

10 South Region

10.1 Introduction

Driver industry and industry cluster analyses were conducted for each of the seven economic regions in the State of Wisconsin. This section provides a summary of the findings from the analysis for the South Region, as well as, detailed information related to each of the regional driver industries identified. For the purposes of this analysis, the South Region is defined to include the counties of Columbia, Crawford, Dane, Grant, Green, Iowa, Juneau, Lafayette, Marquette, Richland, Rock, Sauk, and Winnebago, IL.

The next sub-section provides an overview and summary of the findings from the analyses conducted. This is followed by detailed descriptions of each of the regional driver industries and their associated industry cluster. Next, perspectives on the state of manufacturing in the region appear in tabular form. And, finally, Wisconsin's manufacturing executives identify key issues affecting them in the region.

10.2 Summary of Regional Driver Industries & Industry Clusters

The driver analysis for the South Region identified 12 regional driver industries. These industries include:

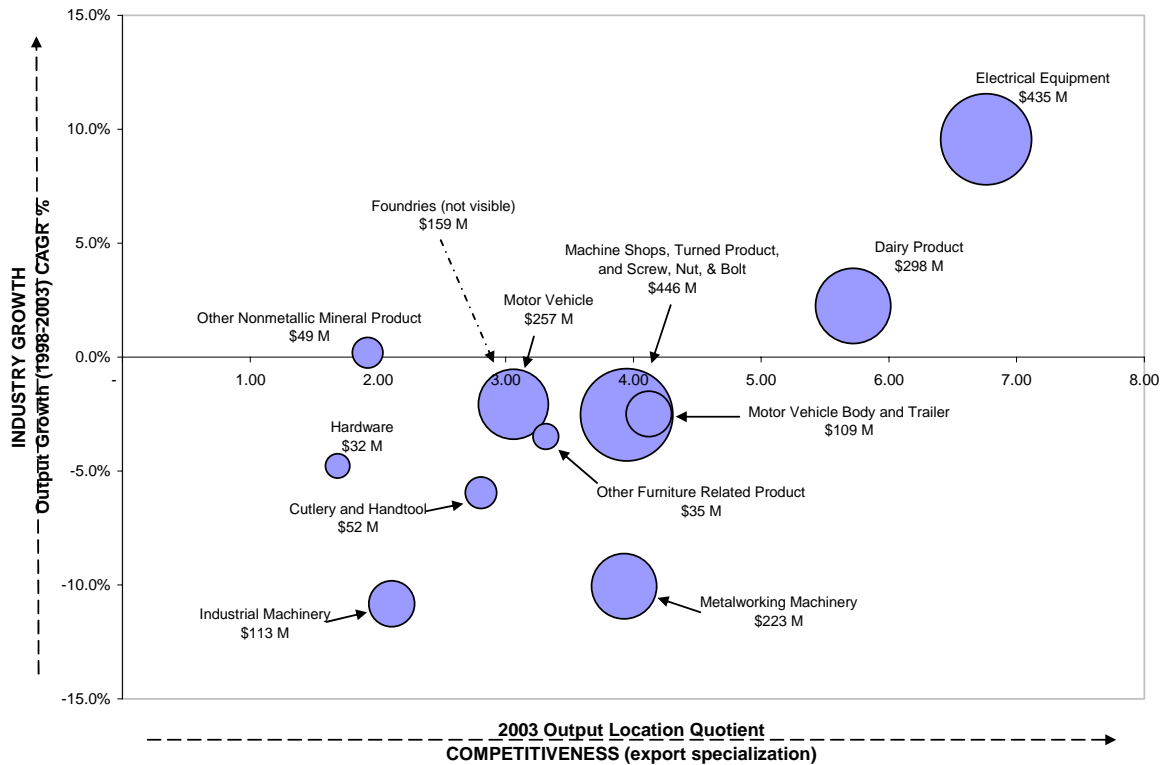
- 3115 Dairy Product Manufacturing
- 3279 Other Nonmetallic Mineral Product Manufacturing
- 3315 Foundries
- 3322 Cutlery and Handtool Manufacturing
- 3325 Hardware Manufacturing
- 3327 Machine Shops, Turned Product, and Screw, Nut, & Bolt Mfg.
- 3332 Industrial Machinery Manufacturing
- 3335 Metalworking Machinery Manufacturing
- 3353 Electrical Equipment Manufacturing
- 3361 Motor Vehicle Manufacturing
- 3362 Motor Vehicle Body and Trailer Manufacturing
- 3379 Other Furniture Related Product Manufacturing

10.2.1 How are the South Region's Driver Industries Doing?

This chart shows the relative economic health of driver industries measured by two factors – their “competitiveness” in terms of export orientation or specialization on the X axis (horizontal), and their “growth” on the Y axis (vertical). Competitiveness is measured in terms of the output location quotients which is a ratio of the industry's concentration in the region compared to the industry's concentration nationally. In general, a location quotient above 1 indicates that the industry is more concentrated in the region than it is nationally. This concentration suggests that the industry exports its product from the region and that the region offers competitive advantages to the industry over other areas throughout the country. An industry is increasingly more competitive as it moves to the right on the X axis. And the more competitive it is, the more it sells goods outside of its own region, thereby generating money for the region in which it operates.

Industry growth is measured in terms of compound annual growth rates over the last five years and is shown on the Y axis. An industry is growing faster as it moves upward from zero; it is declining if it is below zero. The area (size) of each circle represents the gross product of each industry and indicates the industry's relative size as compared to the other industries. Through this picturing of all of the region's drivers in one perspective, a sense of the overall strategies and services that will be needed in that region begins to emerge.

Figure 10-1 Overview of the South Region's Drivers



Interpretation: Only two of the South's driver industries have been growing in the last five years, but Dairy Products have been rising slowly, and Electrical Equipment shows solid growth. As we saw in Section 5, the Metal Working Machinery, Industrial Machinery, Cutlery, Hardware, and other metal industries are losing ground.

10.2.2 Driver Industry and Cluster Relationships in the South Region

For the Study, an industry cluster analysis was conducted for each of the driver industries. Tables 10-1 and 10-2 provide a summary of the results from these analyses and identify regional and national supplier industries that are common to multiple regional driver industries.

The supplier industries identified in Table 10-1 are found in the regional economy and provide goods or services to multiple driver industries. Many, in fact, are driver industries themselves. The importance of these industries to the overall competitiveness of the driver industries can not

be overstated. By providing quality goods and services to the driver industries, these supplier industries help the regional driver industries produce and deliver the products their consumers demand. Attempts to impact the competitiveness of the industries that supply inputs to multiple regional driver industries can indirectly impact the competitiveness of those driver industries.

Table 10-1 Regional & National Supplier Industries Common to Regional Driver Industries

NAICS	Title	Regional Driver**	Count of Drivers	
			Regional Suppliers	National Suppliers
42*	Wholesale Trade		12	12
484*	Truck Transportation		12	12
3261	Plastics Product Manufacturing		10	10
3312	Steel Product Manufacturing from Purchased Steel		9	5
3363	Motor Vehicle Parts Manufacturing		5	2
4931	Warehousing and Storage		4	4
3353	Electrical Equipment Manufacturing	X	4	4
3335	Metalworking Machinery Manufacturing	X	3	4
3219	Other Wood Product Manufacturing		3	4
3332	Industrial Machinery Manufacturing	X	3	3
3272	Glass and Glass Product Manufacturing		3	3
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	X	3	8
3344	Semiconductor and Other Electronic Component Manufacturing		3	3
5415	Computer Systems Design and Related Services		3	3
3326	Spring and Wire Product Manufacturing		2	5
2380	Specialty Trade Contractors		2	1
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing		2	3
3251	Basic Chemical Manufacturing		2	2
3359	Other Electrical Equipment & Component Mfg.		2	3
5411	Legal Services		2	3
3362	Motor Vehicle Body and Trailer Manufacturing	X	2	2
5413	Architectural, Engineering, and Related Services		2	3
*An explanation of the NAICS codes with asterisks is included in the Methodology section of the Appendices.				
**Not all of a Region's drivers are also suppliers. Those marked with an X are suppliers.				

