



Regional Data Snapshot

Target Industry Clusters
SET Session 2

Central South Carolina SET, South Carolina

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01 overview

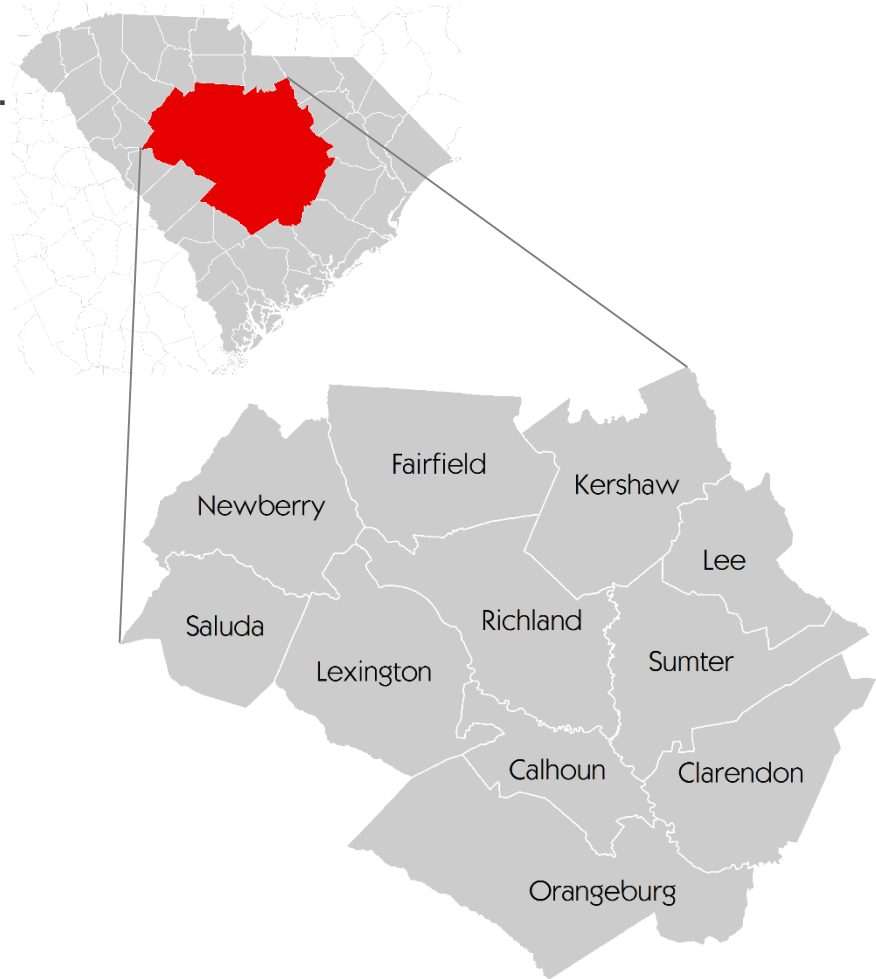
Central South Carolina SET, SC

Overview

Central South Carolina SET, SC

The Central South Carolina SET Region is comprised of 11 South Carolina counties. Interstate 26 connects the region to Charleston in the South. Interstate 20 connects the region to Atlanta in the West. Interstate 77 connects the region to Charlotte in the north.

- Calhoun
- Clarendon
- Fairfield
- Kershaw
- Lee
- Lexington
- Newberry
- Orangeburg
- Richland
- Saluda
- Sumter



02 target industry clusters

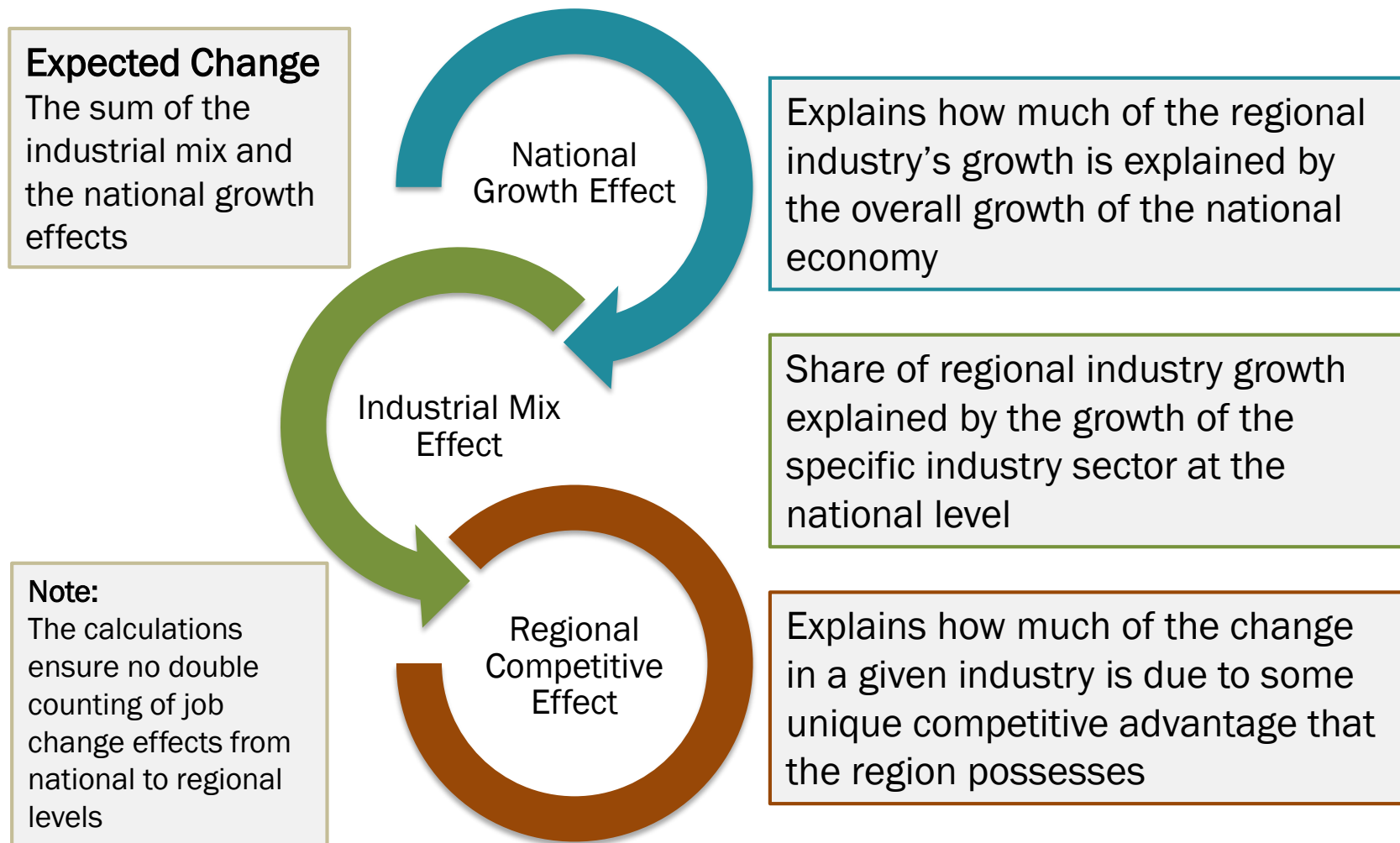
**Agribusiness, Food Processing
and Technology**

