

## 7 Central Region

### 7.1 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 Central Region, as well as detailed information related to each of the regional driver industries identified. For the purposes of this analysis, the Central Region is defined to include the counties of Adams, Clark, Langlade, Lincoln, Marathon, Portage, Taylor, Waushara, and Wood.

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..

### 7.2 Summary of Regional Driver Industries & Industry Clusters

The driver analysis for the Central Region identified 15 regional driver industries. These industries include:

- 3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing
- 3115 Dairy Product Manufacturing
- 3121 Beverage Manufacturing
- 3211 Sawmills and Wood Preservation
- 3212 Veneer, Plywood, and Engineered Wood Product Manufacturing
- 3219 Other Wood Product Manufacturing
- 3221 Pulp, Paper, and Paperboard Mills
- 3322 Cutlery and Handtool Manufacturing
- 3325 Hardware Manufacturing
- 3329 Other Fabricated Metal Product Manufacturing
- 3339 Other General Purpose Machinery Manufacturing
- 3353 Electrical Equipment Manufacturing
- 3362 Motor Vehicle Body and Trailer Manufacturing
- 3369 Other Transportation Equipment Manufacturing
- 3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing

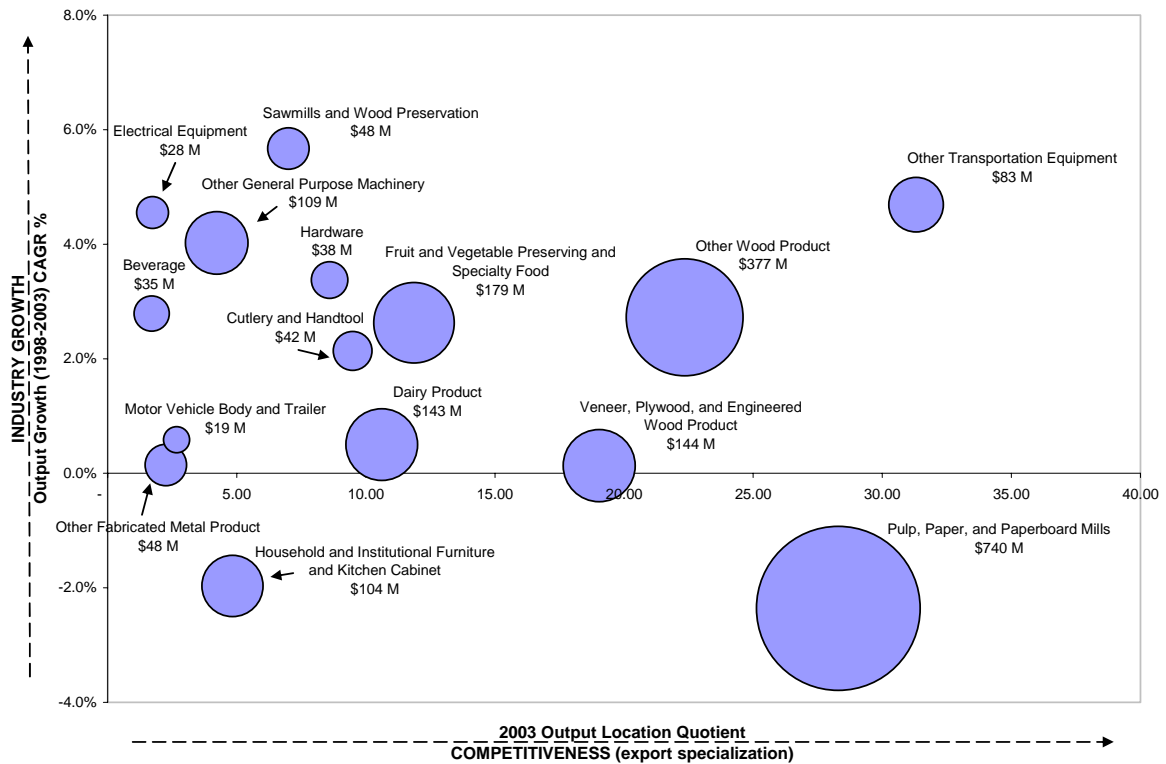
#### 7.2.1 How Are the Central Region's Driver Industries Doing?

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 7-1 Overview of the Central Region's Drivers**



**Interpretation:** Here, in the Central Region, it is clear that Pulp, Paper, and Paperboard Mills as an industry is very concentrated, very large, but it is not growing. Household and Institutional Furniture, by contrast, is not very specialized, small, and also not growing. Other Transportation Equipment, in the upper right-hand corner, is also small by gross product, but it is very competitive and growing rapidly. The several companies in the upper left are growing well, but they are not strong competitively. Specific actions could be planned for industries that can be moved up the value chain, either through stimulating growth or increasing competitiveness, or both, individually or by common characteristics.

## 7.2.2 Driver and Industry Cluster Relationships in the Central Region

For the Study, an industry cluster analysis was conducted for each of the driver industries. The two following tables 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 the table, “Regional & National Supplier Industries Common to Regional Driver Industries,” 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 7-1 Regional & National Supplier Industries Common to Regional Driver Industries**

NAICS	Title	Regional Driver**	Count of Drivers	
			Regional Suppliers	National Suppliers
484*	Truck Transportation		15	15
42*	Wholesale Trade		15	15
3261	Plastics Product Manufacturing		11	13
3211	Sawmills and Wood Preservation	X	6	7
3251	Basic Chemical Manufacturing		5	4
4931	Warehousing and Storage		5	5
3272	Glass and Glass Product Manufacturing		4	5
3219	Other Wood Product Manufacturing	X	4	7
3353	Electrical Equipment Manufacturing	X	4	4
1133	Logging		4	4
3363	Motor Vehicle Parts Manufacturing		3	4
3324	Boiler, Tank, and Shipping Container Manufacturing		3	4
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance		3	8
3212	Veneer, Plywood, and Engineered Wood Product Mfg.	X	3	5
4821	Rail Transportation		3	3
5413	Architectural, Engineering, and Related Services		3	3
3325	Hardware Manufacturing	X	2	4
3331	Agriculture, Construction, and Mining Machinery Mfg.		2	0
3115	Dairy Product Manufacturing	X	2	2
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing		2	3
FR	Farms		2	3
5415	Computer Systems Design and Related Services		2	2
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	X	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.

The next table is similar in that it shows industries that supply inputs to multiple driver industries. The difference is that the industries identified in the table “National Supplier Industries Common to Regional Driver Industries,” 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 7-2 National Supplier Industries Common to Regional Driver Industries**

<b>NAICS</b>	<b>Title</b>	<b>Count of Drivers National Suppliers</b>
3222	Converted Paper Product Manufacturing	11
3321	Forging and Stamping	9
5419	Other Professional, Scientific, and Technical Services	9
3311	Iron and Steel Mills and Ferroalloy Manufacturing	8
3313	Alumina and Aluminum Production and Processing	8
3323	Architectural and Structural Metals Manufacturing	8
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	7
3255	Paint, Coating, and Adhesive Manufacturing	7
3329	Other Fabricated Metal Product Manufacturing	7
3241	Petroleum and Coal Products Manufacturing	6
3262	Rubber Product Manufacturing	6
3312	Steel Product Manufacturing from Purchased Steel	6
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	6
3221	Pulp, Paper, and Paperboard Mills	5
3314	Nonferrous Metal (except Aluminum) Production and Processing	5
3315	Foundries	5
3359	Other Electrical Equipment and Component Manufacturing	5
3112	Grain and Oilseed Milling	4
3259	Other Chemical Product and Preparation Manufacturing	4
3326	Spring and Wire Product Manufacturing	4
517*	Telecommunications	4
5411	Legal Services	4
3119	Other Food Manufacturing	3
3231	Printing and Related Support Activities	3
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	3
3344	Semiconductor and Other Electronic Component Manufacturing	3
5417	Scientific Research and Development Services	3
5418	Advertising and Related Services	3
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	2
3132	Fabric Mills	2
3141	Textile Furnishings Mills	2
3322	Cutlery and Handtool Manufacturing	2

