

8 East Central Region

8.1 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 East Central Region, as well as detailed information related to each of the regional driver industries identified. For the purposes of this analysis, the East Central Region is defined to include the counties of Brown, Calumet, Door, Kewaunee, Marinette, Menominee, Oconto, Outagamie, Shawano, Waupaca, Winnebago.

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.

8.2 Summary of Regional Driver Industries & Industry Clusters

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

- 3115 Dairy Product Manufacturing
- 3221 Pulp, Paper, and Paperboard Mills
- 3222 Converted Paper Product Manufacturing
- 3346 Manufacturing and Reproducing Magnetic and Optical Media
- 3353 Electrical Equipment Manufacturing
- 3359 Other Electrical Equipment and Component Manufacturing
- 3369 Other Transportation Equipment Manufacturing

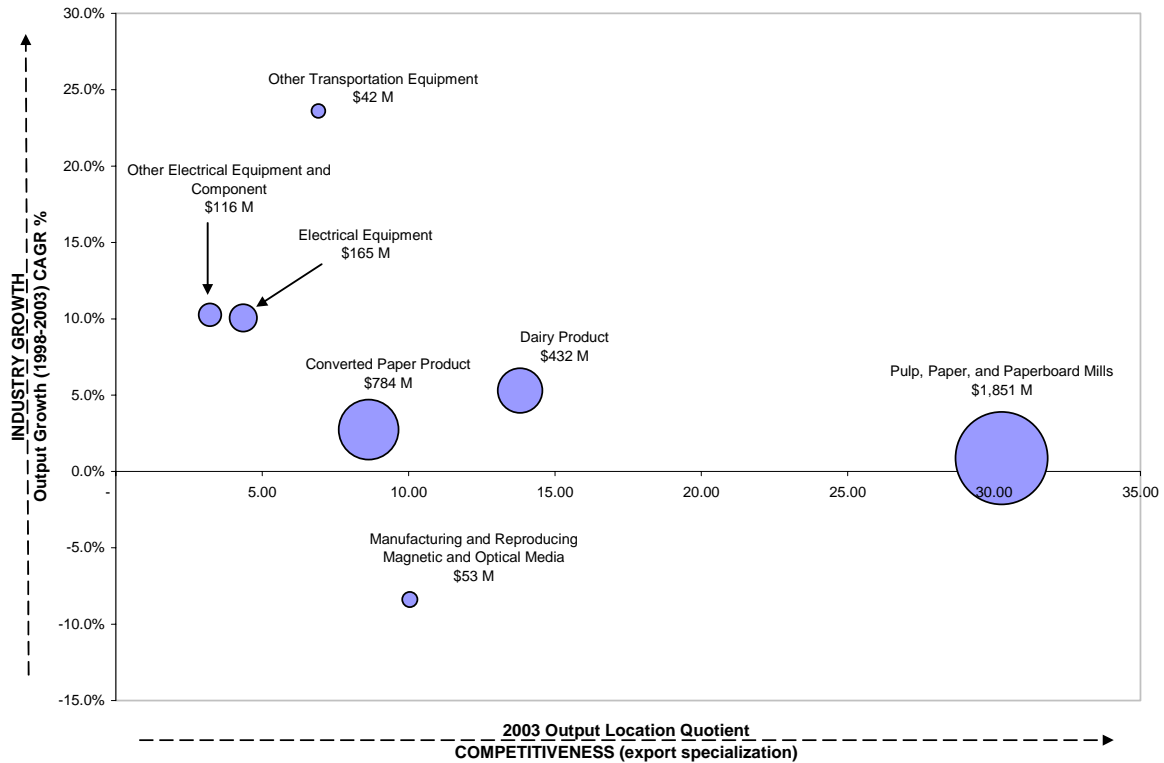
8.2.1 How Are the East Central Region's Driver Industries Doing?

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 8-1 Overview of the East Central Region Drivers



Interpretation: It is important to keep in mind that each of the seven economic regions is unique. Therefore, it should not be surprising that the circumstances for industries that are alike, but are in different regions, are unique. They may not share the same fate. It would be helpful to a region to compare the status of similar industries in other regions.

Here, the Industry Growth/Competitiveness overview shows that the seven driver industries are all well above one, and therefore competitive; and, all but Manufacturing and Reproducing Magnetic and Optical Media Manufacturing is thriving. Other Transportation Equipment shows the fastest growth of the seven industries.

8.2.2 Driver and Industry Cluster Relationships in the East Central Region

For this Study, an industry cluster analysis was conducted for each of the driver industries. Tables 8-1 and 8-2 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 6-1 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 8-1 Supplier Industries Common to Regional Driver Industries

NAICS	Title	Regional Driver**	Count of Drivers	
			Regional Suppliers	National Suppliers
3261	Plastics Product Manufacturing		7	6
484*	Truck Transportation		7	7
42*	Wholesale Trade		7	7
4931	Warehousing and Storage		4	5
3344	Semiconductor and Other Electronic Component Manufacturing		3	4
5413	Architectural, Engineering, and Related Services		3	4
3222	Converted Paper Product Manufacturing	X	2	6
3312	Steel Product Manufacturing from Purchased Steel		2	2
3336	Engine, Turbine, and Power Transmission Equipment 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 6-2 is similar to Table 6-1 in that it shows industries that supply inputs to multiple driver industries. The difference is that the industries identified in Table 6-2 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 8-2 National Supplier Industries Common to Regional Driver Industries

NAICS	Title	Count of Drivers	
		Regional Suppliers	National Suppliers
2380	Specialty Trade Contractors	2	
3112	Grain and Oilseed Milling	2	
3219	Other Wood Product Manufacturing	3	
3221	Pulp, Paper, and Paperboard Mills	5	
3241	Petroleum and Coal Products Manufacturing	4	
3251	Basic Chemical Manufacturing	3	

		Count of Drivers	
NAICS	Title	National Suppliers	
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	5	
3255	Paint, Coating, and Adhesive Manufacturing	3	
3259	Other Chemical Product and Preparation Manufacturing	3	
3262	Rubber Product Manufacturing	3	
3311	Iron and Steel Mills and Ferroalloy Manufacturing	4	
3313	Alumina and Aluminum Production and Processing	5	
3314	Nonferrous Metal (except Aluminum) Production and Processing	3	
3315	Foundries	2	
3321	Forging and Stamping	4	
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	4	
3329	Other Fabricated Metal Product Manufacturing	4	
3359	Other Electrical Equipment and Component Manufacturing	2	
4821	Rail Transportation	2	
517*	Telecommunications	2	
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	2	
5417	Scientific Research and Development Services	4	
5419	Other Professional, Scientific, and Technical Services	4	
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	4	

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

8.2.3 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 to either 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 East Central Region.