**Arts, Entertainment,
Recreation and Visitor
Industries**

Defense and Security

Regional Job Growth:

Three Key Components of the Shift-Share Analysis



Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Poultry Processing	6,615	623	-716	-93	-507	-414
Crop Production	4,362	374	-291	83	85	↑ 2
Animal Production and Aquaculture	3,186	285	-336	-51	-80	-29
Lawn and Garden Tractor and Home Lawn and Garden Equipment Mfg.	1,542	157	-115	42	-250	-292
Farm Labor Contractors and Crew Leaders	746	54	57	111	134	↑ 23
Postharvest Crop Activities (except Cotton Ginning)	608	24	3	27	329	↑ 302
Dog and Cat Food Manufacturing	450	30	41	71	103	↑ 32
Meat Processed from Carcasses	441	50	-5	45	-128	-173
Rendering and Meat Byproduct Processing	366	10	-13	-3	254	↑ 257
Commercial Bakeries	348	49	-23	26	-213	-239
Coffee and Tea Manufacturing	304	20	104	124	78	-46
Soft Drink Manufacturing	268	31	-38	-7	-85	-78
Farm Supplies Merchant Wholesalers	245	30	-7	23	-98	-121
Farm and Garden Machinery and Equipment Merchant Wholesalers	231	21	-9	12	-8	-20
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	209	20	-14	6	-14	-20

Note: Upward arrow (↑) indicates regional competitiveness.

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Shift-Share Analysis

Agribusiness, Food Processing and Technology

Industries that Outperformed

- Crop Production
- Dog and Cat Food Manufacturing
- Farm Labor Contractors and Crew Leaders
- Postharvest Crop Activities (except Cotton Ginning)
- Rendering and Meat Byproduct Processing

Industries that Underperformed

- Animal Production and Aquaculture
- Coffee and Tea Manufacturing
- Commercial Bakeries
- Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour
- Farm and Garden Machinery and Equipment Merchant Wholesalers
- Farm Supplies Merchant Wholesalers
- Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing
- Meat Processed from Carcasses
- Poultry Processing
- Soft Drink Manufacturing

Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Exports 2014 (\$ Millions)	Jobs 2014	Export per job 2014 (\$)	LQ 2015
Poultry Processing	\$1,628.8	7,085	\$229,886	9.1
Crop Production	\$436.5	4,305	\$101,397	0.9
Animal Production and Aquaculture	\$463.5	3,163	\$146,521	0.9
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing	\$622.4	2,105	\$295,689	27.6
Farm Labor Contractors and Crew Leaders	\$2.7	719	\$3,780	0.7
Postharvest Crop Activities (except Cotton Ginning)	\$20.0	598	\$33,394	1.9
Dog and Cat Food Manufacturing	\$325.0	455	\$714,619	5.7
Meat Processed from Carcasses	\$152.0	334	\$455,521	1.1
Rendering and Meat Byproduct Processing	\$125.1	270	\$463,102	13.6
Commercial Bakeries	\$58.4	438	\$133,441	0.8
Coffee and Tea Manufacturing	\$120.3	283	\$424,845	3.6
Soft Drink Manufacturing	\$82.5	286	\$288,147	1.1
Farm Supplies Merchant Wholesalers	\$23.4	221	\$106,031	0.6
Farm and Garden Machinery and Equipment Merchant Wholesalers	\$22.3	231	\$96,712	0.7
Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	\$74.1	208	\$355,469	2.8

Note: Sorted similarly as the shift-share analysis slide.

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Source: EMSI Class of Worker 2016.4 (QCEW, non -QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

