	<b>\$167,705</b>	<b>84.4%</b>
<b>Agriculture, forestry, fishing, and hunting</b>	<b>\$196,009</b>	<b>1.1%</b>	<b>\$1,302</b>	<b>0.7%</b>
<b>Mining</b>	<b>\$304,888</b>	<b>1.7%</b>	<b>\$268</b>	<b>0.1%</b>
<b>Utilities</b>	<b>\$288,333</b>	<b>1.6%</b>	<b>\$4,662</b>	<b>2.3%</b>
<b>Construction</b>	<b>\$716,917</b>	<b>4.0%</b>	<b>\$8,949</b>	<b>4.5%</b>
<b>Manufacturing</b>	<b>\$2,167,757</b>	<b>12.2%</b>	<b>\$33,444</b>	<b>16.8%</b>
Durable goods manufacturing	\$1,175,327	6.6%	\$19,733	9.9%
Nondurable goods manufacturing	\$992,430	5.6%	\$13,711	6.9%
<b>Wholesale trade</b>	<b>\$1,080,429</b>	<b>6.1%</b>	<b>\$11,677</b>	<b>5.9%</b>
<b>Retail trade</b>	<b>\$1,049,698</b>	<b>5.9%</b>	<b>\$14,624</b>	<b>7.4%</b>
<b>Transportation and warehousing</b>	<b>\$527,656</b>	<b>3.0%</b>	<b>\$4,734</b>	<b>2.4%</b>
<b>Information</b>	<b>\$868,008</b>	<b>4.9%</b>	<b>\$5,216</b>	<b>2.6%</b>
<b>Finance, insurance, real estate, rental, and leasing</b>	<b>\$3,635,588</b>	<b>20.4%</b>	<b>\$33,391</b>	<b>16.8%</b>
Finance and insurance	\$1,275,451	7.2%	\$8,493	4.3%
Real estate and rental and leasing	\$2,360,137	13.2%	\$24,898	12.5%
<b>Professional and business services</b>	<b>\$2,192,407</b>	<b>12.3%</b>	<b>\$20,618</b>	<b>10.4%</b>
Professional, scientific, and technical services	\$1,269,823	7.1%	\$10,067	5.1%
Management of companies and enterprises	\$360,936	2.0%	\$1,800	0.9%
Administrative and waste management services	\$561,648	3.1%	\$8,751	4.4%
<b>Educational services, health care, and social assistance</b>	<b>\$1,491,882</b>	<b>8.4%</b>	<b>\$14,770</b>	<b>7.4%</b>
Educational services	\$200,252	1.1%	\$1,404	0.7%
Health care and social assistance	\$1,291,631	7.2%	\$13,366	6.7%
<b>Arts, entertainment, recreation, accommodation, and food</b>	<b>\$703,811</b>	<b>3.9%</b>	<b>\$9,013</b>	<b>4.5%</b>
Arts, entertainment, and recreation	\$183,343	1.0%	\$1,441	0.7%
Accommodation and food services	\$520,469	2.9%	\$7,572	3.8%
<b>Other services, except government</b>	<b>\$400,020</b>	<b>2.2%</b>	<b>\$5,035</b>	<b>2.5%</b>
<b>Government</b>	<b>\$2,206,901</b>	<b>12.4%</b>	<b>\$31,009</b>	<b>15.6%</b>

Source: U.S. Bureau of Economic Analysis

Note: Amounts in millions of current dollars



Figure 2

South Carolina Industry Real Gross Domestic Product (GDP), 2009-2015  
Real GDP in millions of chained 2009 dollars

Industry	Trend Chart	2009	2010	2011	2012	2013	2014	2015
All industry total		\$161,045	\$163,968	\$167,352	\$167,708	\$169,493	\$173,785	\$177,141
Private industries		\$133,183	\$136,950	\$140,166	\$140,190	\$142,472	\$146,841	\$149,970
Agriculture, forestry, fishing, and hunting		\$1,192	\$1,160	\$839	\$932	\$1,143	\$959	\$1,073
Mining		\$279	\$211	\$205	\$194	\$226	\$254	\$247
Utilities		\$4,347	\$4,890	\$4,941	\$4,459	\$4,464	\$4,318	\$4,060
Construction		\$7,870	\$7,242	\$6,904	\$7,152	\$7,368	\$7,396	\$7,728
Manufacturing		\$25,240	\$27,204	\$28,662	\$28,655	\$28,203	\$29,501	\$29,468
Durable goods manufacturing		\$13,487	\$14,762	\$16,583	\$17,440	\$17,253	\$17,897	\$18,044
Nondurable goods manufacturing		\$11,753	\$12,445	\$12,137	\$11,344	\$11,085	\$11,732	\$11,564
Wholesale trade		\$8,736	\$8,852	\$9,038	\$9,271	\$9,605	\$10,106	\$10,567
Retail trade		\$11,915	\$12,063	\$12,032	\$12,087	\$12,488	\$12,953	\$13,333
Transportation and warehousing		\$3,474	\$3,670	\$3,820	\$3,880	\$3,916	\$4,030	\$4,071
Information		\$4,466	\$4,456	\$4,372	\$4,377	\$4,819	\$5,031	\$5,322
Finance, insurance, real estate, rental, and leasing		\$28,204	\$28,233	\$28,993	\$28,194	\$28,671	\$29,219	\$29,576
Finance and insurance		\$8,162	\$7,727	\$7,570	\$7,039	\$6,984	\$6,963	\$7,058
Real estate and rental and leasing		\$20,043	\$20,517	\$21,452	\$21,206	\$21,754	\$22,338	\$22,600
Professional and business services		\$15,101	\$16,313	\$17,237	\$17,515	\$17,538	\$18,379	\$18,983
Professional, scientific, and technical services		\$7,540	\$7,741	\$8,243	\$8,361	\$8,410	\$8,725	\$9,136
Management of companies and enterprises		\$1,415	\$1,431	\$1,517	\$1,614	\$1,683	\$1,754	\$1,759
Administrative and waste management services		\$6,146	\$7,145	\$7,480	\$7,543	\$7,448	\$7,904	\$8,086
Educational services, health care, and social assistance		\$11,600	\$11,771	\$12,051	\$12,131	\$12,429	\$12,893	\$13,438
Educational services		\$1,118	\$1,127	\$1,145	\$1,159	\$1,135	\$1,165	\$1,172
Health care and social assistance		\$10,482	\$10,644	\$10,906	\$10,972	\$11,296	\$11,731	\$12,273
Arts, entertainment, recreation, accommodation, and food services		\$6,718	\$6,921	\$7,208	\$7,351	\$7,464	\$7,660	\$7,885
Arts, entertainment, and recreation		\$1,088	\$1,128	\$1,184	\$1,195	\$1,219	\$1,250	\$1,326
Accommodation and food services		\$5,630	\$5,793	\$6,023	\$6,156	\$6,244	\$6,410	\$6,561
Other services, except government		\$4,041	\$3,983	\$3,979	\$4,042	\$4,114	\$4,187	\$4,278
Government		\$27,862	\$27,033	\$27,212	\$27,538	\$27,057	\$26,996	\$27,231

