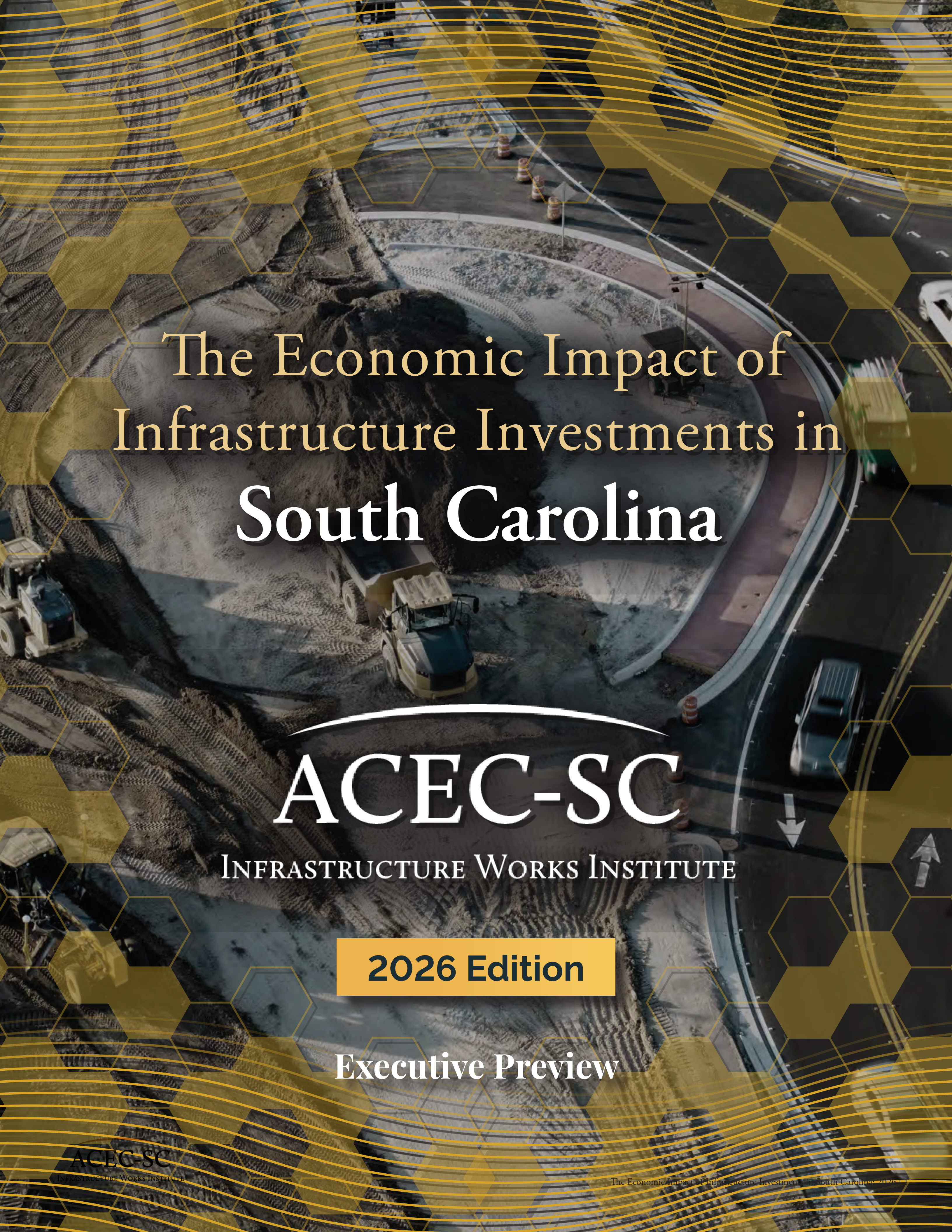


# The Economic Impact of Infrastructure Investments in South Carolina

ACEC-SC

INFRASTRUCTURE WORKS INSTITUTE

**2026 Edition**

**Executive Preview**

# Building on the Foundation

## Why a 2026 Update?

The inaugural Economic Impact of Infrastructure Investments in South Carolina study established the first comprehensive, data-driven assessment of how infrastructure investments strengthen South Carolina's economy. The Economic Impact of Infrastructure Investments in South Carolina: 2026 Edition is a direct update and expansion of that research, incorporating new data sources, expanded partnerships and updated economic analysis.