Table 10-2 is similar to Table 10-1 in that it shows industries that supply inputs to multiple driver industries. The difference is that the industries identified in Table 10-2 either do not exist in the region or they are smaller industries that are not likely to be able to provide inputs at a sufficient scale to meet the needs of the driver industries. Attempts to attract or grow these industries within the region may help reduce the import of goods and services by the region's driver industries.

Table 10-2 National Supplier Industries Common to Regional Driver Industries

		<u>Count of Drivers</u>
NAICS	Title	National Suppliers
2123	Nonmetallic Mineral Mining and Quarrying	2
3132	Fabric Mills	2
3221	Pulp, Paper, and Paperboard Mills	3
3222	Converted Paper Product Manufacturing	8
3241	Petroleum and Coal Products Manufacturing	3
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	3
3255	Paint, Coating, and Adhesive Manufacturing	6
3259	Other Chemical Product and Preparation Manufacturing	2
3262	Rubber Product Manufacturing	6
3279	Other Nonmetallic Mineral Product Manufacturing	4
3311	Iron and Steel Mills and Ferroalloy Manufacturing	10
3313	Alumina and Aluminum Production and Processing	9
3314	Nonferrous Metal (except Aluminum) Production and Processing	6
3315	Foundries	7
3321	Forging and Stamping	7
3322	Cutlery and Handtool Manufacturing	4
3323	Architectural and Structural Metals Manufacturing	4
3324	Boiler, Tank, and Shipping Container Manufacturing	2
3325	Hardware Manufacturing	3
3328	Coating, Engraving, Heat Treating, and Allied Activities	3
3329	Other Fabricated Metal Product Manufacturing	6
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	2
3339	Other General Purpose Machinery Manufacturing	2
3361	Motor Vehicle Manufacturing	2
4821	Rail Transportation	2
483*	Water Transportation	3
5151	Radio and Television Broadcasting	2
517*	Telecommunications	5
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	3
5417	Scientific Research and Development Services	2
5418	Advertising and Related Services	3
5419	Other Professional, Scientific, and Technical Services	9
8111	Automotive Repair and Maintenance	2
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	6

*An explanation of the NAICS codes with asterisks is included in the Methodology section of the Appendices.

10.2.3 Filtering & Refinement of Quantitative Results

The analysis used to identify driver industries is a quantitative analysis based on secondary data and captures industries that exhibit some form of competitive advantage. While the model is extremely good at identifying regional driver industries, certain results often require qualitative insight to filter and refine the results. One way in which to identify industries either to remove or add as driver industries is to receive local perspectives on the lists of driver industries identified by the model. The following are responses to some of the comments related to the driver industries identified by the quantitative analysis for the South Region.

First, the “Biotech” firm Promega Corporation was identified as an important regional firm/industry. Promega Corporation’s primary NAICS code is “Industry 3254: Pharmaceutical and Medicine Manufacturing.” This industry experienced significant growth in terms of both gross product and employment, but it is very small in terms of its relative concentration in the region as compared to the nation as a whole. Because of the nature of this industry, its overall impact may be understated by the data that are available. In general, the industry is growing and evolving rapidly, regionally and nationally. What is not clear is the effect that it is having on other regional industries which may be evolving along with it in order to supply the inputs it demands. It is possible that the industry enjoys certain competitive advantages for future production due to the suppliers and quality of the labor force available in the region. At this point, however, these advantages do not appear in the data.

Second, vegetable canning and food manufacturing were identified as important regional industries. In the region, both “Industry 3114: Fruit and Vegetable Preserving and Specialty Food Manufacturing” and “Industry 3116: Animal Slaughtering and Processing” are relatively large industries in terms of both employment and gross product, but when compared to the nation as whole, they are not overly concentrated in the region. One of the confusing issues related to these industries is due to the characteristics of the larger companies that have production operations in the region. Three specific firms were identified as important regional employers: Frito Lay, Hormel, and Oscar Mayer (Kraft). According to all the information available, each of these companies appear to operate different types of plants in the region and some of the different plants report information in different NAICS industries. For example, Frito Lay reports operations in “Industry 3119: Other Food Manufacturing,” “Industry 4244: Grocery and Related Product Wholesalers,” and “Industry 4931: Warehousing and Storage.” This suggests both that the company itself is important as a large employer and that the company owns and operates its own suppliers.

Third, “container products for food operations” and “plastics” were identified as being important industries. After investigating the industry classifications for the specific firms identified (Flambeau, Inc.; Teel Plastics, Inc.; and Freedom Plastics, Inc.), most of these firms were in the “Industry 3261: Plastics Products Manufacturing.” This industry is clearly an important regional employer because it employs a large number of workers and has a large gross product. It is not, however, overly concentrated in the region as compared to the nation as a whole. For the most part, the firms in this industry are suppliers to other driver industries and directly impact the competitiveness of the industries they supply.

Unlike the other firms identified above, EVCO Plastics was found not to be included in the Plastics Products Manufacturing industry. Rather, it was listed in “Industry 3391: Medical Equipment and Supplies Manufacturing,” and is possibly a supplier to the Pharmaceutical and Medicine Manufacturing industry discussed earlier.

10.3 Detailed Descriptions of the Regional Driver Industries

10.3.1 Driver Industry Definitions

Definitions of Driver Industries

3115 Dairy Product Manufacturing

This industry group comprises establishments that manufacture dairy products from raw milk, processed milk, and dairy substitutes.

31151 Dairy Product (except Frozen) Manufacturing

31152 Ice Cream and Frozen Dessert Manufacturing

3279 Other Nonmetallic Mineral Product Manufacturing

The Other Nonmetallic Mineral Product Manufacturing industry group comprises establishments manufacturing nonmetallic mineral products (except clay products, refractory products, glass products, cement and concrete products, lime, and gypsum products).

32791 Abrasive Product Manufacturing

32799 All Other Nonmetallic Mineral Product Manufacturing

3315 Foundries

This industry group comprises establishments primarily engaged in pouring molten metal into molds or dies to form castings. Establishments making castings and further manufacturing, such as machining or assembling, a specific manufactured product are classified in the industry of the finished product. Foundries may perform operations, such as cleaning and deburring, on the castings they manufacture. More involved processes, such as tapping, threading, milling, or machining to tight tolerances, that transform castings into more finished products are classified elsewhere in the manufacturing sector based on the product being made.

Establishments in this industry group make castings from purchased metals or in integrated secondary smelting and casting facilities. When the production of primary metals is combined with making castings, the establishment is classified in 331 with the primary metal being made.

332 Fabricated Metal Product Manufacturing (Partial)

Industries in the Fabricated Metal Product Manufacturing subsector transform metal into intermediate or end products, other than machinery, computers and electronics, and metal furniture or treating metals and metal formed products fabricated elsewhere. Important fabricated metal processes are forging, stamping, bending, forming, and machining, used to shape individual pieces of metal; and other processes, such as welding and assembling, used to join separate parts together. Establishments in this subsector may use one of these processes or a combination of these processes.

3322 Cutlery and Handtool Manufacturing

3325 Hardware Manufacturing

3327 Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing

333 Machinery Manufacturing (Partial)

Industries in the Machinery Manufacturing subsector create end products that apply mechanical force, for example, the application of gears and levers, to perform work. Some important processes for the manufacture of machinery are forging, stamping, bending, forming, and machining that are used to shape individual pieces of metal. Processes, such as welding and assembling are used to join separate parts together. Although these processes are similar to those used in metal fabricating establishments, machinery manufacturing is different because it typically employs multiple metal forming processes in manufacturing the various parts of the machine. Moreover, complex assembly operations are an inherent part of the production process.

3332 Industrial Machinery Manufacturing

3335 Metalworking Machinery Manufacturing

3353 Electrical Equipment Manufacturing

This industry comprises establishments primarily engaged in manufacturing power, distribution, and specialty transformers; electric motors, generators, and motor generator sets; switchgear and switchboard apparatus; relays; and industrial controls.

336 Transportation Equipment Manufacturing (Partial)

Industries in the Transportation Equipment Manufacturing subsector produce equipment for transporting people and goods. Transportation equipment is a type of machinery. An entire subsector is devoted to this activity because of the significance of its economic size in all three North American countries.