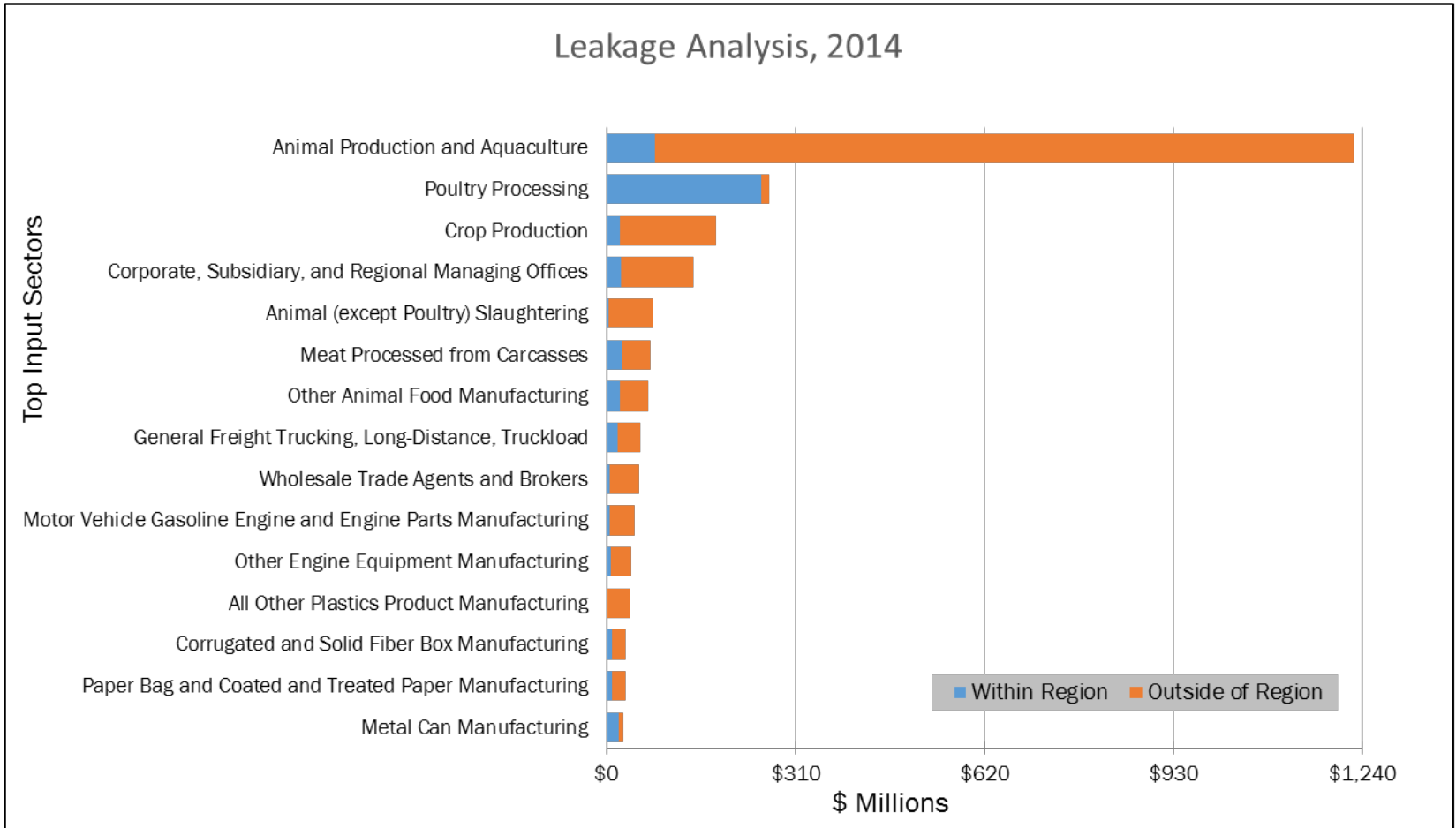
Agribusiness, Food Processing and Technology

Industries	Estimated Input (\$ Millions), 2014	% In-Region	% Out of Region
Animal Production and Aquaculture	\$1,226.57	6%	94%
Poultry Processing	\$266.32	95%	5%
Crop Production	\$179.71	12%	88%
Corporate, Subsidiary, and Regional Managing Offices	\$142.34	17%	83%
Animal (except Poultry) Slaughtering	\$74.99	4%	96%
Meat Processed from Carcasses	\$72.27	35%	65%
Other Animal Food Manufacturing	\$67.23	33%	67%
General Freight Trucking, Long-Distance, Truckload	\$54.27	34%	66%
Wholesale Trade Agents and Brokers	\$52.99	11%	89%
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	\$46.33	11%	89%
Other Engine Equipment Manufacturing	\$40.68	15%	85%
All Other Plastics Product Manufacturing	\$38.83	2%	98%
Corrugated and Solid Fiber Box Manufacturing	\$30.58	30%	70%
Paper Bag and Coated and Treated Paper Manufacturing	\$29.86	29%	71%
Metal Can Manufacturing	\$26.56	75%	25%

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Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology



section 02

Source: EMSI Class of Worker 2016.4 (QCEW, non -QCEW, self-employed and extended proprietors).

Top Occupations

Agribusiness, Food Processing and Technology

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	4,811	-7%	\$11.6	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	2,124	22%	\$11.2	No formal educational credential
Meat, Poultry, and Fish Cutters and Trimmers	1,671	-1%	\$11.4	No formal educational credential
Slaughterers and Meat Packers	921	-1%	\$10.7	No formal educational credential
Food Batchmakers	779	14%	\$13.1	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	741	-1%	\$13.0	No formal educational credential
Team Assemblers	566	-4%	\$14.6	High school diploma or equivalent
Packaging and Filling Machine Operators and Tenders	510	4%	\$13.9	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	459	1%	\$28.1	High school diploma or equivalent
Packers and Packagers, Hand	438	0%	\$10.8	No formal educational credential
Inspectors, Testers, Sorters, Samplers, and Weighers	414	2%	\$18.9	High school diploma or equivalent
Helpers--Production Workers	372	-6%	\$10.9	No formal educational credential
Maintenance and Repair Workers, General	320	4%	\$15.9	High school diploma or equivalent
Agricultural Equipment Operators	287	46%	\$12.1	No formal educational credential
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	277	-1%	\$25.7	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

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Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Arts, Entertainment, Recreation and Visitor Industries

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Hotels (except Casino Hotels) and Motels	3,441	302	69	371	-9	-380
Independent Artists, Writers, and Performers	2,340	165	3	168	451	↑ 283
Fitness and Recreational Sports Centers	1,776	143	124	267	141	-126
Golf Courses and Country Clubs	1,105	102	-16	86	-61	-147
All Other Amusement and Recreation Industries	766	49	140	189	205	↑ 16
Promoters of Performing Arts, Sports, and Similar Events without Facilities	511	17	41	58	317	↑ 259
Other Spectator Sports	510	52	-32	20	-84	-104
Sporting and Recreational Goods and Supplies Merchant Wholesalers	462	33	37	70	79	↑ 9
Sporting and Athletic Goods Manufacturing	430	31	-14	17	81	↑ 64
Television Broadcasting	355	25	3	28	67	↑ 39
Musical Groups and Artists	327	15	36	51	151	↑ 100
Motion Picture Theaters (except Drive-Ins)	296	29	-19	10	-34	-44
Promoters of Performing Arts, Sports, and Similar Events with Facilities	261	34	90	124	-130	-254
Travel Agencies	207	14	-9	5	41	↑ 36
Motion Picture and Video Production	202	12	22	34	69	↑ 35

Note: Upward arrow (↑) indicates regional competitiveness.

