

9 North Region

9.1 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 North Region, as well as, detailed information related to each of the regional driver industries identified. For the purposes of this analysis, the North Region is defined to include the counties of Ashland, Bayfield, Burnett, Douglas, Florence, Forest, Iron, Oneida, Price, Rusk, Sawyer, Vilas, and Washburn.

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.

9.2 Summary of Regional Driver Industries & Industry Clusters

The driver analysis for the North Region identified 4 regional driver industries. These industries include:

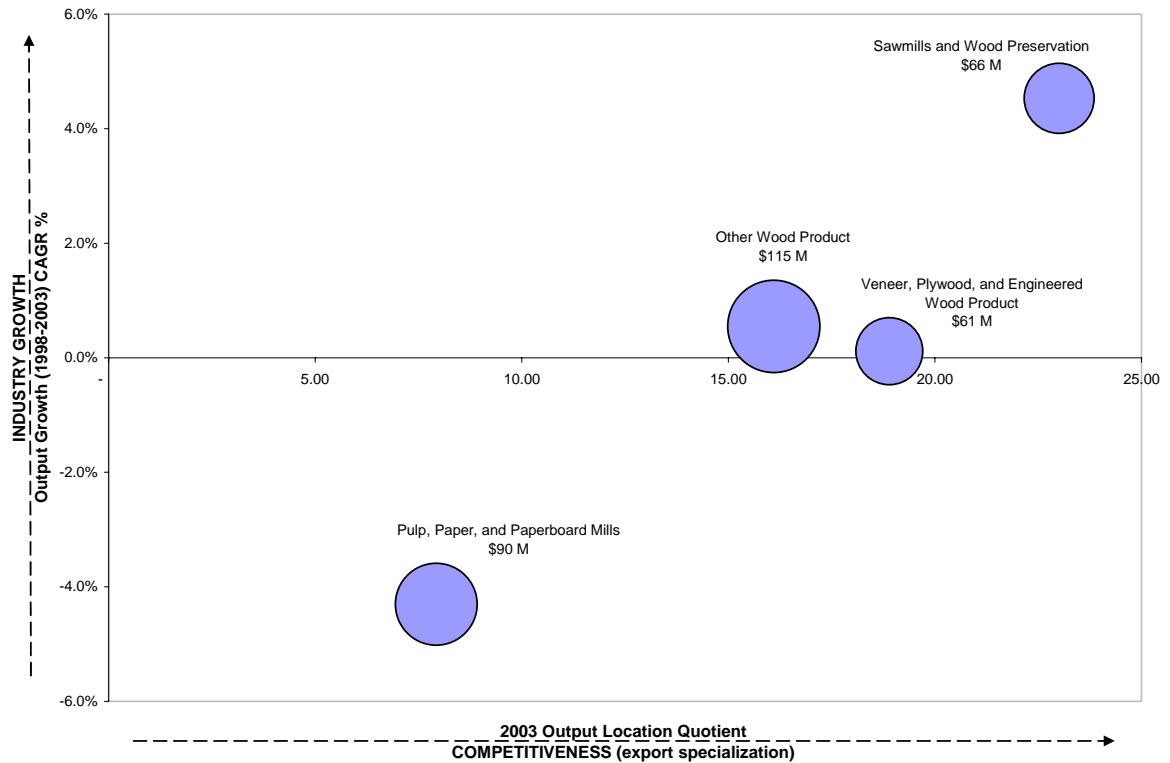
- 3211 Sawmills and Wood Preservation
- 3212 Veneer, Plywood, and Engineered Wood Product Manufacturing
- 3219 Other Wood Product Manufacturing
- 3221 Pulp, Paper, and Paperboard Mills

9.2.1 How Are the North 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 9-1 Overview of the North Region's Drivers



Interpretation: Pulp, Paper, and Paperboard Mills have been losing ground over the past five years; only the Sawmills and Wood Preservation is both very competitive and growing rapidly. The other two closely related industries are very competitive, too, but, they are not growing. The analysis of the drivers and industry cluster in Pulp, Paper, and Paperboard Mills may be needed in careful detail to help rebuild Wisconsin's number one industry in the nation.