Establishments in this subsector utilize production processes similar to those of other machinery manufacturing establishments—bending, forming, welding, machining, and assembling metal or plastic parts into components and finished products. However, the assembly of components and subassemblies and their further assembly into finished vehicles tends to be a more common production process in this subsector than in the Machinery Manufacturing subsector.

NAICS has industry groups for the manufacture of equipment for each mode of transport - road, rail, air and water. Parts for motor vehicles warrant a separate industry group because of their importance and because parts manufacture requires less assembly, and the establishments that manufacture only parts are not as vertically integrated as those that make complete vehicles.

Land use motor vehicle equipment not designed for highway operation (e.g., agricultural equipment, construction equipment, and materials handling equipment) is classified in the appropriate NAICS subsector based on the type and use of the equipment.

3361 Motor Vehicle Manufacturing

3362 Motor Vehicle Body and Trailer Manufacturing

3379 Other Furniture Related Product Manufacturing

This industry group comprises establishments manufacturing furniture related products, such as mattresses, blinds, and shades.

10.3.2 Industry Clusters

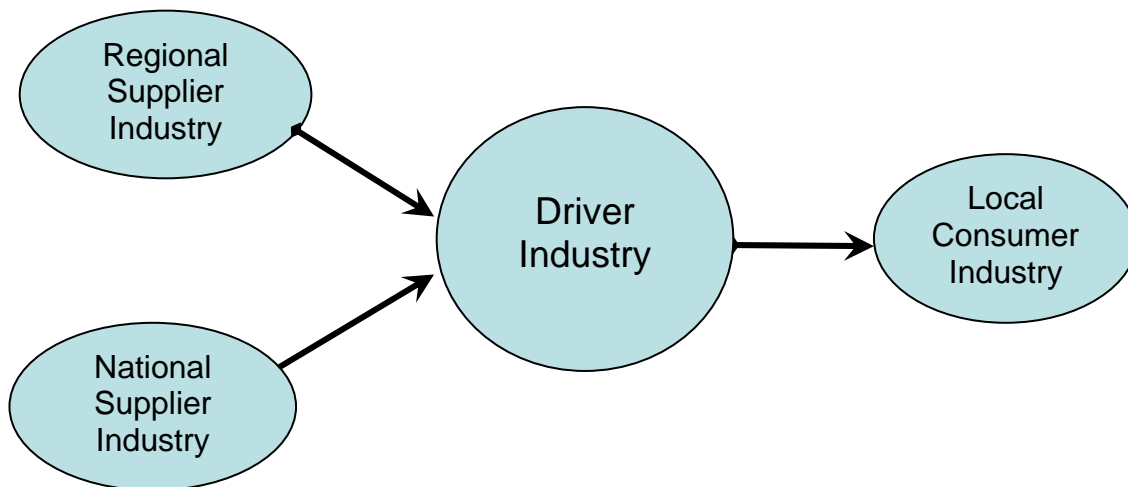
Industries contained within an industry cluster are related to driver industries in three ways, two supplier relationships and one consumer relationship.

Supplier relationships are defined by the backward linkages that a driver industry has with either (1) other regional industries (Regional Suppliers) or (2) industries not located within the region (National Supplier). Both types of supplier relationships are based on linkages identified using information from input-output tables from the IMPLAN model. For supplier relationships with other regional industries, the IMPLAN model is ‘regionalized’ to reflect the industries that exist within the region. For supplier relationships with industries not located within the region, the national IMPLAN model is used.

For both types of supplier relationships, only the most significant supplier industries are listed. The significance of the supplier industry is based on the relative amount of the driver industry’s total outlay that is used to purchase goods or services from the supplier industry. In the case where supplier industries appear in the lists for both types of supplier industries, the specific industry is removed from the list of national supplier industries.

The consumer industries are identified by reversing the relationship used to identify supplier industries. The consumer industries are those industries to which a driver industry sells a significant portion of its total output.

Figure 10-2 Industry Clusters



Industry Clusters

NB: An explanation of the NAICS codes with asterisks is included in the Methodology section of the Appendices.

3115 Dairy Product Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
FR	Farms	3222	Converted Paper Product Manufacturing
42*	Wholesale Trade	3112	Grain and Oilseed Milling
3332	Industrial Machinery Manufacturing	3113	Sugar and Confectionery Product Manufacturing
3115	Dairy Product Manufacturing	481*	Air Transportation
4931	Warehousing and Storage	3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
3261	Plastics Product Manufacturing	5419	Other Professional, Scientific, and Technical Services
3119	Other Food Manufacturing	5324	Commercial and Industrial Machinery and Equipment Rental and Leasing
484*	Truck Transportation	8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3324	Boiler, Tank, and Shipping Container Manufacturing	3219	Other Wood Product Manufacturing
5411	Legal Services		
Consumer Industries - Typical Regional Industry			
722*	Food services and drinking places		
3115	Dairy Product Manufacturing		
3254	Pharmaceutical and Medicine Manufacturing		
6244	Child Day Care Services		

3279 Other Nonmetallic Mineral Product Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
484*	Truck Transportation	3273	Cement and Concrete Product Manufacturing
3272	Glass and Glass Product Manufacturing	3311	Iron and Steel Mills and Ferroalloy Manufacturing
42*	Wholesale Trade	3279	Other Nonmetallic Mineral Product Manufacturing
3219	Other Wood Product Manufacturing	3221	Pulp, Paper, and Paperboard Mills
3261	Plastics Product Manufacturing	2212	Natural Gas Distribution
3251	Basic Chemical Manufacturing	3255	Paint, Coating, and Adhesive Manufacturing
2123	Nonmetallic Mineral Mining and Quarrying	3322	Cutlery and Handtool Manufacturing
		3132	Fabric Mills

Supplier Industries - Typical Regional Industry

Supplier Industries - Typical National Industry

8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing

Consumer Industries - Typical Regional Industry

3363	Motor Vehicle Parts Manufacturing
722*	Food services and drinking places
3221	Pulp, Paper, and Paperboard Mills
3255	Paint, Coating, and Adhesive Manufacturing
3222	Converted Paper Product Manufacturing
3379	Other Furniture Related Product Manufacturing
2360	Construction of Buildings
3361	Motor Vehicle Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
3115	Dairy Product Manufacturing

3315 Foundries

Supplier Industries - Typical Regional Industry

Supplier Industries - Typical National Industry

42*	Wholesale Trade
484*	Truck Transportation
5419	Other Professional, Scientific, and Technical Services
3335	Metalworking Machinery Manufacturing
3332	Industrial Machinery Manufacturing
3363	Motor Vehicle Parts Manufacturing
3328	Coating, Engraving, Heat Treating, and Allied Activities
3312	Steel Product Manufacturing from Purchased Steel

3313	Alumina and Aluminum Production and Processing
3314	Nonferrous Metal (except Aluminum) Production and Processing
3315	Foundries
3311	Iron and Steel Mills and Ferroalloy Manufacturing
2122	Metal Ore Mining
3329	Other Fabricated Metal Product Manufacturing
3222	Converted Paper Product Manufacturing
3321	Forging and Stamping
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
2123	Nonmetallic Mineral Mining and Quarrying

Consumer Industries - Typical Regional Industry

3363	Motor Vehicle Parts Manufacturing
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Consumer Industries - Typical Regional Industry

3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
3329	Other Fabricated Metal Product Manufacturing
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing
2360	Construction of Buildings
3352	Household Appliance Manufacturing
3339	Other General Purpose Machinery Manufacturing

3322 Cutlery and Handtool Manufacture

Supplier Industries - Typical Regional Industry

42*	Wholesale Trade
3312	Steel Product Manufacturing from Purchased Steel
484*	Truck Transportation
3261	Plastics Product Manufacturing

Supplier Industries - Typical National Industry

3311	Iron and Steel Mills and Ferroalloy Manufacturing
3313	Alumina and Aluminum Production and Processing
3329	Other Fabricated Metal Product Manufacturing
3321	Forging and Stamping
3222	Converted Paper Product Manufacturing
483*	Water Transportation
3315	Foundries
3322	Cutlery and Handtool Manufacturing
3241	Petroleum and Coal Products Manufacturing
5418	Advertising and Related Services