NAICS	Title	Count of Drivers
		National Suppliers
3328	Coating, Engraving, Heat Treating, and Allied Activities	2
3335	Metalworking Machinery Manufacturing	2
3339	Other General Purpose Machinery Manufacturing	2
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	2
3352	Household Appliance Manufacturing	2
3369	Other Transportation Equipment Manufacturing	2
3399	Other Miscellaneous Manufacturing	2
483*	Water Transportation	2
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	2
5414	Specialized Design Services	2
5619	Other Support Services	2
FH	Fishing, Hunting, etc.	2

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

### 7.2.3 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 Central Region.

First, “Industry 3121: Beverage Manufacturing,” was identified as a driver industry by the quantitative analysis. While overall the industry is small in terms of employment and gross product, it has experienced significant growth in the region.

Second, industries related to building products manufacturing and milling were noted as not being included as drivers. While there is not a specific NAICS industry called “building products,” several industries that could be categorized as manufactures of building products (such as “Industry 3219: Other Wood Product Manufacturing”; “Industry 3221: Pulp, Paper, and Paperboard Mills”; “Industry 3325: Hardware Manufacturing”; and “Industry 3371: Household and Institutional Furniture and Kitchen Cabinet Manufacturing”) are included as regional driver industries.

## 7.3 Detailed Descriptions of the Regional Driver Industries

### 7.3.1 Driver Industry Definitions

#### 3114 Fruit and Vegetable Preserving and Specialty Food Mfg.

This industry group includes (1) establishments that freeze food and (2) those that use preservation processes, such as pickling, canning, and dehydrating. Both types begin their production process with inputs of vegetable or animal origin.

*31141 Frozen Food Manufacturing*

*31142 Fruit and Vegetable Canning, Pickling, and Drying*

### **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*

### **3121 Beverage Manufacturing**

This industry group includes three types of establishments: (1) those that manufacture nonalcoholic beverages; (2) those that manufacture alcoholic beverages through the fermentation process; and (3) those that produce distilled alcoholic beverages. Ice manufacturing, while not a beverage, is included with nonalcoholic beverage manufacturing because it uses the same production process as water purification.

*31211 Soft Drink and Ice Manufacturing*

*31212 Breweries*

*31213 Wineries*

*31214 Distilleries*

### **321 Wood Product Manufacturing (Complete)**

Industries in the Wood Product Manufacturing subsector manufacture wood products, such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, manufactured homes (i.e., mobile home), and prefabricated wood buildings. The production processes of the Wood Product Manufacturing subsector include sawing, planing, shaping, laminating, and assembling of wood products starting from logs that are cut into bolts, or lumber that then may be further cut, or shaped by lathes or other shaping tools. The lumber or other transformed wood shapes may also be subsequently planed or smoothed, and assembled into finished products, such as wood containers. The Wood Product Manufacturing subsector includes establishments that make wood products from logs and bolts that are sawed and shaped, and establishments that purchase sawed lumber and make wood products. With the exception of sawmills and wood preservation

establishments, the establishments are grouped into industries mainly based on the specific products manufactured.

*3211 Sawmills and Wood Preservation*

*3212 Veneer, Plywood, and Engineered Wood Product Manufacturing*

*3219 Other Wood Product Manufacturing*

### **3221 Pulp, Paper, and Paperboard Mills**

This industry group comprises establishments primarily engaged in manufacturing pulp, paper, or paperboard. The manufacturing of pulp involves separating the cellulose fibers from other impurities in wood or used paper. The manufacturing of paper involves matting these fibers into a sheet.

### **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*

### **3339 All Other General Purpose Machinery Manufacturing**

This industry comprises establishments primarily engaged in manufacturing general purpose machinery (except these groups: ventilation, heating, air-conditioning, and commercial refrigeration equipment; metal working machinery; engines, turbines, and power transmission equipment; pumps and compressors; and material handling equipment).

### **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.

*3362 Motor Vehicle Body and Trailer Manufacturing*

*3369 Other Transportation Equipment Manufacturing*

### **3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing**

This industry group comprises establishments manufacturing household-type furniture, such as living room, kitchen and bedroom furniture and institutional (i.e., public building) furniture, such as furniture for schools, theaters, and churches.

## **7.3.2 Industry Clusters**

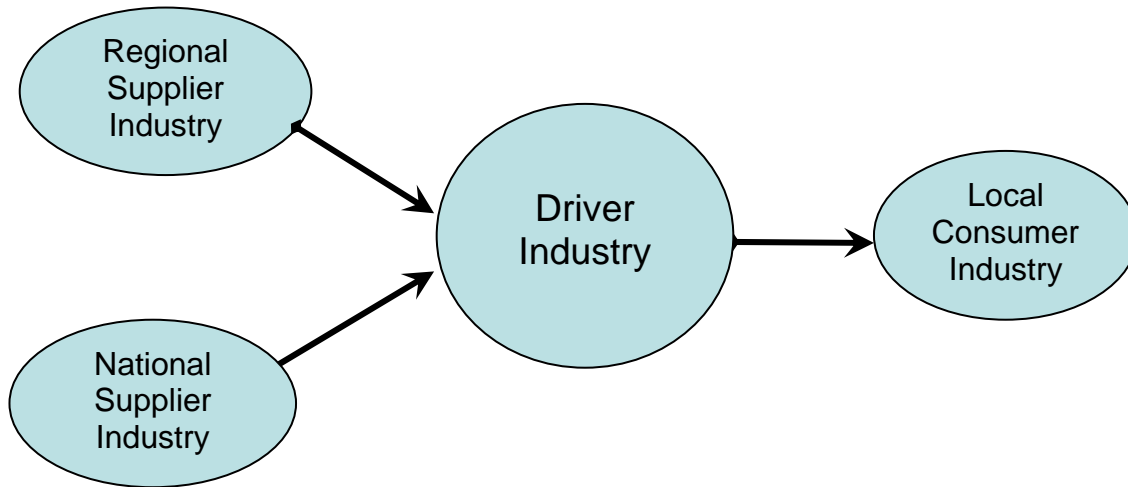
Industries contained within an industry cluster are related to driver industries in three ways, two supplier relationships and one consumer relationship.