SOURCE: U.S. Bureau of Economic Analysis



Figure 3

South Carolina Industry Real Gross Domestic Product (GDP) Annual Percent Change, 2009-2015

Industry	Trend Chart	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
All industry total		-3.7	1.8	2.1	0.2	1.1	2.5	1.9
Private industries		-4.3	2.8	2.3	0.0	1.6	3.1	2.1
Agriculture, forestry, fishing, and hunting		25.9	-2.7	-27.7	11.1	22.6	-16.1	11.9
Mining		-7.0	-24.4	-2.8	-5.4	16.5	12.4	-2.8
Utilities		-1.2	12.5	1.0	-9.8	0.1	-3.3	-6.0
Construction		-14.1	-8.0	-4.7	3.6	3.0	0.4	4.5
Manufacturing		-8.3	7.8	5.4	0.0	-1.6	4.6	-0.1
Durable goods manufacturing		-14.5	9.5	12.3	5.2	-1.1	3.7	0.8
Nondurable goods manufacturing		0.2	5.9	-2.5	-6.5	-2.3	5.8	-1.4
Wholesale trade		-16.7	1.3	2.1	2.6	3.6	5.2	4.6
Retail trade		-3.2	1.2	-0.3	0.5	3.3	3.7	2.9
Transportation and warehousing		-9.6	5.6	4.1	1.6	0.9	2.9	1.0
Information		-1.8	-0.2	-1.9	0.1	10.1	4.4	5.8
Finance, insurance, real estate, rental, and leasing		5.7	0.1	2.7	-2.8	1.7	1.9	1.2
Finance and insurance		18.3	-5.3	-2.0	-7.0	-0.8	-0.3	1.4
Real estate and rental and leasing		1.2	2.4	4.6	-1.1	2.6	2.7	1.2
Professional and business services		-6.1	8.0	5.7	1.6	0.1	4.8	3.3
Professional, scientific, and technical services		-5.7	2.7	6.5	1.4	0.6	3.7	4.7
Management of companies and enterprises		-8.7	1.1	6.0	6.4	4.3	4.2	0.3
Administrative and waste management services		-6.0	16.3	4.7	0.8	-1.3	6.1	2.3
Educational services, health care, and social assistance		0.8	1.5	2.4	0.7	2.5	3.7	4.2
Educational services		4.4	0.8	1.6	1.2	-2.1	2.6	0.6
Health care and social assistance		0.4	1.5	2.5	0.6	3.0	3.9	4.6
Arts, entertainment, recreation, accommodation, and food services		-7.1	3.0	4.1	2.0	1.5	2.6	2.9
Arts, entertainment, and recreation		-7.0	3.7	5.0	0.9	2.0	2.5	6.1
Accommodation and food services		-7.1	2.9	4.0	2.2	1.4	2.7	2.4
Other services, except government		-6.3	-1.4	-0.1	1.6	1.8	1.8	2.2
Government		-0.7	-3.0	0.7	1.2	-1.7	-0.2	0.9

SOURCE: U.S. Bureau of Economic Analysis

The Construction industry fell from 2008 to 2011 but has rebounded with strong growth. Several industries have recovered well since the bottom of the recession in 2009, including Wholesale Trade; Professional, Scientific, and Technical Services; and Arts, Entertainment, Recreation, Accommodations, and Food Services.

## Industry Employment and Wages

Other metrics used in analyzing the state's economy are the employment and wages of workers in the various industries. **Figure 4** highlights these statistics for the year 2015, and it shows that South Carolina had 1.950 million jobs covered by the state's unemployment insurance program with an average salary of \$42,001 overall. Total wages for those jobs in 2015 reached nearly \$82 billion. The Government sector had the most jobs at 343,000, followed by Retail Trade with 242,000, and Manufacturing with 236,000 jobs. The Utilities industry had the highest average salaries at \$88,950 in 2015, followed by Management of Companies at \$71,577, and Mining at \$68,370.

## Industry Location Quotients

A location quotient (LQ) indicates how an industry's concentration of employment in a state compares to its concentration in the nation. For example, an LQ of 2.0 for one of South Carolina's industries means that the industry has twice the concentration of employment in the state as it does in the nation. Economic developers use this statistic to help understand which industries have a competitive advantage in an area. **Figure 5** presents the LQs for the state's industry sectors in 2015.

South Carolina has five industries that have LQs greater than 1.0. The leading sector is the Utilities industry with an LQ of 1.60, followed by Manufacturing with an LQ of 1.37, and Administrative and Waste Services with an LQ of 1.28. Accommodation and Food Services has an LQ of 1.16, while Retail Trade's location quotient is 1.11. These figures support the notion of South Carolina having a strong manufacturing and tourist economy.