Together, these enhancements provide policymakers, business leaders and community stakeholders with an even more comprehensive understanding of how strategic infrastructure investments support economic competitiveness, workforce growth and long-term prosperity across South Carolina.

## The full report includes:

- County-level and project-type data
- Temporary (construction-related) and permanent (productivity-based) impacts
- Agency-specific breakdowns
- Multiplier-driven insights into jobs, income, and GDP growth

## New in This Edition

**EXPANDED RESEARCH PARTNERSHIPS**
The study now includes the South Carolina Office of Resilience as a statewide data partner, broadening the analysis to include resilience-focused infrastructure investments.

**COUNTY-LEVEL INFRASTRUCTURE DATA**
For the first time, infrastructure investment data from Charleston County and Dorchester County have been incorporated into the research, providing a more comprehensive picture of local infrastructure investments.

**UPDATED ECONOMIC ANALYSIS**
The research incorporates the latest available infrastructure investment data and updated economic modeling to reflect South Carolina's continued growth and future infrastructure needs.

**A BROADER STATEWIDE PERSPECTIVE**
By expanding both the data sources and geographic scope of the analysis, the 2026 study provides an even more complete assessment of infrastructure's role in supporting South Carolina's economy and quality of life.

The study is conducted by Dr. Joseph Von Nessen and Dr. Douglas Woodward, leading regional economists of the Division of Research (DOR), University of South Carolina Darla Moore School of Business. The research team used IMPLAN and proprietary forecasting models tailored to all 46 South Carolina counties.

Darla Moore School of Business
UNIVERSITY OF SOUTH CAROLINA

# South Carolina's Momentum Depends on Infrastructure

## Setting the Economic Context

South Carolina's economy continues to rank among the fastest-growing in the nation, driven by sustained population growth, business investment and an expanding workforce. As more people choose to live and work in the state, demand for reliable transportation networks, clean water systems, broadband connectivity and resilient infrastructure continues to grow.

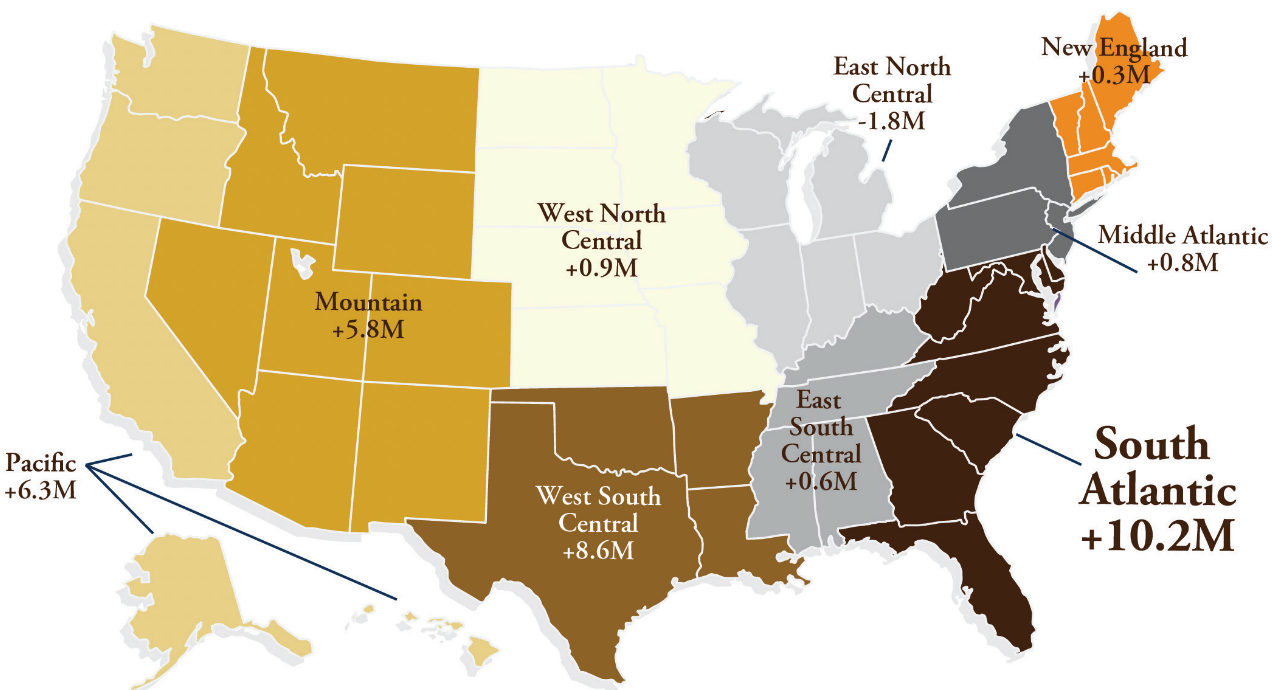
Infrastructure represents more than the collection of individual projects. It is the foundation of South Carolina's long-term economic competitiveness. Every new business investment, freight shipment, neighborhood, hospital and manufacturing facility depends on infrastructure systems that are safe, reliable and prepared for future growth.

