



Regional Data Snapshot

Target Industry Clusters
SET Session 2

Glacial Lakes Region, South Dakota

Table of contents

01

Overview

02

Target Industry Clusters

03

Industry Cluster Comparison

01 overview

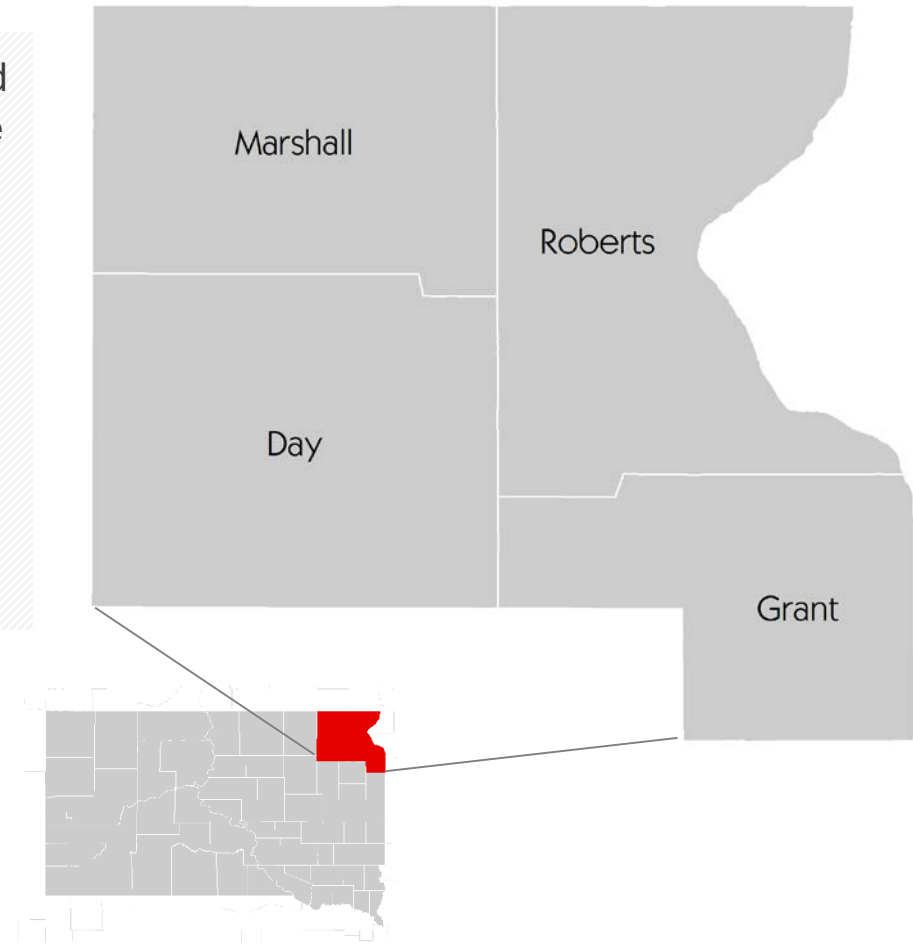
Glacial Lakes Region, SD

Overview

Glacial Lakes Region, SD

The Glacial Lakes Region is comprised of 4 South Dakota counties. Interstate 29 connects the region to I-94 and Fargo in the north, and to I-90 and Sioux Falls in the south.

