

## ECONOMIC FUTURES WORKSHOP

# Mille Lacs County Minnesota

The Mille Lacs County Economic Development Task Force was established in 2013 to develop a county economic development plan. The Task Force's diverse membership includes representatives from the cities in the county, economic development and workforce organizations, the school district, the business community, the tourism industry, and Mille Lacs Corporate Ventures. To learn more about the county's current economic situation and to explore opportunities for economic development, these leaders from Mille Lacs County participated in the University of Minnesota's Economic Futures Workshop on Thursday, March 20, 2014, in Onamia, Minnesota. This report, summarizing the workshop, is presented in partnership with EDA Center at the University of Minnesota-Crookston (<http://www.edacenter.org/>).

### WHAT IS AN ECONOMIC FUTURES WORKSHOP?

The Economic Futures Workshop is designed to help community leaders look objectively at the state of their local economy. The workshop examines the interactions within an economy – among businesses and between businesses and consumers. Using information about how these linkages function, leaders can begin to understand the full implications of change on the local economy. The Futures Workshop can also help communities understand how efforts by different government jurisdictions can affect the economy.

The three-hour Futures Workshop provided a profile of the Mille Lacs County economy, an analysis of how eight selected industries interact, and a facilitated exploration and discussion of the industries.

### PROFILE OF THE CURRENT ECONOMY

In 2013, there were 9,460 jobs in Mille Lacs County.<sup>1</sup> Employment grew steadily in the late 1990s but slowed in the early 2000s. In the late 2000s, particularly around 2009 and 2010, Mille Lacs County lost jobs, which was consistent with the impacts of the Great Recession. Mille Lacs County has added jobs since 2010 but has not returned to pre-recession levels of employment. Growth in the number of jobs in Mille Lacs County has not kept pace with national and industry trends.<sup>2</sup>

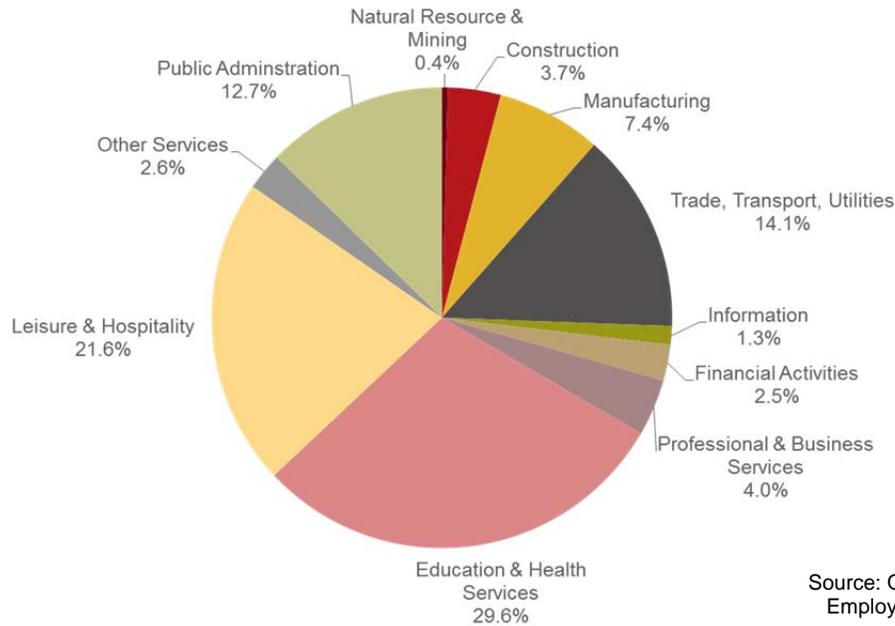
Chart 1 illustrates employment by industry in Mille Lacs County. The largest industry is Education and Health Services, employing 30 percent of the workforce in Mille Lacs County. This industry includes both private and public employment, such as K-12 schools. The Leisure and Hospitality industry employs an additional 22 percent of the workforce in Mille Lacs County, including approximately 1,200 employees at the Grand Casino Mille Lacs.

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<sup>1</sup> Source: Quarterly Census of Employment and Wages (QCEW), MN Department of Employment and Economic Development, <http://mn.gov/deed/>.

<sup>2</sup> Source: Shift-share analysis from EMSI (Economic Modeling System).