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Shift-Share Analysis

Arts, Entertainment, Recreation and Visitor Industries

Industries that Outperformed

- All Other Amusement and Recreation Industries
- Independent Artists, Writers, and Performers
- Motion Picture and Video Production
- Musical Groups and Artists
- Promoters of Performing Arts, Sports, and Similar Events without Facilities
- Sporting and Athletic Goods Manufacturing
- Sporting and Recreational Goods and Supplies Merchant Wholesalers
- Television Broadcasting
- Travel Agencies

Industries that Underperformed

- Fitness and Recreational Sports Centers
- Golf Courses and Country Clubs
- Hotels (except Casino Hotels) and Motels
- Motion Picture Theaters (except Drive-Ins)
- Other Spectator Sports
- Promoters of Performing Arts, Sports, and Similar Events with Facilities

Top Industry Sectors

Arts, Entertainment, Recreation and Visitor Industries

Industries	Exports 2014 (\$ Millions)	Jobs 2014	Export per job 2014 (\$)	LQ 2015
Hotels (except Casino Hotels) and Motels	\$49.6	3,405	\$14,576	0.7
Independent Artists, Writers, and Performers	\$7.9	2,287	\$3,451	0.6
Fitness and Recreational Sports Centers	\$22.0	1,717	\$12,811	0.7
Golf Courses and Country Clubs	\$21.0	1,064	\$19,688	0.9
All Other Amusement and Recreation Industries	\$2.6	676	\$3,894	0.8
Promoters of Performing Arts, Sports, and Similar Events without Facilities	\$2.4	174	\$13,667	1.9
Other Spectator Sports	\$11.1	488	\$22,679	0.9
Sporting and Recreational Goods and Supplies Merchant Wholesalers	\$59.5	467	\$127,284	2.0
Sporting and Athletic Goods Manufacturing	\$125.1	439	\$284,815	2.4
Television Broadcasting	\$9.4	352	\$26,795	0.8
Musical Groups and Artists	\$1.6	288	\$5,709	0.9
Motion Picture Theaters (except Drive-Ins)	\$5.9	281	\$20,896	0.7
Promoters of Performing Arts, Sports, and Similar Events with Facilities	\$13.9	759	\$18,344	0.7
Travel Agencies	\$5.2	209	\$24,975	0.5
Motion Picture and Video Production	\$7.7	177	\$43,600	0.2

Note: Sorted similarly as the shift-share analysis slide.

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Top 15 Inputs by Dollars

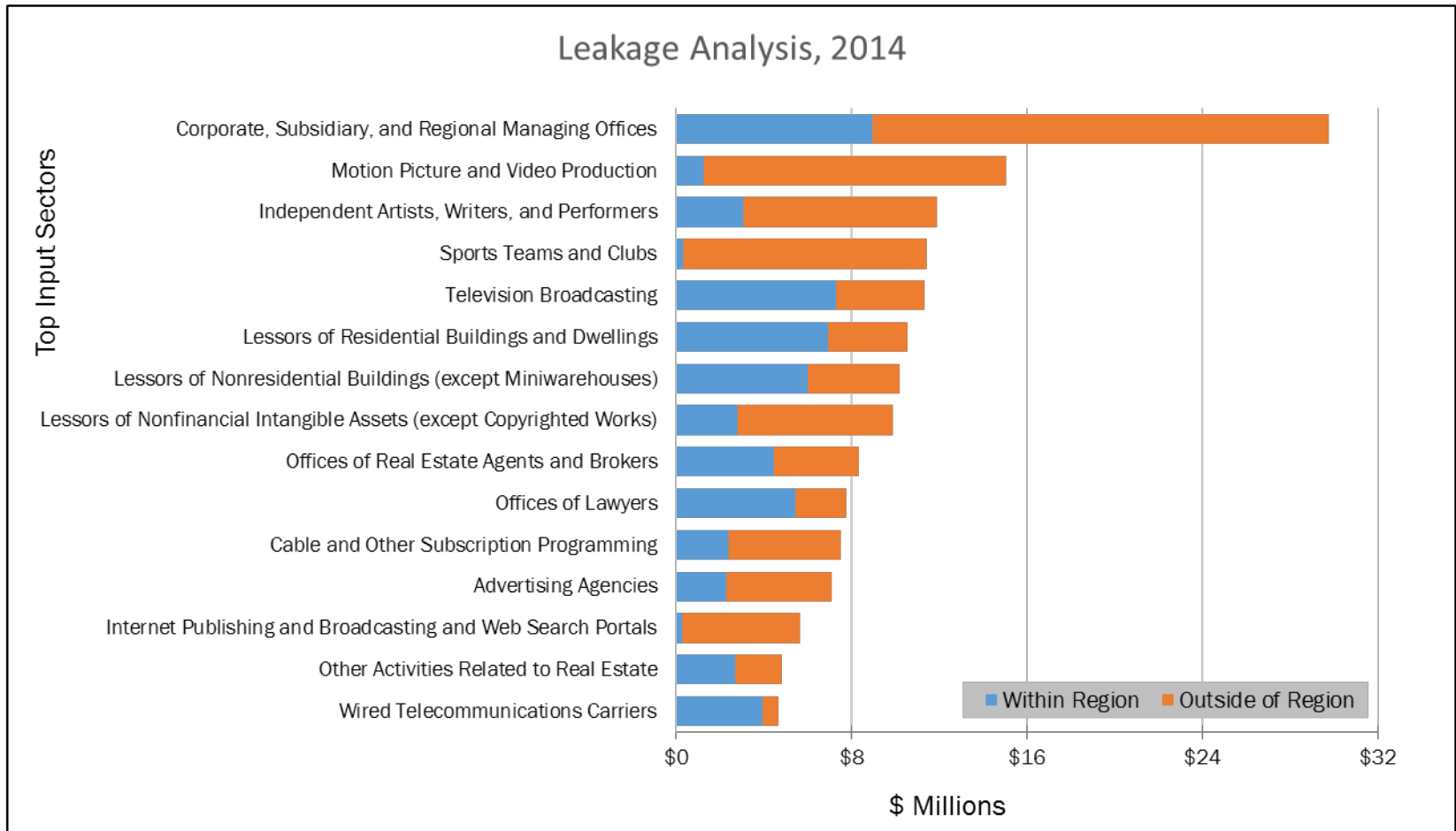
Arts, Entertainment, Recreation and Visitor Industries