- Day
- Grant
- Marshall
- Roberts



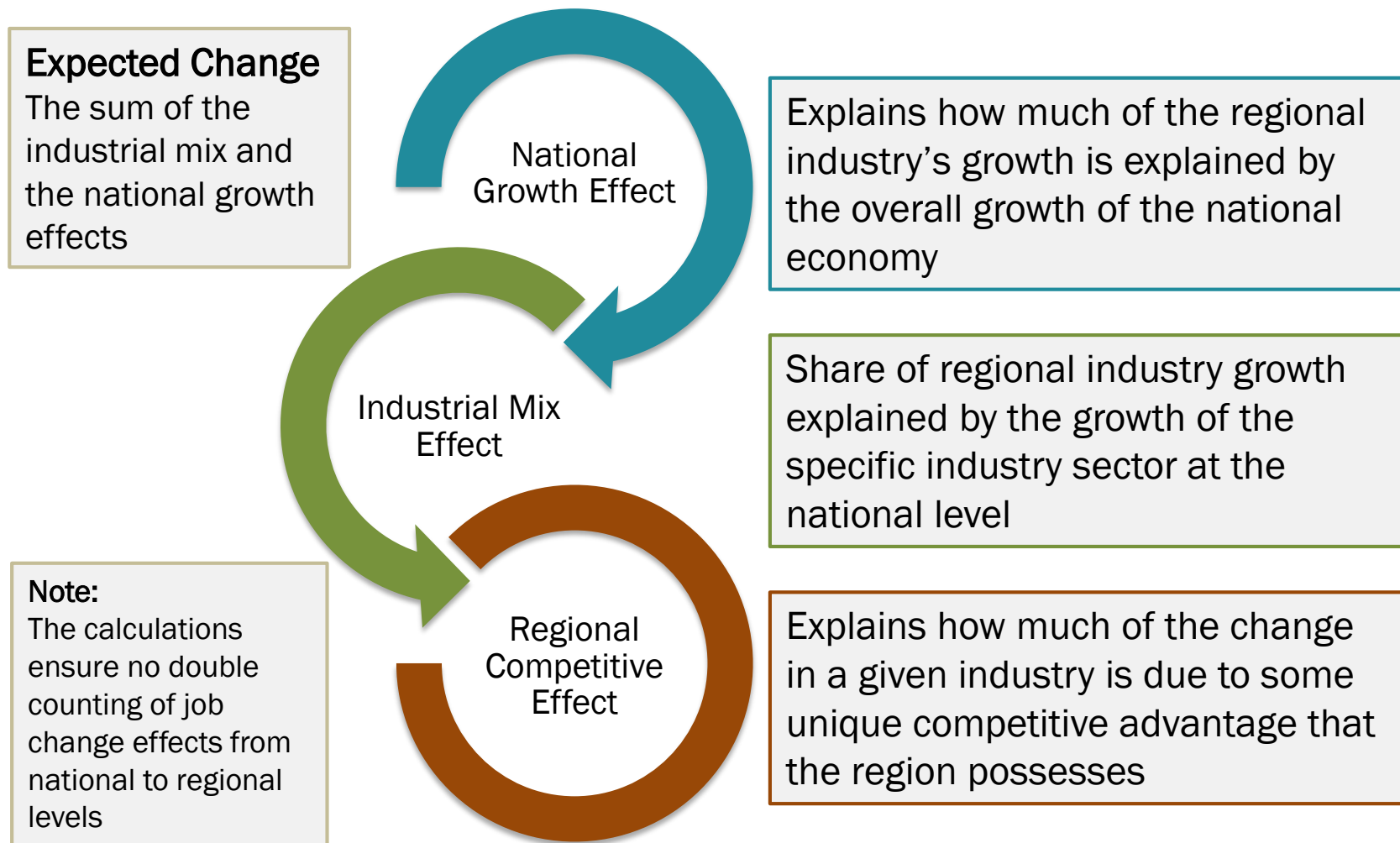
02 target industry clusters

**Agribusiness, Food Processing
and Technology**

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

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 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Animal Production and Aquaculture	2,185	159	-227	-68	-288	-220
Crop Production	720	24	-18	6	349	↑ 343
Cheese Manufacturing	424	23	11	34	75	↑ 41
Farm and Garden Machinery and Equipment Merchant Wholesalers	172	7	-1	6	58	↑ 52
Farm Supplies Merchant Wholesalers	160	6	0	6	71	↑ 65
Grain and Field Bean Merchant Wholesalers	155	10	1	11	-3	-14
Farm Labor Contractors and Crew Leaders	149	8	6	14	25	↑ 11
Soil Preparation, Planting, and Cultivating	53	4	3	7	-12	-19
Livestock Merchant Wholesalers	53	4	-8	-4	-7	-3
Commercial Bakeries	38	0	0	0	38	↑ 38
Postharvest Crop Activities (except Cotton Ginning)	31	2	1	3	0	-3
Farm Management Services	16	1	1	2	-2	-4
Crop Harvesting, Primarily by Machine	13	1	2	3	5	↑ 2
Dog and Cat Food Manufacturing	11	0	1	1	7	↑ 6

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not include detailed sectors for Other Snack Food Manufacturing.

section 02

Shift-Share Analysis

Agribusiness, Food Processing and Technology

Industries that Outperformed

- 
- Crop Production
 - Farm Supplies Merchant Wholesalers
 - Farm and Garden Machinery and Equipment Merchant Wholesalers
 - Cheese Manufacturing
 - Commercial Bakeries