Consumer Industries - Typical Regional Industry

3322	Cutlery and Handtool Manufacturing
3121	Beverage Manufacturing
3332	Industrial Machinery Manufacturing
FR	Farms
8111	Automotive Repair and Maintenance
3221	Pulp, Paper, and Paperboard Mills
722*	Food services and drinking places
8121	Personal Care Services
3222	Converted Paper Product Manufacturing
2360	Construction of Buildings

3325 Hardware Manufacturing

Supplier Industries - Typical Regional Industry

Supplier Industries - Typical National Industry

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
42*	Wholesale Trade	3311	Iron and Steel Mills and Ferroalloy Manufacturing
3312	Steel Product Manufacturing from Purchased Steel	3321	Forging and Stamping
3261	Plastics Product Manufacturing	3325	Hardware Manufacturing
484*	Truck Transportation	3222	Converted Paper Product Manufacturing
3353	Electrical Equipment Manufacturing	3315	Foundries
		3322	Cutlery and Handtool Manufacturing
		3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
		3314	Nonferrous Metal (except Aluminum) Production and Processing
		3326	Spring and Wire Product Manufacturing
		3313	Alumina and Aluminum Production and Processing

Consumer Industries - Typical Regional Industry	
3361	Motor Vehicle Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
2360	Construction of Buildings
3352	Household Appliance Manufacturing
3219	Other Wood Product Manufacturing
8111	Automotive Repair and Maintenance
3261	Plastics Product Manufacturing
3359	Other Electrical Equipment and Component Manufacturing

3327 Machine Shops, Turned products, and Screw, Nut, and Bolt Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
42*	Wholesale Trade	3311	Iron and Steel Mills and Ferroalloy Manufacturing
5415	Computer Systems Design and Related Services	3325	Hardware Manufacturing
3326	Spring and Wire Product Manufacturing	3315	Foundries
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	3314	Nonferrous Metal (except Aluminum) Production and Processing
3312	Steel Product Manufacturing from Purchased Steel	3313	Alumina and Aluminum Production and Processing
3335	Metalworking Machinery Manufacturing	5324	Commercial and Industrial Machinery and Equipment Rental and Leasing
3363	Motor Vehicle Parts Manufacturing	5419	Other Professional, Scientific, and Technical Services

Supplier Industries - Typical Regional Industry

484* Truck Transportation

2380 Specialty Trade Contractors

Consumer Industries - Typical Regional Industry

3363 Motor Vehicle Parts Manufacturing

3361 Motor Vehicle Manufacturing

3119 Other Food Manufacturing

3221 Pulp, Paper, and Paperboard Mills

3327 Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing

GVSL* State and Local Government

3329 Other Fabricated Metal Product Manufacturing

3261 Plastics Product Manufacturing

3332 Industrial Machinery Manufacturing

3344 Semiconductor and Other Electronic Component Manufacturing

Supplier Industries - Typical National Industry

8113 Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance

3332 Industrial Machinery Manufacturing

Supplier Industries - Typical Regional Industry

42* Wholesale Trade

3332 Industrial Machinery Manufacturing

3261 Plastics Product Manufacturing

5415 Computer Systems Design and Related Services

3312 Steel Product Manufacturing from Purchased Steel

3344 Semiconductor and Other Electronic Component Manufacturing

3327 Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing

484* Truck Transportation

3251 Basic Chemical Manufacturing

3329 Other Fabricated Metal Product Manufacturing

3353 Electrical Equipment Manufacturing

Supplier Industries - Typical National Industry

3328 Coating, Engraving, Heat Treating, and Allied Activities

3311 Iron and Steel Mills and Ferroalloy Manufacturing

3334 Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing

3322 Cutlery and Handtool Manufacturing

3321 Forging and Stamping

3279 Other Nonmetallic Mineral Product Manufacturing

3315 Foundries

3255 Paint, Coating, and Adhesive Manufacturing

3359 Other Electrical Equipment and Component Manufacturing

3339 Other General Purpose Machinery Manufacturing

Consumer Industries - Typical Regional Industry

3132	Fabric Mills
3115	Dairy Product Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3231	Printing and Related Support Activities
3344	Semiconductor and Other Electronic Component Manufacturing
3332	Industrial Machinery Manufacturing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3221	Pulp, Paper, and Paperboard Mills
3251	Basic Chemical Manufacturing
3133	Textile and Fabric Finishing and Fabric Coating Mills

3335 Metalworking Machinery Manufacture

Supplier Industries - Typical Regional Industry	Supplier Industries - Typical National Industry
42* Wholesale Trade	3314 Nonferrous Metal (except Aluminum) Production and Processing
3261 Plastics Product Manufacturing	3311 Iron and Steel Mills and Ferroalloy Manufacturing
5415 Computer Systems Design and Related Services	3315 Foundries
3335 Metalworking Machinery Manufacturing	3321 Forging and Stamping
3353 Electrical Equipment Manufacturing	3255 Paint, Coating, and Adhesive Manufacturing
484* Truck Transportation	3279 Other Nonmetallic Mineral Product Manufacturing
2380 Specialty Trade Contractors	3339 Other General Purpose Machinery Manufacturing
3312 Steel Product Manufacturing from Purchased Steel	3329 Other Fabricated Metal Product Manufacturing
3344 Semiconductor and Other Electronic Component Manufacturing	3323 Architectural and Structural Metals Manufacturing
517* Telecommunications	5324 Commercial and Industrial Machinery and Equipment Rental and Leasing
3327 Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	
4931 Warehousing and Storage	
3363 Motor Vehicle Parts Manufacturing	
3359 Other Electrical Equipment and Component Manufacturing	

Consumer Industries - Typical Regional Industry

Consumer Industries - Typical Regional Industry

3363	Motor Vehicle Parts Manufacturing
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
3335	Metalworking Machinery Manufacturing
3315	Foundries
3323	Architectural and Structural Metals Manufacturing
3261	Plastics Product Manufacturing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3332	Industrial Machinery Manufacturing
3361	Motor Vehicle Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing

3353 Electrical Equipment Manufacturing

Supplier Industries - Typical Regional Industry

42*	Wholesale Trade
3344	Semiconductor and Other Electronic Component Manufacturing
3353	Electrical Equipment Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
3261	Plastics Product Manufacturing
3359	Other Electrical Equipment and Component Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
484*	Truck Transportation
4931	Warehousing and Storage
5413	Architectural, Engineering, and Related Services

Supplier Industries - Typical National Industry

3255	Paint, Coating, and Adhesive Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3321	Forging and Stamping
3314	Nonferrous Metal (except Aluminum) Production and Processing
3315	Foundries
3241	Petroleum and Coal Products Manufacturing
3271	Clay Product and Refractory Manufacturing
3329	Other Fabricated Metal Product Manufacturing
3323	Architectural and Structural Metals Manufacturing
3221	Pulp, Paper, and Paperboard Mills

Consumer Industries - Typical Regional Industry

3399	Other Miscellaneous Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
2360	Construction of Buildings
3363	Motor Vehicle Parts Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3219	Other Wood Product Manufacturing

Consumer Industries - Typical Regional Industry

3353	Electrical Equipment Manufacturing
3352	Household Appliance Manufacturing
3261	Plastics Product Manufacturing
3361	Motor Vehicle Manufacturing

3361 Motor Vehicle Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
3363	Motor Vehicle Parts Manufacturing	3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
42*	Wholesale Trade	5413	Architectural, Engineering, and Related Services
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	5414	Specialized Design Services
8111	Automotive Repair and Maintenance	3255	Paint, Coating, and Adhesive Manufacturing
3261	Plastics Product Manufacturing	3361	Motor Vehicle Manufacturing
484*	Truck Transportation	3262	Rubber Product Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing	3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
3272	Glass and Glass Product Manufacturing		

Consumer Industries - Typical Regional Industry

3361	Motor Vehicle Manufacturing
3363	Motor Vehicle Parts Manufacturing
8111	Automotive Repair and Maintenance
3362	Motor Vehicle Body and Trailer Manufacturing
484*	Truck Transportation