Overall, the East Central Region was a very difficult region to evaluate because of the region's industrial diversity and general economic strength. Most of the industries that were identified as needing further review are definitely important industries simply based on their size and the value of the products they produce. For many of these industries, the fact that they do not appear to be heavily concentrated in the region as compared to the nation as a whole or the fact that they have relatively low gross product per employee resulted in their not being classified as driver industries.

First, “Industry 3116: Animal Slaughtering and Processing,” which includes the processing of beef products, was identified as an important industry in the region. After experiencing employment growth from 1993 to 1998, the industry has declined to a level well below that in 1993. In terms of gross product, the industry has experienced only a slight decline. Overall this industry is an important regional industry, but it does not exhibit the characteristics of a driver industry. That is, the regional industry’s characteristics relative to the nation as a 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 beef processing but, rather, 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 3231: Printing and Related Support Activities.” This industry employs a large number of workers and had some growth since 1993. In terms of gross product, the industry does not appear as large as its employment would suggest, however, the industry’s gross product has grown considerably since 1993. As compared to the nation as a whole, the industry is not overly concentrated in the region, although this appears to be changing rapidly. This industry will likely be a driver industry for the region in the future.

A third industry identified was “Industry 3261: Plastics Product Manufacturing.” In many respects, this industry is similar to the Printing industry identified above. The industry employs a large number of workers but its gross product per worker is relatively low. Also, the industry is only slightly more concentrated in the region than in the nation as a whole. As with the printing industry, the plastics industry also appears to be growing, especially in terms of gross product per employee. This industry is also likely to be a future regional driver industry.

The “Industry 3315: Foundries” was also identified as an important regional industry. As a large regional employer, this is clearly an important regional industry. Like the printing and the plastics industries, the industry has a fairly low gross product per employee. Unlike these other two industries, both employment and gross product has been declining in the foundries industry. Since employment has declined more rapidly than gross product, the gross product per employee has actually increased. It is not clear what the future of this industry will be in terms of being a regional driver.

Finally, transportation and warehousing were identified as being important in the region. Transportation and warehousing 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 are quite large and have experienced some 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 themselves, they are best viewed as supplier industries that help other regional driver industries be more competitive.

8.3 Detailed Descriptions of the Regional Driver Industries

8.3.1 Driver Industry Definitions

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

322 Paper Manufacturing (Complete)

Industries in the Paper Manufacturing subsector make pulp, paper, or converted paper products.

The manufacturing of these products is grouped together because they constitute a series of vertically connected processes. More than one is often carried out in a single establishment.

There are essentially three activities. 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. Converted paper products are made from paper and other materials by various cutting and shaping techniques and include coating and laminating activities.

3221 Pulp, Paper, and Paperboard Mills

3222 Converted Paper Product Manufacturing

3346 Manufacturing and Reproducing Magnetic and Optical Media

This industry comprises establishments primarily engaged in (1) manufacturing optical and magnetic media, such as blank audio tape, blank video tape, and blank diskettes and/or (2) mass duplicating (i.e., making copies) audio, video, software, and other data on magnetic, optical, and similar media.

335 Electrical Equipment, Appliance, and Component Manufacturing (Partial)

Industries in the Electrical Equipment, Appliance, and Component Manufacturing subsector manufacture products that generate, distribute and use electrical power. Electric Lighting Equipment Manufacturing establishments produce electric lamp bulbs, lighting fixtures, and parts. Household Appliance Manufacturing establishments make both small and major electrical appliances and parts. Electrical Equipment Manufacturing establishments make goods, such as electric motors, generators, transformers, and switchgear apparatus. Other Electrical Equipment and Component Manufacturing establishments make devices for storing electrical power (e.g., batteries), for transmitting electricity (e.g., insulated wire), and wiring devices (e.g., electrical outlets, fuse boxes, and light switches).

3353 Electrical Equipment Manufacturing

3359 Other Electrical Equipment and Component Manufacturing

3369 Other Transportation Equipment Manufacturing

This industry group comprises establishments primarily engaged in manufacturing transportation equipment (except motor vehicles and parts, aerospace products and parts, railroad rolling stock, ship building, and boat manufacturing).

8.3.2 Industry Clusters

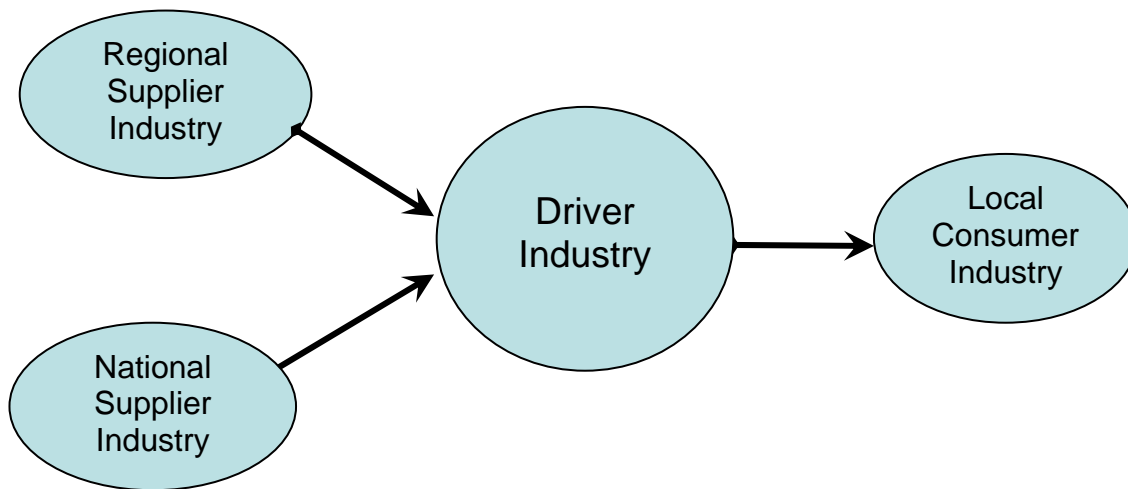
Industries contained within an industry cluster are related to driver industries in three ways, two supplier relationships and one consumer relationship.

