

13 West Central II Region

13.1 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 West Central II Region, as well as, detailed information related to each of the regional driver industries identified. For the purposes of this analysis, the West Central II Region is defined to include the counties of Jackson, La Crosse, Monroe, Trempealeau, and Vernon.

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 identify key issues affecting them in the region.

13.2 Summary of Regional Driver Industries & Industry Clusters

The driver analysis for the West Central II Region identified seven regional driver industries. These industries include:

- 3115 Dairy Product Manufacturing
- 3116 Animal Slaughtering and Processing
- 3272 Glass and Glass Product Manufacturing
- 3323 Architectural and Structural Metals Manufacturing
- 3331 Agriculture, Construction, and Mining Machinery Manufacturing
- 3333 Commercial and Service Industry Machinery Manufacturing
- 3334 Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing

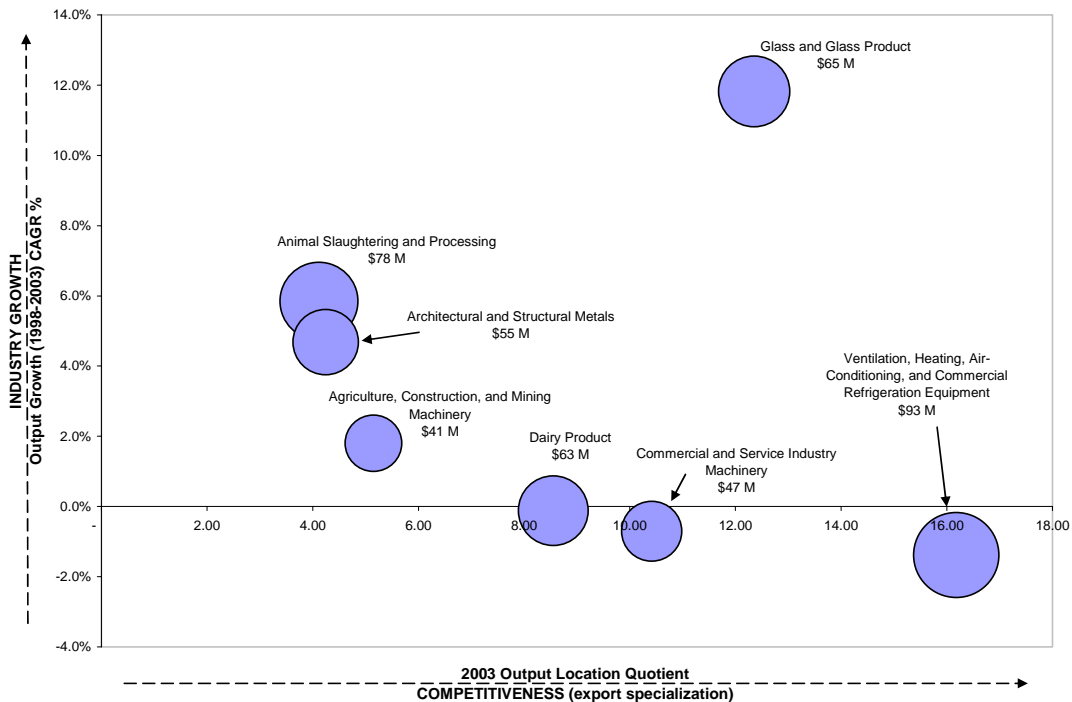
13.2.1 How Are the West Central II's Driver Industries Doing?

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 13-1 Overview of the West Central II's Drivers



Interpretations: All 7 driver industries are clearly ahead of their kindred industries in other parts of the country. There appear to be opportunities to increase the output of three industries at or below 0.0% growth with their favorable export or specialization advantages, so that all industries return monies to the region.

13.2.2 Driver and Industry Cluster Relationships in the West Central II Region

For this Study, an industry cluster analysis was conducted for each of the driver industries. Tables 13-1 and 13-2 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 13-1 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 13-1 Regional & National Supplier Industries Common to Regional Driver Industries

NAICS	Title	Regional Driver**	Count of Drivers	
			Regional Suppliers	National Suppliers
484*	Truck Transportation		7	7
42*	Wholesale Trade		7	7
3261	Plastics Product Manufacturing		6	6
4931	Warehousing and Storage		2	3
3353	Electrical Equipment Manufacturing		2	3
FR	Farms		2	2
3272	Glass and Glass Product Manufacturing	X	2	3
3119	Other Food Manufacturing		2	2
3219	Other Wood Product Manufacturing		2	2