 - Farm Labor Contractors and Crew Leaders
 - Dog and Cat Food Manufacturing
 - Crop Harvesting, Primarily by Machine

Industries that Underperformed

- 
- Livestock Merchant Wholesalers
 - Postharvest Crop Activities (except Cotton Ginning)
 - Farm Management Services
 - Grain and Field Bean Merchant Wholesalers
 - Soil Preparation, Planting, and Cultivating
 - Animal Production and Aquaculture

Top Industry Sectors

Agribusiness, Food Processing and Technology

Industries	Exports 2013 (\$ Millions)	Jobs 2013	Exports per job 2013 (\$)	LQ 2014
Animal Production and Aquaculture	\$392.1	2,140	\$183,250	20.1
Crop Production	\$105.5	683	\$154,472	5.0
Cheese Manufacturing	\$328.1	396	\$829,083	101.5
Farm and Garden Machinery and Equipment Merchant Wholesalers	\$33.3	191	\$174,504	16.9
Farm Supplies Merchant Wholesalers	\$18.3	128	\$143,137	14.2
Grain and Field Bean Merchant Wholesalers	\$30.6	152	\$201,212	31.0
Farm Labor Contractors and Crew Leaders	\$0.9	149	\$5,907	5.1
Soil Preparation, Planting, and Cultivating	\$2.0	70	\$28,321	7.7
Livestock Merchant Wholesalers	\$2.8	67	\$42,319	28.1
Commercial Bakeries	\$4.7	30	\$156,515	2.9
Postharvest Crop Activities (except Cotton Ginning)	\$0.3	43	\$6,088	3.4
Farm Management Services	\$0.0	16	\$1,616	5.4
Dog and Cat Food Manufacturing	\$21.5	18	\$1,219,484	5.0

•Note: Sorted similarly as the shift-share analysis slide. EMSI does not include detailed sectors for Crop Harvesting, Primarily by Machine; and Other Snack Food Manufacturing.