## Characteristics of Industry by Firm Size

Analyzing the number of jobs by firm size gives a deeper dive into the characteristics of the state's industries. **Figure 6** presents a table of private sector industry employment by five categories of firm size for the one-year period starting in the third quarter of 2014 through second quarter of 2015. Overall, there were 1.568 million jobs with 51 percent or 803,000 in the 500+ Employee category and 18 percent or 284,000 in the 0-19 Employee category.

The top three industries having the most jobs in the smallest size firm category are Retail Trade with 37,316 positions, Accommodation and Food Services with 37,226, and Construction with 33,459. On the opposite end of the spectrum, Retail Trade had the most jobs in the largest category with 158,604. Manufacturing had 156,306 jobs, and Administrative and Support and Waste Management had 95,473.

The top three industries having the most employees on a percent basis in the largest size firm category are Utilities with 77 percent of jobs, Information at 75 percent, and Management of Companies at 74 percent. The Other Services industry has the highest percent of jobs in the

smallest size category at 53 percent, followed by Agriculture, Forestry, Fishing, and Hunting at 46 percent, and Construction at 40 percent.

### Comparison of Industry Employment, Turnover, and Earnings

Examining South Carolina's employment turnover, average monthly earnings, and employment levels by industry reveals interesting information. **Figures 7, 8, and 9** illustrate these data elements in a bar chart. Administrative and Support and Waste Management has the highest employee turnover rate at over 18 percent in a 4-quarter period, shown in **Figure 7**. This industry supports the Manufacturing sector, among others, with the Temporary Help subsector, which leads to higher turnover. Accommodation and Food Services; Arts, Entertainment, and Recreation; and Retail Trade each had turnover rates over 11 percent. Not coincidentally, these three industries had the lowest average monthly earnings as illustrated in **Figure 8**. In addition, three of the four previously mentioned industries are among the leaders in level of employment as well. This analysis highlights the nature of the tourist sector to a large degree. High levels of employment with low wages and high turnover are typical in this seasonal industry cluster.

### Industry Employment Projections

South Carolina's economy is projected to grow by 169,456 jobs or 8.26 percent in the 10-year period 2014 to 2024 according to SCDEW's latest statewide industry employment projections, shown in **Figure 10**. The top three industries in terms of numeric growth are Health Care and Social Assistance with an additional 39,408 jobs, Administrative and Support and Waste Management growing by 26,530, and Accommodation and Food Services with 20,004 in job growth. On a percent basis, the Administrative and Support and Waste Management industry has the most growth at 17.40 percent, followed by Health Care and Social Assistance at 16.71 percent, and Construction at 13.79 percent. All industries are projected to grow with the exception of Government, which is estimated to decline slightly.

### Top Occupations by Industry Sector

Occupational employment for industries gives insight into the actual work being performed in each sector. **Figure 11** illustrates the top five occupations by employment level for each of the 20 industry sectors. The Administrative and Support sector gives support to other industries through the Temporary Help subsector. Team Assemblers and Laborers, found in the Manufacturing industry, are top occupations in this sector.



Figure 4

South Carolina Employment and Wages, 2015

Industry Code	Industry	Average Establishments	Average Employment	Total Wages	Average Weekly Wage	Average Annual Pay	Percent of Total Employment	Percent of Total Wages
11	Agriculture, forestry, fishing and hunting	1,061	10,779	\$363,758,387	\$649	\$33,746	0.6%	0.4%
21	Mining, quarrying, and oil and gas extraction	115	1,238	\$84,647,312	\$1,315	\$68,370	0.1%	0.1%
22	Utilities	251	12,345	\$1,098,114,724	\$1,711	\$88,950	0.6%	1.3%
23	Construction	10,907	86,933	\$4,178,484,830	\$924	\$48,065	4.5%	5.1%
31-33	Manufacturing	5,423	235,824	\$13,349,739,574	\$1,089	\$56,609	12.1%	16.3%
42	Wholesale trade	8,420	70,820	\$4,519,637,218	\$1,227	\$63,818	3.6%	5.5%
44-45	Retail trade	17,776	241,760	\$6,310,421,315	\$502	\$26,102	12.4%	7.7%
48-49	Transportation and warehousing	2,984	58,355	\$2,374,392,855	\$782	\$40,689	3.0%	2.9%
51	Information	2,081	26,948	\$1,541,540,824	\$1,100	\$57,205	1.4%	1.9%
52	Finance and insurance	7,029	66,881	\$4,181,996,499	\$1,202	\$62,529	3.4%	5.1%
53	Real estate and rental and leasing	4,745	28,183	\$1,157,224,377	\$790	\$41,061	1.4%	1.4%
54	Professional and technical services	15,172	88,315	\$5,853,981,382	\$1,275	\$66,285	4.5%	7.1%
55	Management of companies and enterprises	712	16,662	\$1,192,623,206	\$1,376	\$71,577	0.9%	1.5%
56	Administrative and waste services	7,719	157,088	\$5,164,128,170	\$632	\$32,874	8.1%	6.3%
61	Educational services	1,380	24,342	\$858,938,252	\$679	\$35,286	1.2%	1.0%
62	Health care and social assistance	9,641	190,988	\$8,576,619,668	\$864	\$44,907	9.8%	10.5%
71	Arts, entertainment, and recreation	1,797	28,810	\$553,488,103	\$369	\$19,212	1.5%	0.7%
72	Accommodation and food services	10,088	210,103	\$3,493,637,913	\$320	\$16,628	10.8%	4.3%
81	Other services, except public administration	11,474	50,584	\$1,575,243,043	\$599	\$31,141	2.6%	1.9%
92	Government	4,039	342,842	\$15,465,887,556	\$868	\$45,111	17.6%	18.9%
	Total	122,813	1,949,802	\$81,894,505,208	\$808	\$42,001	100.0%	100.0%

Source: U.S. Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW). Only includes jobs covered by unemployment insurance laws.