*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 13-2 is similar to Table 13-1 in that it shows industries that supply inputs to multiple driver industries. The difference is that the industries identified in Table 13-2 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 13-2 National Supplier Industries Common to Regional Driver Industries

NAICS	Title	Count of Drivers
		National Suppliers
3222	Converted Paper Product Manufacturing	6
5419	Other Professional, Scientific, and Technical Services	6
3255	Paint, Coating, and Adhesive Manufacturing	5
517*	Telecommunications	5
3311	Iron and Steel Mills and Ferroalloy Manufacturing	4
3312	Steel Product Manufacturing from Purchased Steel	4
3321	Forging and Stamping	4
3323	Architectural and Structural Metals Manufacturing	4
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	4
3329	Other Fabricated Metal Product Manufacturing	4
3259	Other Chemical Product and Preparation Manufacturing	3
3315	Foundries	3
3339	Other General Purpose Machinery Manufacturing	3

		<u>Count of Drivers</u>
NAICS	Title	National Suppliers
3344	Semiconductor and Other Electronic Component Mfg.	3
5411	Legal Services	3
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	3
2380	Specialty Trade Contractors	2
3112	Grain and Oilseed Milling	2
3241	Petroleum and Coal Products Manufacturing	2
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	2
3262	Rubber Product Manufacturing	2
3313	Alumina and Aluminum Production and Processing	2
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	2
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	2
3359	Other Electrical Equipment and Component Mfg.	2

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

13.2.3 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 West Central II Region.

First, “Industry 3116: Animal Slaughtering and Processing,” which includes poultry processing, was identified as an important industry in the region. After significant growth throughout the 1990s, the industry appears to be maintaining a fairly constant level of employment and gross product. The industry was not identified as a driver industry because some of its characteristics relative to the nation as whole did not suggest that the region offered the industry competitive advantages as compared to other locations. One of the problems with data for this industry is the fact that they are not specific to poultry processing but, rather, they include other types of meat processing as well. This lack of detailed information results in the industry’s relative concentration in the region being understated.

The second industry identified was “Industry 3121: Beverage Manufacturing,” which includes City Brewing Company, Inc. According to the data available on this industry, it has maintained fairly constant levels of employment and gross product since 1993; however, overall the industry is very small and was not included as a regional driver industry.

Finally, warehousing and distribution was identified as being important in the region. Warehousing and distribution includes several NAICS industries including “Industry 4841: General Freight Trucking”; “Industry 4842: Specialized Freight Trucking”; and “Industry 4931: Warehousing and Storage.” As a whole, these industries exhibited significant growth throughout the 1990s in terms of both employment and gross product. Individually, General Freight Trucking and Specialized Freight Trucking exhibited characteristics of driver industries. However, due to the nature of the industries, they are best viewed as supplier industries that help other regional driver industries be more competitive.

13.3 Detailed Descriptions of the Regional Driver Industries

13.3.1 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

3116 Animal Slaughtering and Processing

This industry comprises establishments primarily engaged in one or more of the following: (1) slaughtering animals; (2) preparing processed meats and meat byproducts; and (3) rendering and/or refining animal fat, bones, and meat scraps. This industry includes establishments primarily engaged in assembly [sic] cutting and packing of meats (i.e., boxed meats) from purchased carcasses.

3272 Glass and Glass Product Manufacturing

This industry comprises establishments primarily engaged in manufacturing glass and/or glass products. Establishments in this industry may manufacture glass and/or glass products by melting silica sand or cullet, or purchasing glass.

3323 Architectural and Structural Metals Manufacturing

33231 Plate Work and Fabricated Structural Product Manufacturing

This industry comprises establishments primarily engaged in manufacturing one or more of the following: (1) prefabricated metal buildings, panels and sections; (2) structural metal products; and (3) metal plate work products.

33232 Ornamental and Architectural Metal Products Manufacturing

This industry comprises establishments primarily engaged in manufacturing one or more of the following: (1) metal framed windows (i.e., typically using purchased glass) and metal doors; (2) sheet metal work; and (3) ornamental and architectural metal products.

333 Machinery Manufacturing

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.