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 7-2 Industry Clusters**



**Industry Clusters**

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

**3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing**

<u>Supplier Industries for Typical Regional Industry</u>		<u>Supplier Industries for Typical National Industry</u>	
FR	Farms	3222	Converted Paper Product Manufacturing
42*	Wholesale Trade	3272	Glass and Glass Product Manufacturing
3115	Dairy Product Manufacturing	3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
484*	Truck Transportation	3119	Other Food Manufacturing
3116	Animal Slaughtering and Processing	3231	Printing and Related Support Activities
3261	Plastics Product Manufacturing	3112	Grain and Oilseed Milling
4931	Warehousing and Storage	3221	Pulp, Paper, and Paperboard Mills
3324	Boiler, Tank, and Shipping Container Manufacturing	5419	Other Professional, Scientific, and Technical Services
<u>Consumer Industries for Typical Regional Industry</u>			
722*	Food services and drinking places		
3221	Pulp, Paper, and Paperboard Mills		
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing		
622*	Hospitals		
3115	Dairy Product Manufacturing		
623*	Nursing and residential care facilities		

### 3115 Dairy Product Manufacturing

#### Supplier Industries for Typical Regional Industry

FR	Farms
42*	Wholesale Trade
3115	Dairy Product Manufacturing
3332	Industrial Machinery Manufacturing
4931	Warehousing and Storage
484*	Truck Transportation
3324	Boiler, Tank, and Shipping Container Manufacturing
3261	Plastics Product Manufacturing

#### Supplier Industries for Typical National Industry

3222	Converted Paper Product Manufacturing
3119	Other Food Manufacturing
3112	Grain and Oilseed Milling
5411	Legal Services
3113	Sugar and Confectionery Product Manufacturing
481*	Air Transportation
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
5419	Other Professional, Scientific, and Technical Services
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 for Typical Regional Industry

3115	Dairy Product Manufacturing
722*	Food services and drinking places
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing

### 3121 Beverage Manufacturing

#### Supplier Industries for Typical Regional Industry

42*	Wholesale Trade
3324	Boiler, Tank, and Shipping Container Manufacturing
484*	Truck Transportation
3272	Glass and Glass Product Manufacturing

#### Supplier Industries for Typical National Industry

3119	Other Food Manufacturing
FR	Farms
3261	Plastics Product Manufacturing
3112	Grain and Oilseed Milling
3121	Beverage Manufacturing
3231	Printing and Related Support Activities
3222	Converted Paper Product Manufacturing
3339	Other General Purpose Machinery Manufacturing
5418	Advertising and Related Services
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing

#### Consumer Industries for Typical Regional Industry

722*	Food services and drinking places
813b*	Civic, social, professional and similar organizations
3111	Animal Food Manufacturing

### 3211 Sawmills and Wood Preservation

<u>Supplier Industries for Typical Regional Industry</u>		<u>Supplier Industries for Typical National Industry</u>	
1133	Logging	FH	Fishing, Hunting, Etc.
3211	Sawmills and Wood Preservation	484*	Truck Transportation
42*	Wholesale Trade	3219	Other Wood Product Manufacturing
484*	Truck Transportation	3259	Other Chemical Product and Preparation Manufacturing
4821	Rail Transportation	3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3251	Basic Chemical Manufacturing		
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance		
<u>Consumer Industries for Typical Regional Industry</u>			
3221	Pulp, Paper, and Paperboard Mills		
4821	Rail Transportation		
2360	Construction of Buildings		
3219	Other Wood Product Manufacturing		
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing		
2380	Specialty Trade Contractors		
2370	Heavy and Civil Engineering Construction		

### 3212 Veneer, Plywood, and Engineered Wood Product Manufacturing

<u>Supplier Industries for Typical Regional Industry</u>		<u>Supplier Industries for Typical National Industry</u>	
1133	Logging	3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
42*	Wholesale Trade	3323	Architectural and Structural Metals Manufacturing
3211	Sawmills and Wood Preservation	FH	Fishing, Hunting, Etc.
484*	Truck Transportation	3241	Petroleum and Coal Products Manufacturing
3219	Other Wood Product Manufacturing	3255	Paint, Coating, and Adhesive Manufacturing
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	3321	Forging and Stamping
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	3261	Plastics Product Manufacturing
3251	Basic Chemical Manufacturing		
<u>Consumer Industries for Typical Regional Industry</u>			
3219	Other Wood Product Manufacturing		

**Consumer Industries for Typical Regional Industry**

2360	Construction of Buildings
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3221	Pulp, Paper, and Paperboard Mills
2380	Specialty Trade Contractors
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3391	Medical Equipment and Supplies Manufacturing

**3219 Other Wood Product Manufacturing**

**Supplier Industries for Typical Regional Industry**

42*	Wholesale Trade
3211	Sawmills and Wood Preservation
484*	Truck Transportation
3219	Other Wood Product Manufacturing
3272	Glass and Glass Product Manufacturing
1133	Logging
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3261	Plastics Product Manufacturing
3363	Motor Vehicle Parts Manufacturing
3325	Hardware Manufacturing
4821	Rail Transportation
3353	Electrical Equipment Manufacturing

**Supplier Industries for Typical National Industry**

3323	Architectural and Structural Metals Manufacturing
3222	Converted Paper Product Manufacturing
3274	Lime and Gypsum Product Manufacturing
3359	Other Electrical Equipment and Component Manufacturing
3141	Textile Furnishings Mills
3352	Household Appliance Manufacturing
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3399	Other Miscellaneous Manufacturing

**Consumer Industries for Typical Regional Industry**

3219	Other Wood Product Manufacturing
3221	Pulp, Paper, and Paperboard Mills
42*	Wholesale Trade
FR	Farms
2360	Construction of Buildings
3272	Glass and Glass Product Manufacturing
4931	Warehousing and Storage
621b*	Other ambulatory health care services
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
2380	Specialty Trade Contractors

### 3221 Pulp, Paper, and Paperboard Mills

<b>Supplier Industries for Typical Regional Industry</b>	
3221	Pulp, Paper, and Paperboard Mills
42*	Wholesale Trade
1133	Logging
484*	Truck Transportation
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3211	Sawmills and Wood Preservation
3251	Basic Chemical Manufacturing
4821	Rail Transportation

<b>Supplier Industries for Typical National Industry</b>	
3241	Petroleum and Coal Products Manufacturing
8112	Electronic and Precision Equipment Repair and Maintenance
3112	Grain and Oilseed Milling
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing
3222	Converted Paper Product Manufacturing
8111	Automotive Repair and Maintenance
3219	Other Wood Product Manufacturing
2380	Specialty Trade Contractors
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing

#### **Consumer Industries for Typical Regional Industry**

3221	Pulp, Paper, and Paperboard Mills
3222	Converted Paper Product Manufacturing

### 3322 Cutlery and Handtool Manufacturing

<b>Supplier Industries for Typical Regional Industry</b>	
42*	Wholesale Trade
484*	Truck Transportation
3261	Plastics Product Manufacturing
3322	Cutlery and Handtool Manufacturing

<b>Supplier Industries for Typical National Industry</b>	
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
3241	Petroleum and Coal Products Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
5418	Advertising and Related Services

#### **Consumer Industries for Typical Regional Industry**

3322	Cutlery and Handtool Manufacturing
3221	Pulp, Paper, and Paperboard Mills
FR	Farms
8111	Automotive Repair and Maintenance

**Consumer Industries for Typical Regional Industry**

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722*	Food services and drinking places
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3325	Hardware Manufacturing
2360	Construction of Buildings
8121	Personal Care Services

**3325 Hardware Manufacturing**

**Supplier Industries for Typical Regional Industry**

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42*	Wholesale Trade
3353	Electrical Equipment Manufacturing
484*	Truck Transportation
3261	Plastics Product Manufacturing
3326	Spring and Wire Product Manufacturing
3325	Hardware Manufacturing

**Supplier Industries for Typical National Industry**

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3311	Iron and Steel Mills and Ferroalloy Manufacturing
3321	Forging and Stamping
3222	Converted Paper Product 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
3312	Steel Product Manufacturing from Purchased Steel
3313	Alumina and Aluminum Production and Processing
5419	Other Professional, Scientific, and Technical Services

**Consumer Industries for Typical Regional Industry**

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3219	Other Wood Product Manufacturing
3323	Architectural and Structural Metals Manufacturing
3325	Hardware Manufacturing
2360	Construction of Buildings
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3364	Aerospace Product and Parts Manufacturing

**3329 Other Fabricated Metal Product Manufacturing**

**Supplier Industries for Typical Regional Industry**

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5415	Computer Systems Design and Related Services
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**Supplier Industries for Typical National Industry**