**Chart 1: Employment by Industry,  
Mille Lacs County 2012**



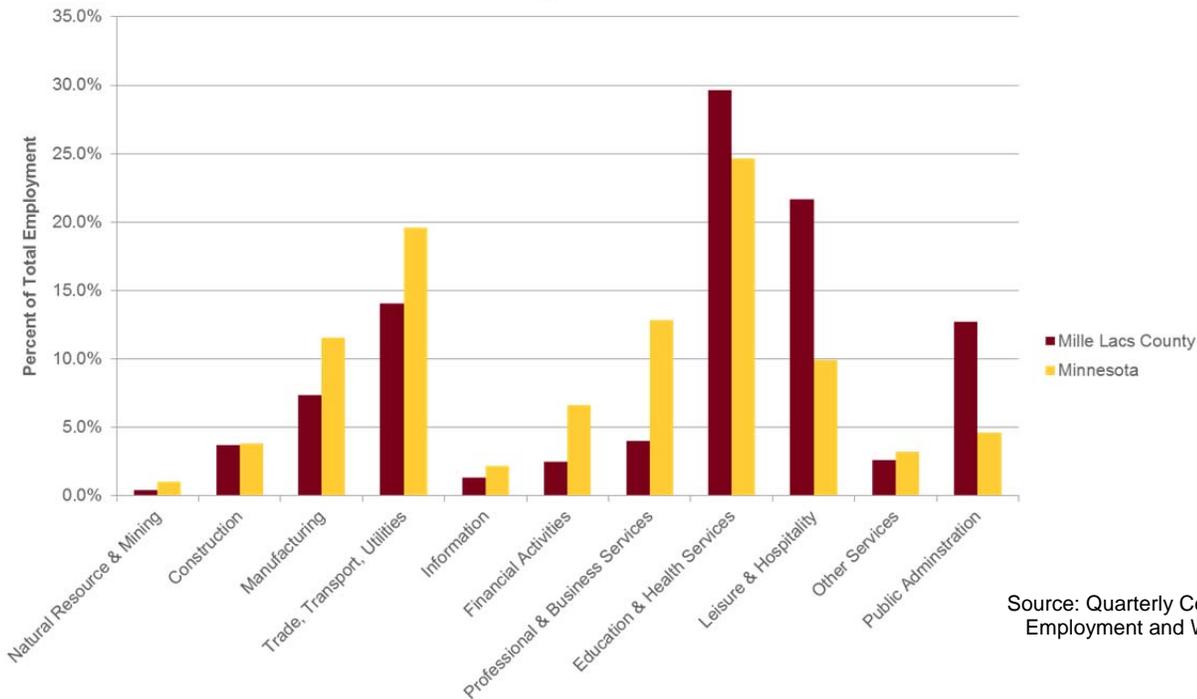
Source: Quarterly Census of Employment and Wages

Employment by industry as compared to the average Minnesota county is shown in chart 2. Mille Lacs County has a higher percentage of its employment in the Leisure and Hospitality industry, the Education and Health Services industry, and Public Administration. Mille Lacs County is also home to the Mille Lacs Band of Ojibwe. While employment by the Band’s tribal operations, such as the casino, is classified by the type of operation, employment by the tribal government is included in Public Administration. Therefore, it is not surprising to see a higher percentage of employment in that sector.

Wages in Mille Lacs County are lower than the Minnesota average. Mille Lacs County’s average weekly wage is \$584. Minnesota’s average weekly wage is \$949.<sup>3</sup>

<sup>3</sup> Source: Quarterly Census of Employment and Wages (QCEW), MN Department of Employment and Economic Development, <http://mn.gov/deed/>.

**Chart 2: Percent of Employment by Industry:  
Mille Lacs County Versus Minnesota, 2012**



Source: Quarterly Census of Employment and Wages

### **ANALYSIS OF INDUSTRIES**

On January 16<sup>th</sup>, the Mille Lacs County Futures Workshop planning committee selected seven industries to be analyzed and discussed during the facilitated workshop. At the discretion of University of Minnesota staff, an eighth industry was included. The results of this analysis can be found in appendix one. The input-output model IMPLAN was used in the analysis.

Note, these industries were selected to represent different economic activities in Mille Lacs County. The workshop is designed to use these industries as examples.

Food and hospitality

Metal fabrication manufacturing

Transportation and warehousing

Furniture and related manufacturing

Nursing and residential care

Arts, entertainment, and recreation

Vegetables and specialty crops

Machinery manufacturing

## **EXPLORATION AND DISCUSSION OF INDUSTRIES**

After reviewing the current structure of the Mille Lacs County economy, attendees were divided into geographically diverse groups to explore the economic interdependencies of the selected industries. Each group was assigned two industries and asked to address the following four questions:

1. What surprises you about this information?
2. What information favors this industry in the region?
3. What information works against this industry in the region?
4. What could be done to support this industry in Mille Lacs County?

The small groups reported out to the full Task Force their summary thoughts and considerations. (Notes from each industry is provided in appendix two).

## **KEY CONCLUSIONS**

Following the group discussion of each industry, the Economic Development Task Force took a straw vote on actions they could take to support industries in Mille Lacs County. The actions selected for consideration were taken from the small group responses to question four above.

Three themes were common across several industries and therefore were automatically put forth as items for the Task Force to consider as they move forward with planning. The items were not considered during the vote process. They were:

- examine ways to decrease taxes for businesses
- consider ways to enhance and increase workforce training opportunities
- collaborate on marketing and advertising activities across the county.

Each Task Force member was invited to vote for up to four local action steps that could be taken to support local industries. The potential actions receiving the most votes were:

- market and promote assets in all parts of Mille Lacs County (12 votes)
- support value-added processing facility / shared facilities for freezing, canning, etc. for small, specialty farms (11 votes)
- work on tourism collaboration across the county (8 votes)
- have county and city economic development entities work together to support the industries (7 votes).
- look farther back the supply chain to explore ways to support the industries and businesses supplying the inputs (6 votes).