3331 Agriculture, Construction, and Mining Machinery Manufacturing

3333 Commercial and Service Industry Machinery Manufacturing

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

13.3.2 Cluster Industries

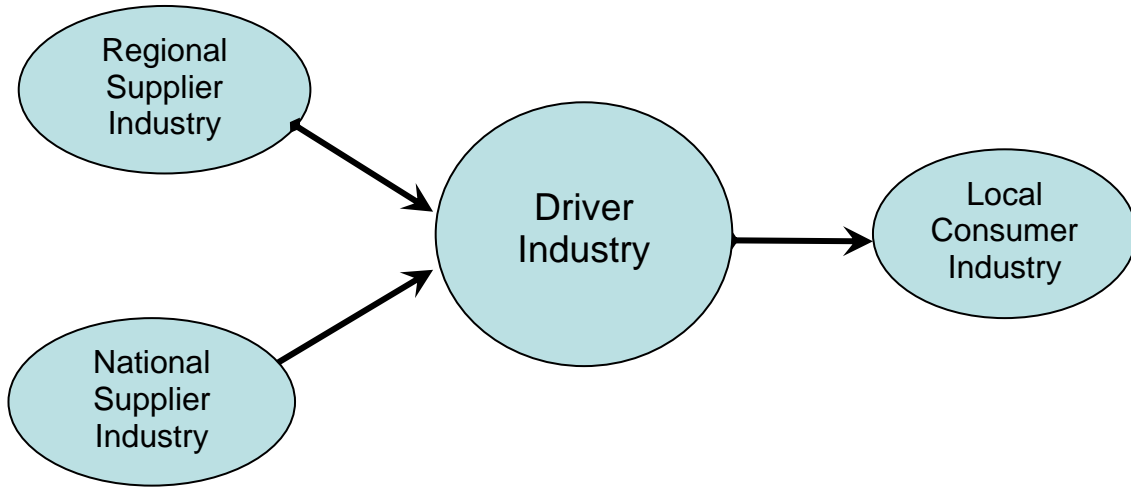
Industries contained within an industry cluster are related to driver industries in three ways, two supplier relationships and one consumer relationship.

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 13-2 Industry Clusters



Cluster Industries

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

3115 Dairy Product Manufacturing

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

Consumer Industries - Typical Regional Industry

722*	Food services and drinking places
3115	Dairy Product Manufacturing
622*	Hospitals
6244	Child Day Care Services

3116 Animal Slaughtering and Processing

Supplier Industries - Typical Regional Industry

FR	Farms
3116	Animal Slaughtering and Processing
42*	Wholesale Trade
484*	Truck Transportation
3261	Plastics Product Manufacturing
3119	Other Food Manufacturing
4931	Warehousing and Storage

Supplier Industries - Typical National Industry

FH	Fishing, Hunting, Etc.
3222	Converted Paper Product Manufacturing
517*	Telecommunications
3259	Other Chemical Product and Preparation Manufacturing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
5419	Other Professional, Scientific, and Technical Services
3112	Grain and Oilseed Milling
562*	Waste management and remediation services

Consumer Industries - Typical Regional Industry

722*	Food services and drinking places
3116	Animal Slaughtering and Processing
622*	Hospitals
623*	Nursing and residential care facilities
624*	Social assistance, except child day care services
3115	Dairy Product Manufacturing

3272 Glass and Glass Product Manufacturing

Supplier Industries - Typical Regional Industry

3272	Glass and Glass Product Manufacturing
42*	Wholesale Trade
484*	Truck Transportation
3261	Plastics Product Manufacturing
3219	Other Wood Product Manufacturing
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing

Supplier Industries - Typical National Industry

3222	Converted Paper Product Manufacturing
3271	Clay Product and Refractory Manufacturing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
2123	Nonmetallic Mineral Mining and Quarrying
3251	Basic Chemical Manufacturing
3335	Metalworking Machinery Manufacturing

Supplier Industries - Typical Regional Industry

Supplier Industries - Typical National Industry

3219	Other Wood Product Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
2380	Specialty Trade Contractors

Consumer Industries - Typical Regional Industry

3272	Glass and Glass Product Manufacturing
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
622*	Hospitals
722*	Food services and drinking places
3261	Plastics Product Manufacturing
8111	Automotive Repair and Maintenance
621b*	Other ambulatory health care services
3366	Ship and Boat Building
2360	Construction of Buildings
621a*	Offices of physicians, dentists, and other health practitioners