**Figure 5**

**South Carolina Industry Location Quotients, 2015**

Industry Code	Industry	Location Quotient (LQ)
11	Agriculture, forestry, fishing and hunting	0.62
21	Mining, quarrying, and oil and gas extraction	0.12
22	Utilities	1.60
23	Construction	0.97
31-33	Manufacturing	1.37
42	Wholesale trade	0.86
44-45	Retail trade	1.11
48-49	Transportation and warehousing	0.91
51	Information	0.70
52	Finance and insurance	0.83
53	Real estate and rental and leasing	0.96
54	Professional and technical services	0.73
55	Management of companies and enterprises	0.54
56	Administrative and waste services	1.28
61	Educational services	0.64
62	Health care and social assistance	0.74
71	Arts, entertainment, and recreation	0.95
72	Accommodation and food services	1.16
81	Other services, except public administration	0.84

Source: U.S. Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW).



**Figure 6**

South Carolina Average Beginning of Quarter Employment, 2014 Quarter 3 - 2015 Quarter 2

Industry Code	Industry	Firm Size					All Firm Sizes
		0-19 Employees	20-49 Employees	50-249 Employees	250-499 Employees	500+ Employees	
0	All NAICS Sectors	284,412	152,790	240,111	87,473	803,198	1,567,983
11	Agriculture, Forestry, Fishing and Hunting	4,881	2,066	1,238	1,183	1,343	10,711
21	Mining, Quarrying, and Oil and Gas Extraction	219	51	218	140	559	1,187
22	Utilities	445	330	2,016	246	10,025	13,061
23	Construction	33,459	14,669	14,621	3,825	16,155	82,728
31-33	Manufacturing	14,573	13,592	33,828	16,790	156,306	235,089
42	Wholesale Trade	12,758	7,914	11,099	5,277	32,412	69,460
44-45	Retail Trade	37,316	12,747	19,480	4,447	158,604	232,594
48-49	Transportation and Warehousing	6,754	3,371	5,927	3,453	36,643	56,147
51	Information	2,089	1,356	2,465	969	20,366	27,244
52	Finance and Insurance	9,545	2,514	7,711	3,879	44,799	68,448
53	Real Estate and Rental and Leasing	8,594	2,570	5,257	1,727	8,656	26,803
54	Professional, Scientific, and Technical Services	28,041	9,063	13,271	4,627	29,363	84,364
55	Management of Companies and Enterprises	587	480	1,653	1,789	12,792	17,300
56	Administrative and Support and Waste Management	18,722	9,922	17,599	9,611	95,473	151,327
61	Educational Services	3,505	3,008	4,973	1,841	10,762	24,087
62	Health Care and Social Assistance	33,366	19,747	37,745	9,852	85,992	186,701
71	Arts, Entertainment, and Recreation	6,280	5,177	9,254	2,414	4,065	27,190
72	Accommodation and Food Services	37,226	37,293	44,138	14,389	71,047	204,093
81	Other Services (except Public Administration)	26,054	6,922	7,622	1,016	7,838	49,452