3362 Motor Vehicle Body and Trailer Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
3363	Motor Vehicle Parts Manufacturing	3329	Other Fabricated Metal Product Manufacturing
42*	Wholesale Trade	3311	Iron and Steel Mills and Ferroalloy Manufacturing
484*	Truck Transportation	3361	Motor Vehicle Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing	3313	Alumina and Aluminum Production and Processing
3272	Glass and Glass Product Manufacturing	3321	Forging and Stamping
3312	Steel Product Manufacturing from Purchased Steel	3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
3211	Sawmills and Wood Preservation	3359	Other Electrical Equipment and Component Manufacturing
5413	Architectural, Engineering, and Related	3262	Rubber Product Manufacturing

Supplier Industries - Typical Regional Industry

Services
 3261 Plastics Product Manufacturing
 4931 Warehousing and Storage
 3219 Other Wood Product Manufacturing

Supplier Industries - Typical National Industry

3325 Hardware Manufacturing
 3369 Other Transportation Equipment Manufacturing

Consumer Industries - Typical Regional Industry

3362 Motor Vehicle Body and Trailer Manufacturing
 3361 Motor Vehicle Manufacturing
 8111 Automotive Repair and Maintenance

3379 Other Furniture Related Product Manufacture

Supplier Industries - Typical Regional Industry

42* Wholesale Trade
 3261 Plastics Product Manufacturing
 484* Truck Transportation
 3326 Spring and Wire Product Manufacturing
 3231 Printing and Related Support Activities
 3219 Other Wood Product Manufacturing
 5418 Advertising and Related Services
 5111 Newspaper, Periodical, Book, and Directory Publishers
 5151 Radio and Television Broadcasting
 3312 Steel Product Manufacturing from Purchased Steel
 3379 Other Furniture Related Product Manufacturing

Supplier Industries - Typical National Industry

3262 Rubber Product Manufacturing
 3149 Other Textile Product Mills
 3311 Iron and Steel Mills and Ferroalloy Manufacturing
 3313 Alumina and Aluminum Production and Processing
 3132 Fabric Mills
 3222 Converted Paper Product Manufacturing
 3133 Textile and Fabric Finishing and Fabric Coating Mills
 517* Telecommunications
 3131 Fiber, Yarn, and Thread Mills
 3314 Nonferrous Metal (except Aluminum) Production and Processing

Consumer Industries - Typical Regional Industry

3379 Other Furniture Related Product Manufacturing
 3343 Audio and Video Equipment Manufacturing
 2360 Construction of Buildings
 622* Hospitals
 621a* Offices of physicians, dentists, and other health practitioners
 3219 Other Wood Product Manufacturing
 3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing
 2380 Specialty Trade Contractors
 623* Nursing and residential care facilities

**Consumer Industries - Typical Regional
Industry**

621b* Other ambulatory health care services

3391 Medical Equipment and Supplies
Manufacturing

10.3.3 Top Firms by Driver Industry in the South Region

3115 Dairy Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Sites	All Sites				
Mille Lacs Gourmet Foods	1,300	1,924	Branch	Private	500MM-999.9MM	1946
Wisconsin Cheeseman Inc	424	1,924	Parent	Private		1946
AMPI	400	1,796	Branch	Private	100MM-499.9MM	1972
Schoep's Ice Cream Co Inc	200	350	Branch	Private	50MM-99.9MM	
Dean Foods	150	33,805	Branch	Public	50MM-99.9MM	1985
Grande Cheese Co	150	800	Branch	Private	50MM-99.9MM	1941
Wisconsin Cheese Group	150	153	Branch	Private	50MM-99.9MM	1985
Schoeps Ice Cream Co Inc	150	350	Parent	Private		1928
Foremost Farms USA Cooperative	140	1,467	Parent	Private		1995
Lactalis USA Inc	120	-	Single	Private	50MM-99.9MM	1960
Lactoprot USA Inc	120	-	Single	Private	50MM-99.9MM	1890
Foremost Farms USA	100	1,467	Branch	Private	25MM-49.9MM	1993
Hilltop Valley Dairy LLC	100	-	Single	Private	25MM-49.9MM	2001
Madison Dairy Produce Co	100	6,861	Branch	Private	50MM-99.9MM	1915
Roth Kase USA Ltd	100	-	Single	Private	50MM-99.9MM	1990
Saputo Cheese USA Inc	70	1,745	Branch	Private	25MM-49.9MM	1984
Foremost Farms USA Cooperative	65	1,467	Branch	Private	25MM-49.9MM	1963
Meister Cheese Co	55	-	Single	Private	25MM-49.9MM	1923
Foremost Farms USA	50	1,467	Branch	Private	25MM-49.9MM	1977
Montchevre-Betin Inc	50	-	Single	Private	25MM-49.9MM	1989
Zander's Creamery Inc	45	-	Single	Private	25MM-49.9MM	1870
Klondike Cheese Co	40	-	Single	Private	10MM-24.9MM	1925
Chula Vista Cheese Co	35	235	Branch	Private	10MM-24.9MM	1985
Cedar Grove Cheese Inc	30	-	Single	Private	10MM-24.9MM	1900
Torkelson Springdale Cheese	30	-	Single	Private	10MM-24.9MM	1949
Wisconsin Pride Cheese Co	28	50	Branch	Private	10MM-24.9MM	1986
Salemville Cheese Coop Cambria	26	-	Single	Private	10MM-24.9MM	1984
Arena Cheese	25	-	Single	Private	10MM-24.9MM	1981
Zimmerman Cheese Inc	25	-	Single	Private	10MM-24.9MM	1979
Carr Valley Cheese Co Inc	22	50	Parent	Private		1986
Chalet Cheese Co-Op	20	-	Single	Private	10MM-24.9MM	1885
Saputo Cheese USA Inc	20	1,745	Branch	Private	10MM-24.9MM	1981
Swiss Valley Farms Co	20	668	Branch	Private	10MM-24.9MM	1984
International Ingredient Corp	20	97	Branch	Private	10MM-24.9MM	1993

3279 Other Nonmetallic Mineral Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Sites	All Sites				
3M	500	71,847	Branch	Public	100MM-499.9MM	1967
Universal Silencer	65	14,589	Branch	Public	10MM-24.9MM	1959
Bjoin Limestone Inc	40	-	Single	Private	1MM-4.9MM	1973
Quarra Stone Co LLC	40	-	Single	Private	1MM-4.9MM	1989

3315 Foundries

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Grede Foundries Inc	825	3,246	Branch	Private	100MM-499.9MM	1953
Madison-Kipp Corp	600	-	Single	Private	50MM-99.9MM	1898
Citation Corp	180	5,373	Branch	Private	25MM-49.9MM	1930
Fall River Group Inc	160	235	Parent	Private		1953
Richland Center Foundry	150	-	Single	Private	10MM-24.9MM	1964
Berntsen Brass & Aluminum	100	-	Single	Private	5MM-9.9MM	1946
Stroh Controls Inc	50	-	Single	Private	5MM-9.9MM	1994

3322 Cutlery and Handtool Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Sites	All Sites				
Fiskars Consumer Products Inc	300	1,736	Branch	Private	25MM-49.9MM	1990
Wisconsin Knife Works Inc	100	-	Single	Private	10MM-24.9MM	1926
VNE Corp	65	-	Single	Private	5MM-9.9MM	1981

3325 Hardware Manufacturing

*No firms were identified in database. (This study used the Harris Infosource database. Harris is a fully owned subsidiary of Dun & Bradstreet. Companies providing data to D&B for the Harris database do so voluntarily. Therefore, the information is incomplete for this item because eligible firms chose not to participate.)