3323 Architectural and Structural Metals Manufacturing

Supplier Industries - Typical Regional Industry

Supplier Industries - Typical National Industry

42*	Wholesale Trade	3311	Iron and Steel Mills and Ferroalloy Manufacturing
484*	Truck Transportation	3323	Architectural and Structural Metals Manufacturing
		3325	Hardware Manufacturing
		3313	Alumina and Aluminum Production and Processing
		3329	Other Fabricated Metal Product Manufacturing
		3321	Forging and Stamping
		3312	Steel Product Manufacturing from Purchased Steel
		3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
		3272	Glass and Glass Product Manufacturing
		3255	Paint, Coating, and Adhesive Manufacturing

Consumer Industries - Typical Regional Industry

3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
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Consumer Industries - Typical Regional Industry

2360	Construction of Buildings
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3339	Other General Purpose Machinery Manufacturing
2370	Heavy and Civil Engineering Construction
3363	Motor Vehicle Parts Manufacturing
5511	Management of Companies and Enterprises
3315	Foundries
2380	Specialty Trade Contractors
3121	Beverage Manufacturing

3331 Agriculture, Construction and Mining Machinery Manufacturing

Supplier Industries - Typical Regional Industry

42*	Wholesale Trade
484*	Truck Transportation
3261	Plastics Product Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3363	Motor Vehicle Parts Manufacturing

Supplier Industries - Typical National Industry

517*	Telecommunications
3363	Motor Vehicle Parts Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3262	Rubber Product Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
3315	Foundries
3323	Architectural and Structural Metals Manufacturing
51Info*	Information services
3241	Petroleum and Coal Products Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing

Consumer Industries - Typical Regional Industry

FR	Farms
3331	Agriculture, Construction, and Mining Machinery Manufacturing
4821	Rail Transportation
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
8111	Automotive Repair and Maintenance

Consumer Industries - Typical Regional Industry

8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
2360	Construction of Buildings
8114	Personal and Household Goods Repair and Maintenance
3366	Ship and Boat Building

3333 Commercial and Service Industry Machinery 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	3344	Semiconductor and Other Electronic Component Manufacturing
3328	Coating, Engraving, Heat Treating, and Allied Activities	3359	Other Electrical Equipment and Component Manufacturing
3272	Glass and Glass Product Manufacturing	3255	Paint, Coating, and Adhesive Manufacturing
3261	Plastics Product Manufacturing	3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
3333	Commercial and Service Industry Machinery Manufacturing	3222	Converted Paper Product Manufacturing
3353	Electrical Equipment Manufacturing	3329	Other Fabricated Metal Product Manufacturing
484*	Truck Transportation	5411	Legal Services
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	3321	Forging and Stamping
		3323	Architectural and Structural Metals Manufacturing

Consumer Industries - Typical Regional Industry

8112	Electronic and Precision Equipment Repair and Maintenance
2370	Heavy and Civil Engineering Construction
2360	Construction of Buildings
5614	Business Support Services
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
42*	Wholesale Trade
521*	Monetary authorities and depository credit intermediation

Consumer Industries - Typical Regional Industry

3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
3231	Printing and Related Support Activities
8129	Other Personal Services

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

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
42*	Wholesale Trade	3311	Iron and Steel Mills and Ferroalloy Manufacturing
3353	Electrical Equipment Manufacturing	3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
484*	Truck Transportation	3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
3261	Plastics Product Manufacturing	3132	Fabric Mills
		3255	Paint, Coating, and Adhesive Manufacturing
		3222	Converted Paper Product Manufacturing
		3323	Architectural and Structural Metals Manufacturing
		3315	Foundries
		3314	Nonferrous Metal (except Aluminum) Production and Processing
		3329	Other Fabricated Metal Product Manufacturing

Consumer Industries - Typical Regional Industry

8114	Personal and Household Goods Repair and Maintenance
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
8112	Electronic and Precision Equipment Repair and Maintenance
2370	Heavy and Civil Engineering Construction
2360	Construction of Buildings
3331	Agriculture, Construction, and Mining Machinery Manufacturing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3399	Other Miscellaneous Manufacturing
3323	Architectural and Structural Metals Manufacturing