9.2.2 Drive and Industry Cluster Relationships in the North Region

For this Study, an industry cluster analysis was conducted for each of the driver industries. Tables 9-1 and 9-2 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 9-1 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 9-1 Regional & National Supplier Industries Common to Regional Driver Industries

NAICS	Title	Regional Driver**	Count of Drivers	
			Regional Suppliers	National Suppliers
484*	Truck Transportation		4	4
42*	Wholesale Trade		4	4
3211	Sawmills and Wood Preservation	X	4	4
1133	Logging		4	4
4821	Rail Transportation		3	3
3219	Other Wood Product Manufacturing	X	3	4
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	X	3	3
3261	Plastics Product Manufacturing		2	2

*An explanation of the NAICS codes with asterisks is included in the Methodology section of the Appendices.
**Not all of a Region's drivers are also suppliers. Those marked with an X are suppliers.

Table 9-2 National Supplier Industries Common to Regional Driver Industries
Count of Drivers

NAICS	Title	National Suppliers
3222	Converted Paper Product Manufacturing	2
3241	Petroleum and Coal Products Manufacturing	2
3251	Basic Chemical Manufacturing	2
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	2
3255	Paint, Coating, and Adhesive Manufacturing	2
3323	Architectural and Structural Metals Manufacturing	2
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	4
FH	Fishing, Hunting, Etc.	2

7.2.1 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 North Region.

First, "Industry 3332: Industrial Machinery Manufacturing," which includes the firm Marquip Ward United, was identified as an important regional industry. While the industry appeared to be fairly large in terms of both employment and gross product in the 1990s, regional data did not

exist for the industry after 2001. This result could have been due to an error in the data used for the analysis or simply due to changes in the primary industry in which the major firms identify themselves.

Second, it was noted that the truck transportation industry was an important regional industry due to its strong link to other regional manufacturing industries. The truck transportation industry, including “Industry 4841: General Freight Trucking” and “Industry 4842: Specialized Freight Trucking,” does have a large gross product and employs a fairly large number of local workers, the region does not appear to have a significant concentration in the region as compared to the nation as a whole. Clearly, these industries are important in the region, however, they are not considered driver industries because of they are not overly concentrated in the region and because they are really supplier industries to other driver industries in the region. In general, the truck transportation industry and the other regional driver industries are mutually dependent. Without the demand created by the other regional driver industries, truck transportation would not prosper in the region. The industry is important in the sense that it helps other industries to be more competitive.

9.3 Detailed Descriptions of the Regional Driver Industries

9.3.1 Driver Industry Definitions

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.

9.3.2 Industry Clusters

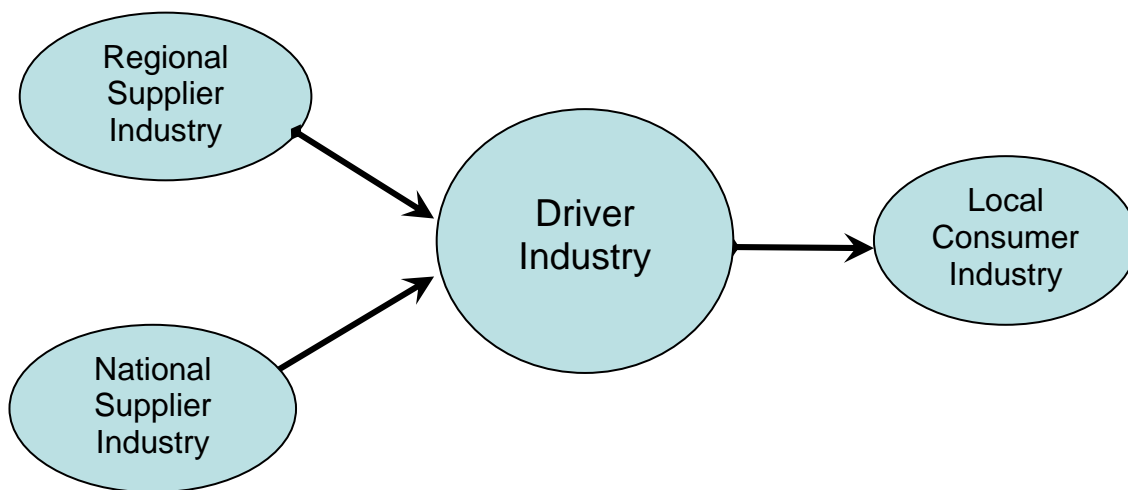
Industries contained within an industry cluster are related to driver industries in three ways, two supplier relationships and one consumer relationship.