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 8-2 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	3222	Converted Paper Product Manufacturing
42*	Wholesale Trade	3119	Other Food Manufacturing
3115	Dairy Product Manufacturing	3324	Boiler, Tank, and Shipping Container

3332 Industrial Machinery Manufacturing
 4931 Warehousing and Storage
 3261 Plastics Product Manufacturing
 484* Truck Transportation

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

Consumer Industries - Typical Regional Industry

722* Food services and drinking places
 3115 Dairy Product Manufacturing
 3114 Fruit and Vegetable Preserving and
 Specialty Food Manufacturing
 622* Hospitals
 6244 Child Day Care Services

3221 Pulp, Paper, and Paperboard Mills

Supplier Industries - Typical Regional Industry

42* Wholesale Trade
 484* Truck Transportation
 1133 Logging
 8113 Commercial and Industrial Machinery and
 Equipment (except Automotive and
 Electronic) Repair and Maintenance
 3211 Sawmills and Wood Preservation
 8111 Automotive Repair and Maintenance
 3261 Plastics Product Manufacturing
 2380 Specialty Trade Contractors

Supplier Industries - Typical National Industry

3221 Pulp, Paper, and Paperboard Mills
 3251 Basic Chemical Manufacturing
 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
 4821 Rail Transportation
 3219 Other Wood Product Manufacturing
 3252 Resin, Synthetic Rubber, and Artificial
 Synthetic Fibers and Filaments
 Manufacturing

Consumer Industries - Typical Regional Industry

3221 Pulp, Paper, and Paperboard Mills
 3222 Converted Paper Product Manufacturing
 3231 Printing and Related Support Activities
 722* Food services and drinking places
 3261 Plastics Product Manufacturing

3222 Converted Paper Product Manufacturing

Supplier Industries - Typical Regional Industry

42* Wholesale Trade
 484* Truck Transportation

Supplier Industries - Typical National Industry

3313 Alumina and Aluminum Production and
 Processing
 3251 Basic Chemical Manufacturing

3261	Plastics Product Manufacturing	3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
3132	Fabric Mills	3255	Paint, Coating, and Adhesive Manufacturing
3221	Pulp, Paper, and Paperboard Mills	3329	Other Fabricated Metal Product Manufacturing
3259	Other Chemical Product and Preparation Manufacturing	4821	Rail Transportation
3222	Converted Paper Product Manufacturing	5418	Advertising and Related Services
		8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
		3231	Printing and Related Support Activities
		3321	Forging and Stamping

Consumer Industries - Typical Regional Industry

3121	Beverage Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3116	Animal Slaughtering and Processing
622*	Hospitals
3231	Printing and Related Support Activities
8121	Personal Care Services
3222	Converted Paper Product Manufacturing
3261	Plastics Product Manufacturing
3115	Dairy Product Manufacturing
722*	Food services and drinking places

3346 Manufacturing and Reproducing Magnetic and Optical Media

Supplier Industries - Typical Regional Industry

3222	Converted Paper Product Manufacturing
42*	Wholesale Trade
3261	Plastics Product Manufacturing
3344	Semiconductor and Other Electronic Component Manufacturing
5413	Architectural, Engineering, and Related Services
484*	Truck Transportation

Supplier Industries - Typical National Industry

5614	Business Support Services
5415	Computer Systems Design and Related Services
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
3259	Other Chemical Product and Preparation Manufacturing
3346	Manufacturing and Reproducing Magnetic and Optical Media
3313	Alumina and Aluminum Production and Processing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3329	Other Fabricated Metal Product Manufacturing

Consumer Industries - Typical Regional Industry

521*	Monetary authorities and depository credit intermediation
GVSL*	State and Local Government
3221	Pulp, Paper, and Paperboard Mills

523*	Securities, commodity contracts, investments
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services
517*	Telecommunications
5413	Architectural, Engineering, and Related Services
5182	Data Processing, Hosting, and Related Services
5112	Software Publishers
441*	Motor vehicle and parts dealers

3353 Electrical Equipment Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
42*	Wholesale Trade	3255	Paint, Coating, and Adhesive Manufacturing
3344	Semiconductor and Other Electronic Component Manufacturing	3311	Iron and Steel Mills and Ferroalloy Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	3321	Forging and Stamping
3261	Plastics Product Manufacturing	3314	Nonferrous Metal (except Aluminum) Production and Processing
3353	Electrical Equipment Manufacturing	3315	Foundries
484*	Truck Transportation	3241	Petroleum and Coal Products Manufacturing
4931	Warehousing and Storage	3271	Clay Product and Refractory Manufacturing
5413	Architectural, Engineering, and Related Services	3329	Other Fabricated Metal Product Manufacturing
3312	Steel Product Manufacturing from Purchased Steel	3359	Other Electrical Equipment and Component Manufacturing
3339	Other General Purpose Machinery Manufacturing	3323	Architectural and Structural Metals Manufacturing

Consumer Industries - Typical Regional Industry	
3221	Pulp, Paper, and Paperboard Mills
3351	Electric Lighting Equipment Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
3332	Industrial Machinery Manufacturing
2360	Construction of Buildings
3339	Other General Purpose Machinery Manufacturing
2211	Electric Power Generation, Transmission and Distribution
3333	Commercial and Service Industry Machinery Manufacturing
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3361	Motor Vehicle Manufacturing