The Economic Impact of Infrastructure Investments in South Carolina: 2026 Edition study examines how strategic investments in these essential systems support economic activity today while positioning the state for continued success in the years ahead.

South Carolina currently ranks 3rd in the U.S. for overall economic growth, driven by strong employment growth (currently ranked 4th in the nation) and population growth (currently ranked 1st in the nation).

**POPULATION GROWTH TRENDS IN THE UNITED STATES**

Projected Population Growth by U.S. Region: 2024-2050



# Infrastructure by the Numbers

Strategic infrastructure investments deliver measurable returns across South Carolina's economy. From roads and bridges to water, wastewater, broadband and resilience projects, these investments generate economic activity during construction while creating the foundation for long-term growth and competitiveness.

The study's findings reflect an overall economic multiplier of approximately 1.7, meaning every $100 in direct infrastructure spending is associated with approximately $170 in total economic output.

## The 2026 Economic Impact at a Glance

The 2026 study quantifies both the immediate and lasting impacts of these investments among the state and local data partners.

**$39 Billion**

PROJECTED INFRASTRUCTURE INVESTMENT AND DIRECT ECONOMIC OUTPUT

**38,056**

AVERAGE ANNUAL JOBS SUPPORTED THROUGH INFRASTRUCTURE INVESTMENTS

**$66.7 Billion**

TOTAL PROJECTED ECONOMIC IMPACT OF CONSTRUCTION-RELATED ACTIVITIES

**140,000**

PROJECTED NEW JOBS SUPPORTED THROUGH MAINTAINED AND IMPROVED INFRASTRUCTURE

**$15.1 Billion**

POTENTIAL NEW PERMANENT LABOR INCOME OVER 10 YEARS

**8 Years**

STUDY PERIOD ANALYZED BETWEEN FY 2021 - FY2028

Source: The Economic Impact of Infrastructure Investments in South Carolina: 2026 Edition

# Infrastructure Creates High-Quality Jobs

Infrastructure investments support thousands of jobs across South Carolina while strengthening the state's long-term economy. From engineers and contractors to manufacturers and suppliers, these investments create employment during construction and support continued job growth long after projects are complete.

During construction, infrastructure projects support thousands of jobs each year in engineering, construction, manufacturing, transportation and professional services. Beyond the construction phase, improved infrastructure increases productivity and connectivity, enabling businesses to expand, attract talent and create additional permanent jobs throughout South Carolina.

The study projects that continued infrastructure maintenance, modernization and expansion could support long-term employment growth, increase labor income and sustain South Carolina's economic momentum.

Construction-related impacts are the immediate effects of infrastructure investment (economic output and jobs during the construction period).

Permanent impacts reflect the potential long-term gains associated with maintained and improved infrastructure, including greater productivity, business growth, labor income and employment.