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD) Program

Figure 7

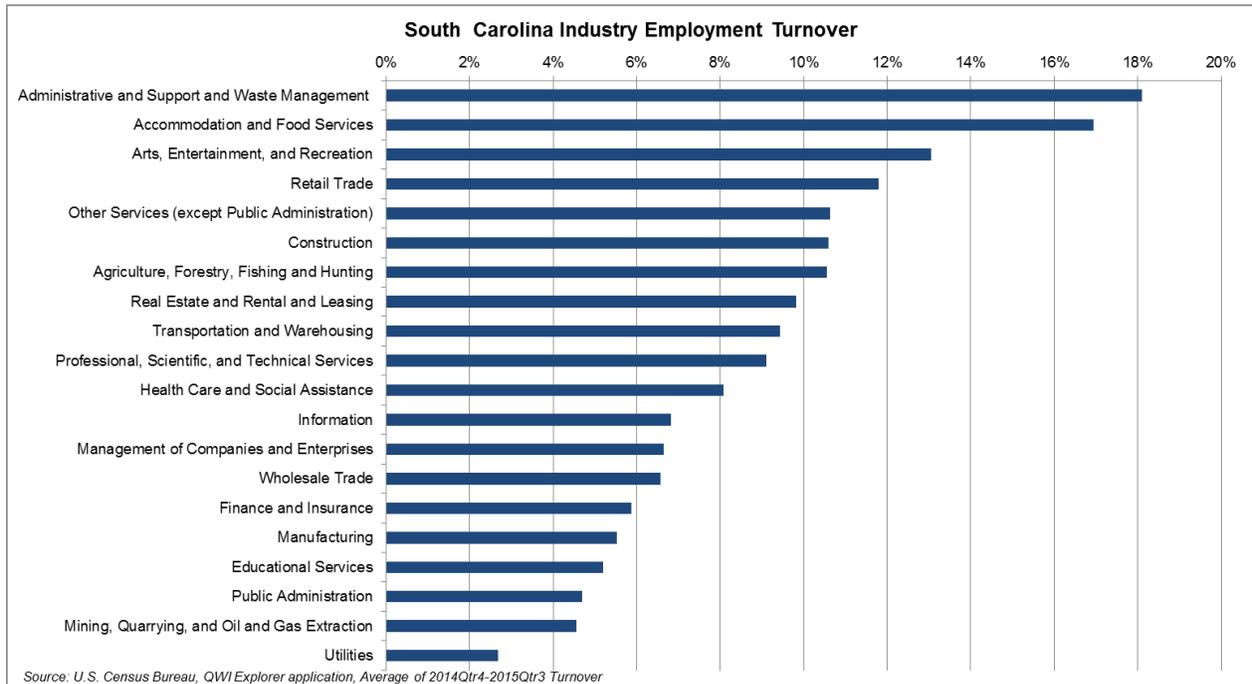


Figure 8

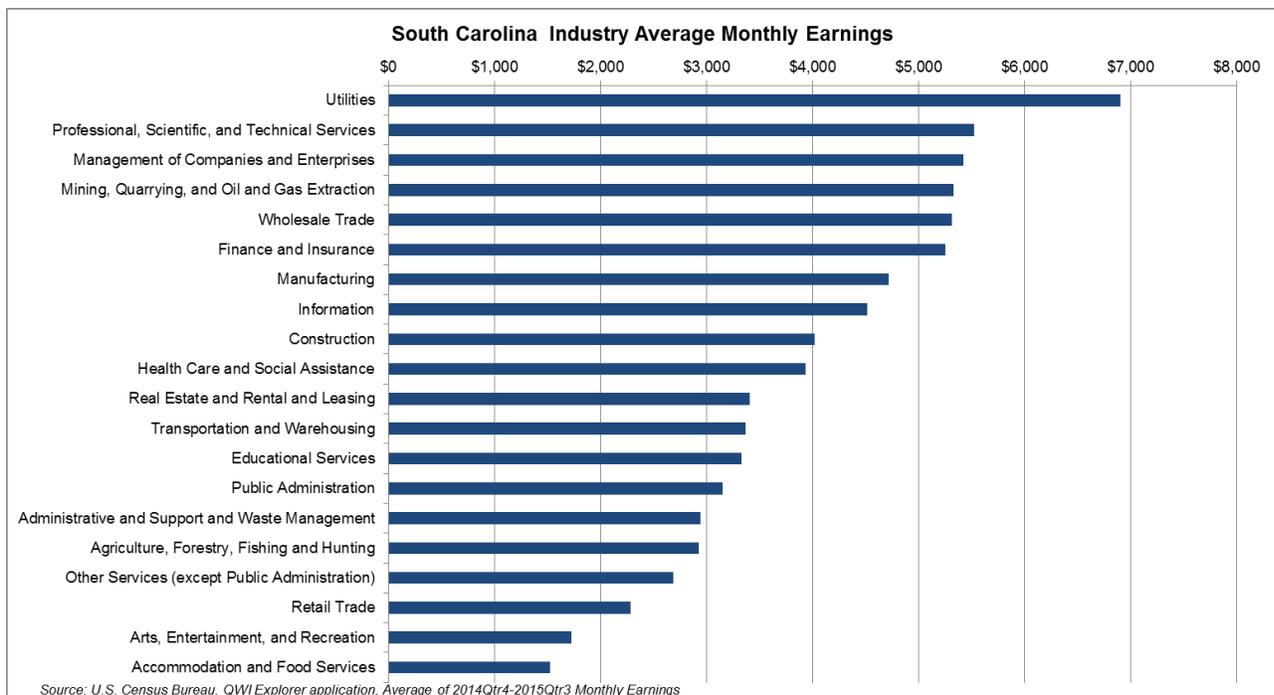




Figure 9

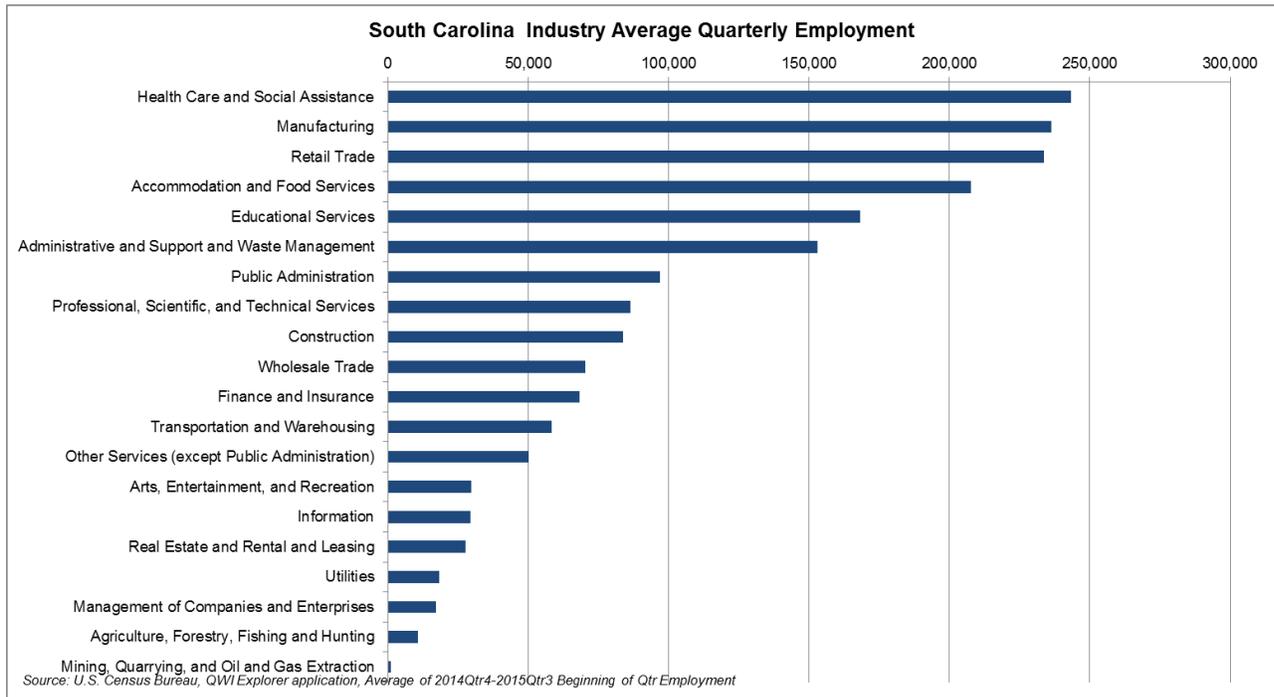




Figure 10

South Carolina Industry Employment Projections, 2014-2024

Industry Code	Industry	2014 Estimated Employment	2024 Projected Employment	Numeric Change	Percent Change
0	Total Employment, All Jobs	2,050,795	2,220,183	169,388	8.26
110000	Agriculture, forestry, fishing, and hunting	13,089	13,443	354	2.70
210000	Mining, quarrying, and oil and gas extraction	1,155	1,244	89	7.71
220000	Utilities	12,353	12,376	23	0.19
230000	Construction	82,666	94,065	11,399	13.79
310000	Manufacturing	230,154	238,317	8,163	3.55
420000	Wholesale trade	68,189	71,629	3,440	5.04
440000	Retail Trade	236,872	248,522	11,650	4.92
480000	Transportation and Warehousing	56,213	62,738	6,525	11.61
510000	Information	26,450	26,996	546	2.06
520000	Finance and insurance	66,669	69,824	3,155	4.73
530000	Real estate and rental and leasing	27,261	29,097	1,836	6.73
540000	Professional, scientific, and technical services	84,977	95,573	10,596	12.47
550000	Management of companies and enterprises	17,005	17,770	765	4.50
560000	Administrative and support and waste management and remediation	152,429	178,959	26,530	17.40
610000	Educational services; state, local, and private	178,599	190,512	11,913	6.67
620000	Health care and social assistance	235,850	275,258	39,408	16.71
710000	Arts, entertainment, and recreation	27,805	29,839	2,034	7.32
720000	Accommodation and food services	201,152	221,156	20,004	9.94
810000	Other services (except public administration)	72,036	75,431	3,395	4.71
900000	Government	151,309	150,898	-411	-0.27

Source: SCDEW, Business Intelligence Unit, Industry Employment Projections Program

Figure 11

South Carolina's Top Five Occupations by Industry Sector

<p><b>Accommodation and food services</b></p> <p><b>Occupation</b></p> <p>Combined food preparation and serving workers</p> <p>Waiters and waitresses</p> <p>Cooks, restaurant</p> <p>Cooks, fast food</p> <p>First-line supervisors of food preparation and serving workers</p>	<p><b>Government</b></p> <p><b>Occupation</b></p> <p>Police and sheriff's patrol officers</p> <p>Correctional officers and jailers</p> <p>Secretaries and administrative assistants, except legal and medical</p> <p>Firefighters</p> <p>First-line supervisors of office and administrative support</p>	<p><b>Professional, scientific, and technical services</b></p> <p><b>Occupation</b></p> <p>Paralegals and legal assistants</p> <p>Lawyers</p> <p>Accountants and auditors</p> <p>Civil engineers</p> <p>Secretaries and administrative assistants, except legal and medical</p>
<p><b>Administrative and support and waste management</b></p> <p><b>Occupation</b></p> <p>Team assemblers</p> <p>Janitors and cleaners, except maids and housekeeping cleaner</p> <p>Laborers and freight, stock, and material movers, hand</p> <p>Security guards</p> <p>Customer service representatives</p>	<p><b>Health care and social assistance</b></p> <p><b>Occupation</b></p> <p>Registered nurses</p> <p>Nursing assistants</p> <p>Personal care aides</p> <p>Home health aides</p> <p>Licensed practical and licensed vocational nurses</p>	<p><b>Real estate and rental and leasing</b></p> <p><b>Occupation</b></p> <p>Real estate sales agents</p> <p>Maintenance and repair workers, general</p> <p>Counter and rental clerks</p> <p>Secretaries and administrative assistants, except legal and medical</p> <p>Property, real estate, and community association managers</p>