section 02

Top 15 Inputs by Dollars

Agribusiness, Food Processing and Technology

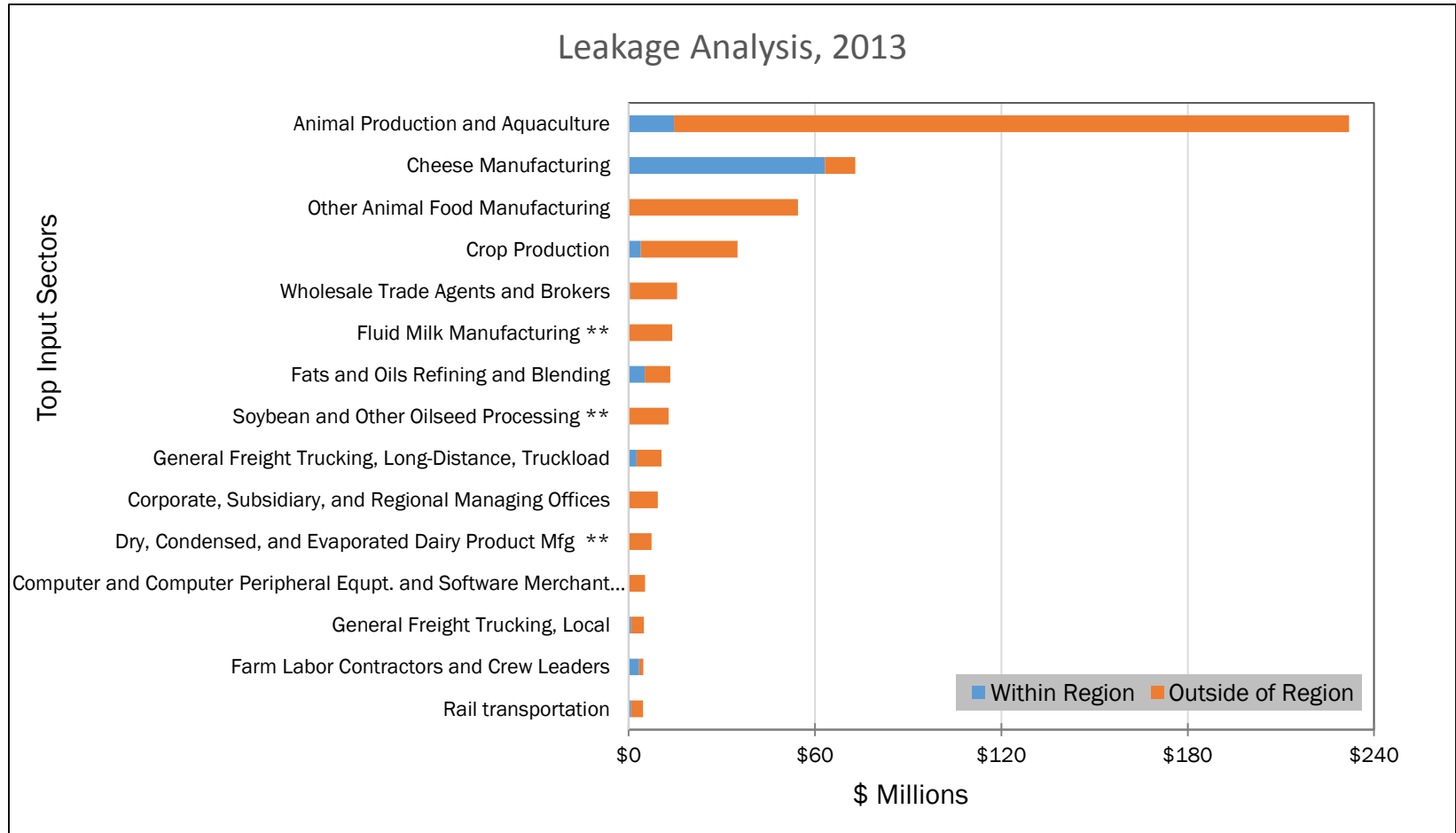
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Animal Production and Aquaculture	\$231.94	6%	94%
Cheese Manufacturing	\$72.93	87%	13%
Other Animal Food Manufacturing *	\$54.47	0%	100%
Crop Production	\$35.05	11%	89%
Wholesale Trade Agents and Brokers	\$15.55	3%	97%
Fluid Milk Manufacturing **	\$14.01	0%	100%
Fats and Oils Refining and Blending *	\$13.42	39%	61%
Soybean and Other Oilseed Processing **	\$12.84	0%	100%
General Freight Trucking, Long-Distance, Truckload	\$10.55	24%	76%
Corporate, Subsidiary, and Regional Managing Offices *	\$9.35	0%	100%
Dry, Condensed, and Evaporated Dairy Product Manufacturing **	\$7.36	0%	100%
Computer and Computer Peripheral Equipment and Software Merchant Wholesalers *	\$5.27	1%	99%
General Freight Trucking, Local	\$4.94	16%	84%
Farm Labor Contractors and Crew Leaders	\$4.75	71%	29%
Rail transportation	\$4.66	16%	84%

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

Agribusiness, Food Processing and Technology



Note: ** industry sector is not present in the region.

section 02

Source: EMSI Class of Worker 2015.4 (QCEW, non -QCEW, self-employed and extended proprietors).