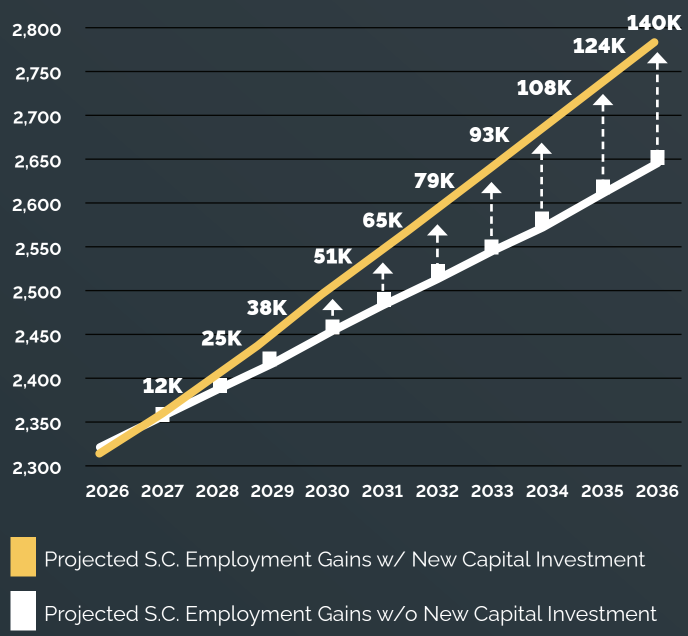
### TOTAL ECONOMIC IMPACT OF CONSTRUCTION-RELATED ACTIVITIES FY21-FY28

| | Employment* | Labor Income | Economic Output |
|---|---|---|---|
| Direct Effect | 22,634 | $ 14.4 B | $39 B |
| Multiplier Effect | 15,422 | $7.7 B | $27.7 B |
| Total Impact | 38,056 | $22.1 B | $66.7 B |

*Average annual employment effects between FY21 and FY28

### PROJECTED SC EMPLOYMENT GAINS

Resulting from Infrastructure Maintenance, Modernization, and Expansion



# A Broader Picture of Infrastructure Investment

Infrastructure investment extends far beyond roads and bridges. The 2026 study examines transportation investments administered by the S.C. Department of Transportation; water, wastewater and stormwater projects supported by the S.C. Department of Environmental Services and S.C. Rural Infrastructure Authority; broadband expansion through the S.C. Broadband Office within the S.C. Office of Regulatory Staff; and resilience projects administered by the S.C. Office of Resilience.

Together, these investments improve public safety, support economic development efforts, strengthen quality of life and prepare communities for continued growth.

For the first time, the 2026 study incorporates infrastructure investment data from Charleston and Dorchester counties, expanding the analysis beyond state agencies to include county-level infrastructure projects. These two counties account for approximately $1.5 billion in projected infrastructure investment between FY21 and FY28.

- TRANSPORTATION
- DRINKING WATER
- WASTEWATER
- BROADBAND
- RESILIENCE

**$1.5 BILLION**

## in county-level infrastructure investment

**CHARLESTON COUNTY**

- $1.1B investment
- $2.0B economic impact
- 1,165 jobs/year

**DORCHESTER COUNTY**

- $405.7M investment
- $729.5M economic impact
- 435 jobs/year

Their inclusion provides a more complete picture of how infrastructure investment supports South Carolina's economy at both the state and local levels.

# Investing in South Carolina's Future

Infrastructure investments create immediate economic activity during construction while delivering lasting benefits that extend well beyond project completion.

Improved transportation networks, reliable utility systems and expanded broadband access increase productivity, strengthen business competitiveness and support continued job creation. As South Carolina continues to grow, strategic infrastructure investments will play an essential role in sustaining economic opportunity and maintaining the state's competitive advantage.

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**INFRASTRUCTURE IN ACTION**

Improved transportation infrastructure reduces travel times, strengthens freight movement, expands access to jobs and healthcare and improves connectivity for communities across South Carolina.

**INFRASTRUCTURE INVESTMENT**

↓

**CONSTRUCTION ACTIVITY**

↓

**IMPROVED INFRASTRUCTURE**

↓

**BUSINESS GROWTH**

↓

**PERMANENT JOBS & LABOR INCOME**

# Advancing Infrastructure Research Together

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The data you've seen in this preview is only a glimpse into the full scope of the ACEC-SC IWI Economic Impact of Infrastructure Study.

**FOR FULL ACCESS TO:**

- County-specific data
- Statewide economic insights
- Detailed workforce projections

**Access the full report by scanning the QR code or visiting infrastructureworks.org/research.**

## RESEARCH SUPPORTERS

- Renee Tison

JMA

KCI TECHNOLOGIES

Terracon

Stantec

## RESEARCH CHAMPIONS

- Adam B. Jones
- Theresa McClure
- Frank Mundy
- Bryan Shiver
- Peter Strub
- Ricky Ward

CarolinaTEA
Carolina Transportation Engineers & Associates, PC

stv

## SUPPORTERS

- Derek Hutton

HOLT CONSULTING COMPANY, LLC