<p><b>Agriculture, forestry, fishing, and hunting</b></p> <p><b>Occupation</b></p> <p>Farmworkers and laborers, crop, nursery, and greenhouse</p> <p>Farmers, ranchers, and other agricultural managers</p> <p>Logging equipment operators</p> <p>Farmworkers, farm, ranch, and aquacultural animals</p> <p>Heavy and tractor-trailer truck drivers</p>	<p><b>Information</b></p> <p><b>Occupation</b></p> <p>Customer service representatives</p> <p>Telecommunications equipment installers and repairers</p> <p>Sales representatives, services, all other</p> <p>Computer user support specialists</p> <p>Telecommunications line installers and repairers</p>	<p><b>Retail Trade</b></p> <p><b>Occupation</b></p> <p>Retail salespersons</p> <p>Cashiers</p> <p>First-line supervisors of retail sales workers</p> <p>Stock clerks and order fillers</p> <p>Customer service representatives</p>
<p><b>Arts, entertainment, and recreation</b></p> <p><b>Occupation</b></p> <p>Amusement and recreation attendants</p> <p>Landscaping and groundskeeping workers</p> <p>Fitness trainers and aerobics instructors</p> <p>Waiters and waitresses</p> <p>Childcare workers</p>	<p><b>Management of companies and enterprises</b></p> <p><b>Occupation</b></p> <p>Customer service representatives</p> <p>General and operations managers</p> <p>Bookkeeping, accounting, and auditing clerks</p> <p>Accountants and auditors</p> <p>Family and general practitioners</p>	<p><b>Transportation and Warehousing</b></p> <p><b>Occupation</b></p> <p>Heavy and tractor-trailer truck drivers</p> <p>Laborers and freight, stock, and material movers, hand</p> <p>Light truck or delivery services drivers</p> <p>Industrial truck and tractor operators</p> <p>Customer service representatives</p>
<p><b>Construction</b></p> <p><b>Occupation</b></p> <p>Construction laborers</p> <p>First-line supervisors of construction trades and extraction</p> <p>Carpenters</p> <p>Electricians</p> <p>Plumbers, pipefitters, and steamfitters</p>	<p><b>Manufacturing</b></p> <p><b>Occupation</b></p> <p>Team assemblers</p> <p>First-line supervisors of production and operating workers</p> <p>Inspectors, testers, sorters, samplers, and weighers</p> <p>Machinists</p> <p>Laborers and freight, stock, and material movers, hand</p>	<p><b>Utilities</b></p> <p><b>Occupation</b></p> <p>Electrical power-line installers and repairers</p> <p>Customer service representatives</p> <p>Electrical engineers</p> <p>Nuclear engineers</p> <p>Nuclear power reactor operators</p>
<p><b>Educational services; state, local, and private</b></p> <p><b>Occupation</b></p> <p>Elementary school teachers, except special education</p> <p>Secondary school teachers, except special and career/technical</p> <p>Teacher assistants</p> <p>Middle school teachers, except special and career/technical</p> <p>Substitute Teachers</p>	<p><b>Mining, quarrying, and oil and gas extraction</b></p> <p><b>Occupation</b></p> <p>Excavating and loading machine and dragline operators</p> <p>Operating engineers and other construction equipment operators</p> <p>Mine cutting and channeling machine operators</p> <p>Heavy and tractor-trailer truck drivers</p> <p>Maintenance and repair workers, general</p>	<p><b>Wholesale trade</b></p> <p><b>Occupation</b></p> <p>Sales representatives, wholesale and manufacturing</p> <p>Laborers and freight, stock, and material movers, hand</p> <p>Customer service representatives</p> <p>Heavy and tractor-trailer truck drivers</p> <p>Light truck or delivery services drivers</p>
<p><b>Finance and insurance</b></p> <p><b>Occupation</b></p> <p>Customer service representatives</p> <p>Tellers</p> <p>Insurance sales agents</p> <p>Loan officers</p> <p>First-line supervisors of office and administrative support</p>	<p><b>Other services (except public administration)</b></p> <p><b>Occupation</b></p> <p>Automotive service technicians and mechanics</p> <p>Hairdressers, hairstylists, and cosmetologists</p> <p>Secretaries and administrative assistants, except legal and medical</p> <p>Nonfarm animal caretakers</p> <p>Maids and housekeeping cleaners</p>	