The Task Force also discussed the lessons learned as a result of the workshop. They included a greater understanding of how the county's economy is interrelated and connected together, the need to express to lay people how interconnected the economy is, the importance of working

together to market all the assets of the county, and the need to understand what local businesses purchase and the potential to produce those items locally. All in all, the group felt the information was very useful and would be useful in the long-term.

### **ACTION STEPS**

At the conclusion of the workshop, attendees completed a workshop evaluation which included identifying potential future actions based on the information presented. Action items included:

- sharing the information with additional audiences (EDAs, Chambers, media, SBDC, technical colleges, financial institutions, businesses)
- use the data in referendum presentation
- reinforce tourism collaboration county-wide
- support “grow your own”
- identify new business opportunities through investigating the supply chains of existing businesses
- helping people understand the interconnectedness of economic development (good housing, skilled workers, etc.)
- work with other jurisdictions in the county
- work with the county regarding taxes to make the area more business friendly
- make business retention visits
- share economic development tools available from the state
- learn about the entrepreneurship class at the Milaca High School
- explore collaboration with other small farms for shared needs
- propose county-wide bike routes
- get more townships involved to improve rural governance
- use this information in personal decision-making regarding local spending.

### **EXTENSION STAFF**

The following University of Minnesota Extension staff participated in the planning, preparation, and presentation of the Economic Futures Workshop in Mille Lacs County.

Brigid Tuck, Economic Impact Analyst, Presenter

Liz Templin, Extension Educator, Presenter

Owusau Yamoah, Community Economics Intern

Neil Linscheid, Extension Educator, Program Manager

## APPENDIX ONE: ANALYSIS OF SELECTED INDUSTRIES

Eight of Mille Lacs County's industries were analyzed to measure their economic linkages for the workshop. The results of the analysis are presented in this appendix. To allow for comparison, the analysis considers the economic impact of 100 jobs in each industry. This allows one to compare and contrast the types of impacts each industry has in Mille Lacs County. The IMPLAN model used in this analysis is linear; therefore, if a person wanted to consider the economic linkages of 10 jobs, it could be done by dividing the results for 100 job by 10.

Interpreting the results requires knowing several definitions. Those are included here.

### Output

Output is measured in dollars and is equivalent to total sales.

### Employment

Employment includes full- and part-time workers and is measured in annual average jobs. Total wage and salaried employees as well as the self-employed are included in employment estimates in IMPLAN. Because employment is measured in jobs and not in dollar values, it tends to be a very stable metric.

### Direct Impact

The direct impact is equivalent to the initial change in the economy. For this workshop, the direct impact is 100 jobs.

### Indirect Impact

The indirect impact is the summation of changes in the local economy that occur due to **spending for inputs** (goods and services) by the industry or industries directly impacted. For instance, if employment in a manufacturing plant increases by 100 jobs, this implies a corresponding increase in output by the plant. As the plant increases output, it must also purchase more of its inputs, such as electricity, steel, and equipment. As it increases its purchase of these items, its suppliers must also increase their production, and so forth. As these ripples move through the economy, they can be captured and measured. Ripples related to the purchase of goods and services are indirect impacts.

### Induced Impact

The induced impact is the summation of changes in the local economy that occur due to **spending by labor** - by the employees in the industry or industries directly impacted. For instance, if employment in a manufacturing plant increases by 100 jobs, the new employees will have money to spend to purchase housing, buy groceries, and go out to dinner. As they spend their new income, more activity occurs in the local economy. This can be quantified and is called the induced impact.

### Total Impact

The total impact is the summation of the direct, indirect and induced impacts

## APPENDIX TWO: SUMMARY OF INDUSTRY EXPLORATION AND DISCUSSION

During small group discussions, the participants answered the following questions about eight selected industries. The responses, shared with the large group, are summarized below. Following a large group discussion, participants could select ideas in a “straw vote” as potential items to include in the county economic development plan. These are in **bold**. If the item received any votes, the number of votes is also listed. The straw vote was non-binding, just to get a sense of the group’s feelings at the end of the meeting. Participants were urged to think about what items on the list they have more local control over because those are the items that that they might best be able to influence in the next one to five years, compared to other items beyond their control (for example, changing the dollar rate of exchange with the European Union).

### Questions for Discussion

1. What surprises you about this information?
2. What information favors this industry in the region?
3. What information works against this industry in the region?
4. What could be done to support this industry in Mille Lacs County?

### Fabricated Metal

1. Surprises?
  - a. None of the inputs are in Mille Lacs County. Why are they here?
  - b. Number of businesses seemed high
  - c. Manufacturing wages are relatively low. Jobs might be seasonal, but wages still seem low? Why?
  - d. Larger drop in employment than national figures (lost facility due to fire)
2. Favors industry
  - a. Labor force availability
  - b. Transportation (surface)
  - c. Wage rates more favorable
3. Against industry
  - a. Inputs not available locally
  - b. Increased transportation costs
  - c. Construction/structural products may be seasonal
  - d. Prototypes/replacement parts may require higher skills
  - e. Bigger plants use more robots
4. Support?
  - a. **Training/technical training to increase skills and entrepreneurs**
  - b. Work with logistics firms, warehousing, etc. to bring needed supplies into county more easily (as a way to decrease the cost of inputs)
  - c. **Look farther back the supply chain to support the inputs (to make it more favorable to locate here) (6 votes)**
  - d. Strengthen building and equipment maintenance & repair (skilled workforce)