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 9-2 Industry Clusters



Industry Clusters

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

3211 Sawmills and Wood Preservation

<u>Supplier Industries - Typical Regional Industry</u>		<u>Supplier Industries - Typical National Industry</u>	
1133	Logging	3251	Basic Chemical Manufacturing
3211	Sawmills and Wood Preservation	8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
484*	Truck Transportation	3259	Other Chemical Product and Preparation Manufacturing
42*	Wholesale Trade		
FH	Fishing, Hunting, Etc.		
3219	Other Wood Product Manufacturing		
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing		
4821	Rail Transportation		
<u>Consumer Industries - Typical Regional Industry</u>			
4821	Rail Transportation		
3221	Pulp, Paper, and Paperboard Mills		
3219	Other Wood Product Manufacturing		
2360	Construction of Buildings		
3211	Sawmills and Wood Preservation		
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 - Typical Regional Industry</u>		<u>Supplier Industries - Typical National Industry</u>	
1133	Logging	3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
3211	Sawmills and Wood Preservation	3323	Architectural and Structural Metals Manufacturing
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	FH	Fishing, Hunting, Etc.
484*	Truck Transportation	3241	Petroleum and Coal Products Manufacturing
42*	Wholesale Trade	3255	Paint, Coating, and Adhesive Manufacturing
3219	Other Wood Product Manufacturing	3321	Forging and Stamping
		3261	Plastics Product Manufacturing
		8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance

Consumer Industries - Typical Regional Industry

3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
2360	Construction of Buildings
3219	Other Wood Product Manufacturing
2380	Specialty Trade Contractors
3372	Office Furniture (including Fixtures) Manufacturing
4821	Rail Transportation
3221	Pulp, Paper, and Paperboard Mills
3211	Sawmills and Wood Preservation
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing

3219 Other Wood Product Manufacturing

Supplier Industries - Typical Regional Industry

3211	Sawmills and Wood Preservation
1133	Logging
42*	Wholesale Trade
484*	Truck Transportation
3219	Other Wood Product Manufacturing
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3261	Plastics Product Manufacturing
4821	Rail Transportation

Supplier Industries - Typical National Industry

3363	Motor Vehicle Parts Manufacturing
3325	Hardware Manufacturing
3323	Architectural and Structural Metals Manufacturing
3222	Converted Paper Product Manufacturing
3272	Glass and Glass Product Manufacturing
3274	Lime and Gypsum Product Manufacturing
3359	Other Electrical Equipment and Component Manufacturing
3141	Textile Furnishings Mills
3352	Household Appliance Manufacturing
3353	Electrical Equipment Manufacturing

Consumer Industries - Typical Regional Industry

3116	Animal Slaughtering and Processing
3219	Other Wood Product Manufacturing
FR	Farms
2360	Construction of Buildings
42*	Wholesale Trade
3274	Lime and Gypsum Product Manufacturing
2380	Specialty Trade Contractors
3221	Pulp, Paper, and Paperboard Mills
3211	Sawmills and Wood Preservation
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing

3221 Pulp, Paper, and Paperboard Mills

Supplier Industries - Typical Regional Industry

1133	Logging
3221	Pulp, Paper, and Paperboard Mills
484*	Truck Transportation
42*	Wholesale Trade
3211	Sawmills and Wood Preservation
3241	Petroleum and Coal Products Manufacturing
3261	Plastics Product Manufacturing
4821	Rail Transportation