Source: SCDEW, Occupational Employment Statistics (OES)

Construction laborers, supervisors, and trade craftsmen are top occupations in the Construction sector. Police and corrections officers are leading occupations in the Government sector. Not surprisingly, registered nurses, assistants, and aides are found in the Health Care and Social Assistance industry. Manufacturing's top occupations include team assemblers, supervisors, machinists, and laborers. For the Professional, Scientific, and Technical Services sector, the legal profession leads the way with paralegals and lawyers. Accountants and civil engineers follow.

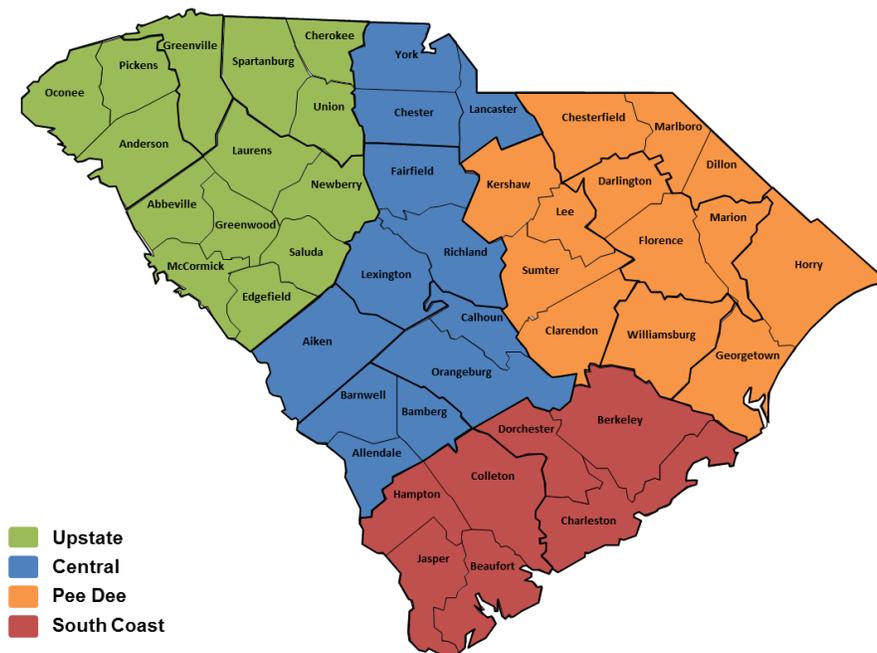
Interestingly, customer service representatives are among the top occupations in seven different industry sectors.

### Regional Industry Projections

South Carolina has four substate regions, identified in **Figure 12** and developed as a result of the federal legislation, the Workforce Innovation and Opportunity Act (WIOA) of 2014. Industry employment projections for these regions over the period 2012 to 2022, the latest available below the state level, show a slightly higher growth rate than the latest statewide projections.

**Figure 12**

## South Carolina WIOA Regions



**Figure 13** presents a table showing the base and future year employment as well the 10-year change in numeric and percentage terms for the Central, Pee Dee, South Coast, and Upstate regions.

The Upstate region has the largest base-year employment with 615,000, followed by Central with 566,000, South Coast with 402,000, and Pee Dee with 350,000. Each region is projected to grow between 12 and 14 percent. The Construction industry has the most growth in percentage terms in each region, expanding by 28 to 29 percent, or ranging from 3,423 in Pee Dee to 6,046 in Upstate. Health Care and Social Assistance is expected to grow by the most in numeric terms, increasing by 11,636 in Pee Dee to 17,605 in Upstate. Manufacturing is estimated to grow to nearly 108,000 jobs by 2022 in the Upstate region, marking the largest single employment sector in any of the regions.