### Nursing and Residential Care Facilities

1. Surprises?
  - a. High number of establishments and employees versus population, must be labor intensive
  - b. Not a lot of induced or indirect effects, low wages
2. Favors industry
  - a. Critical mass of number of businesses, may lead to additional businesses or more specialized type of care, entrepreneurial
  - b. Good health care options in and near retirees
  - c. Location near Lake Mille Lacs
  - d. Insurance company decisions are leading to growth in this industry
3. Against industry
  - a. Large number of businesses could saturate market
  - b. Lack of health insurance for employees due to low paying jobs
4. Support?
  - a. **Workforce training**
  - b. **Promote niche training for more specialized care options**
  - c. Paperwork -- Ease navigation for new businesses

### Machinery Manufacturing

1. Surprises?
  - a. High wage rate
  - b. Thought induced would be higher
2. Favors industry
  - a. Wage compared to average
  - b. New moving in
3. Against industry
  - a. Workforce, finding skilled labor
  - b. Higher education levels in the area so these jobs are becoming less appealing
  - c. Lack of government incentives
  - d. Profit margins
4. Support?
  - a. **Partner with technical college to train for specific skills**
  - b. Reduce taxes
  - c. **Have the county and city economic development entities work together to support the industry (7 votes)**
  - d. **Make connections with fabricated metal (2 votes)**
  - e. **Maintenance workers now need to be able to use technology and fix equipment (1 vote)**

### Furniture and Related Manufacturing

1. Surprises?
  - a. Wages higher than county average
  - b. 6 establishments = 201 employees
2. Favors industry
  - a. Because it started here - lumber/wood industry

- b. Skilled trade - handed down from generations
- c. Ugly truth - cheap labor
- d. Craft/hobby
- e. Highway 169 corridor
- 3. Against industry
  - a. No railroad
  - b. Reduced demand from low housing market
- 4. Support?
  - a. **Computerized training**
  - b. **Skilled workforce**
  - c. Highway and road improvements
  - d. **Tax breaks/incentives**
  - e. **Taxes - reduce the indirect + direct taxes**
  - f. **Advertising our niche**
  - g. Connections to each other? Specialized retailers connected to manufacturers?
  - h. **Manufacturer open house - inform students to bring them back (1 vote)**
  - i. **Talk with companies that moved out of the county (to find out why) (1 vote)**
  - j. The improving housing market will increase demand

#### Transportation and Warehousing

- 1. Surprises?
  - a. Weekly wage is higher than expected
  - b. Had growth during time frame - 80% competitive share
  - c. Only 17 establishments - low?
- 2. Favors industry
  - a. Good transportation routes
  - b. Lower wages
  - c. Lack of educational opportunities
- 3. Against industry
  - a. Weather
  - b. Smaller, spread out population
- 4. Support?
  - a. **Repeal state warehouse tax**
  - b. **Property tax**
  - c. **Make land WITH utilities available (3 votes)**
  - d. Existing industrial parks need infrastructure (i.e. utilities)

#### Vegetable and Specialty Crops

- 1. Surprises?
  - a. Lack of employees, but 762 farms (Census of Agriculture data shows number of farms. Quarterly Census of Wages and Employment data (QCEW) highlighted above does not include self-employed persons, such as farm operators)
- 2. Favors industry
  - a. Amish farmers have good reputations
  - b. Good, sandy soils for these crops
  - c. Farmers markets
  - d. Seasonal work for high school and college kids

3. Against industry
  - a. Greenhouse heating costs
  - b. Increased regulations from EPA
  - c. Increased cost of real estate/land
  - d. Weather
  - e. No USDA certified slaughter house
  - f. No local storage/distribution center for vegetables and fruits
4. Support?
  - a. Towns support farmers' markets
  - b. Work with schools to buy local
  - c. Market to Twin Cities visitors as they drive through to the lake
  - d. Work better with Master Gardeners
  - e. **Support a value-added processing facility / shared facilities for freezing, canning, etc. (11 votes)**
  - f. **Distribution (4 votes)**
  - g. **Bring resources together (3 votes)**

#### Food and Hospitality

1. Surprises?
  - a. Low weekly wage, tips perhaps not reported
  - b. Low induced impacts, hypothesize would buy local due to lower wages
2. Favors industry
  - a. Tourism - casino lake, highway system
  - b. Prime real estate
  - c. Employment availability - willing to work
  - d. Our local ag producers
3. Against industry
  - a. Fishing issues/regulations
  - b. Gas prices
  - c. Economy
4. Support?
  - a. Work with supply chain to get located here to increase indirect
  - b. **Tourism collaboration (8 votes)**

#### Arts, Entertainment, and Recreation

1. Surprises?
  - a. Number of employees
  - b. Positive shift-share
  - c. State parks, 2 in Mille Lacs
  - d. 50% of expenditures are for inputs
  - e. Indirect and induced
2. Favors industry
  - a. Location - woods and water
3. Against industry
  - a. Economy
  - b. Fuel costs
4. Support?