3327 Machine Shops, Turned Product, and Screw, Nut, & Bolt Mfg.

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
MPI Wisconsin Fineblanking	230	2,371	Branch	Private	10MM-24.9MM	1977
HyPro Inc	120	430	Branch	Private	10MM-24.9MM	1997
Brunner Manufacturing Inc	120	220	Parent	Private		1952
E K Machine Co Inc	100	-	Single	Private	5MM-9.9MM	1970
Latitude Corp	100	-	Single	Private	5MM-9.9MM	1985
Elroy Manufacturing	100	220	Branch	Private	10MM-24.9MM	
Addison Machine Engineering	60	165	Branch	Private	5MM-9.9MM	1977
Quality Machining Inc	60	-	Single	Private	5MM-9.9MM	1984
Necedah Screw Machine Products	55	-	Single	Private	5MM-9.9MM	1963
Endres Manufacturing Co Inc	50	-	Single	Private	1MM-4.9MM	1926
Production Machine Enterprises	50	-	Single	Private	1MM-4.9MM	1978
Cuba City Machine Inc	43	-	Single	Private	1MM-4.9MM	1974
Kelsch Machine Corp	40	-	Single	Private	1MM-4.9MM	1950
ITW Shakeproof	40	24,632	Branch	Public	5MM-9.9MM	1912
Daleo Machining Inc	35	-	Single	Private	1MM-4.9MM	1989
SCA Packaging North Amercian	32	2,296	Branch	Private	1MM-4.9MM	1962
Beloit Special Machining Co	30	-	Single	Private	1MM-4.9MM	1978
Richland Ltd	30	-	Single	Private	1MM-4.9MM	1970
T W Design & Manufacturing LLC	30	-	Single	Private	1MM-4.9MM	1989
ITW Shakeproof Automotive	30	24,632	Branch	Public	1MM-4.9MM	1983
Shakeproof Automotive	30	24,632	Branch	Public	1MM-4.9MM	1989
Draeving Machine & Tool Inc	25	-	Single	Private	1MM-4.9MM	1971
Middleton Machining & Welding	25	-	Single	Private	1MM-4.9MM	1990

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Webber Metal Products Inc	24	199	Branch	Private	1MM-4.9MM	1993
Westfield Machining & Mfg	21	-	Single	Private	1MM-4.9MM	1980
Metal Solutions Inc	20	-	Single	Private	1MM-4.9MM	1960

3332 Industrial Machinery Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Lyco Manufacturing Inc	70	-	Single	Private	10MM-24.9MM	1972
Yates-American Machine Co	40	52	Parent	Private		1883
Hughes Co Inc	40	-	Single	Private	5MM-9.9MM	1961
Johnson Industries Intl	38	-	Single	Private	5MM-9.9MM	1964
Stainless Steel Fabricating	33	-	Single	Private	1MM-4.9MM	1966
Advanced Greig Laminators Inc	25	-	Single	Private	1MM-4.9MM	1995
GBC Pro-Tech Engineering Co	25	2,918	Branch	Private	1MM-4.9MM	1987
Wolf Machine Inc	20	-	Single	Private	1MM-4.9MM	1946

3335 Metalworking Machinery Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Flambeau Inc	200	1,762	Branch	Private	10MM-24.9MM	1947
Portage Casting & Mold Inc	60	-	Single	Private	5MM-9.9MM	1972
Dumore Corp	58	-	Single	Private	5MM-9.9MM	1915
Ellis Manufacturing Co Inc	50	-	Single	Private	5MM-9.9MM	1950
Rapid Die & Molding Co	50	59	Parent	Private		1945
Apollo Tool Inc	40	-	Single	Private	1MM-4.9MM	1973
Del-Tool Co Inc	30	-	Single	Private	1MM-4.9MM	1967
Wisconsin Porcelain Co Inc	30	460	Branch	Private	5MM-9.9MM	1919
Mauston Tool Corp	25	-	Single	Private	1MM-4.9MM	1978
VersaTool & Die Machining	25	-	Single	Private	1MM-4.9MM	1956
Prairie Tool Co Inc	20	-	Single	Private	1MM-4.9MM	1920

3353 Electrical Equipment Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Rockwell Automation	550	16,905	Branch	Public	50MM-99.9MM	1971
Philips Advance	400	18,600	Branch	Private	50MM-99.9MM	1950
Merkle-Korff Industries Inc	125	4,726	Branch	Private	10MM-24.9MM	1984
Hankscraft Motors Inc	65	90	Parent	Private		1949
SoftSwitching Technologies	45	-	Single	Private	5MM-9.9MM	1995
Electric Motors Unlimited Inc	24	-	Single	Private	1MM-4.9MM	1952

3361 Motor Vehicle Manufacturing

*No firms were identified in database. (This study used the Harris Infosource database. Harris is a fully owned subsidiary of Dun & Bradstreet. Companies providing data to D&B for the Harris database do so voluntarily. Therefore, the information is incomplete for this item because eligible firms chose not to participate.)

3362 Motor Vehicle Body and Trailer Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
General Motors Corp	4,800	204,874	Branch	Public	1B-9.9B	1923
Stoughton Trailers Inc	350	475	Branch	Private	50MM-99.9MM	1994
Stoughton Trailers LLC	180	-	Single	Private	25MM-49.9MM	1972
Morgan Corp	150	1,215	Branch	Private	25MM-49.9MM	1950
Stoughton Trailers LLC	100	475	Parent	Private		1961
Maxi Products Co Inc	25	-	Single	Private	5MM-9.9MM	1986

3379 Other Furniture Related Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Springs Window Fashions LP	1,200	13,265	HQs	Private		1939
Simmons Co	350	2,261	Branch	Private	50MM-99.9MM	1980
Serta Mattress Co	150	1,235	Branch	Private	25MM-49.9MM	1989

10.3.4 Detailed Employment, Gross Product, & Gross Product per Employee, South Region

Table 10-3 Employment in the South Region's Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3115	Dairy Product Manufacturing	3,239	3,231	3,375	3,249	3,052	2,955	2,909	2,788
3279	Other Nonmetallic Mineral Product Manufacturing	900	887	896	835	773	758	756	691
3315	Foundries	2,919	3,540	3,464	3,079	2,853	2,775	2,758	2,530
3322	Cutlery and Handtool Manufacturing	1,180	1,239	1,139	979	908	807	776	685
3325	Hardware Manufacturing	730	690	660	560	510	460	430	400
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	6,209	7,835	7,930	7,237	6,832	6,499	6,502	6,620
3332	Industrial Machinery Manufacturing	4,118	4,191	2,852	2,540	2,258	2,031	1,899	1,843
3335	Metalworking Machinery Mfg.	6,890	7,487	6,336	5,814	4,763	4,208	3,947	3,660
3353	Electrical Equipment Manufacturing	4,618	3,451	3,167	2,922	2,826	2,897	3,096	3,189
3361	Motor Vehicle Manufacturing	4,478	4,985	4,945	4,488	4,138	4,149	4,030	3,848
3362	Motor Vehicle Body and Trailer Mfg.	540	529	548	467	416	443	432	390
3379	Other Furniture Related Product Mfg.	1,099	957	875	824	812	766	725	573

Table 10-4 CAGR* in Employment in the South Region's Driver Industries, 1993-2008

NAICS	Title	1993-1998	1998-2003	2003-2008
3115	Dairy Product Manufacturing	0.0%	-1.5%	-1.0%
3279	Other Nonmetallic Mineral Product Manufacturing	-0.2%	-2.6%	-1.5%
3315	Foundries	3.3%	-4.0%	-1.5%
3322	Cutlery and Handtool Manufacturing	0.8%	-6.9%	-2.7%
3325	Hardware Manufacturing	-0.9%	-6.5%	-2.3%
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	4.0%	-3.1%	0.3%
3332	Industrial Machinery Manufacturing	0.3%	-11.4%	-1.6%
3335	Metalworking Machinery Manufacturing	1.4%	-9.2%	-2.3%
3353	Electrical Equipment Manufacturing	-4.7%	-2.9%	1.6%

NAICS	Title	1993-1998	1998-2003	2003-2008
3361	Motor Vehicle Manufacturing	1.8%	-3.0%	-1.2%
3362	Motor Vehicle Body and Trailer Mfg.	-0.3%	-2.9%	-2.1%
3379	Other Furniture Related Product Mfg.	-2.3%	-3.6%	-4.7%

***Compound Annual Growth Rate—CAGR.** An average annual growth rate over a specified period of time. It is calculated as:
 $CAGR = (\text{present value} / \text{base value})^{(1 / \text{number of years})} - 1$