Supplier Industries - Typical National Industry

8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
3251	Basic Chemical 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 - Typical Regional Industry

3221	Pulp, Paper, and Paperboard Mills
622*	Hospitals
623*	Nursing and residential care facilities

9.3.3 Top Firms by Driver Industry in the North Region

3211 Sawmills and Wood Preservation

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
John A Biewer Lumber Co Inc	100	283	Branch	Private	10MM-24.9MM	1989
Nicolet Hardwood Corp	70	-	Single	Private	10MM-24.9MM	1872
North Country Lumber Co	55	-	Single	Private	10MM-24.9MM	1979
Park Falls Hardwoods	50	360	Branch	Private	10MM-24.9MM	1989
Pine River Lumber Co Ltd	50	62	Parent	Private		1969
Old Fosterville Enterprises	48	96	Branch	Private	5MM-9.9MM	1998
Nagel Lumber Co Inc	30	-	Single	Private	5MM-9.9MM	1950
Besse Lumber Co	25	-	Single	Private	5MM-9.9MM	1993
Koppers Inc	25	1,490	Branch	Private	5MM-9.9MM	1928
Tri-State Lumber & Land Inc	25	-	Single	Private	5MM-9.9MM	1996
Peterson Wood Treating Inc	25	-	Single	Private	5MM-9.9MM	1984
Drummond Lumber Co	22	54	Branch	Private	1MM-4.9MM	2002
Midwest Forest Products Co	20	25	Branch	Private	1MM-4.9MM	1974
OEI Inc	20	-	Single	Private	1MM-4.9MM	1998

3212 Veneer, Plywood, and Engineered Wood Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Columbia Forest Products	250	3,532	Branch	Private	25MM-49.9MM	1974
Bird's Eye Veneer Co	150	633	Branch	Private	10MM-24.9MM	1912
Louisiana Pacific Corp	150	4,371	Branch	Public	25MM-49.9MM	1979
Trussworks Inc	100	-	Single	Private	10MM-24.9MM	1982
Georgia-Pacific Corp	100	57,936	Branch	Public	10MM-24.9MM	1959
Butternut Veneers Inc	50	-	Single	Private	5MM-9.9MM	1986
Saunders Wood Specialties Inc	50	195	Branch	Private	5MM-9.9MM	1967
K-Wood Truss Rafters Inc	35	-	Single	Private	1MM-4.9MM	1973
Columbia Forest Products	30	4,371	Branch	Public	1MM-4.9MM	1973

3219 Other Wood Product Manufacturing

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Jeld-Wen Windows & Doors	700	11,046	Branch	Private	50MM-99.9MM	1922
Weather Shield Manufacturing	311	-	Single	Private	25MM-49.9MM	2001
Birchwood Lumber & Veneer Co	200	-	Single	Private	10MM-24.9MM	1905
Pride Manufacturing Co	170	381	Branch	Private	10MM-24.9MM	1930
Action Floor Systems LLC	135	-	Single	Private	10MM-24.9MM	1988
Norse Building Systems Inc	100	-	Single	Private	10MM-24.9MM	1996
Larson-Juhl US LLC	100	90,036	Branch	Public	5MM-9.9MM	1957
Pukall Lumber Co Inc	75	-	Single	Private	5MM-9.9MM	1942
Northern Manufacturing Co Inc	65	-	Single	Private	5MM-9.9MM	1954
Solon Manufacturing	55	-	Single	Private	1MM-4.9MM	1988
Snow Country Hardwoods Inc	52	-	Single	Private	5MM-9.9MM	1999
Superior Floor Co Inc	50	60	Branch	Private	5MM-9.9MM	1986