**Consumer Industries - Typical Regional
Industry**

3372 Office Furniture (including Fixtures)
Manufacturing

13.3.3 Top Firms by Driver Industry in the West Central II Region

3115 Dairy Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Great Lakes Cheese	350	1,305	Branch	Private	100MM-499.9MM	1995
Century Foods International	350	13,754	Branch	Public	100MM-499.9MM	2003
Organic Valley	300	-	Single	Private	100MM-499.9MM	1988
Whitehall Specialties Inc	180	246	Parent	Private		1994
AMPI	100	1,796	Branch	Private	50MM-99.9MM	1975
Main Street Ingredients LLC	100	-	Single	Private	50MM-99.9MM	1989
Whitehall Specialties Inc	66	246	Branch	Private	25MM-49.9MM	
Foremost Farms USA Cooperative	60	1,467	Branch	Private	25MM-49.9MM	1965
Foremost Farms USA Cooperative	40	1,467	Branch	Private	10MM-24.9MM	1963
Westby Co-Operative Creamery	35	-	Single	Private	10MM-24.9MM	1903
Swiss Valley Farms Co	28	668	Branch	Private	10MM-24.9MM	1958
K & K Cheese LLC	20	-	Single	Private	10MM-24.9MM	2001

3116 Animal Slaughtering and Processing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Gold 'n Plump Poultry	500	-	Single	Private	50MM-99.9MM	1983
Valley Pride Pack Inc	100	-	Single	Private	25MM-49.9MM	1979
Bakalars Sausage Co Inc	50	-	Single	Private	10MM-24.9MM	1935

3272 Glass and Glass Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Cardinal IG	350	4,124	Branch	Private	50MM-99.9MM	1988
Cardinal TG	140	4,124	Branch	Private	10MM-24.9MM	1990

3323 Architectural and Structural Metals Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Global Finishing Solutions	200	-	Single	Private	10MM-24.9MM	1975
Mid-City Steel Fabricating Inc	50	-	Single	Private	5MM-9.9MM	1972
River Steel Inc	30	-	Single	Private	5MM-9.9MM	1954
Ted Mannstedt & Son Inc	25	-	Single	Private	1MM-4.9MM	1947
Trempla Mfg Inc	22	38	Branch	Private	1MM-4.9MM	1960

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
HBBK TSS Fabricating Inc	20	-	Single	Private	1MM-4.9MM	1992

3331 Agriculture, Construction, and Mining Machinery Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Toro Co	600	4,556	Branch	Public	100MM-499.9MM	1975
Westfalia Surge Inc	160	2,495	Branch	Private	25MM-49.9MM	1948
Universal Truck Equipment Inc	22	-	Single	Private	5MM-9.9MM	1968

3333 Commercial and Service Industry Machinery 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.)

3334 Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equip. Mfg

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Trane Co	2,300	18,780	Division HQ	Private		1913
MULTISTACK Inc	50	165	Branch	Private	5MM-9.9MM	1989
Titan Air Inc	48	-	Single	Private	5MM-9.9MM	1982

13.3.4 Detailed Employment, Gross Product, & Gross Product per Employee, West Central II Region

Table 13-3 Employment in the West Central II Region's Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2005
3115	Dairy Product Manufacturing	1,349	927	836	774	762	717	725	670
3116	Animal Slaughtering and Processing	320	857	1,045	1,052	930	934	902	952
3272	Glass and Glass Product Mfg.	420	688	955	1,052	1,158	1,219	1,313	1,641
3323	Architectural and Structural Metals Manufacturing	190	329	318	298	297	324	353	379
3331	Agriculture, Construction, and Mining Machinery Manufacturing	540	897	885	864	851	737	735	816
3333	Commercial and Service Industry Machinery Manufacturing	700	887	885	824	703	688	735	767
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	1,639	1,914	1,890	1,777	1,524	1,464	1,519	1,534

Table 13-4 CAGR* for Employment in the West Central II Region's Driver Industries, 1993-2008

NAICS	Title	1993-1998	1998-2003	2003-2008
3115	Dairy Product Manufacturing	-6.1%	-4.2%	-1.1%
3116	Animal Slaughtering and Processing	17.9%	1.4%	0.3%
3272	Glass and Glass Product Mfg.	8.6%	10.0%	5.1%
3323	Architectural and Structural Metals Manufacturing	9.6%	-0.2%	2.6%
3331	Agriculture, Construction, and Mining Machinery Mfg.	8.8%	-3.2%	1.7%
3333	Commercial and Service Industry Machinery Mfg.	4.0%	-4.2%	1.8%
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	2.6%	-4.4%	0.8%