- 
- a. Support tourism groups
  - b. Taxes on individual businesses
  - c. **Play on assets / cross-county marketing – we don't focus on the whole county; lots of cool stuff in other parts of the county which is an opportunity for cross-county marketing (12 votes)**

### Concluding Discussion

Following the discussion of industries and the straw vote, the group reflected on what it learned during the session. Here are a few of those comments.

- We are more connected together than we thought. We need to express to others (lay people) this interconnectedness.
- We really need to work together to market the county and all our assets. We can work to encourage people to visit and explore all of Mille Lacs County.
- We should explore the inputs our businesses need and how we can get them here in Mille Lacs County.
- Information compiled here is useful, in the short-term and long-term.
- The road system (Highways 10 & 169) are both a positive (tourism) and a negative (traffic for moving manufactured goods)
- We should continue to develop our entrepreneurial skills in our schools.

## APPENDIX THREE: INDUSTRY ANALYSIS SLIDES

### FOOD AND HOSPITALITY: MILLE LACS COUNTY

- 732 employees
- \$35.7 million in output generated
- 55 establishments (QCEW)
- 51% of expenditures are for inputs
  - Real estate, wholesale trade, advertising
- 49% are for labor
  - Average weekly wage: \$195 (QCEW)
- This U.S. industry comprises establishments including full & limited-service restaurants, cafeterias, & buffets, snack bars, drinking places, mobile food, caterers and food service contractors

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### SHIFT-SHARE ANALYSIS

#### SHIFT-SHARE MILLE LACS COUNTY

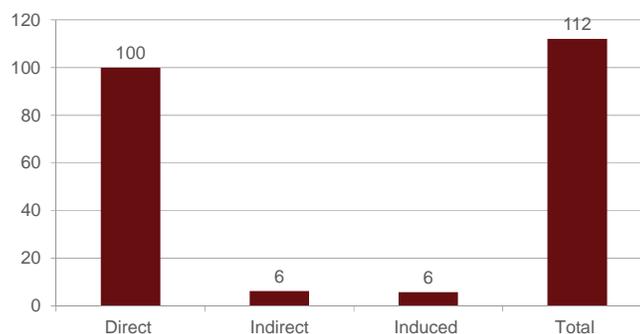
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Food services and drinking places	-18	20	133	-171	-950%

Source: EMSI, based on CEW data

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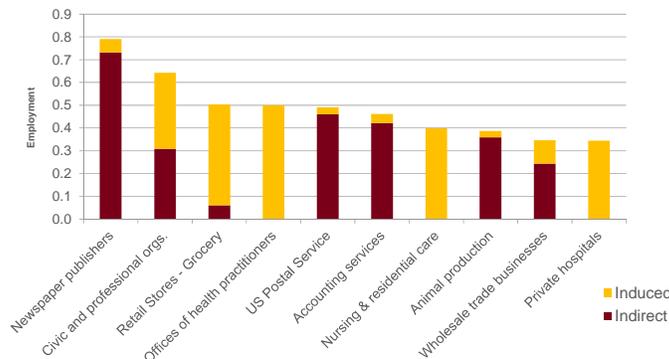
### FOOD AND HOSPITALITY: MILLE LACS COUNTY



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## FOOD AND HOSPITALITY: TOP INDUSTRIES AFFECTED



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## NURSING AND RESIDENTIAL CARE: MILLE LACS COUNTY

- 657 employees
- 13 establishments (QCEW)
- \$37.9 million in output generated
- 32% of expenditures for inputs
  - Real estate, insurance, professional consulting
- 68% of expenditures for labor
  - Average weekly wage: \$504 (QCEW)
- Includes nursing care, residential intellectual and development disability care, & assisting living facilities



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## SHIFT-SHARE ANALYSIS

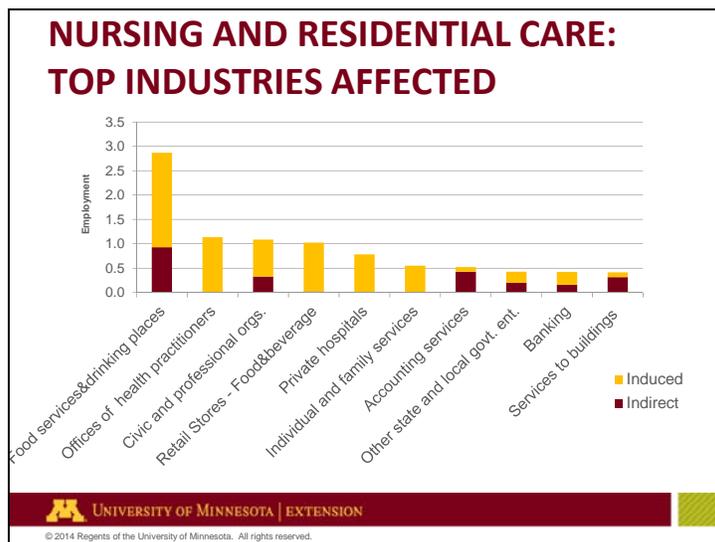
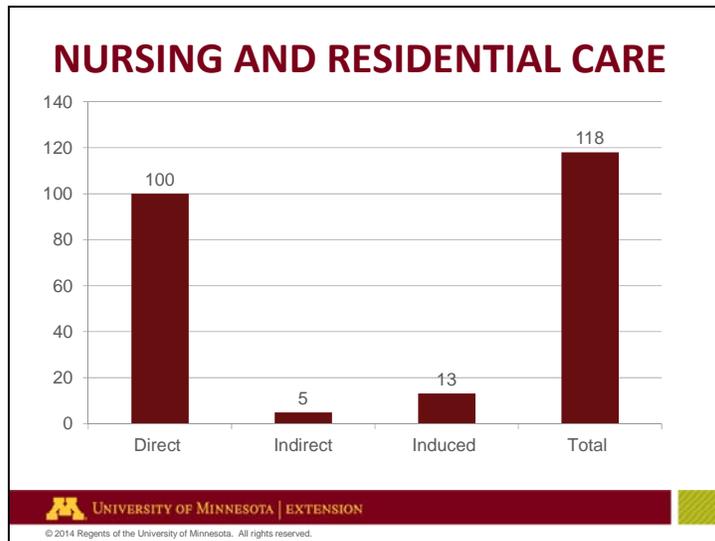
SHIFT-SHARE MILLE LACS COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Nursing and residential care facilities	87	18	103	-34	-39%