Top Occupations

Agribusiness, Food Processing and Technology

Occupations	Jobs 2014	% Change, 2009-2014	Median Hr. Earnings	Entry Level Education
Farmers, Ranchers, and Other Agricultural Managers	2,258	-4%	\$14.4	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	431	30%	\$11.3	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	94	13%	\$11.7	Less than high school
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	72	36%	\$21.7	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	72	24%	\$16.5	Postsecondary non-degree award
Bookkeeping, Accounting, and Auditing Clerks	55	20%	\$13.9	High school diploma or equivalent
Farm Equipment Mechanics and Service Technicians	51	55%	\$15.9	High school diploma or equivalent
Nonfarm Animal Caretakers	48	30%	\$9.4	Less than high school
Animal Trainers	47	-10%	\$10.3	High school diploma or equivalent
Packaging and Filling Machine Operators and Tenders	45	5%	\$13.3	High school diploma or equivalent
Farmworkers, Farm, Ranch, and Aquacultural Animals	44	29%	\$13.0	Less than high school
Agricultural Equipment Operators	43	30%	\$14.9	Less than high school
Packers and Packagers, Hand	42	8%	\$10.1	Less than high school
Graders and Sorters, Agricultural Products	27	-16%	\$13.6	Less than high school
Conveyor Operators and Tenders	27	4%	\$14.5	Less than high school

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.

section 02

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

Arts, Entertainment, Recreation and Visitor Industries

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Hotels (except Casino Hotels) and Motels	146	9	4	13	6	-7
Independent Artists, Writers, and Performers	35	2	2	4	4	0
Golf Courses and Country Clubs	30	1	0	1	14	↑ 13
Fitness and Recreational Sports Centers	21	1	1	2	11	↑ 9
All Other Amusement and Recreation Industries	18	1	3	4	2	-2
RV (Recreational Vehicle) Parks and Campgrounds	13	0	1	1	5	↑ 4
Motion Picture Theaters (except Drive-Ins)	10	0	0	0	7	↑ 7


Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not include detailed sectors for Travel Agencies; Radio Stations; Amusement Arcades; Radio Networks; Racetracks; Sports Teams and Clubs; Theater Companies and Dinner Theaters; and Other Spectator Sports.

section 02


Shift-Share Analysis

Arts, Entertainment, Recreation and Visitor Industries

Industries that Outperformed

- 
- Golf Courses and Country Clubs
 - Fitness and Recreational Sports Centers
 - Motion Picture Theaters (except Drive-Ins)
 - RV (Recreational Vehicle) Parks and Campgrounds

Industries that Underperformed

- 
- Hotels (except Casino Hotels) and Motels
 - All Other Amusement and Recreation Industries

Top Industry Sectors

Arts, Entertainment, Recreation and Visitor Industries

Industries	Exports 2013 (\$ Millions)	Jobs 2013	Exports per job 2013 (\$)	LQ 2014
Hotels (except Casino Hotels) and Motels	\$3.9	138	\$28,289	1.0
Independent Artists, Writers, and Performers	\$0.2	34	\$4,516	0.3
Golf Courses and Country Clubs	\$0.5	37	\$13,360	0.8
Fitness and Recreational Sports Centers	\$0.3	24	\$11,206	0.3
All Other Amusement and Recreation Industries	\$0.2	17	\$12,621	0.7
RV (Recreational Vehicle) Parks and Campgrounds	\$0.8	14	\$55,283	3.2

•Note: Sorted similarly as the shift-share analysis slide. EMSI does not include detailed sectors for Motion Picture Theaters (except Drive-Ins); Travel Agencies; Radio Stations; Amusement Arcades; Radio Networks; Racetracks; Sports Teams and Clubs; Theater Companies and Dinner Theaters; and Other Spectator Sports.