Table 10-5 Labor Location Quotients*—South Region’s Driver Industries, 1993-2003

NAICS	Title	1993	1998	2001	2002	2003
3115	Dairy Product Manufacturing	4.61	5.06	4.95	4.63	4.45
3279	Other Nonmetallic Mineral Product Manufacturing	2.72	2.48	2.32	2.24	2.22
3315	Foundries	3.03	3.26	3.21	3.32	3.45
3322	Cutlery and Handtool Manufacturing	3.22	3.20	2.84	2.93	2.69
3325	Hardware Manufacturing	2.75	2.64	2.53	2.51	2.38
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Mfg.	4.26	4.34	4.32	4.45	4.33
3332	Industrial Machinery Manufacturing	5.87	5.07	3.54	3.58	3.37
3335	Metalworking Machinery Manufacturing	5.66	5.32	4.86	4.56	4.21
3353	Electrical Equipment Manufacturing	4.37	3.30	3.10	3.36	3.72
3361	Motor Vehicle Manufacturing	3.44	3.61	3.35	3.24	3.19
3362	Motor Vehicle Body and Trailer Manufacturing	0.80	0.64	0.61	0.57	0.60
3379	Other Furniture Related Product Manufacturing	4.96	3.73	3.09	3.15	3.05

* The location quotient (LQ) technique is the calculated ratio between the local economy and the economy of some reference unit – in our case the national economy. A location quotient greater than one suggests that there is a concentration or specialization of an industry within a region, while a location quotient less than one suggests an industry is not concentrated in the region.

Table 10-6 Manufacturing Gross Product in the South Region’s Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3115	Dairy Product Manufacturing	\$ 207,832,237	\$ 260,890,034	\$ 301,327,592	\$ 320,159,826	\$ 296,611,000	\$ 297,988,611	\$ 304,733,222	\$ 337,038,607
3279	Other Nonmetallic Mineral Product Manufacturing	\$ 56,661,899	\$ 48,928,180	\$ 53,948,328	\$ 47,046,834	\$ 46,266,688	\$ 49,495,059	\$ 51,153,586	\$ 54,961,615
3315	Foundries	\$ 142,571,927	\$ 178,175,082	\$ 175,238,298	\$ 168,288,168	\$ 154,152,924	\$ 158,764,700	\$ 165,643,393	\$ 176,936,159
3322	Cutlery and Handtool Mfg.	\$ 68,201,947	\$ 75,155,494	\$ 69,150,023	\$ 62,370,443	\$ 56,135,685	\$ 51,999,680	\$ 50,475,584	\$ 53,520,735
3325	Hardware Manufacturing	\$ 42,217,989	\$ 43,369,003	\$ 42,138,300	\$ 37,529,572	\$ 34,439,670	\$ 32,325,654	\$ 32,030,177	\$ 35,150,322

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Mfg.	\$ 335,862,533	\$ 520,413,081	\$ 525,282,990	\$ 500,496,731	\$ 462,799,882	\$ 446,235,774	\$ 445,674,810	\$ 533,520,424
3332	Industrial Machinery Manufacturing	\$ 184,184,736	\$ 223,789,293	\$ 134,672,276	\$ 135,301,711	\$ 119,664,988	\$ 112,526,304	\$ 107,746,880	\$ 121,303,160
3335	Metalworking Machinery Mfg.	\$ 311,988,828	\$ 421,917,970	\$ 316,075,469	\$ 307,572,436	\$ 250,194,603	\$ 223,416,608	\$ 212,025,730	\$ 234,600,397
3353	Electrical Equipment Manufacturing	\$ 285,148,692	\$ 251,415,483	\$ 251,317,429	\$ 431,957,157	\$ 412,934,826	\$ 434,766,253	\$ 476,823,736	\$ 573,321,652
3361	Motor Vehicle Manufacturing	\$ 223,705,791	\$ 290,411,258	\$ 291,783,880	\$ 251,068,756	\$ 241,916,281	\$ 256,935,538	\$ 269,976,871	\$ 317,160,132
3362	Motor Vehicle Body and Trailer Mfg.	\$ 99,708,505	\$ 127,063,220	\$ 121,727,946	\$ 102,440,546	\$ 100,243,745	\$ 109,206,629	\$ 106,877,335	\$ 119,903,588
3379	Other Furniture Related Product Manufacturing	\$ 42,355,023	\$ 43,164,979	\$ 39,474,197	\$ 33,015,985	\$ 35,748,119	\$ 34,893,778	\$ 34,125,653	\$ 32,319,151

Table 10-7 CAGR* for Gross Product in the South Region's Driver Industries, 1993-2008

NAICS	Title	1993-1998	1998-2003	2003-2008
3115	Dairy Product Manufacturing	3.9%	2.2%	2.1%
3279	Other Nonmetallic Mineral Product Manufacturing	-2.4%	0.2%	1.8%
3315	Foundries	3.8%	-1.9%	1.8%
3322	Cutlery and Handtool Manufacturing	1.6%	-6.0%	0.5%
3325	Hardware Manufacturing	0.4%	-4.8%	1.4%
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	7.6%	-2.5%	3.0%
3332	Industrial Machinery Manufacturing	3.3%	-10.8%	1.3%
3335	Metalworking Machinery Manufacturing	5.2%	-10.1%	0.8%
3353	Electrical Equipment Manufacturing	-2.1%	9.6%	4.7%
3361	Motor Vehicle Manufacturing	4.4%	-2.0%	3.6%
3362	Motor Vehicle Body and Trailer Manufacturing	4.1%	-2.5%	1.6%
3379	Other Furniture Related Product Manufacturing	0.3%	-3.5%	-1.3%

*Compound Annual Growth Rate—CAGR. An average annual growth rate over a specified period of time. It is calculated as:

$$CAGR = (\text{present value} / \text{base value})^{(1 / \text{number of years})} - 1$$

Table 10-8 Output Location Quotients*—South Region's Driver Industries, 1993-2003

NAICS	Title	1993	1998	2001	2002	2003
3115	Dairy Product Manufacturing	4.09	4.94	6.21	5.66	5.72
3279	Other Nonmetallic Mineral Product Manufacturing	2.64	1.66	1.81	1.81	1.92
3315	Foundries	3.04	2.65	2.82	2.93	3.07
3322	Cutlery and Handtool Manufacturing	3.92	3.29	3.09	3.05	2.81
3325	Hardware Manufacturing	2.68	2.04	1.90	1.83	1.69
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Mfg.	4.39	4.16	4.14	4.11	3.95
3332	Industrial Machinery Manufacturing	4.03	3.19	2.14	2.21	2.11
3335	Metalworking Machinery Manufacturing	4.93	4.86	4.52	4.23	3.93
3353	Electrical Equipment Manufacturing	4.87	3.26	6.24	6.24	6.76
3361	Motor Vehicle Manufacturing	3.62	3.20	2.99	3.00	3.06
3362	Motor Vehicle Body and Trailer Manufacturing	5.64	5.04	3.98	3.94	4.12
3379	Other Furniture Related Product Manufacturing	5.65	4.44	3.33	3.39	3.32

* The location quotient (LQ) technique is the calculated ratio between the local economy and the economy of some reference unit – in our case the national economy. A location quotient greater than one suggests that there is a concentration or specialization of an industry within a region, while a location quotient less than one suggests an industry is not concentrated in the region.