Figure 13

South Carolina Industry Employment Projections by WIOA Region, 2012-2022

Industry	Central				Pee Dee			
	Estimated 2012 Employ	Projected 2022 Employ	10-Year Change	10-Year % Change	Estimated 2012 Employ	Projected 2022 Employ	10-Year Change	10-Year % Change
Health care and social assistance	63,955	80,927	16,972	27%	42,318	53,954	11,636	27%
Administrative and support and waste management	38,892	46,317	7,425	19%	13,620	17,058	3,438	25%
Construction	20,255	25,919	5,664	28%	11,847	15,270	3,423	29%
Educational services; state, local, and private	54,061	60,751	6,690	12%	27,365	31,323	3,958	14%
Professional, scientific, and technical services	13,426	16,808	3,382	25%	5,095	6,427	1,332	26%
Retail Trade	62,410	67,902	5,492	9%	47,277	51,812	4,535	10%
Accommodation and food services	45,585	51,138	5,553	12%	46,699	51,472	4,773	10%
Other services (except public administration)	23,363	26,282	2,919	12%	13,609	15,138	1,529	11%
Transportation and Warehousing	9,156	10,711	1,555	17%	7,458	8,524	1,066	14%
Finance and insurance	29,244	32,352	3,108	11%	9,582	10,468	886	9%
Wholesale trade	17,737	19,323	1,586	9%	7,610	8,788	1,178	15%
Real estate and rental and leasing	6,266	7,272	1,006	16%	5,671	6,441	770	14%
Arts, entertainment, and recreation	6,227	6,995	768	12%	7,319	8,251	932	13%
Information	7,253	7,714	461	6%	3,603	3,917	314	9%
Utilities	4,687	5,241	554	12%	1,609	1,742	133	8%
Management of companies and enterprises	3,745	4,217	472	13%	1,050	1,351	301	29%
Manufacturing	53,473	56,450	2,977	6%	36,124	36,839	715	2%
Agriculture, forestry, fishing, and hunting	8,031	8,471	440	5%	2,652	2,179	-473	-18%
Government	49,047	49,291	244	0%	25,212	25,971	759	3%
Mining, quarrying, and oil and gas extraction	319	354	35	11%	82	85	3	4%
Total Employment, All Jobs	566,465	638,144	71,679	13%	350,289	392,187	41,898	12%

SOURCE: SCDEW, Industry Employment Projections (IEP), 2012-2022

Industry	South Coast				Upstate			
	Estimated 2012 Employ	Projected 2022 Employ	10-Year Change	10-Year % Change	Estimated 2012 Employ	Projected 2022 Employ	10-Year Change	10-Year % Change
Health care and social assistance	47,403	60,566	13,163	28%	69,459	87,064	17,605	25%
Administrative and support and waste management	25,673	30,921	5,248	20%	48,065	59,603	11,538	24%
Construction	16,236	20,886	4,650	29%	21,486	27,532	6,046	28%
Educational services; state, local, and private	32,809	36,594	3,785	12%	49,196	54,942	5,746	12%
Professional, scientific, and technical services	19,992	25,557	5,565	28%	20,490	25,279	4,789	23%
Retail Trade	48,641	53,580	4,939	10%	65,824	71,520	5,696	9%
Accommodation and food services	47,003	51,585	4,582	10%	50,183	55,139	4,956	10%
Other services (except public administration)	18,277	20,640	2,363	13%	25,556	28,402	2,846	11%
Transportation and Warehousing	12,881	15,661	2,780	22%	16,842	19,481	2,639	16%
Finance and insurance	8,841	9,887	1,046	12%	15,240	16,883	1,643	11%
Wholesale trade	7,962	8,743	781	10%	23,176	25,836	2,660	11%
Real estate and rental and leasing	7,024	7,976	952	14%	5,246	6,104	858	16%
Arts, entertainment, and recreation	6,158	6,888	730	12%	6,673	7,494	821	12%
Information	5,270	5,835	565	11%	8,486	9,366	880	10%
Utilities	1,496	1,578	82	5%	970	1,620	650	67%
Management of companies and enterprises	2,588	3,211	623	24%	6,762	7,242	480	7%
Manufacturing	25,928	28,442	2,514	10%	102,815	107,804	4,989	5%
Agriculture, forestry, fishing, and hunting	1,667	1,664	-3	0%				
Government	34,108	35,066	958	3%	31,472	32,447	975	3%
Mining, quarrying, and oil and gas extraction	132	145	13	10%				
Total Employment, All Jobs	402,263	459,583	57,320	14%	614,638	691,696	77,058	13%

SOURCE: SCDEW, Industry Employment Projections (IEP), 2012-2022

## Selected Industry Descriptions

Descriptions of industries give insight into what kind of work activity is actually included in the sectors. Those of particular interest, because of their overall importance to the economy or their rather broad and varied nature, are described below. These descriptions come from the Bureau of Labor Statistics *Industry at a Glance* website.

### *Construction: NAICS 23<sup>2</sup>*

The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.

Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).

### *Manufacturing: NAICS 31-33<sup>3</sup>*

The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products.

Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector. Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing.

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<sup>2</sup> U.S. Bureau of Labor Statistics (BLS), North American Industry Classification System (NAICS); <http://www.bls.gov/iag/tgs/iag23.htm>

<sup>3</sup> U.S. Bureau of Labor Statistics (BLS), North American Industry Classification System (NAICS); <http://www.bls.gov/iag/tgs/iag31-33.htm>

## *Real Estate and Rental and Leasing: NAICS 53<sup>4</sup>*

The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks.

This sector also includes establishments primarily engaged in managing real estate for others, selling, renting and/or buying real estate for others, and appraising real estate. These activities are closely related to this sector's main activity, and it was felt that from a production basis they would best be included here. In addition, a substantial proportion of property management is self-performed by lessors.

The main components of this sector are the real estate lessors industries (including equity real estate investment trusts (REITs)); equipment lessors industries (including motor vehicles, computers, and consumer goods); and lessors of nonfinancial intangible assets (except copyrighted works).

## *Professional, Scientific, and Technical Services: NAICS 54<sup>5</sup>*

The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

## *Administrative and Support and Waste Management and Remediation Services: NAICS 56<sup>6</sup>*

The Administrative and Support and Waste Management and Remediation Services sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these

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<sup>4</sup> U.S. Bureau of Labor Statistics (BLS), North American Industry Classification System (NAICS); <http://www.bls.gov/iag/tgs/iag53.htm>

<sup>5</sup> U.S. Bureau of Labor Statistics (BLS), North American Industry Classification System (NAICS); <http://www.bls.gov/iag/tgs/iag54.htm>

<sup>6</sup> U.S. Bureau of Labor Statistics (BLS), North American Industry Classification System (NAICS); <http://www.bls.gov/iag/tgs/iag56.htm>

support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.

*Other Services (except Public Administration): NAICS 81<sup>7</sup>*

The Other Services (except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.

### **Required Language**

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<sup>7</sup> U.S. Bureau of Labor Statistics (BLS), North American Industry Classification System (NAICS); <http://www.bls.gov/iag/tgs/iag81.htm>





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