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3311	Iron and Steel Mills and Ferroalloy Manufacturing
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**Supplier Industries for Typical Regional Industry**

42*	Wholesale Trade
484*	Truck Transportation
5112	Software Publishers
3261	Plastics Product Manufacturing
3251	Basic Chemical Manufacturing
3329	Other Fabricated Metal Product Manufacturing
5411	Legal Services

**Supplier Industries for Typical National Industry**

3328	Coating, Engraving, Heat Treating, and Allied Activities
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
3313	Alumina and Aluminum Production and Processing
3221	Pulp, Paper, and Paperboard Mills
3259	Other Chemical Product and Preparation Manufacturing
3222	Converted Paper Product Manufacturing
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
3315	Foundries
3323	Architectural and Structural Metals Manufacturing

**Consumer Industries for Typical Regional Industry**

8114	Personal and Household Goods Repair and Maintenance
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
2123	Nonmetallic Mineral Mining and Quarrying
3324	Boiler, Tank, and Shipping Container Manufacturing
3329	Other Fabricated Metal Product Manufacturing
2360	Construction of Buildings
2131	Support Activities for Mining
3391	Medical Equipment and Supplies Manufacturing
3364	Aerospace Product and Parts Manufacturing
3315	Foundries

**3339 Other General Purpose Machinery Manufacturing**

**Supplier Industries for Typical Regional Industry**

42*	Wholesale Trade
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
3353	Electrical Equipment Manufacturing
5415	Computer Systems Design and Related Services
3261	Plastics Product Manufacturing
484*	Truck Transportation

**Supplier Industries for Typical National Industry**

3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3326	Spring and Wire Product Manufacturing
3323	Architectural and Structural Metals Manufacturing
3315	Foundries
3321	Forging and Stamping

**Supplier Industries for Typical Regional Industry**

3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
3339	Other General Purpose Machinery Manufacturing

**Supplier Industries for Typical National Industry**

3359	Other Electrical Equipment and Component Manufacturing
3314	Nonferrous Metal (except Aluminum) Production and Processing
3329	Other Fabricated Metal Product Manufacturing
3363	Motor Vehicle Parts Manufacturing

**Consumer Industries for Typical Regional Industry**

2212	Natural Gas Distribution
FR	Farms
2211	Electric Power Generation, Transmission and Distribution
3231	Printing and Related Support Activities
3331	Agriculture, Construction, and Mining Machinery Manufacturing
2123	Nonmetallic Mineral Mining and Quarrying
3328	Coating, Engraving, Heat Treating, and Allied Activities
3221	Pulp, Paper, and Paperboard Mills
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing

**3353 Electrical Equipment Manufacturing**

**Supplier Industries for Typical Regional Industry**

42*	Wholesale Trade
3261	Plastics Product Manufacturing
484*	Truck Transportation
3353	Electrical Equipment Manufacturing
4931	Warehousing and Storage
5413	Architectural, Engineering, and Related Services
2380	Specialty Trade Contractors

**Supplier Industries for Typical National Industry**

3255	Paint, Coating, and Adhesive Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3344	Semiconductor and Other Electronic Component Manufacturing
3321	Forging and Stamping
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
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

**Consumer Industries for Typical Regional Industry**

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3221	Pulp, Paper, and Paperboard Mills
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3219	Other Wood Product Manufacturing
3399	Other Miscellaneous Manufacturing
3333	Commercial and Service Industry Machinery Manufacturing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
484*	Truck Transportation
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3353	Electrical Equipment Manufacturing

**3362 Motor Vehicle Body and Trailer Manufacturing**

**Supplier Industries for Typical Regional Industry**

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42*	Wholesale Trade
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing
484*	Truck Transportation
3363	Motor Vehicle Parts Manufacturing
3261	Plastics Product Manufacturing
3211	Sawmills and Wood Preservation
4931	Warehousing and Storage
3219	Other Wood Product Manufacturing
5413	Architectural, Engineering, and Related Services
3272	Glass and Glass Product Manufacturing

**Supplier Industries for Typical National Industry**

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3363	Motor Vehicle Parts Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing
3329	Other Fabricated Metal Product Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3361	Motor Vehicle Manufacturing
3313	Alumina and Aluminum Production and Processing
3321	Forging and Stamping
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
3359	Other Electrical Equipment and Component Manufacturing
3262	Rubber Product Manufacturing

**Consumer Industries for Typical Regional Industry**

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3362	Motor Vehicle Body and Trailer Manufacturing
8111	Automotive Repair and Maintenance
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3361	Motor Vehicle Manufacturing
3369	Other Transportation Equipment Manufacturing

### 3369 Other Transportation Equipment Manufacturing

<u>Supplier Industries for Typical Regional Industry</u>		<u>Supplier Industries for Typical National Industry</u>	
42*	Wholesale Trade	3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing
484*	Truck Transportation	3311	Iron and Steel Mills and Ferroalloy Manufacturing
3363	Motor Vehicle Parts Manufacturing	3344	Semiconductor and Other Electronic Component Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing	3329	Other Fabricated Metal Product Manufacturing
3261	Plastics Product Manufacturing	3314	Nonferrous Metal (except Aluminum) Production and Processing
3369	Other Transportation Equipment Manufacturing	3262	Rubber Product Manufacturing
4931	Warehousing and Storage	3255	Paint, Coating, and Adhesive Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	5417	Scientific Research and Development Services
5413	Architectural, Engineering, and Related Services	3321	Forging and Stamping
		3313	Alumina and Aluminum Production and Processing

#### Consumer Industries for Typical Regional Industry

3369	Other Transportation Equipment Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing
FR	Farms
3362	Motor Vehicle Body and Trailer Manufacturing
3353	Electrical Equipment Manufacturing
8111	Automotive Repair and Maintenance
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
621b*	Other ambulatory health care services
3333	Commercial and Service Industry Machinery Manufacturing
3325	Hardware Manufacturing

### 3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing

<u>Supplier Industries for Typical Regional Industry</u>		<u>Supplier Industries for Typical National Industry</u>	
42*	Wholesale Trade	3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing

**Supplier Industries for Typical Regional Industry**

3261	Plastics Product Manufacturing
484*	Truck Transportation
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3372	Office Furniture (including Fixtures) Manufacturing
3211	Sawmills and Wood Preservation
3251	Basic Chemical Manufacturing
3219	Other Wood Product Manufacturing
3272	Glass and Glass Product Manufacturing

**Supplier Industries for Typical National Industry**

3132	Fabric Mills
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3133	Textile and Fabric Finishing and Fabric Coating Mills
3222	Converted Paper Product Manufacturing
3313	Alumina and Aluminum Production and Processing
3149	Other Textile Product Mills
3326	Spring and Wire Product Manufacturing
3131	Fiber, Yarn, and Thread Mills
3241	Petroleum and Coal Products Manufacturing

**Consumer Industries for Typical Regional Industry**

3219	Other Wood Product Manufacturing
2360	Construction of Buildings
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3364	Aerospace Product and Parts Manufacturing
3333	Commercial and Service Industry Machinery Manufacturing
8112	Electronic and Precision Equipment Repair and Maintenance
3399	Other Miscellaneous Manufacturing
8121	Personal Care Services
3391	Medical Equipment and Supplies Manufacturing