Table 10-9 Manufacturing Productivity (Gross Product per Employee) of Driver Industries, South Region, 1993-1008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3115	Dairy Product Manufacturing	\$ 64,172	\$ 80,738	\$ 89,282	\$ 98,541	\$ 97,183	\$ 100,832	\$ 104,762	\$ 120,904
3279	Other Nonmetallic Mineral Product Manufacturing	\$ 62,985	\$ 55,132	\$ 60,210	\$ 56,370	\$ 59,876	\$ 65,308	\$ 67,663	\$ 79,493
3315	Foundries	\$ 48,848	\$ 50,335	\$ 50,592	\$ 54,651	\$ 54,041	\$ 57,213	\$ 60,059	\$ 69,936
3322	Cutlery and Handtool Mfg.	\$ 57,801	\$ 60,645	\$ 60,719	\$ 63,739	\$ 61,822	\$ 64,445	\$ 65,012	\$ 78,126
3325	Hardware Manufacturing	\$ 57,833	\$ 62,854	\$ 63,851	\$ 67,026	\$ 67,543	\$ 70,300	\$ 74,523	\$ 87,940
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Mfg.	\$ 54,089	\$ 66,422	\$ 66,237	\$ 69,160	\$ 67,739	\$ 68,660	\$ 68,548	\$ 80,598
3332	Industrial Machinery Mfg.	\$ 44,721	\$ 53,392	\$ 47,218	\$ 53,263	\$ 53,003	\$ 55,406	\$ 56,727	\$ 65,830
3335	Metalworking Machinery Mfg.	\$ 45,283	\$ 56,350	\$ 49,887	\$ 52,901	\$ 52,529	\$ 53,088	\$ 53,721	\$ 64,094
3353	Electrical Equipment Mfg.	\$ 61,748	\$ 72,852	\$ 79,359	\$ 147,808	\$ 146,144	\$ 150,072	\$ 154,022	\$ 179,768
3361	Motor Vehicle Manufacturing	\$ 49,958	\$ 58,259	\$ 59,001	\$ 55,944	\$ 58,460	\$ 61,925	\$ 66,985	\$ 82,419
3362	Motor Vehicle Body and Trailer	\$ 184,716	\$ 240,337	\$ 222,266	\$ 219,303	\$ 240,764	\$ 246,380	\$ 247,171	\$ 307,579

NAICS Title		1993	1998	2000	2001	2002	2003	2004	2008
	Manufacturing								
3379	Other Furniture Related Product Manufacturing	\$ 38,523	\$ 45,106	\$ 45,088	\$ 40,071	\$ 44,048	\$ 45,524	\$ 47,056	\$ 56,418

10.4 Wisconsin Executive Perspectives in the South Region

Region Responses to the WMEP Study Questionnaire's "Open Ended" Questions

(NB: Incomplete answers are due to the space limits of the online questionnaire. In some cases, a partial word or intended meaning has been inferred and, therefore, completed. In such cases, the extrapolation appears in brackets. Where an inference could not be made, ellipses indicate the omission of the letters or words. Where provided by the respondent, job title and industry sector are included.)

As you consider your industry and business for the next 5 to 10 years, what are the most prominent workforce-related concerns?

Continuing to find honest hard working employees looking to work as part of a team.
Many people are interested only in individual rewards.

--President, Laser Printer Toner Cartridges

Continuing to get new workers to enter the trade.

--Owner, Plastic Injection Molds

Finding candidates that want to learn and increase their knowledge base.

--Machined Parts

Finding skilled, experienced CNC machinists and other laborers in a generally non-manufacturing area of the state, maintaining the current benefits programs as costs continue to increase . . .

--Vice President Operation, Sanitary Pumps

Health care costs are by far the greatest concern. Second, we have over 90 traveling crews erecting homes and buildings in the field. The crews are getting harder to fill, as market wages increase.

--CEO, Factory Built Homes and Buildings

Increased technical needs for general labor activities. Offshore sourcing of lower cost materials is requiring automation of existing activities.

--Plant Manager, Foodservice Supplies

Lack of professional and skilled labor in Juneau county to cover initial development of the team, and then growth and turnover. Their [sic] are limited existing personnel . . .

--President, House Wares

Securing enough entry level production workers to meet demand. These individuals will be trained internally but must have good work ethic, including good attendance.

--Vice President Operations, Industrial and Commercial Vehicle and Equipment Seating

As you consider your industry and business for the next 5 to 10 years, what are the most prominent advantages that the Wisconsin workforce can offer?

A strong representation of businesses in this industry in Wisconsin.

--Owner, Plastics Injection Molds

Excellent work ethic, good educational backgrounds (at least high school graduate), and willingness to be trained for the job at hand.

--Vice President Operations, Sanitary Pumps

Good work ethic.

--Vice President Operations, Industrial and Commercial Vehicle and Equipment Seating

In general, solid values and a good education.

--President, House Wares

Most people in the Wisconsin workforce do have a good work ethic. Most also have a good attitude.

--President, Laser Printer Toner Cartridges

Strong knowledge base in manufacturing gained through a strong emphasis on improving the knowledge base in the state.

--Machined Parts

Work ethic. Ability to understand the goals of our company and work as part of a team to achieve those goals. Desire to build a career at a company they can care about, because the company cares about them.

--CEO, Factory Built Homes and Buildings

What changes, if any, would you like to see in the Wisconsin higher education system to better meet the long-term needs of your industry and firm in the state?

Have no problem with current product coming from the Wisconsin higher education system.

--Vice President Operations, Industrial and Commercial Vehicle and Equipment Seating

Improved math skills.

--Machined Parts

Promote the trades as a lucrative and fulfilling career for young people.

--Owner, Plastic Injection Molds

Require 3-6 month internships in their field of study that will provide some practical experience to enhance their educational experience.

--Vice President Operations, Sanitary Pumps

The standard prescriptions of business publications for education are, as stated earlier, bunk. Except for a few technical specialties, we don't need people who've been narrowed on a vocational track

--CEO, Factory Built Homes and Buildings

UW and MATC both seem to me to be doing a very good job.

--CEO, Laser Printer Toner Cartridges

Describe any innovative workforce attraction or development programs that you would like to see expanded in Wisconsin.

Biggest challenge is to have enough entry level workers for production functions.

--Vice President Operations, Industrial and Commercial Vehicle and Equipment Seating

More workshops on how to increase you employees learning base.

--Machined Parts

Programs to improve communication within a company. We have English, Spanish and Hmong workers. Can we bring language courses or instructors on site?

--CEO, Laser Printer Toner Cartridges

School to work with an emphasis on the company developing the jobs. We would like to tap the tech school grads but have limited money to invest in their early development.

--President, House Wares

Training for quality and continuous improvement.

--Plant Manager, Food Service Supplies

We must mitigate the terrifying increases in health care costs, in order to keep health care available to our employees.

--CEO, Factory Built Homes and Buildings

What are the business challenges that your organization faces—what most keeps you up at night?

Controlling health insurance costs and being able to attract enough workers to meet demand.

--Vice President Operations, Industrial and Commercial Vehicle and Equipment Seating

Finding skilled workers, finding high quality, low cost raw materials, and managing sustainable growth.

--Vice President Operations, Sanitary Pumps

Health Care. Ability to fill traveling field crews. Off-season lack of business, as we've moved away from simple pole barns and trailers to complex products going into complex projects.

--CEO, Factory Built Homes and Buildings

Reducing costs and improving the bottom line.

--Plant Manager, Food Service Supplies

Steady flow of business.

--Owner, Plastic Injection Molds

Technology is changing so fast and so radically that it is hard to predict or plan too far into the future. Global competition is another wild card. The internet can also radically impact a business.

--President, Laser Printer Toner Cartridges

To be able to compete not only with the top notch companies in Wisconsin but be able to compete with the competition from overseas. To be able to retain and improve my employee base.

--Machined Parts

Remaining competitive vs. China etc.

--President, House Wares

What are the business strengths and/or advantages your organization has by being located in Wisconsin?

Good work ethic

--Plant Manager Foodservice Supplies

Great work ethic of employees. Good education system, good access to training within higher education systems, both technical colleges and four year degree institutions.

--Vice President Operations, Industrial and Commercial Vehicle and Equipment Seating

None in particular.

--President, House Wares

Our quality people from Wisconsin have built this business over the years. Our people are very focused on a producing a high quality product and providing the very best customer service. . . .

--Vice President Operations, Sanitary Pumps

Proximity to customers, Strong work force.

--Owner, Plastic Injection Molds

Strengths would include dedicated workers. Also the overall cost of doing business is much less than in a larger area like Chicago. The biggest advantage for me is the quality of life in Wisconsin.

--President, Laser Printer Toner Cartridges

The ability to work with companies that believe in manufacturing in Wisconsin. The ability to use the resources available to improve and increase our knowledge base.

--Machined Parts

We are inheritors of the Wisconsin progressive tradition, with fundamentally different attitudes toward regulation, our customers, our dealers, our employees, our communities and our suppliers. . . .

--*CEO, Factory Built Homes and Buildings*