Industries	Estimated Input (\$ Millions), 2014	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$29.73	30%	70%
Motion Picture and Video Production	\$15.02	8%	92%
Independent Artists, Writers, and Performers	\$11.90	26%	74%
Sports Teams and Clubs	\$11.44	3%	97%
Television Broadcasting	\$11.30	65%	35%
Lessors of Residential Buildings and Dwellings	\$10.55	66%	34%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$10.18	59%	41%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$9.87	28%	72%
Offices of Real Estate Agents and Brokers	\$8.33	54%	46%
Offices of Lawyers	\$7.75	70%	30%
Cable and Other Subscription Programming	\$7.47	32%	68%
Advertising Agencies	\$7.11	32%	68%
Internet Publishing and Broadcasting and Web Search Portals	\$5.64	5%	95%
Other Activities Related to Real Estate	\$4.80	56%	44%
Wired Telecommunications Carriers	\$4.69	84%	16%

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Top 15 Inputs by Dollars

Arts, Entertainment, Recreation and Visitor Industries



section 02

Top Occupations

Arts, Entertainment, Recreation and Visitor Industries

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Hotel, Motel, and Resort Desk Clerks	946	3%	\$10.4	High school diploma or equivalent
Maids and Housekeeping Cleaners	877	0%	\$9.6	No formal educational credential
Musicians and Singers	826	33%	\$13.0	No formal educational credential
Fitness Trainers and Aerobics Instructors	774	14%	\$15.7	High school diploma or equivalent
Writers and Authors	687	29%	\$14.4	Bachelor's degree
Ushers, Lobby Attendants, and Ticket Takers	428	11%	\$9.8	No formal educational credential
Fine Artists, Including Painters, Sculptors, and Illustrators	413	17%	\$7.0	Bachelor's degree
Coaches and Scouts	405	28%	\$13.7	Bachelor's degree
Amusement and Recreation Attendants	342	-4%	\$10.1	No formal educational credential
Maintenance and Repair Workers, General	286	1%	\$15.9	High school diploma or equivalent
Broadcast Technicians	249	12%	\$15.5	Associate's degree
Waiters and Waitresses	244	-3%	\$9.9	No formal educational credential
Recreation Workers	229	13%	\$10.5	High school diploma or equivalent
Managers, All Other	226	85%	\$18.5	Bachelor's degree
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	222	6%	\$11.2	No formal educational credential

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

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Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Defense and Security

Industries	Jobs 2015	National Trend, 2009-2015	Industry Trend, 2009-2015	Cumulative Expected Growth	Actual Job Growth, 2009-2015	Regional Performance, 2009-2015
		A	B	C=A+B	D	D-C
Federal Government, Military	18,900	1,785	-2,498	-713	-1,511	-798
Security Guards and Patrol Services	4,273	249	138	387	1,421	↑ 1,034
Computer Systems Design Services	1,959	120	290	410	588	↑ 178
Custom Computer Programming Services	1,119	84	189	273	157	-116
Power and Communication Line and Related Structures Construction	1,026	74	149	223	179	-44
Other Personal and Household Goods Repair and Maintenance	940	72	-19	53	112	↑ 59
Automobile and Other Motor Vehicle Merchant Wholesalers	823	66	-85	-19	66	↑ 85
Small Arms, Ordnance, and Ordnance Accessories Manufacturing	721	26	9	35	429	↑ 394
Security Systems Services (except Locksmiths)	522	43	65	108	29	-79
Boat Building	330	15	22	37	156	↑ 119
Surgical Appliance and Supplies Manufacturing	290	35	-30	5	-111	-116
Other Communications Equipment Mfg.	286	31	-105	-74	-68	↑ 6
Investigation Services	238	40	-66	-26	-223	-197
Motor Vehicle Supplies and New Parts Merchant Wholesalers	232	17	3	20	34	↑ 14
Armored Car Services	225	29	-69	-40	-104	-64

Note: Upward arrow (↑) indicates regional competitiveness.

section 02

Shift-Share Analysis

Defense and Security

Industries that Outperformed

- Automobile and Other Motor Vehicle Merchant Wholesalers
- Boat Building
- Computer Systems Design Services
- Motor Vehicle Supplies and New Parts Merchant Wholesalers
- Other Communications Equipment Manufacturing
- Other Personal and Household Goods Repair and Maintenance
- Security Guards and Patrol Services
- Small Arms, Ordnance, and Ordnance Accessories Manufacturing

Industries that Underperformed

- Armored Car Services
- Custom Computer Programming Services
- Federal Government, Military
- Investigation Services
- Power and Communication Line and Related Structures Construction
- Security Systems Services (except Locksmiths)
- Surgical Appliance and Supplies Manufacturing

Top Industry Sectors

Defense and Security

Industries	Exports 2014 (\$ Millions)	Jobs 2014	Export per job 2014 (\$)	LQ 2015
Federal Government, Military	\$6,660.1	18,603	\$358,014	2.9
Security Guards and Patrol Services	\$124.6	3,897	\$31,981	1.9
Computer Systems Design Services	\$84.1	1,744	\$48,239	0.6
Custom Computer Programming Services	\$17.8	1,062	\$16,779	0.3
Power and Communication Line and Related Structures Construction	\$90.6	1,005	\$90,145	1.7
Other Personal and Household Goods Repair and Maintenance	\$12.1	926	\$13,084	0.9
Automobile and Other Motor Vehicle Merchant Wholesalers	\$75.8	839	\$90,353	2.1
Small Arms, Ordnance, and Ordnance Accessories Manufacturing	\$135.0	588	\$229,599	11.7
Security Systems Services (except Locksmiths)	\$14.1	532	\$26,492	1.0
Boat Building	\$32.0	192	\$166,212	2.7
Surgical Appliance and Supplies Manufacturing	\$105.9	301	\$351,297	0.9
Other Communications Equipment Manufacturing	\$30.4	195	\$155,818	4.6
Investigation Services	\$4.6	221	\$20,830	1.0
Motor Vehicle Supplies and New Parts Merchant Wholesalers	\$12.1	226	\$53,409	0.4
Armored Car Services	\$9.5	239	\$39,605	2.2

Note: Sorted similarly as the shift-share analysis slide.

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Source: EMSI Class of Worker 2016.4 (QCEW, non -QCEW, self-employed and extended proprietors).