### 7.3.3 Top Firms by Driver Industry in the Central Region

#### 3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
McCain Foods USA Inc	600	4,124	Branch	Private	100MM-499.9MM	1979
Del Monte Foods Co	600	10,001	Branch	Public	100MM-499.9MM	1966
Kraft Pizza Co	400	41,810	Branch	Private	50MM-99.9MM	1962
Golden County Foods Inc	350		Single	Private	50MM-99.9MM	1991
Basic American Foods	170	1,545	Branch	Private	25MM-49.9MM	1974
Chef-Fresh Frozen Co Inc	30		Single	Private	5MM-9.9MM	1972
Ocean Spray Cranberries Inc	30		Single		5MM-9.9MM	1969
Abbotsford Produce Egg Prods	25		Single	Private	5MM-9.9MM	1948
Portesi's Italian Foods Inc	20		Single	Private	1MM-4.9MM	1957
Northland Cranberries Inc	20	5,014	HQs	Private		1987

#### 3115 Dairy Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Land O'Lakes Inc	470	6,861	Branch	Private	100MM-499.9MM	1908
Kraft Foods Inc	265	41,810	Branch	Private	100MM-499.9MM	1918
Grassland Dairy Products Inc	211		Single	Private	100MM-499.9MM	1904
Schreiber Foods Inc	180	4,107	Branch	Private	50MM-99.9MM	1945
Kerry Specialty Ingredients	150	20,973	Branch	Private	50MM-99.9MM	1972
Antigo Cheese Co	145		Single	Private	50MM-99.9MM	1993
Kerry Specialty Ingredients	125	20,973	Branch	Private	50MM-99.9MM	1992
Mullins Cheese Inc	100	101	Branch	Private	50MM-99.9MM	1970
Lynn Protein Inc	80		Single	Private	25MM-49.9MM	1975
Rondele Specialty Foods	70		Single	Private	25MM-49.9MM	1995
Drangle Foods Inc	68		Single	Private	25MM-49.9MM	1932
Foremost Farms USA Co-op	65	1,467	Branch	Private	10MM-24.9MM	1963
Foremost Farms USA Cooperative	65	1,467	Branch	Private	25MM-49.9MM	1963
Foremost Farms USA Cooperative	65	1,467	Branch	Private	25MM-49.9MM	1970
Welcome Dairy Inc	60		Single	Private	25MM-49.9MM	1899
Wiskerchen Cheese Inc	60		Single	Private	25MM-49.9MM	1936
Quality Ingredients Corp	50	90	Branch	Private	10MM-24.9MM	1999
Foremost Farms USA Co-Op	50	1,467	Branch	Private	25MM-49.9MM	1963
Maple Island Inc	50	91	Branch	Private	25MM-49.9MM	1984
Grande Custom Ingredients Grp	35	800	Branch	Private	10MM-24.9MM	1940
Mullin's Cheese Inc	35		Single	Private	10MM-24.9MM	1958
Nasonville Dairy Inc	35		Single	Private	10MM-24.9MM	1985
Dairy Concepts	30	3,658	Branch	Private	10MM-24.9MM	

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Wisconsin Dairy State Cheese	30		Single	Private	10MM-24.9MM	1952
North Hendren Cooperative	29		Single	Private	10MM-24.9MM	1923
Spring Brook Farm	22		Single	Private	5MM-9.9MM	2001
LaGrander's Hillside Dairy Inc	20		Single	Private	10MM-24.9MM	1960
Herschlebs Ice Cream Co Inc	20		Single	Private	5MM-9.9MM	1939

### 3121 Beverage Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Stevens Point Brewery	24		Single	Private	10MM-24.9MM	1857

### 3211 Sawmills and Wood Preservation

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Kretz Lumber Co Inc	150		Single	Private	25MM-49.9MM	1936
Louisiana Pacific Corp	145	4,371	Branch	Public	25MM-49.9MM	1992
Hamel Forest Products Inc	140	180	Parent	Private		1965
Northwest Hardwoods	125	43,346	Branch	Public	25MM-49.9MM	1986
American Wood Fibers	55	405	Branch	Private	10MM-24.9MM	1966
Golden Eagle Log Homes Inc	55		Single	Private	10MM-24.9MM	1967
Wetterau Wood Products Inc	45		Single	Private	5MM-9.9MM	1970
Hamel Forest Products Inc	40	180	Branch	Private	5MM-9.9MM	1974
Northwest Hardwoods	40	43,346	Branch	Public	5MM-9.9MM	1989
Granite Valley Forest Products	26	185	Branch	Private	5MM-9.9MM	2002
Polar Manufacturing Co Inc	25		Single	Private	5MM-9.9MM	1933
James Grezenski Forest Prdts	22		Single	Private	1MM-4.9MM	1966

### 3212 Veneer, Plywood, and Engineered Wood Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Automated Products Inc	150		Single	Private	10MM-24.9MM	1968
Riverstone Inc	50		Single	Private	5MM-9.9MM	1999
Hatley Veneer Co	30	633	Branch	Private	1MM-4.9MM	1988

### 3219 Other Wood Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Weather Shield Mfg Inc	2,500	3,953	Parent	Private		1956
Kolbe & Kolbe Millwork Co Inc	1,600	1,710	Parent	Private		1946
Hurd Millwork Co Inc	1,000	4,242	HQs	Private		1919
Wick Building Systems Inc	600	1,167	Branch	Private	50MM-99.9MM	1954
Lincoln Wood Products Inc	500		Single	Private	50MM-99.9MM	1947
Semling-Menke Co Inc	375	457	Parent	Private		1941

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Wausau Homes Inc	300	530	Parent	Private		1960
Hurd Millwork Co	250	4,242	Branch	Private	25MM-49.9MM	1982
Menzner Lumber & Supply Co	200	213	Parent	Private		1904
Wisconsin Homes Inc	200		Single	Private	25MM-49.9MM	1965
Award Hardwood Flooring LLP	150		Single	Private	10MM-24.9MM	1998
Liberty Homes Inc	150	935	Branch	Private	10MM-24.9MM	1941
Stratford Homes LP	150		Single	Private	10MM-24.9MM	1973
Robbins Inc	115	540	Branch	Private	10MM-24.9MM	1917
Parrett Manufacturing Inc	100		Single	Private	10MM-24.9MM	1983
Polywood Fabrication Inc	100		Single	Private	10MM-24.9MM	1999
Terrace Homes	100		Single	Private	10MM-24.9MM	1971
Wisconsin Box Co	90	114	Parent	Private		1900
Marth Wood Shaving Supply Inc	60		Single	Private	5MM-9.9MM	1958
JMB Pallet	55		Single	Private	1MM-4.9MM	1984
Sterling Building Systems	50	530	Branch	Private	5MM-9.9MM	1963
Pittsville Homes Inc	50		Single	Private	5MM-9.9MM	1971
Zelazoski Wood Products Inc	36		Single	Private	1MM-4.9MM	1924
Trimpac Inc	35		Single	Private	1MM-4.9MM	1986
Owen Manufacturing Inc	30		Single	Private	1MM-4.9MM	1992
Tannery Lane Co Inc	27		Single	Private	1MM-4.9MM	1980
Merrill Millwork Inc	25		Single	Private	1MM-4.9MM	1966
Woodruff Lumber Co Inc	25		Single	Private	1MM-4.9MM	1948
Feltz Manufacturing Co Inc	20		Single	Private	1MM-4.9MM	1938
Community Industries Corp	20	90	Branch	Private	1MM-4.9MM	1965

### 3221 Pulp, Paper, and Paperboard Mills

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Domtar Industries Inc	1,400	4,274	Branch	Private	100MM-499.9MM	1908
Wausau Papers	650	3,149	Branch	Public	100MM-499.9MM	1899
Stora Enso North America	350	2,688	Branch	Private	100MM-499.9MM	
Weyerhaeuser Co	350	43,346	Branch	Public	100MM-499.9MM	1973
Stora Enso North America	300	2,688	HQs	Private		2002
Kimberly-Clark Corp	110	18,353	Branch	Public	25MM-49.9MM	1981
Wausau-Mosinee Paper Corp	38	3,149	Parent	Public		1899
Industrial Recyclers of Wiscon	35		Single	Private	10MM-24.9MM	1989
Wausau-Mosinee Paper Corp	20	3,149	Branch	Public	5MM-9.9MM	