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

Table 13-5 Labor Location Quotients*—West Central II Region’s Driver Industries, 1993-2003

NAICS	Title	1993	1998	2001	2002	2003
3115	Dairy Product Manufacturing	10.96	8.10	6.74	6.64	6.25
3116	Animal Slaughtering and Processing	0.83	1.97	2.42	2.14	2.15
3272	Glass and Glass Product Manufacturing	3.35	5.53	9.17	11.12	12.47
3323	Architectural and Structural Metals Manufacturing	0.67	0.95	0.84	0.89	1.02
3331	Agriculture, Construction, and Mining Machinery Mfg.	3.01	4.26	4.74	5.08	4.63
3333	Commercial and Service Industry Machinery Manufacturing	5.88	6.78	6.86	6.45	6.86
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	11.63	11.81	11.49	10.85	11.00

* 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 13-6 Gross Product in the West Central II Region’s Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3115	Dairy Product Manufacturing	\$ 97,966,113	\$ 63,451,117	\$ 65,974,463	\$ 68,994,197	\$ 66,314,595	\$ 63,000,668	\$ 64,829,156	\$ 68,464,327
3116	Animal Slaughtering and Processing	\$ 14,763,782	\$ 55,736,241	\$ 63,386,646	\$ 80,887,340	\$ 74,260,766	\$ 78,395,568	\$ 80,067,003	\$ 94,976,709
3272	Glass and Glass Product Mfg.	\$ 27,139,596	\$ 33,387,989	\$ 51,597,702	\$ 50,695,519	\$ 57,430,056	\$ 65,276,436	\$ 73,320,315	\$111,352,004
3323	Architectural and Structural Metals Manufacturing	\$ 18,420,047	\$ 42,028,650	\$ 46,749,263	\$ 46,674,599	\$ 47,108,019	\$ 55,308,367	\$ 60,772,736	\$ 75,939,779
3331	Agriculture, Construction, and Mining Machinery Manufacturing	\$ 16,676,137	\$ 37,210,586	\$ 41,137,368	\$ 45,407,461	\$ 44,482,588	\$ 41,416,915	\$ 41,646,612	\$ 53,950,098
3333	Commercial and Service Industry Machinery Manufacturing	\$ 35,769,967	\$ 48,708,239	\$ 48,732,264	\$ 54,496,935	\$ 44,841,963	\$ 46,689,282	\$ 49,643,854	\$ 59,626,867
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	\$ 74,492,691	\$ 101,567,578	\$ 97,672,744	\$ 109,532,653	\$ 93,407,446	\$ 93,409,457	\$ 98,499,543	\$115,146,914

Table 13-7 CAGR* for Gross Product in the West Central II Region's Driver Industries, 1993-2009

NAICS	Title	1993-1998	1998-2003	2003-2008
3115	Dairy Product Manufacturing	-7.0%	-0.1%	1.4%
3116	Animal Slaughtering and Processing	24.8%	5.9%	3.2%
3272	Glass and Glass Product Mfg.	3.5%	11.8%	9.3%
3323	Architectural and Structural Metals Mfg.	14.7%	4.7%	5.4%
3331	Agriculture, Construction, and Mining Machinery Manufacturing	14.3%	1.8%	4.5%
3333	Commercial and Service Industry Machinery Mfg.	5.3%	-0.7%	4.2%
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Mfg.	5.3%	-1.4%	3.5%

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

Table 13-8 Output Location Quotients*—West Central II Region's Driver Industries, 1993-2003

NAICS	Title	1993	1998	2001	2002	2003
3115	Dairy Product Manufacturing	12.72	7.99	9.11	8.87	8.55
3116	Animal Slaughtering and Processing	0.90	2.83	4.26	3.84	4.12
3272	Glass and Glass Product Manufacturing	4.90	4.58	8.56	10.55	12.36
3323	Architectural and Structural Metals Manufacturing	1.49	2.69	3.15	3.44	4.24
3331	Agriculture, Construction, and Mining Machinery Mfg.	2.14	3.63	4.88	5.28	5.15
3333	Commercial and Service Industry Machinery Manufacturing	6.73	8.93	10.22	9.50	10.42
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	14.35	14.65	16.70	15.56	16.18