3359 Other Electrical Equipment and Component Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
42*	Wholesale Trade	3272	Glass and Glass Product Manufacturing
484*	Truck Transportation	3344	Semiconductor and Other Electronic

3261	Plastics Product Manufacturing	3252	Component Manufacturing Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
4931	Warehousing and Storage	3241	Petroleum and Coal Products Manufacturing
		3314	Nonferrous Metal (except Aluminum) Production and Processing
		3359	Other Electrical Equipment and Component Manufacturing
		3221	Pulp, Paper, and Paperboard Mills
		3259	Other Chemical Product and Preparation Manufacturing
		3279	Other Nonmetallic Mineral Product Manufacturing
		3311	Iron and Steel Mills and Ferroalloy Manufacturing

Consumer Industries - Typical Regional Industry

3221	Pulp, Paper, and Paperboard Mills
3344	Semiconductor and Other Electronic Component Manufacturing
3363	Motor Vehicle Parts Manufacturing
2360	Construction of Buildings
3261	Plastics Product Manufacturing
3333	Commercial and Service Industry Machinery Manufacturing
3332	Industrial Machinery Manufacturing
3339	Other General Purpose Machinery Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3315	Foundries

3369 Other Transportation Equipment Manufacturing

Supplier Industries - Typical Regional Industry		Supplier Industries - Typical National Industry	
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	3311	Iron and Steel Mills and Ferroalloy Manufacturing
42*	Wholesale Trade	3329	Other Fabricated Metal Product Manufacturing
3344	Semiconductor and Other Electronic Component Manufacturing	3369	Other Transportation Equipment Manufacturing
484*	Truck Transportation	3314	Nonferrous Metal (except Aluminum) Production and Processing
3363	Motor Vehicle Parts Manufacturing	3262	Rubber Product Manufacturing
3261	Plastics Product Manufacturing	3255	Paint, Coating, and Adhesive Manufacturing
3327	Machine Shops, Turned Product, and Screw, Nut, & Bolt Manufacturing	5417	Scientific Research and Development Services
4931	Warehousing and Storage	3321	Forging and Stamping
3312	Steel Product Manufacturing from Purchased Steel	3313	Alumina and Aluminum Production and Processing
5413	Architectural, Engineering, and Related Services	5182	Data Processing, Hosting, and Related Services

Consumer Industries - Typical Regional Industry

3361	Motor Vehicle Manufacturing
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- 3336 Engine, Turbine, and Power Transmission
Equipment Manufacturing
- 3362 Motor Vehicle Body and Trailer
Manufacturing
- 3363 Motor Vehicle Parts Manufacturing
- FR Farms
- 3321 Forging and Stamping
- 8111 Automotive Repair and Maintenance
- 3331 Agriculture, Construction, and Mining
Machinery Manufacturing
- 8113 Commercial and Industrial Machinery and
Equipment (except Automotive and
Electronic) Repair and Maintenance
- 3366 Ship and Boat Building

8.3.3 Top Firms by Driver Industry in the East Central Region

3115 Dairy Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Schreiber Foods Inc	760	4,107	Parent	Private		1945
Sturm Foods Inc	450	-	Single	Private	100-499.9MM	1905
Saputo Cheese USA Inc	300	1,745	Branch	Private	100-499.9MM	
Bel Kaukauna USA Inc	275	475	Parent	Private		1971
Schreiber Foods Inc	250	4,107	Branch	Private	100-499.9MM	1945
Good Humor-Breyers Ice Cream	220	-	Single	Private	50-99.9MM	1938
Churny Co Inc	200	41,810	Branch	Private	100-499.9MM	1955
White Clover Dairy Inc	190	-	Single	Private	100-499.9MM	1905
Trega Foods Inc	175	181	Parent	Private		
Morning Glory Dairy	150	1,467	Branch	Private	100-499.9MM	1963
Land O'Lakes Inc	150	6,861	Branch	Private	50-99.9MM	
Foremost Farms USA Cooperative	100	1,467	Branch	Private	50-99.9MM	1995
Land O'Lakes Inc	100	6,861	Branch	Private	50-99.9MM	1948
Saputo Cheese USA Inc	80	1,745	Branch	Private	25-49.9MM	1992
Trega Foods Inc	80	-	Single	Private	25-49.9MM	
Wohlt Cheese Corp	80	-	Single	Private	25-49.9MM	1935
Galloway Co Corp	75	150	Parent	Private		1918
Classic Mix Partners	75	150	Branch	Private	10-24.9MM	1932
Milk Products LLC	73	6,861	Branch	Private	25-49.9MM	1992
Belgioioso Cheese Inc	65	90	Parent	Private		1979
Alto Dairy	55	505	Branch	Private	25-49.9MM	1953
Graf Creamery Inc	50	-	Single	Private	25-49.9MM	1926
Foremost Farms USA Cooperative	50	1,467	Branch	Private	25-49.9MM	1995
Thiel Cheese & Ingredients LLC	50	-	Single	Private	25-49.9MM	1955
Sargento Foods Inc	40	661	Branch	Private	10-24.9MM	1979
Milk Source	35	-	Single	Private	10-24.9MM	1965
Weyauwega Star Dairy Inc	30	-	Single	Private	10-24.9MM	1976
BelGioioso Cheese Inc	20	90	Branch	Private	10-24.9MM	1978
Dupont Cheese Inc	20	-	Single	Private	10-24.9MM	1971
Springside Cheese Corp	20	-	Single	Private	10-24.9MM	1947