**3322 Cutlery and Handtool Manufacturing**

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Fiskars Brands Inc	300	1,736	Branch	Private	50MM-99.9MM	1977
Fiskars Brands	120	1,736	Branch	Private	10MM-24.9MM	1988
Hydratight Sweeney Mfg	50	17,619	Branch	Public	5MM-9.9MM	1997

**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.)

**3329 Other Fabricated Metal Product Manufacturing**

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Felker Brothers Corp	250	300	Parent	Private		1903
A & B Process Systems Corp	200		Single	Private	25MM-49.9MM	1972
Custom Fabricating & Repair	80		Single	Private	10MM-24.9MM	1984
J & D Tube Benders Inc	72		Single	Private	5MM-9.9MM	1968
Innovative Industries Inc	21		Single	Private	1MM-4.9MM	1979
TEAM-Marshfield Inc	20		Single	Private	1MM-4.9MM	1992

**3339 Other General Purpose Machinery Manufacturing**

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Donaldson Co Inc	420	5,578	Branch	Public	50MM-99.9MM	1976
Steel King Industries Inc	200	380	Parent	Private		1970
Jarp Industries Inc	128		Single	Private	10MM-24.9MM	1949
Stainless Specialists Inc	125		Single	Private	10MM-24.9MM	1985
Ramrod Industries Ltd	80	103	Parent	Private		1992
Creative Automation Inc	45		Single	Private	5MM-9.9MM	1971
Professional Hydraulic Jacks	20		Single	Private	1MM-4.9MM	1996

**3353 Electrical Equipment Manufacturing**

Company	Employment Site		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Marathon Electric	750	4,950	HQs	Public		1932
Motor Technologies	160	4,950	Branch	Public	25MM-49.9MM	1972
Wilson-Hurd Mfg Co	75	140	Parent	Private		1904
L & S Electric Inc	40	115	Parent	Private		1933

**3362 Motor Vehicle Body and Trailer 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.)

**3369 Other Transportation Equipment Manufacturing**

Company	Employment Site		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Harley-Davidson Inc	275	7,203	Branch	Public	50MM-99.9MM	1964
Pingel Enterprises Inc	30		Single	Private	5MM-9.9MM	1967

**3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing**

Company	Employment Site		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Sunrise Medical Long Term Care	330		Single	Private	25MM-49.9MM	1889
Marshfield Furniture	120		Single	Private	10MM-24.9MM	1944
Great Northern Cabinetry Inc	80		Single	Private	5MM-9.9MM	1972
Wisconsin Bench Inc	70		Single	Private	5MM-9.9MM	1983
Counter-Form LLC	60		Single	Private	5MM-9.9MM	1980
Especially For You Ltd	60		Single	Private	5MM-9.9MM	1984
Lang Furniture Inc	50		Single	Private	1MM-4.9MM	1960
Buffets Inc	40	20,834	Branch	Private	1MM-4.9MM	1994
Featherstone Manufacturing	32		Single	Private	1MM-4.9MM	1976
Mapleton Sign & Cabinetry Inc	30		Single	Private	1MM-4.9MM	1978
Evergreen Mfg	25		Single	Private	1MM-4.9MM	1985
Badger Basket Co	25	28	Branch	Private	1MM-4.9MM	1936
Witmer Furniture Inc	25		Single	Private	1MM-4.9MM	1984
Westwood Kitchens Inc	20		Single	Private	1MM-4.9MM	1986

### 7.3.4 Detailed Employment, Gross Product, & Gross Product per Employee, Central Region

**Table 7-3 Manufacturing Employment in the Central Region's Driver Industries, 1993-2008**

<b>NAICS</b>	<b>Title</b>	<b>1993</b>	<b>1998</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2008</b>
3114	Fruit and Vegetable Preserving and Specialty Food Mfg.	3,048	2,711	2,696	2,442	2,454	2,152	2,019	1,874
3115	Dairy Product Manufacturing	3,009	2,382	2,358	2,313	2,167	2,083	2,087	2,010
3121	Beverage Manufacturing	220	159	139	119	148	118	118	136
3211	Sawmills and Wood Preservation	530	638	736	744	703	708	715	767
3212	Veneer, Plywood, and Engineered Wood Product Mfg.	2,029	2,472	2,358	2,323	2,147	2,073	2,087	1,932
3219	Other Wood Product Manufacturing	5,737	6,708	6,944	6,849	6,601	6,446	6,527	6,350
3221	Pulp, Paper, and Paperboard Mills	9,735	7,935	7,401	6,670	6,511	4,196	3,734	2,845
3322	Cutlery and Handtool Mfg.	380	618	647	605	604	590	598	651
3325	Hardware Manufacturing	310	478	527	496	485	482	490	563
3329	Other Fabricated Metal Product Manufacturing	950	269	338	288	297	275	294	291
3339	Other General Purpose Machinery Manufacturing	280	817	865	814	821	766	794	893
3353	Electrical Equipment Mfg.	350	279	249	208	188	177	176	175
3362	Motor Vehicle Body and Trailer Manufacturing	180	169	219	189	178	177	176	184
3369	Other Transportation Equipment Manufacturing	650	1,017	1,124	1,102	1,158	1,268	1,431	1,728

**Table 7-4 CAGR\* for Employment in the Central Region's Driver Industries, 1993-2008**

NAICS	Title	1993-1998	1998-2003	2003-2008
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	-1.9%	-3.8%	-2.3%
3115	Dairy Product Manufacturing	-3.8%	-2.2%	-0.6%
3121	Beverage Manufacturing	-5.2%	-4.9%	2.4%
3211	Sawmills and Wood Preservation	3.1%	1.7%	1.4%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	3.3%	-2.9%	-1.2%
3219	Other Wood Product Manufacturing	2.6%	-0.7%	-0.3%
3221	Pulp, Paper, and Paperboard Mills	-3.4%	-10.1%	-6.3%
3322	Cutlery and Handtool Manufacturing	8.5%	-0.8%	1.7%
3325	Hardware Manufacturing	7.5%	0.1%	2.6%
3329	Other Fabricated Metal Product Manufacturing	-19.0%	0.4%	1.0%
3339	Other General Purpose Machinery Mfg.	19.6%	-1.1%	2.6%
3353	Electrical Equipment Manufacturing	-3.7%	-7.3%	-0.2%
3362	Motor Vehicle Body and Trailer Manufacturing	-1.0%	0.7%	0.7%
3369	Other Transportation Equipment Mfg.	7.8%	3.7%	5.3%

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

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

**Table 7-5 Labor Location Quotients\*—Central Region's Driver Industries, 1993-2003**

NAICS	Title	1993	1998	2003
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	8.82	8.61	7.28
3115	Dairy Product Manufacturing	13.26	11.71	9.50
3121	Beverage Manufacturing	0.83	0.60	0.43
3211	Sawmills and Wood Preservation	2.48	3.05	3.78
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	13.59	14.14	11.34
3219	Other Wood Product Manufacturing	12.14	11.95	13.10
3221	Pulp, Paper, and Paperboard Mills	26.70	24.60	17.33
3322	Cutlery and Handtool Manufacturing	3.20	5.00	5.95
3325	Hardware Manufacturing	3.61	5.76	7.53
3329	Other Fabricated Metal Product	1.93	0.53	0.60