Source: EMSI, based on CEW data



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- ### VEGETABLE AND SPECIALTY CROPS: MILLE LACS CO.
- 11 employees
  - 762 farms, primarily livestock (Census of Agriculture)
  - \$2.8 million in output
  - 49% of expenditures are for inputs
    - Ag & support services, pesticides, real estate
  - 51% for labor
    - Average weekly wage: N/A
  - This U.S. industry comprises of establishments primarily engaged in potato and other vegetable and melon farming.
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## SHIFT-SHARE ANALYSIS

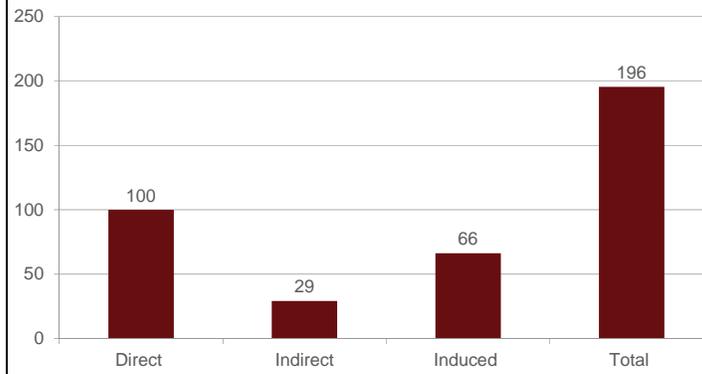
SHIFT-SHARE MILLE LACS COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Crop Production	-	0	0	4	-

Source: EMSI, based on CEW data

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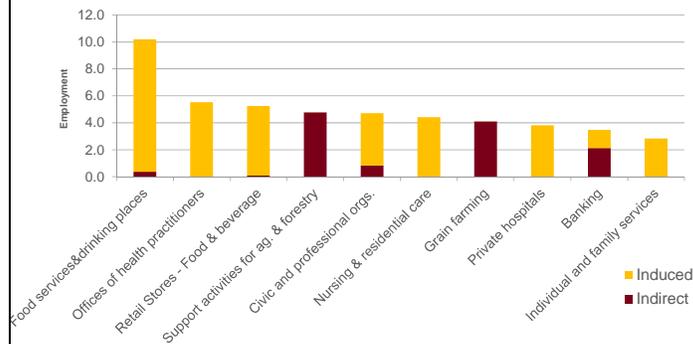
## VEGETABLE AND SPECIALTY CROPS



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## VEGETABLE AND SPECIALTY CROPS : TOP INDUSTRIES AFFECTED



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## TRANSPORTATION AND WAREHOUSING: MILLE LACS COUNTY

- 216 employees
- 17 establishments (QCEW)
- \$16.3 million of output
- 61% of expenditures for inputs
  - Petroleum products, couriers & messengers, truck transportation services
- 39% for labor
  - Average weekly wage: \$591(QCEW)
- Includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation: air, rail, water, road, and pipeline.

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## SHIFT-SHARE ANALYSIS

SHIFT-SHARE MILLE LACS COUNTY

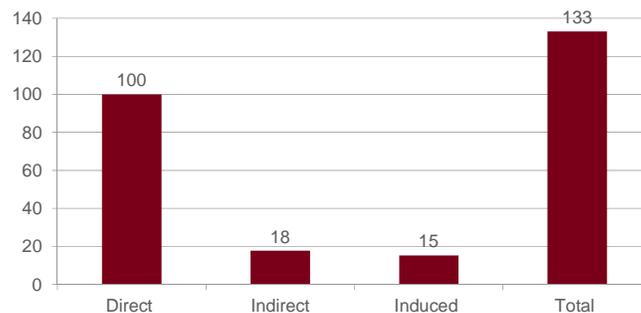
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Transportation and warehousing	10	4	-1	8	80%