3221 Pulp, Paper, and Paperboard Mills

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Georgia-Pacific Corp	3,000	57,936	Branch	Public	1-9.9B	1919
Kimberly-Clark Corp	1,200	18,353	Branch	Public	100-499.9MM	1872
International Paper	1,000	59,195	Branch	Public	100-499.9MM	1883
Georgia-Pacific Corp	785	57,936	Branch	Public	100-499.9MM	1902
International Paper De Pere	300	59,195	Branch	Public	100-499.9MM	1892
Cellu Tissue Corp	280	-	Single	Private	50-99.9MM	2002
Badger Paper Mills Inc	260	310	Parent	Public		1929
Glatfelter	200	1,300	Branch	Public	50-99.9MM	1904
Shawano Specialty Papers	200	310	Branch	Private	50-99.9MM	1894
Fox River Paper Co	175	-	Single	Private	50-99.9MM	

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Sonoco US Mills Inc	120	11,300	Branch	Public	25-49.9MM	1971
Green Bay Packaging Inc	100	2,883	Branch	Private	25-49.9MM	1940
Kerwin Paper Co	100	-	Single	Private	25-49.9MM	
PCDI Oconto Falls Tissue Inc	100	138	Parent	Private		1997
SCA Tissue North America LLC	100	57,936	Branch	Public	25-49.9MM	
Sonoco- U S Mills Inc	70	11,300	Branch	Public	25-49.9MM	1933
George A Whiting Paper Co	55	-	Single	Private	10-24.9MM	1882
Kimberly-Clark Corp	55	18,353	Branch	Public	10-24.9MM	
Ecosource Corp	50	57,936	Branch	Public	10-24.9MM	1990
Fox River Fiber Co	48	-	Single	Private	10-24.9MM	1990
EcoFibre Inc	30	138	Branch	Private	10-24.9MM	1990
Minergy Corp	30	9,722	Branch	Public	10-24.9MM	1997

3222 Converted Paper Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Procter & Gamble Paper Prods	1,500	25,019	Branch	Public	100-499.9MM	1892
Appleton Papers	1,425	2,627	HQs	Private		1907
Appleton Coated LLC	800	993	Branch	Private	100-499.9MM	
Stora Enso	800	2,688	Branch	Private	100-499.9MM	2000
SCA North America LLC	700	57,936	Branch	Public	100-499.9MM	1915
WS Packaging Group Inc	400	1,429	Parent	Private		1966
Hoffmaster	400	-	Single	Private	50-99.9MM	1947
Belmark Inc	340	-	Single	Private	50-99.9MM	1977
Green Bay Packaging Inc	320	2,883	Branch	Private	50-99.9MM	1929
Graphic Packaging Intl	316	6,847	Branch	Private	50-99.9MM	
Kimberly-Clark Corp	300	18,353	Branch	Public	100-499.9MM	1979
Green Bay Packaging Inc	300	2,883	Branch	Private	25-49.9MM	1926
Hoffmaster	300	8,877	Branch	Private	25-49.9MM	1989
Great Northern Corp	250	669	Parent	Private		1962
Kimberly-Clark Corp	250	18,353	Branch	Public	100-499.9MM	1941
Coating Excellence Intl	230	-	Single	Private	25-49.9MM	1997
Menasha Packaging Co LLC	200	4,125	HQs	Private		2001
Stora Enso Niagara Mill	200	2,688	Branch	Private	50-99.9MM	
Kimberly-Clark Corp	200	18,353	Branch	Public	50-99.9MM	
Intertape Polymer Group Inc	180	570	Division HQ	Private		1919
Converting Inc	165	-	Single	Private	25-49.9MM	1968
Atlas Tag & Label Inc	160	690	Branch	Private	25-49.9MM	1931
Menasha Corp	150	4,125	Parent	Private		1849
Hayes Manufacturing Group Inc	150	11,300	HQs	Public		1968
Outlook Label Systems Inc	150	500	Branch	Public	25-49.9MM	1981
H C Miller Co	150	-	Single	Private	25-49.9MM	1888
Williamhouse of Wisconsin	150	4,143	Branch	Private	10-24.9MM	1978
Hoffmaster	147	8,877	Branch	Private	10-24.9MM	1927
Printed Systems	140	4,125	Branch	Private	25-49.9MM	1849
Avery Dennison	130	7,023	HQs	Public		1987
Resource One International LLC	120	-	Single	Private	10-24.9MM	1981
Little Rapids Corp	110	310	Parent	Private		1925
Green Bay Packaging Inc	100	2,883	Branch	Private	10-24.9MM	1989
Green Bay Packaging Inc	100	2,883	Parent	Private		1943

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Green Bay Packaging Inc	100	2,883	Branch	Private	10-24.9MM	1919
Laminations Inc	100	669	Branch	Private	25-49.9MM	1972
Fox River Paper Co	100	725	Branch	Private	25-49.9MM	
Northstar Print Group	100	4,757	Branch	Public	25-49.9MM	1961
Midwest Towel & Supply Inc	100	-	Single	Private	25-49.9MM	1995
Green Bay Converting Inc	100	-	Single	Private	10-24.9MM	1999
National Packaging Services	100	-	Single	Private	10-24.9MM	1996
Progressive Converting Inc	100	210	Parent	Private		1991
R Sabee Co Inc	100	-	Single	Private	10-24.9MM	1946
US Paper Converters Inc	100	-	Single	Private	10-24.9MM	1983
Zebra Technologies Corp	80	1,245	Branch	Public	10-24.9MM	1991
Fox River Paper Co LLC	80	725	HQs	Private		1883
Custom Paper Products Inc	75	-	Single	Private	10-24.9MM	2000
Georgia-Pacific Corp	70	57,936	Branch	Public	10-24.9MM	1927
Sonoco	70	11,300	Branch	Public	10-24.9MM	1985
Dura-Fibre	70	-	Single	Private	10-24.9MM	1897
Fox River Paper Co	70	725	Branch	Private	10-24.9MM	2001
Filter Materials	65	190	Branch	Private	10-24.9MM	1938
Milltown Paper Inc	65	-	Single	Private	10-24.9MM	1994
Newark Paperboard Products	60	-	Single	Private	10-24.9MM	1986
Pro Label Inc	55	-	Single	Private	10-24.9MM	1992
Wausau Papers	55	3,149	Branch	Public	5-9.9MM	1969
Smurfit-Stone Container Corp	50	29,591	Branch	Public	10-24.9MM	1970
Wisconsin Converting Inc	50	-	Single	Private	5-9.9MM	1987
American Paper Converters Inc	50	-	Single	Private	10-24.9MM	1979
Cellynne USA Inc	45	130	Branch	Private	5-9.9MM	1995
Nichols Paper Products Co	45	-	Single	Private	5-9.9MM	1951
Libman Business Forms Inc	40	-	Single	Private	5-9.9MM	1965
Contract Converting LLC	40	-	Single	Private	5-9.9MM	1994
Straubel Paper Co	37	-	Single	Private	5-9.9MM	1907
Appleton Coated LLC	35	993	Parent	Private		1999
Waldan Paper Services Inc	35	-	Single	Private	5-9.9MM	1989
BemisTape	25	8,173	Branch	Public	5-9.9MM	1981
Vibrant Impressions Inc	25	-	Single	Private	5-9.9MM	1994
Swanson Wiper Corp	25	-	Single	Private	1-4.9MM	1994
American Custom Converting LLC	24	-	Single	Private	1-4.9MM	1997
Kadant Grantek Inc	24	59	Branch	Public	1-4.9MM	1988
Superior Specialties Inc	22	-	Single	Private	1-4.9MM	1967
Menasha Corp	20	4,125	Branch	Private	1-4.9MM	1849
Alpha-Prime Inc	20	-	Single	Private	1-4.9MM	1979
Precision Paper Converters LLC	20	-	Single	Private	1-4.9MM	1992