* 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 13-9 Manufacturing Productivity (Gross Product per Employee) of Driver Industries, West Central II Region, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
2123	Nonmetallic Mineral Mining and Quarrying	\$ 93,405	\$ 87,006	\$139,147	\$137,715	\$161,467	\$164,192	\$166,832	\$208,753
3115	Dairy Product Manufacturing	\$ 72,603	\$ 68,446	\$ 78,950	\$ 89,112	\$ 87,029	\$ 87,823	\$ 89,394	\$102,193
3116	Animal Slaughtering and Processing	\$ 46,160	\$ 65,018	\$ 60,683	\$ 76,877	\$ 79,832	\$ 83,976	\$ 88,805	\$ 99,815
3272	Glass and Glass Product Mfg.	\$ 64,650	\$ 48,544	\$ 54,028	\$ 48,182	\$ 49,602	\$ 53,570	\$ 55,833	\$ 67,861
3323	Architectural and Structural Metals Manufacturing	\$ 96,996	\$127,769	\$146,853	\$156,740	\$158,679	\$170,555	\$172,257	\$200,545
3331	Agriculture, Construction, and Mining Machinery Manufacturing	\$ 30,897	\$ 41,478	\$ 46,463	\$ 52,581	\$ 52,268	\$ 56,196	\$ 56,662	\$ 66,148
3333	Commercial and Service Industry Machinery Manufacturing	\$ 51,125	\$ 54,904	\$ 55,041	\$ 66,148	\$ 63,822	\$ 67,875	\$ 67,542	\$ 77,736
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Mfg.	\$ 45,445	\$ 53,070	\$ 51,675	\$ 61,647	\$ 61,292	\$ 63,796	\$ 64,844	\$ 75,059

13.4 Wisconsin Executive Perspectives in the West Central II Region

West Central II 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. 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?

Attracting and retaining qualified employees.

--President, Fabricated Metal Products

For the industry it would be Detroit and the continued loss of market share of the big 3 auto mfg. to the foreign companies, which in turn increases the pressure down to their suppliers, which squeeze.

--Job Shop, Die Sets

Having a qualified workforce. Welding capabilities.

--Dairy Farm Equipment

Health care costs – State of Wisconsin regulations (W.C., Unemployment tax, etc), competitive market (\$'s per hour wages).

--Director of Operations, Turf Maintenance Equipment

Qualified people with good work ethics.

--Fabricated Metals

The ability to attract and retain qualified production employees.

--President, Beverages

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 higher level of education and a stronger work ethic.

--President, Beverages

Good work ethics.

--Dairy Farm Equipment

I don't believe there are any prominent advantages

--Fabricated Metals

I'm familiar with the Chippewa Valley and the Tech. schools education in mfg. There still may be some work ethic left here, but that to[o] is deteriorating.

--Job Shop, Die Sets

Work ethic and dependability.

--President, Fabricated Metal Products

Work ethic, education, understanding of what Western Wisconsin has to offer...family life, etc.

--Director of Operations, Turf Maintenance Equipment

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?

Geometric dimension and tolerancing skills - blue print reading skills.

--Dairy Farm Equipment

More emphasis on training in multi-task production skills at the time of graduation and follow-up continuing education to enhance skills with technology changes.

--President, Beverages

Teach a class in "listening" and then comprehension.

--Fabricated Metals

That manufacturing is the back-bone of our economy...welding, fabricating, painting, assembly are good paying jobs.

--Director of Operations, Turf Maintenance Equipment

We believe it is more important to strengthen technical education programs at the high school level than within the higher education system. . . .

--President, Fabricated Metal Products

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

A continuing education program that allows workers to learn and to teach skills needed in a production setting.

--President, Beverages

Improve the working relationship between employers and the tech ed programs in their area high schools.

--President, Fabricated Metal Products

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

Financing for growth.

--Fabricated Metals

Foreign sourcing by major oem's.

--President, Fabricated Metal Products

Not much.

--Job Shop, Die Sets

Sales retention and growth along with the condition of our production facility.

--President, Beverages

Staying competitive with cost...work place safety.

--Director of Operations, Turf Maintenance Equipment

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

Access to excellent workers. Great clean environment. Lack of big city influence.

--Director of Operations, Turf Maintenance Equipment

Can't think of any.

--Job Shop, Die Sets

Central location provides certain geographic shipping advantages.

--President, Beverages

Close to our end users – cost of living.

--Dairy Farm Equipment

None other than less expensive Workmen's Comp rates.

--Fabricated Metals

The work ethic of the people of Wisconsin.

--President, Fabricated Metal Products