Top 15 Inputs by Dollars

Defense and Security

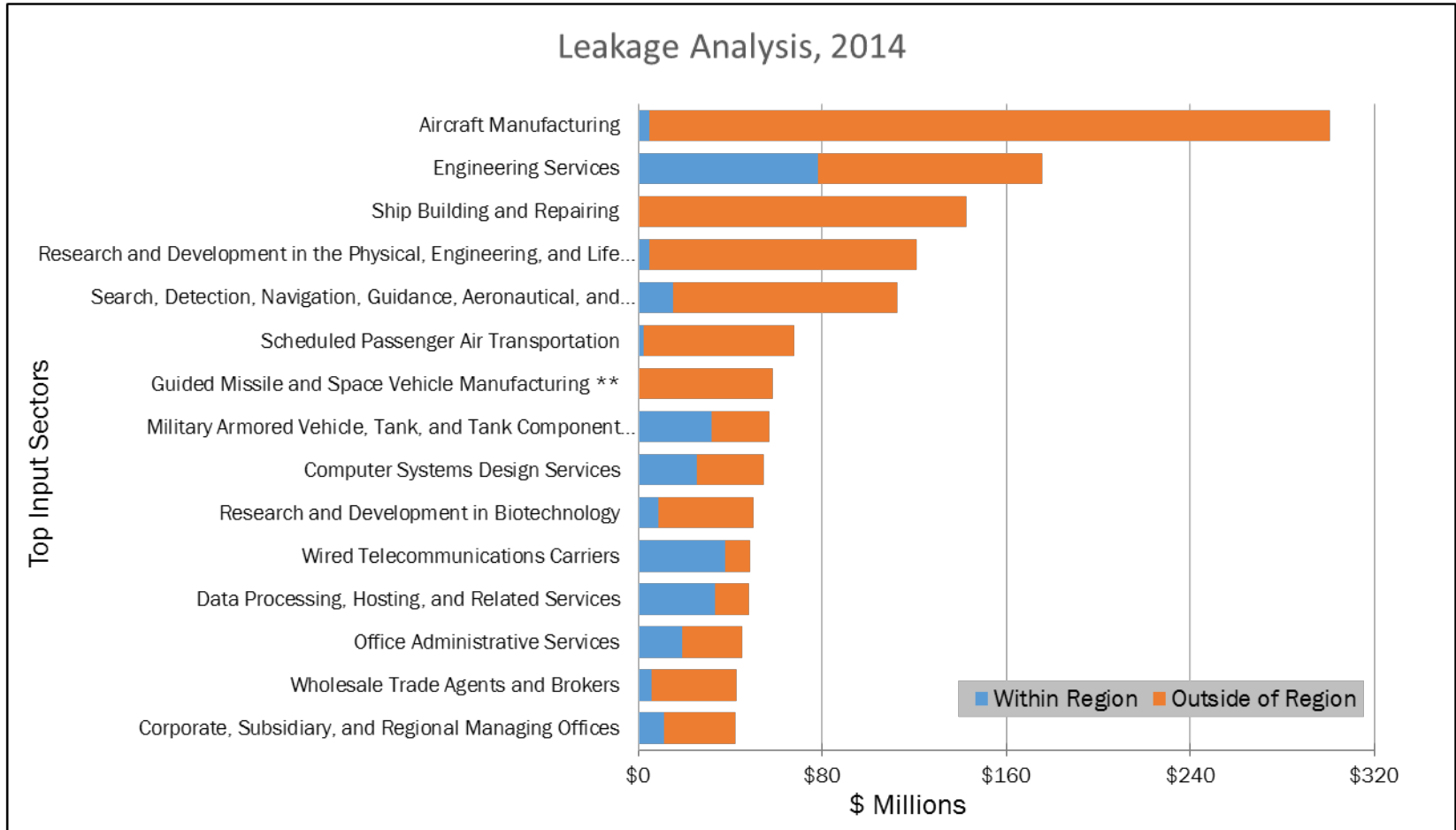
Industries	Estimated Input (\$ Millions), 2014	% In-Region	% Out of Region
Aircraft Manufacturing	\$300.55	2%	98%
Engineering Services	\$175.69	45%	55%
Ship Building and Repairing *	\$142.81	0%	100%
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	\$120.94	4%	96%
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$112.36	14%	86%
Scheduled Passenger Air Transportation	\$67.90	3%	97%
Guided Missile and Space Vehicle Manufacturing **	\$58.22	0%	100%
Military Armored Vehicle, Tank, and Tank Component Manufacturing *	\$57.00	56%	44%
Computer Systems Design Services	\$54.47	47%	53%
Research and Development in Biotechnology	\$49.91	18%	82%
Wired Telecommunications Carriers	\$48.66	77%	23%
Data Processing, Hosting, and Related Services	\$48.11	69%	31%
Office Administrative Services	\$45.14	42%	58%
Wholesale Trade Agents and Brokers	\$42.70	14%	86%
Corporate, Subsidiary, and Regional Managing Offices	\$42.21	27%	73%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

section 02

Top 15 Inputs by Dollars

Defense and Security



section 02

Top Occupations

Defense and Security

Occupations	Jobs 2015	% Change, 2009-2015	Median Hr. Earnings	Entry Level Education
Military occupations	18,900	-7%	\$18.4	N/A
Security Guards	3,916	28%	\$11.7	High school diploma or equivalent
Computer Programmers	573	21%	\$31.1	Bachelor's degree
Team Assemblers	351	49%	\$14.6	High school diploma or equivalent
Software Developers, Applications	273	25%	\$36.9	Bachelor's degree
Computer User Support Specialists	271	41%	\$21.3	Some college, no degree
Computer Systems Analysts	266	28%	\$30.5	Bachelor's degree
Software Developers, Systems Software	251	39%	\$32.9	Bachelor's degree
General and Operations Managers	232	46%	\$40.6	Bachelor's degree
Electrical Power-Line Installers and Repairers	230	31%	\$23.1	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	200	7%	\$25.7	High school diploma or equivalent
Web Developers	195	60%	\$22.3	Associate's degree
Customer Service Representatives	192	41%	\$14.6	High school diploma or equivalent
Construction Laborers	191	23%	\$12.0	No formal educational credential
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	181	38%	\$14.7	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2015. Extended proprietors include estimates for underreported self employment, proprietorships, trusts, partnerships and cooperatives.