Source: EMSI, based on CEW data

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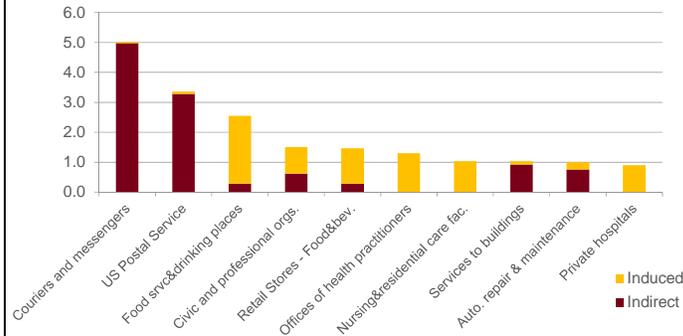
## TRUCK TRANSPORTATION: MILLE LACS COUNTY



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## TRUCK TRANSPORTATION : TOP INDUSTRIES AFFECTED



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## FABRICATED METAL MANUFACTURING: MILLE LACS COUNTY

- 78 employees
- 9 establishments (QCEW)
- \$13.5 million in output
- 75% of expenditures for inputs
  - Iron & steel, chemicals, paints and coatings
- 25% for labor
  - Average weekly wage: \$576 (QCEW)
- Primarily engaged in fabricated metal includes plate work and fabricated structure manufacturing; machine shops; turned product and screw, nut, and bolt manufacturing; and electroplating.



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## SHIFT-SHARE ANALYSIS

SHIFT-SHARE MILLE LACS COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Fabricated metal product manufacturing	-79	5	-25	-59	-74.7%

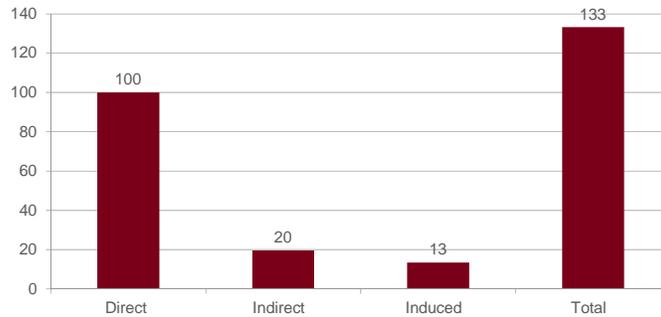
Source: EMSI, based on CEW data



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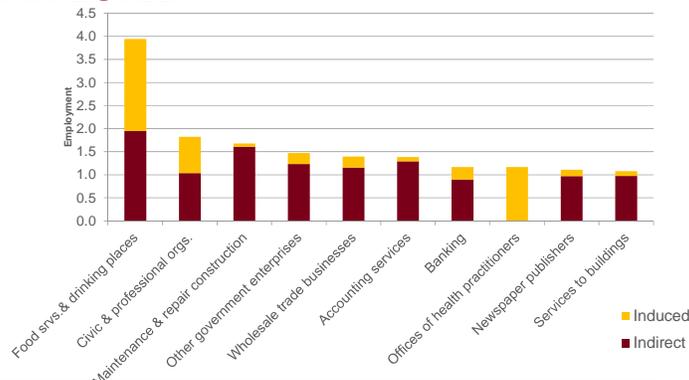
## FABRICATED METAL MANUFACTURING: MILLE LACS COUNTY



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## FABRICATED METAL: TOP INDUSTRIES AFFECTED



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## ARTS, ENTERTAINMENT & RECREATION : MILLE LACS COUNTY

- 229 employees in private employment; 1,200 in public employment (casino)
- 16 establishments (QCEW)
- \$11.4 million in output generated in *private* sector
- 50% of expenditures are for inputs
  - Real estate, advertising, and electricity
- 50% for labor
  - Average weekly wage: \$493 (QCEW)
- Includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. Does not include charter fishing.

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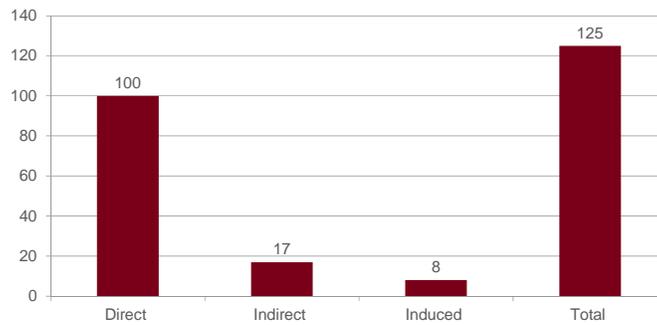
## SHIFT-SHARE ANALYSIS

### SHIFT-SHARE MILLE LACS COUNTY

	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Amusement and recreation industries	24	4	14	6	25%

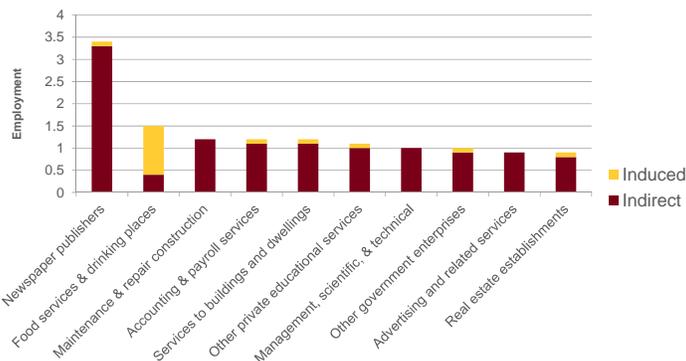
Source: EMSI, based on CEW data

## MUSEUMS, HISTORIC SITES, ZOOS, AND PARKS



Note: Does not measure tourism impacts.