3346 Manufacturing and Reproducing Magnetic and Optical Media

*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.)

3353 Electrical Equipment Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
AZCO Inc	200	-	Single	Private	25-49.9MM	1949
Baldor Generators	140	-	Single	Private	10-24.9MM	1965
Shallbetter Inc	48	-	Single	Private	5-9.9MM	1982
Dana Brake Parts Inc	40	24,940	Branch	Public	5-9.9MM	2001
L & S Electric Inc	35	115	Branch	Private	5-9.9MM	1930
Cummins NPower LLC	30	14,589	Branch	Public	1-4.9MM	
E M S Holdin Co Inc	20	48	Branch	Private	1-4.9MM	1980

3359 Other Electrical Equipment and Component Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Grayhill Inc	75	700	Branch	Private	5-9.9MM	1980
Sturgeon Bay Metal Products	30	-	Single	Private	5-9.9MM	1946

3369 Other Transportation Equipment 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.)

8.3.4 Detailed Employment, Gross Product, & Gross Product per Employee, East Central Region

Table 8-3 Employment in the East Central Region's Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3115	Dairy Product Manufacturing	2,999	3,598	4,138	4,070	4,047	4,088	4,263	4,758
3221	Pulp, Paper, and Paperboard Mills	18,211	19,677	18,703	18,324	17,288	13,866	13,407	12,865
3222	Converted Paper Product Manufacturing	9,145	8,802	9,013	9,092	8,847	7,252	7,134	6,282
3346	Manufacturing and Reproducing Magnetic and Optical Media	100	110	139	149	148	138	157	126
3353	Electrical Equipment Manufacturing	840	1,296	1,512	1,469	1,366	1,228	1,303	1,418
3359	Other Electrical Equipment and Component Manufacturing	260	459	507	476	426	413	431	369
3369	Other Transportation Equipment Mfg.	20	150	249	308	346	403	519	718

Table 8-4 CAGR* for Employment in the East Central Region's Driver Industries, 1993-2008

NAICS	Title	1993-1998	1998-2003	2003-2008
3115	Dairy Product Manufacturing	3.1%	2.1%	2.6%
3221	Pulp, Paper, and Paperboard Mills	1.3%	-5.7%	-1.2%
3222	Converted Paper Product Mfg.	-0.6%	-3.2%	-2.4%
3346	Manufacturing and Reproducing Magnetic and Optical Media	1.6%	3.9%	-1.4%
3353	Electrical Equipment Manufacturing	7.5%	-0.9%	2.4%
3359	Other Electrical Equipment and Component Manufacturing	9.9%	-1.7%	-1.9%
3369	Other Transportation Equipment Mfg.	39.8%	18.0%	10.1%

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

Table 8-5 Labor Location Quotients*—East Central Region’s Driver Industries, 1993-1003

NAICS	Title	1993	1998	2001	2002	2003
3115	Dairy Product Manufacturing	6.68	8.54	9.26	9.14	9.15
3221	Pulp, Paper, and Paperboard Mills	25.27	29.45	31.75	32.40	28.13
3222	Converted Paper Product Manufacturing	7.06	6.56	7.09	7.15	6.00
3346	Manufacturing and Reproducing Magnetic and Optical Media	0.69	0.58	0.76	0.83	0.86
3353	Electrical Equipment Manufacturing	1.24	1.88	2.32	2.41	2.34
3359	Other Electrical Equipment and Component Manufacturing	0.46	0.78	0.82	0.87	0.90
3369	Other Transportation Equipment Manufacturing	0.17	1.18	2.43	2.75	3.16