NAICS	Title	1993	1998	2003
	Manufacturing			
3339	Other General Purpose Machinery Manufacturing	0.55	1.45	1.80
3353	Electrical Equipment Manufacturing	1.02	0.84	0.69
3362	Motor Vehicle Body and Trailer Manufacturing	0.83	0.64	0.73
3369	Other Transportation Equipment Manufacturing	11.18	16.56	20.24
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	1.98	2.18	2.11

\* 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 7-6 Manufacturing Gross Product in the Central Region’s Driver Industries, 1993-2008**

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	\$ 143,258,224	\$ 153,142,764	\$ 176,754,847	\$ 191,517,514	\$ 188,052,737	\$ 178,920,661	\$ 175,203,711	\$ 186,376,846
3115	Dairy Product Manufacturing	\$ 153,900,037	\$ 138,837,892	\$ 146,077,813	\$ 160,507,541	\$ 143,640,028	\$ 143,064,445	\$ 146,882,334	\$ 162,484,512
3121	Beverage Manufacturing	\$ 36,820,277	\$ 29,654,985	\$ 29,616,129	\$ 26,669,774	\$ 34,210,465	\$ 34,970,622	\$ 35,719,615	\$ 46,589,013
3211	Sawmills and Wood Preservation	\$ 22,680,736	\$ 34,283,910	\$ 39,174,197	\$ 44,878,655	\$ 44,422,693	\$ 47,729,339	\$ 52,849,056	\$ 66,520,086
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	\$ 106,893,742	\$ 142,710,261	\$ 128,359,693	\$ 141,360,778	\$ 134,965,124	\$ 143,836,765	\$ 150,518,400	\$ 161,808,706
3219	Other Wood Product Manufacturing	\$ 238,499,477	\$ 320,968,677	\$ 323,030,960	\$ 359,637,863	\$ 350,939,271	\$ 377,087,521	\$ 398,138,664	\$ 454,068,728
3221	Pulp, Paper, and Paperboard Mills	\$ 786,255,589	\$ 854,121,313	\$ 916,424,357	\$ 901,324,623	\$ 906,153,049	\$ 740,129,126	\$ 727,129,030	\$ 715,553,593
3322	Cutlery and Handtool Manufacturing	\$ 20,946,734	\$ 37,200,631	\$ 43,160,030	\$ 41,456,383	\$ 40,808,981	\$ 42,230,425	\$ 43,737,875	\$ 54,220,420
3325	Hardware Manufacturing	\$ 16,775,223	\$ 30,789,819	\$ 36,427,739	\$ 35,000,961	\$ 35,198,745	\$ 37,575,913	\$ 40,417,075	\$ 52,317,767
3329	Other Fabricated Metal Product Manufacturing	\$ 31,578,639	\$ 47,493,768	\$ 50,407,901	\$ 46,764,396	\$ 49,234,319	\$ 47,904,398	\$ 50,631,687	\$ 50,810,200
3339	Other General Purpose Machinery Manufacturing	\$ 47,620,627	\$ 86,346,876	\$ 95,045,266	\$ 106,010,606	\$ 105,526,356	\$ 109,401,617	\$ 115,166,595	\$ 146,327,554
3353	Electrical Equipment Manufacturing	\$ 21,868,232	\$ 21,601,651	\$ 19,522,651	\$ 32,945,602	\$ 28,670,106	\$ 28,215,402	\$ 29,151,577	\$ 33,644,733
3362	Motor Vehicle Body and Trailer Manufacturing	\$ 14,952,045	\$ 18,515,701	\$ 21,515,567	\$ 17,779,849	\$ 17,998,677	\$ 19,174,116	\$ 20,103,449	\$ 24,828,066
3369	Other Transportation Equipment Manufacturing	\$ 34,035,966	\$ 62,694,561	\$ 67,570,779	\$ 63,556,476	\$ 71,555,474	\$ 82,535,200	\$ 98,163,260	\$ 139,299,174

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

NAICS	Title	1993-1998	1998-2003	2003-2008
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	1.1%	2.6%	0.7%
3115	Dairy Product Manufacturing	-1.7%	0.5%	2.1%
3121	Beverage Manufacturing	-3.5%	2.8%	4.9%
3211	Sawmills and Wood Preservation	7.1%	5.7%	5.7%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	4.9%	0.1%	2.0%
3219	Other Wood Product Manufacturing	5.1%	2.7%	3.1%
3221	Pulp, Paper, and Paperboard Mills	1.4%	-2.4%	-0.6%
3322	Cutlery and Handtool Manufacturing	10.0%	2.1%	4.3%
3325	Hardware Manufacturing	10.7%	3.4%	5.7%
3329	Other Fabricated Metal Product Manufacturing	7.0%	0.1%	1.0%
3339	Other General Purpose Machinery Manufacturing	10.4%	4.0%	5.0%
3353	Electrical Equipment Manufacturing	-0.2%	4.6%	3.0%
3362	Motor Vehicle Body and Trailer Manufacturing	3.6%	0.6%	4.4%
3369	Other Transportation Equipment Manufacturing	10.7%	4.7%	9.1%
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	4.6%	-2.0%	3.4%

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

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

**Table 7-8 Output Location Quotients\*—Central Region's Driver Industries, 1993-2003**

NAICS	Title	1993	1998	2003
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	8.49	8.92	11.87
3115	Dairy Product Manufacturing	10.26	9.46	10.62
3121	Beverage Manufacturing	1.79	1.32	1.71
3211	Sawmills and Wood Preservation	2.32	3.70	7.00
3212	Veneer, Plywood, and Engineered Wood Product Mfg.	13.16	16.34	19.04
3219	Other Wood Product Manufacturing	12.53	14.49	22.35
3221	Pulp, Paper, and Paperboard Mills	29.83	30.93	28.30
3322	Cutlery and Handtool Manufacturing	4.03	6.01	9.49
3325	Hardware Manufacturing	3.56	5.50	8.60
3329	Other Fabricated Metal Product Manufacturing	1.30	1.77	2.26

NAICS	Title	1993	1998	2003
3339	Other General Purpose Machinery Manufacturing	1.98	2.68	4.23
3353	Electrical Equipment Manufacturing	1.27	1.00	1.74
3362	Motor Vehicle Body and Trailer Manufacturing	2.85	2.64	2.67
3369	Other Transportation Equipment Manufacturing	19.98	31.86	31.31
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	4.73	5.06	4.84

\* 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 7-9 Manufacturing Productivity (Gross Product per Employee) of Driver Industries, Central Region, 1993-2008**