section 02

03 Cluster Comparisons

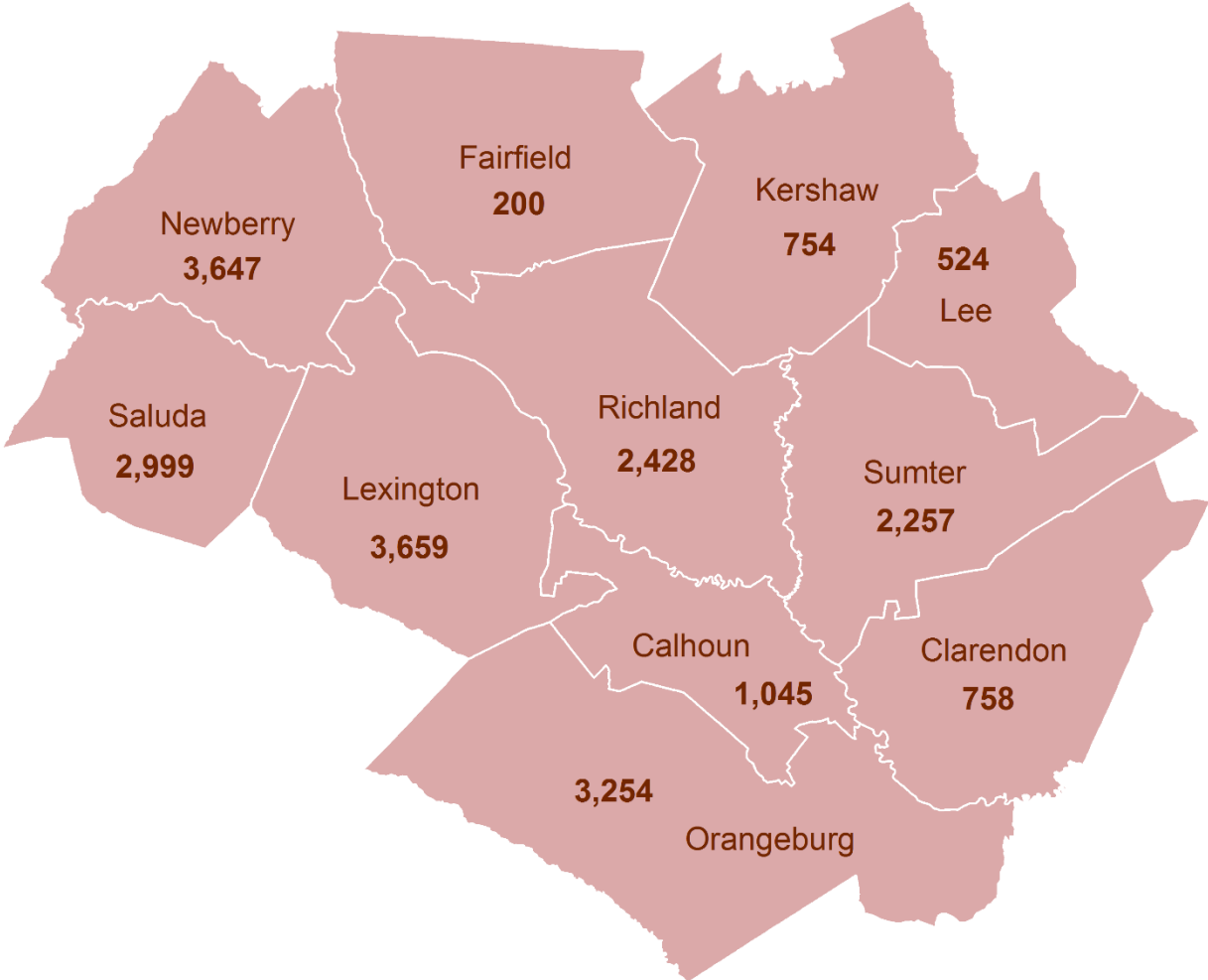
**Agribusiness, Food Processing
and Technology**

**Arts, Entertainment,
Recreation and Visitor
Industries**

Defense and Security

Agribusiness, Food Processing and Technology

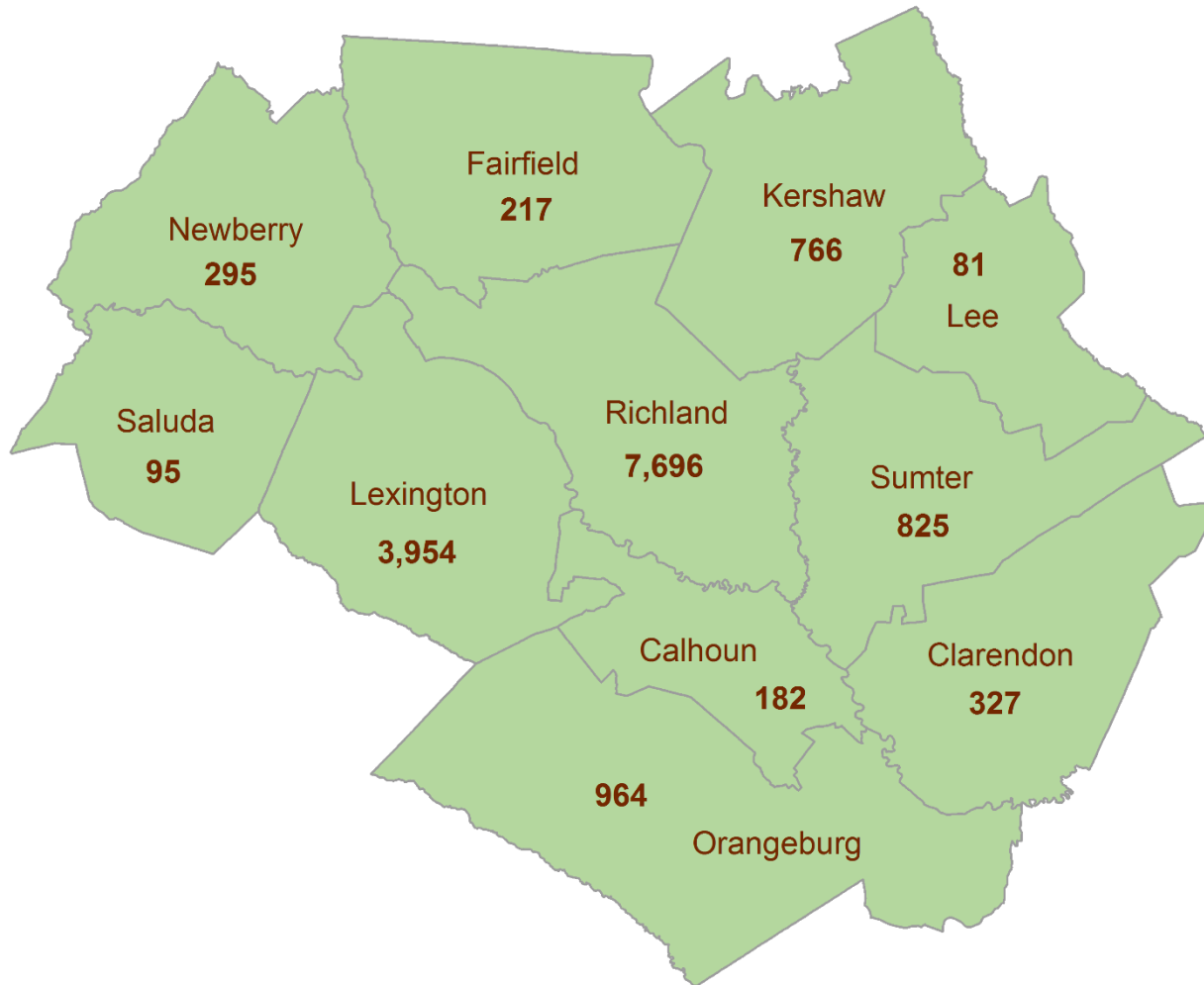
Contribution by Counties (Jobs, 2015)