* 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 8-6 Manufacturing Gross Product in the East Central Region’s Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3115	Dairy Product Manufacturing	\$ 207,901,788	\$ 317,285,447	\$ 382,084,747	\$ 425,359,450	\$ 427,865,399	\$ 432,426,780	\$ 466,908,643	\$ 581,775,233
3221	Pulp, Paper, and Paperboard Mills	\$ 1,447,187,481	\$ 1,757,289,323	\$ 1,961,039,853	\$ 2,022,383,041	\$ 1,991,803,724	\$1,851,342,277	\$1,921,608,076	\$ 2,198,614,650
3222	Converted Paper Product Manufacturing	\$ 655,373,180	\$ 666,535,364	\$ 816,114,222	\$ 873,856,651	\$ 856,768,991	\$ 783,935,082	\$ 811,840,950	\$ 839,517,173
3346	Manufacturing and Reproducing Magnetic and Optical Media	\$ 47,105,381	\$ 89,950,469	\$ 104,196,819	\$ 53,658,827	\$ 48,146,213	\$ 53,166,467	\$ 63,252,827	\$ 64,659,021
3353	Electrical Equipment Manufacturing	\$ 59,956,807	\$ 93,145,920	\$ 111,266,220	\$ 211,482,429	\$ 176,183,393	\$ 165,461,708	\$ 182,181,594	\$ 250,599,193
3359	Other Electrical Equipment and Component Manufacturing	\$ 28,764,603	\$ 64,416,720	\$ 70,376,727	\$ 134,975,198	\$ 117,804,988	\$ 115,672,851	\$ 125,402,225	\$ 132,655,483
3369	Other Transportation Equipment Manufacturing	\$ 1,516,012	\$ 11,875,931	\$ 21,128,882	\$ 25,552,298	\$ 33,411,854	\$ 42,364,293	\$ 58,135,013	\$ 95,517,354

Table 8-7 CAGR* for Gross Product in the East Central Region’s Driver Industries, 1993-2008

NAICS	Title	1993-1998	1998-2003	2003-2008
3115	Dairy Product Mfg.	7.3%	5.3%	5.1%
3221	Pulp, Paper, and Paperboard Mills	3.3%	0.9%	2.9%
3222	Converted Paper Product Mfg.	0.3%	2.7%	1.1%
3346	Manufacturing and Reproducing Magnetic and Optical Media	11.4%	-8.4%	3.3%

NAICS	Title	1993-1998	1998-2003	2003-2008
3353	Electrical Equipment Mfg.	7.6%	10.0%	7.2%
3359	Other Electrical Equipment and Component Mfg.	14.4%	10.2%	2.3%
3369	Other Transportation Equipment Mfg.	40.9%	23.6%	14.5%

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

Figure 8-8 Output Location Quotients*—East Central Region’s Driver Industries, 1993-2003

NAICS	Title	1993	1998	2001	2002	2003
3115	Dairy Product Manufacturing	6.37	9.48	13.14	13.40	13.81
3221	Pulp, Paper, and Paperboard Mills	25.28	27.98	30.50	31.53	30.26
3222	Converted Paper Product Manufacturing	9.04	7.70	9.16	9.28	8.64
3346	Manufacturing and Reproducing Magnetic and Optical Media	3.50	7.51	8.79	8.87	10.05
3353	Electrical Equipment Manufacturing	1.60	1.90	4.72	4.41	4.36
3359	Other Electrical Equipment and Component Manufacturing	0.72	1.37	3.06	3.11	3.22
3369	Other Transportation Equipment Manufacturing	0.42	2.60	4.73	5.6	6.93

* 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 8-9 Manufacturing Productivity (Gross Product per Employee) of Driver Industries, East Central Region, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
3115	Dairy Product Manufacturing	\$ 69,335	\$ 88,173	\$ 92,326	\$ 104,518	\$ 105,713	\$ 105,781	\$ 109,525	\$ 122,283
3221	Pulp, Paper, and Paperboard Mills	\$ 79,468	\$ 89,308	\$ 104,854	\$ 110,370	\$ 115,212	\$ 133,521	\$ 143,334	\$ 170,899
3222	Converted Paper Product Manufacturing	\$ 71,661	\$ 75,728	\$ 90,548	\$ 96,109	\$ 96,844	\$ 108,097	\$ 113,791	\$ 133,638
3346	Manufacturing and Reproducing Magnetic and Optical Media	\$ 471,287	\$ 820,359	\$ 748,141	\$ 360,388	\$ 324,351	\$ 386,454	\$ 403,395	\$ 512,262
3353	Electrical Equipment Mfg.	\$ 71,412	\$ 71,881	\$ 73,583	\$ 143,957	\$ 129,012	\$ 134,703	\$ 139,773	\$ 176,780
3359	Other Electrical Equipment and Component Mfg.	\$ 110,688	\$ 140,486	\$ 138,713	\$ 283,291	\$ 276,847	\$ 280,266	\$ 290,819	\$ 359,540
3369	Other Transportation Equipment Manufacturing	\$ 75,838	\$ 79,427	\$ 84,956	\$ 83,040	\$ 96,467	\$ 105,149	\$ 111,926	\$ 132,940

8.4 Wisconsin Executive Perspectives in the East Central Region

East 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?

Available skilled work force; Use of leading edge technology; Affordable health care for associates.

--Chairman/CEO, Special Machinery

Cost of Health Care!! Availability of educated, motivated labor force in NE Wisconsin. Access to educated, globally-minded technical and business professionals.

--President, Fiberglass Reinforced Products

Health Insurance.

--President, Electric Wiring and Components

Health care costs.

--Vice President, general Manager, Aircraft

Health care costs; availability of appropriate individuals for our type of work.

--President, Overhead Material Handling

None.

--Co-owner, Assembly and Packaging Services (Contract Manufacturing)

Qualified workers. Benefit costs.

--VP Operations, Exhaust Systems

Retaining and training workers in a somewhat seasonal business. Developing a learning, thinking, and continuous improvement based workforce. Healthcare and other employee related benefit costs.

--Vice President, Outdoor Power Equipment

Runaway cost of healthcare which will continue and the increasingly non-competitive position this puts the U.S. in relative to labor in other countries of the world.

--Wire Harnesses and Cable Assemblies

The ability to hire and retain production workers willing and able to work safely and with increasing productivity in a teamwork environment. This is more of a concern with our Jacksonville, FL, plant.

--President, Laminated Paper Edge Protectors

The ability to provide employees affordable health care coverage. The ability to hire skilled employees for manufacturing positions.

--Corrugate

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?

Single greatest difference is upper mid-west work ethic.

--Chairman/CEO, Special Machinery

Close to major customer. Close to key equipment supplier.

--VP Operations, Exhaust Systems

Generally exhibits a strong work ethic, particularly if you are selective in your hiring process.

--President, Overhead Material Handling

Speed to market (delivery and new products) relative to off-shore competition.