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3114	Fruit & Vegetable Preserving & Specialty Food Mfg.	\$ 46,993	\$ 56,483	\$ 65,563	\$ 78,432	\$ 76,625	\$ 83,139	\$ 86,785	\$ 99,458
3115	Dairy Product Manufacturing	\$ 51,155	\$ 58,278	\$ 61,957	\$ 69,400	\$ 66,279	\$ 68,673	\$ 70,366	\$ 80,844
3121	Beverage Manufacturing	\$167,448	\$185,939	\$212,646	\$223,902	\$230,469	\$296,559	\$303,736	\$342,737
3211	Sawmills and Wood Preservation	\$ 42,815	\$ 53,741	\$ 53,214	\$ 60,284	\$ 63,225	\$ 67,459	\$ 73,873	\$ 86,722
3212	Veneer, Plywood, and Engineered Wood Product Mfg.	\$ 52,683	\$ 57,729	\$ 54,442	\$ 60,860	\$ 62,850	\$ 69,371	\$ 72,107	\$ 83,744
3219	Other Wood Product Manufacturing	\$ 41,571	\$ 47,845	\$ 46,521	\$ 52,509	\$ 53,168	\$ 58,496	\$ 61,000	\$ 71,507
3221	Pulp, Paper, and Paperboard Mills	\$ 80,764	\$107,646	\$123,817	\$135,124	\$139,162	\$176,388	\$194,741	\$251,525
3322	Cutlery and Handtool Manufacturing	\$ 55,150	\$ 60,194	\$ 66,746	\$ 68,467	\$ 67,604	\$ 71,625	\$ 73,164	\$ 83,348
3325	Hardware Manufacturing	\$ 54,140	\$ 64,352	\$ 69,090	\$ 70,523	\$ 72,590	\$ 78,037	\$ 82,483	\$ 92,902
3329	Other Fabricated Metal Product Mfg.	\$ 33,257	\$176,468	\$149,031	\$162,457	\$165,841	\$174,103	\$172,215	\$174,436
3339	Other General Purpose Machinery Manufacturing	\$170,158	\$105,639	\$109,817	\$130,244	\$128,478	\$142,731	\$145,081	\$163,811
3353	Electrical Equipment Manufacturing	\$ 62,512	\$ 77,397	\$ 78,498	\$158,052	\$152,483	\$159,515	\$165,257	\$192,509
3362	Motor Vehicle Body and Trailer Mfg.	\$ 83,108	\$109,266	\$ 98,308	\$ 94,275	\$101,045	\$108,400	\$113,964	\$134,585
3369	Other Transportation Equipment Mfg.	\$ 52,389	\$ 61,663	\$ 60,109	\$ 57,684	\$ 61,802	\$ 65,109	\$ 68,607	\$ 80,600

## 7.4 Wisconsin Executive Perspectives in the Central Region

### Central 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?*

Difficult to find toolmakers and other skilled workers. Health Insurance and the cost of other benefits. Dealing with a changing work ethic and set of values among younger workers.

*--President, Wire Forms*

Get quality people to live in rural areas. The aging of the population to have [to] replace workers.

*--Cheese Industry*

Maintaining a stable workforce. Employees need to be dedicated to the corporate goals of easier to do business with for our customers and engaged in the continuous improvement environment .

...

*--Director of Research, Windows and Doors*

Quality of personnel -- experience and knowledge

*--Controller, Marketing Solutions Company*

The high cost of wages and benefits of our Unionized work force. Health Care costs are increasing at a rate that offsets any productivity improvements. Lack of or inability of the workforce to accept . . .

*--Commercial Wood Doors and Door Components*

There are fewer students enrolling in the Machine Tool programs. More focus needs to be placed on jobs in the manufacturing sector as a career choice.

*--President, Precision Machined Components*

Technically skilled labor (toolmakers, CNC technicians, welders), state taxes, regulatory costs, health insurance costs. . .

*--President, Wireform Components*

Cost of Chinese, Indian and Mexican Labor keeps us lowering prices to keep business and prevents reasonable wage increases to reward the improved productivity.

Supply of labor that possess the necessary "soft skills" to be successful employees.

*--Assistant General Manager, Hardwood Plywood*

***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?***

Dependable and knowledgeable workers.

*--Director of Research, Windows and Doors*

Generally, a slightly better work ethic. Controlled influx of “foreign” workers.

*--President Wire Forms*

Higher work ethic, when good employees are obtained.

*--Controller, Marketing Solutions Company*

Its close to milk

*--Cheese Industry*

Reliable, hard working, family oriented labor.

*--President, Wireform Components*

Strong work ethic, good skill sets, educated.

*--Commercial Wood Doors and Door Components*

Work ethic and job stability

*--President, Precision Machined Components*

None.

Strong work ethic installed in a culture where “an honest day of work equals an honest day of pay.”

*--Assistant General Manager, Hardwood Plywood*

***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?***

Better prepared for business. Understanding of overall business needs do not appear to be a focus at this point. Individuals are not versed in business terminology, cost structures, etc.

*--Controller, Marketing Solutions Company*

I think students entering the workforce must understand that it takes more than one year to really understand and fit into a good work environment. It is also important to be a dependable employee.

*--Director of Research, Windows and Doors*

I think that more required for graduation, internships or Coop arrangements would help.

*--Commercial Wood Doors and Door Components*

Less emphasis on college and more on trades. More medical practitioners (increased supply means lower prices).

*--President, Wire Forms*

More advertising and enhancing the level of skill provided in the education system that keeps pace with technology.

*--President, Precision Machined Components*

More positive marketing for 2 year tech college based careers in manufacturing vs. 4 year colleges which are not for everyone

*--President, Wireform Components*

The state must get evolved [sic] to solve local schools, force consolidation to keep real estate taxes from increasing.

*--Cheese Industry*

More technical and engineering.

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

Health insurance, more help with rural area, sewer, water, land encouragements, aging population and its effect.

*--Cheese Industry*

Inexpensive, accessible education for all levels so that people could continue being educated, on their own or through the company, during non-work hours . . .

*--President, Wire Forms*

More education of the technologies employed by business today. Examples would be a background in Lean, Six Sigma, and various quality/business systems such as Baldrige.

*--President, Precision Machined Components*

Number One: Teach great analytical and problem solving skills! then more emphasis on flow manufacturing and continuous improvement. . . .

*--Director of Research, Windows and Doors*

WMEP is one of the best resources for manufacturers to help keep these types of businesses in WI. Lower taxes.

*--President Wireform Components*

High school graduates that can write in complete sentences and do basic math.

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

Cash Flow and Technology Changes and maintaining the business at the highest technological level.

*--Controller, Marketing Solutions Company*

Dealing with the high level of expectations among younger workers. They are spoiled and pampered by parents, schools, and society. We do not have the time or resources to pamper them

...

*--President, Wire Forms*

High cost of labor, Competition with highly flexible non-union manufactures, Health Care costs. Location in relationship to East Coast and West Coast (major markets of our products) speed to deliver.

*--Commercial Wood Doors and Door Components*

Lack of results from State government to keep the dairy industry in Wisconsin, from the farm to the manufacturing plant. The state lives in a vacuum to the changes in the industry. . . .

*--Cheese Industry*

Price of raw material and cost of transportation. Also the shortage of skilled machinists in the state. Health care is also at the top of the list as employers continue to offer incentives for employ[ment].

*--President, Precision Machined Components*

Terrorism causing the economy to collapse. Labor availability during growth phases.

*--President Wireform Components*

The biggest challenge is the State of Wisconsin business tax environment and regulations. Wisconsin talks about being business friendly but realistically it is not. The tax structure and business reg[ulation].

*--Director of Research, Windows and Doors*

How to cope with inflation while imports lower the price customers are willing to pay. We have improved productivity 50% in 2 years and it is not enough to survive . . .

Personnel issues.

*--Assistant General Manager, Hardwood Plywood*

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

Better work ethic than elsewhere. Excellent transportation. Great business community.

*--President Wire Form*

Its a clean state with the best road system in the nation. A very safe place to live and work.

*--Cheese Industry*

Not many.

*--Commercial Wood Doors and Door Components*

Regional material sources, tool/die infrastructure, good roads-airports-trucking systems

*--President, Wireform Components*

Still a decent work ethic. The ability for recreation and at this point a good educational system, which is rapidly becoming a weakness in K-12. Positive economic development folks at least in our area.

*--President, Precision Machined Components*

The people, work ethic and loyalty of the work force.

*--Director of Research, Windows and Doors*

Working with National and international companies, we struggle with our location and always justifying the location to customers.

*--Controller Marketing Solutions Company*

None come to mind.

Located close to customers, central location in the U.S., good work ethic.

*--Assistant General Manager, Hardwood Plywood*