Top 15 Inputs by Dollars

Arts, Entertainment, Recreation and Visitor Industries

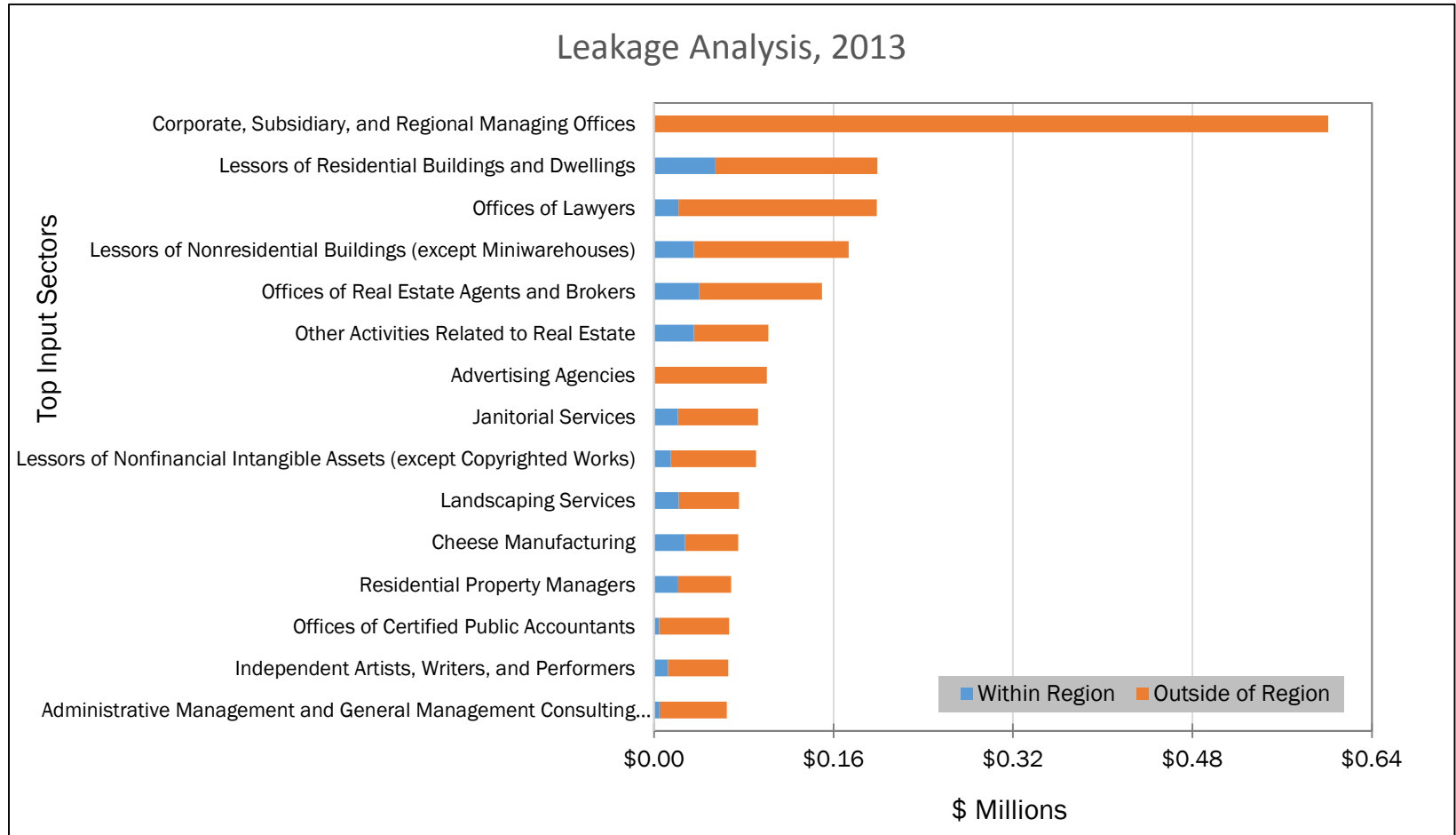
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices *	\$0.60	0%	100%
Lessors of Residential Buildings and Dwellings	\$0.20	28%	72%
Offices of Lawyers	\$0.20	11%	89%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.17	20%	80%
Offices of Real Estate Agents and Brokers	\$0.15	27%	73%
Other Activities Related to Real Estate	\$0.10	35%	65%
Advertising Agencies *	\$0.10	0%	100%
Janitorial Services	\$0.09	23%	77%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) *	\$0.09	16%	84%
Landscaping Services	\$0.08	29%	71%
Cheese Manufacturing	\$0.07	37%	63%
Residential Property Managers *	\$0.07	30%	70%
Offices of Certified Public Accountants *	\$0.07	7%	93%
Independent Artists, Writers, and Performers	\$0.07	19%	81%
Administrative Management and General Management Consulting Services	\$0.06	7%	93%