--Vice President, Outdoor Power Equipment

Strong work ethic

--Vice President, General Manager, Aircraft

Strong work ethic and technical capabilities

--Wire Harnesses and Cable Assemblies

The work ethic in the State of Wisconsin is a key advantage. Wisconsin educational institutions need to educate at all levels that a key to keeping manufacturing in the state is to work closely with . . .

--Corrugate

We are still able to hire workers that are well educated enough and yet are still willing to do the physical labor required in our manufacturing process. The diversity of our workforce has broadened.

--President, Laminated Paper Edge Protectors

Work ethic.

--President, Electric Wiring and Components

Work ethics.

--Co-owner, Assembly and Packaging Services (Contract Manufacturing)

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?

A focus on the use of technology & data base driven information systems. Math & science focus driven curriculums. Something more than designing a garage & thinking you are computer literate.

--Chairman/CEO, Special Machinery

A stronger link to the main industries and companies to really understand their needs and prepare them to be part of these industries and companies in the future.

--Vice President, Outdoor Power Equipment

Greater emphasis on technical education

-Wire Harnesses and Cable Assemblies

Higher standards of secondary education. Require foreign language study in secondary school system. Enhance cooperative education programs with Vo-Tech colleges. . . .

--President, Fiberglass Reinforced Products

More emphasis on emotional control and personal accountability.

--Co-owner, Assembly and Packaging Services (Contract Manufacturing)

N/A

--Vice President, General Manager, Aircraft

N/A

--President, Electric Wiring and Components

Tech training specifically for our welders, both undergrad and through customized company training.

--VP Operations, Exhaust Systems

The entire education system needs to focus on all levels training our future employees on how successful business operate. . .

--Corrugate

We need to have people better educated in basic language, reading and math skills. It's essential that workers are computer literate and able to learn new skills as required in this area. . . .

--President, Laminated Paper Edge Protectors

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

Math & science fairs, symposiums & learning centers sponsored by corporations & not government or educational systems. Stop dumbing down. Expect MORE not less.

--Chairman/CEO, Special Machinery

Additional education on successful business practices at all levels.

--Corrugate

Additional lean or other training at low cost.

--VP Operations, Exhaust Systems

Continue job retraining efforts and increase partnership with WMEP as a feeder for industry/tech college partnerships.

--Wire Harnesses and Cable Assemblies

Health Insurance buying cooperatives for small business.

--President, Electric Wiring and Components

I don't think that the workforce development is the issue. I think that the development can be accomplished by the employer if emotional control and personal accountability are already in place.

-Co-owner, Assembly and Packaging Services (Contract Manufacturing)

N/A

--Vice President, general Manager, Aircraft

There may be some no-cost or low-cost training programs; personally I'm unaware of many that an existing manufacturer might use to strengthen the skills of its manufacturing and office employees. . . .

--President, Laminated paper Edge Protectors

Wisconsin needs to become much more aware, and aggressive in providing tax and investment incentives targeting new business development. I currently have much more attractive expansion options OUTSID[E] . . .

--President, Fiberglass Reinforced Products

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

The changing demographics & how we can position LMC to find an opportunity for special machine builders.

--Chairman/CEO, Special Machinery

Being able to recruit, train, and retain highly skilled technicians. 2. Many of our competitors operate in states that do not tax parts and labor. . . .

--Vice President, General Manager, Aircraft

Cost of raw materials. Employee and business costs (health care, insurance, taxes, etc.) Logistics and transportations costs, availability, and lead time. Suppliers ability to improve fast enough.

--Vice President, Outdoor Power Equipment

Funding for Business Expansion (Growth).

--President, Electric Wiring and Components

Increasing competition of all types and from all locations.

--Wire Harnesses and Cable Assemblies

Rising cost and risk of health care. Rapid escalation of raw materials cost, particularly petroleum-based resins and steel hardware. Cost of freight and energy.

--President, Fiberglass Reinforced Products

State and Federal taxation.

--Co-owner, Assembly and Packaging Services (Contract Manufacturing)

Taxes are high. Energy cost is high. Government is pro-labor. We pay comp to workers legally terminated or faking injuries.

--VP Operations, Exhaust Systems

The ability to grow the business while attaining desirable profit levels. To do this, we must be much more successful with new product and service offers. We must also bring our cost structure on [down]. . . .

--President, Laminated Paper Edge Protectors

The challenge of rising utility cost and health care cost with a extremely competitive customer pricing arena. The secondary issue is the concern of if our workforce has developed the attitude of wor[k].

--Corrugate

The need to constantly monitor our costs as they relate to employees, particularly health insurance premiums. You can add to that all costs resulting from mandated programs by various governmental uni[ts].

--President, Overhead Material Handling

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

Flexible, skilled associates.

--Chairman/CEO, Special Machinery

Available work force.

--Co-Owner, Assembly and Packaging Services (Contract Manufacturing)

Close to major customer and equipment suppliers. Good work ethic.

--VP Operations, Exhaust Systems

Good source of labor. Strong work ethic. Access to many suppliers of recycled paperboard, our primary raw material. Use of the Wisconsin Paper Group for cost-effective LTL shipment of products. . . .

--President, Laminated Paper Edge Protectors

Level of Service and Support.

--President, Electric Wiring and Components

Located in a niche market with strong players within a 200-400 mile radius.

--Wire Harnesses and Cable Assemblies

Strong work ethic, high quality people, favorable relationships with local government.

--Vice President, general Manager, Aircraft

The work ethic in Wisconsin is terrific.

--President, Overhead Material Handling

Thought hard about this, history and current work force only thing can come up with.

--Vice President, Outdoor Power Equipment

We have the best quality and service as a result of the systems we have in place and the people we employ. Wisconsin specifically has a strong work ethic and we have access to various paper sources.

--Corrugate

We serve customers nationally, and globally. Wisconsin's reputation among our US customers is typically neutral. The most common awareness among our customers is related either to cheese, or the Pack[aging?].

--President, Fiberglass Reinforced Products