section 03

Arts, Entertainment, Recreation And Visitor Industries

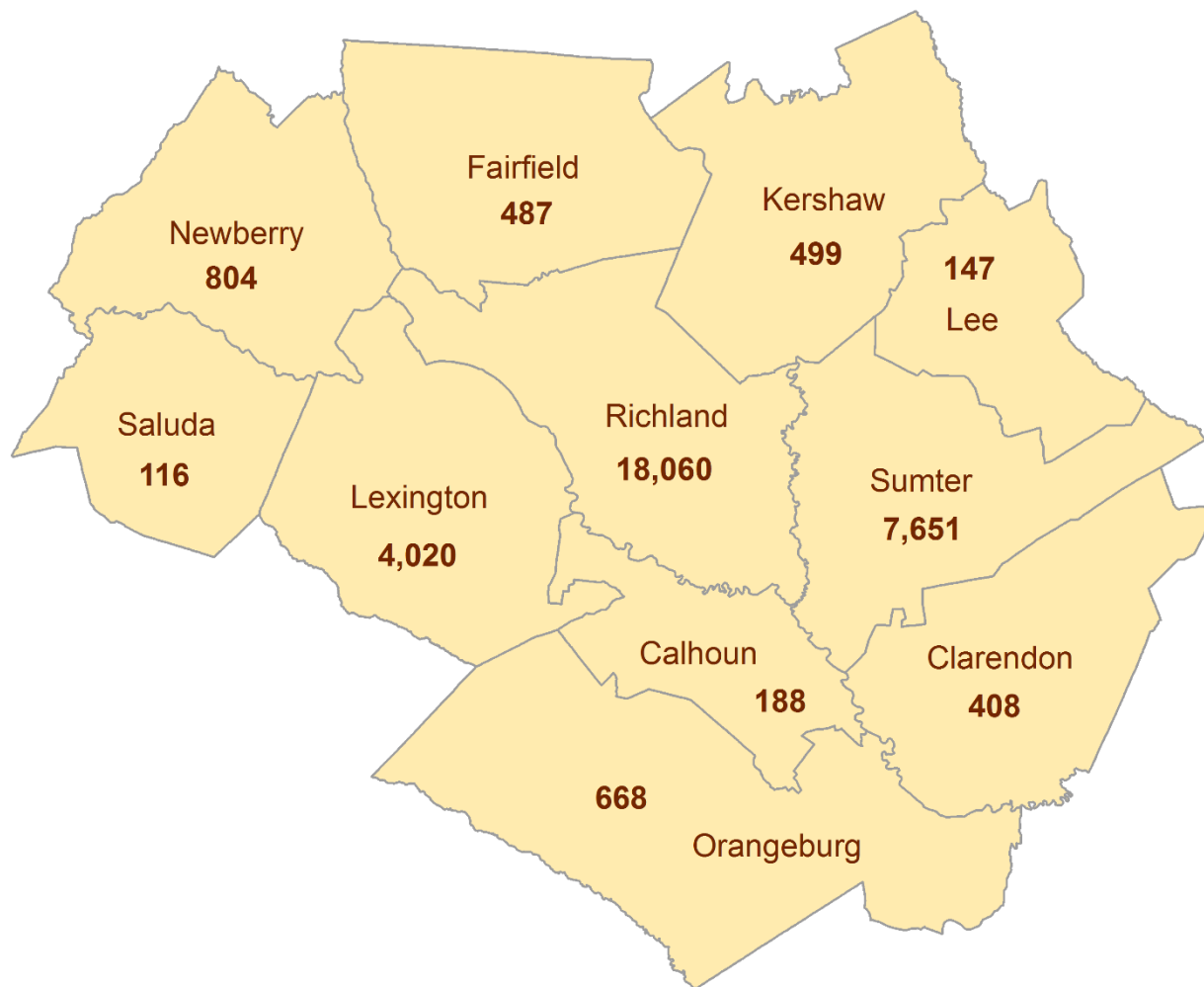
Contribution by Counties (Jobs, 2015)



section 03

Defense and Security

Contribution by Counties (Jobs, 2015)



section 03

Industry Clusters: Components to Assess

	Agribusiness, Food Processing and Technology	Arts, Entertainment, Recreation And Visitor Industries	Defense and Security
Regional Performance, 2009-2015 (Shift-share analysis)	-243 (negative value)	-88 (negative value)	776 (positive value)
Export value, 2014	\$4,484,769,914	\$435,833,989	\$7,523,816,657
Leakage, 2014	\$2,855,337,277	\$260,470,623	\$2,643,876,657
Number of establishments, 2015	315	644	670
Contribution by counties	11	11	11

Business input	Seek input from businesses on how they can strengthen their connections to the key clusters, especially providing products and services now being imported from outside the region.
Resident's value	Review Civic Forum Input from Residents

section 03