Note: * industry sector has less than 10 jobs as calculated by EMSI.

section 02

Top 15 Inputs by Dollars

Arts, Entertainment, Recreation and Visitor Industries



section 02

Top Occupations

Arts, Entertainment, Recreation and Visitor Industries

Occupations	Jobs 2014	% Change, 2009-2014	Median Hr. Earnings	Entry Level Education
Maids and Housekeeping Cleaners	33	-3%	\$8.9	Less than high school
Lodging Managers	31	11%	\$14.2	High school diploma or equivalent
Hotel, Motel, and Resort Desk Clerks	30	-3%	\$8.7	High school diploma or equivalent
Fitness Trainers and Aerobics Instructors	16	78%	\$13.8	High school diploma or equivalent
Musicians and Singers	13	44%	\$16.1	High school diploma or equivalent
Amusement and Recreation Attendants	13	-28%	\$9.5	Less than high school
Waiters and Waitresses	11	-27%	\$8.3	Less than high school
Writers and Authors	10	43%	\$13.4	Bachelor's degree

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. EMSI does not include detailed occupations for Cooks, Restaurant; Cooks, Institution and Cafeteria Cooks, Fast Food; Security Guards; Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers; Chefs and Head Cooks; and First-Line Supervisors of Food Preparation and Serving Workers.