## MUSEUMS, HISTORIC SITES, ZOOS AND PARKS: TOP INDUSTRIES AFFECTED



## MACHINERY MANUFACTURING: MILLE LACS COUNTY

- 55 employees
- 5 establishments (QCEW)
- \$36.5 million in output generated
- 74% of expenditures are for inputs
  - Motor vehicle parts, wholesale trade, fabricated metals
- 26% are for labor
  - Average weekly wage: \$893 (QCEW)
- Includes manufacturing motor vehicle parts and other transportation machinery equipment



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## SHIFT-SHARE ANALYSIS

### SHIFT-SHARE MILLE LACS COUNTY

	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Machinery manufacturing	-133	6	-45	-95	-71%

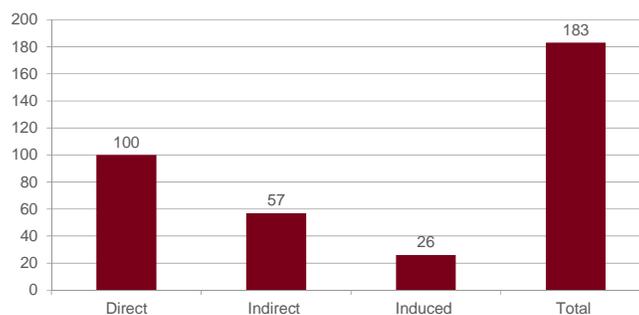
Source: EMSI, based on CEW data



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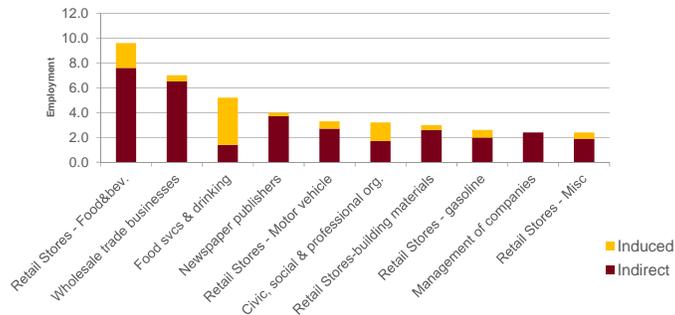
## MACHINERY MANUFACTURING: MILLE LACS COUNTY



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## MACHINERY MANUFACTURING: TOP INDUSTRIES AFFECTED



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## FURNITURE & RELATED MANUF.: MILLE LACS COUNTY

- 201 employees in Mille Lacs County
- 6 establishments (QCEW)
- \$56.2 million in output generated
- 71% of expenditures are for inputs
  - Lumber, wholesale trade, advertising
- 29% for labor
  - Average weekly wage: \$828 (QCEW)
- Establishments primarily engaged in manufacturing institutional-type furniture & those manufacturing wood or plastics-laminated-on wood kitchen cabinets, bathroom vanities, and countertops (except freestanding).

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## SHIFT-SHARE ANALYSIS

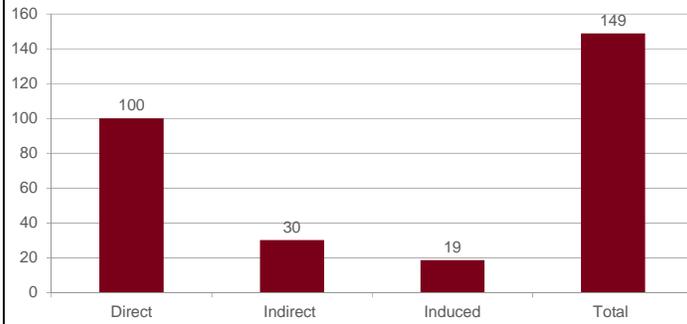
SHIFT-SHARE MILLE LACS COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Furniture and related product manufacturing	-88	9	-132	36	41%

Source: EMSI, based on CEW data

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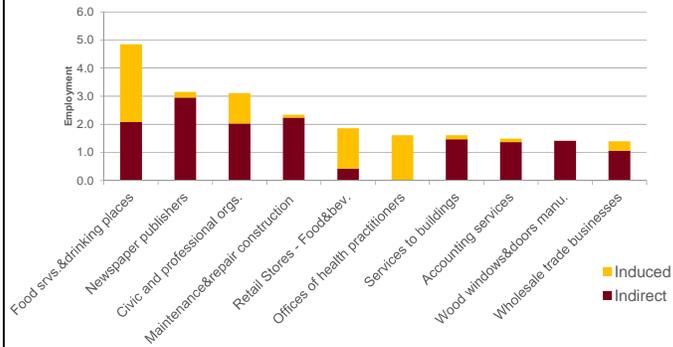
## WOOD KITCHEN CABINET & COUNTERTOP MANUFACTURING



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## KITCHEN CABINET MANUFACTURING: TOP INDUSTRIES AFFECTED



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