section 02

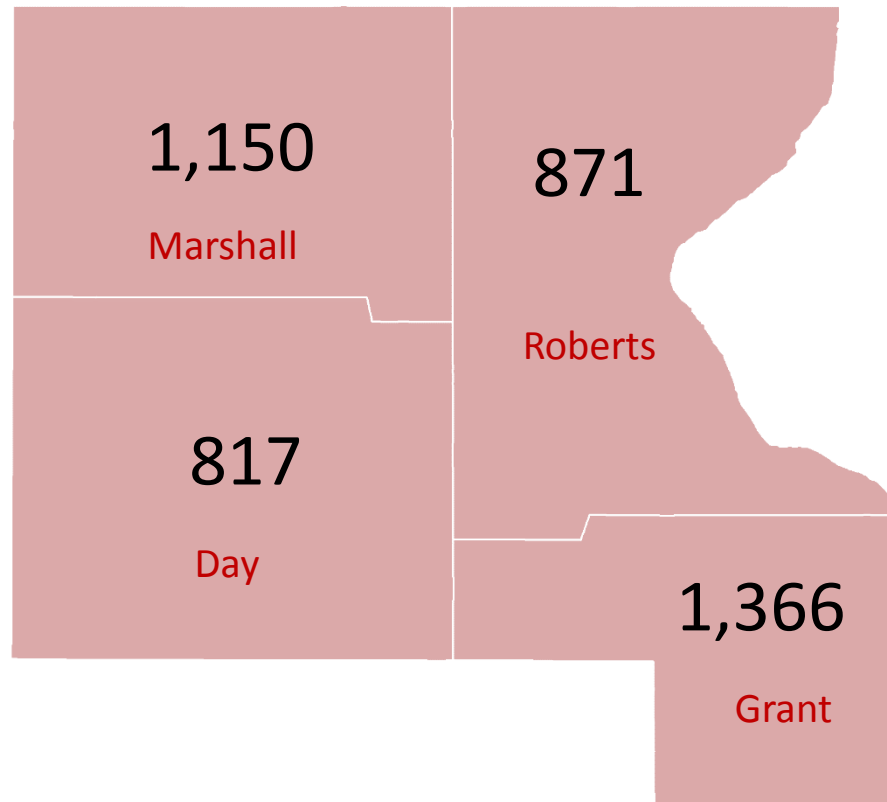
03 Cluster Comparisons

**Agribusiness, Food Processing
and Technology**

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

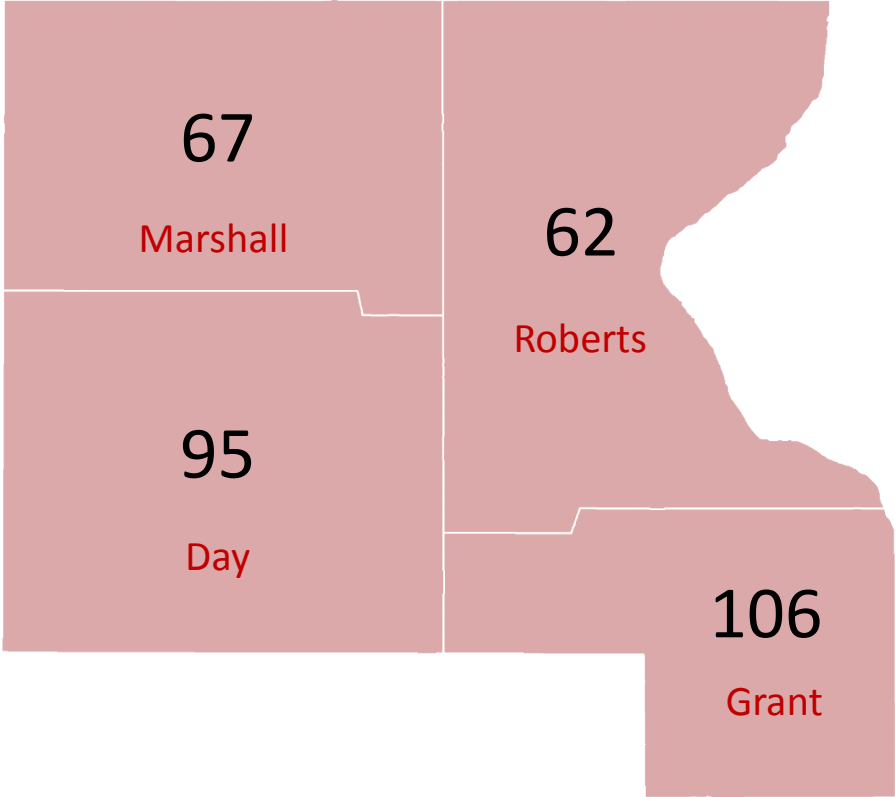
Agribusiness, Food Processing and Technology

Contribution by Counties (Jobs, 2014)



Art, Entertainment, Recreation and Visitor Industries

Contribution by Counties (Jobs, 2014)



Industry Clusters: Components to Assess

	Agribusiness, Food Processing and Technology	Art, Entertainment, Recreation and Visitor Industries
Regional Performance, 2009-2014 (Shift-share analysis)	209 (positive value)	-12 (negative value)
Export value, 2013	\$996,905,633	\$9,955,715
Leakage, 2013	\$607,271,012	\$5,069,333
Number of establishments	95	23
Contribution by counties	4	4

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