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
Snow River Products	50	-	Single	Private	1MM-4.9MM	1991
Superior Kilns	50	360	Branch	Private	1MM-4.9MM	1983
Beaver Mfg Inc	40	-	Single	Private	1MM-4.9MM	1992
Snowbelt Hardwoods Inc	32	-	Single	Private	1MM-4.9MM	1994
Woodline Mfg Superior	32	-	Single	Private	1MM-4.9MM	2004
Black Bear Forest Products Inc	30	-	Single	Private	1MM-4.9MM	1991
Walters Brothers Lumber Mfg	28	68	Parent	Private		1930
Superior Wood Systems	26	-	Single	Private	1MM-4.9MM	1988
ANP Dimensional Lumber Inc	25	-	Single	Private	1MM-4.9MM	1979
L & N Manufacturing Inc	24	-	Single	Private	1MM-4.9MM	1972
Larson Pallet Co Inc	20	-	Single	Private	1MM-4.9MM	1969

3221 Pulp, Paper, and Paperboard Mills

Company	Employment		Location Type	Ownership	Sales Range	Year Estab.
	Site	All Sites				
CityForest Corp	100	-	Single	Private	25MM-49.9MM	1993

9.3.4 Detailed Employment, Gross Product, & Gross Product per Employee, North Region

Table 9-3 Employment in the North Region's Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
1133	Logging	847	672	592	455	450	411	393	352
3211	Sawmills and Wood Preservation	820	1,116	1,154	1,151	1,118	1,120	1,147	1,223
3212	Veneer, Plywood, and Engineered Wood Product Mfg.	1,099	1,376	1,363	1,310	1,217	1,140	1,137	1,019
3219	Other Wood Product Manufacturing	1,759	2,033	2,029	1,916	1,771	1,671	1,686	1,602
3221	Pulp, Paper, and Paperboard Mills	1,509	1,475	1,373	1,221	1,188	639	549	379

Table 9-4 CAGR* for Employment in the North Region's Driver Industries, 1993-2008

NAICS	Title	1993-1998	1998-2003	2003-2008
1133	Logging	-3.8%	-7.9%	-2.6%
3211	Sawmills and Wood Preservation	5.3%	0.1%	1.5%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	3.8%	-3.1%	-1.8%
3219	Other Wood Product Manufacturing	2.4%	-3.2%	-0.7%
3221	Pulp, Paper, and Paperboard Mills	-0.4%	-13.0%	-8.3%

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

Table 9-5 Labor Location Quotients*—North Region’s Driver Industries, 1993-2003

NAICS	Title	1993	1998	2001	2002	2003
3211	Sawmills and Wood Preservation	7.46	9.98	10.52	10.50	10.56
3212	Veneer, Plywood, and Engineered Wood Product Mfg.	14.35	14.70	13.01	11.95	11.01
3219	Other Wood Product Manufacturing	7.25	6.77	6.69	6.32	5.99
3221	Pulp, Paper, and Paperboard Mills	8.07	8.55	7.88	8.19	4.66

* 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 9-6 Manufacturing Gross Product in the North Region’s Driver Industries, 1993-2008

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
1133	Logging	\$ 25,248,296	\$ 22,873,025	\$ 19,156,372	\$ 17,364,936	\$ 17,785,983	\$ 18,035,939	\$ 18,541,686	\$ 18,685,851
3211	Sawmills and Wood Preservation	\$ 35,116,001	\$ 50,967,951	\$ 53,312,998	\$ 58,707,427	\$ 60,604,532	\$ 66,481,254	\$ 73,782,705	\$ 97,004,127
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	\$ 43,488,750	\$ 60,504,532	\$ 58,577,867	\$ 61,241,704	\$ 58,767,728	\$ 60,910,257	\$ 64,072,518	\$ 69,140,133
3219	Other Wood Product Manufacturing	\$ 91,961,514	\$ 111,442,618	\$ 107,776,137	\$ 114,271,950	\$ 110,577,565	\$ 115,147,674	\$ 123,069,258	\$ 141,815,251
3221	Pulp, Paper, and Paperboard Mills	\$ 98,857,885	\$ 117,634,428	\$ 125,236,466	\$ 123,541,019	\$ 123,335,363	\$ 90,330,477	\$ 86,088,580	\$ 77,447,346

Table 9-7 CAGR* for Gross Product in the North Region’s Driver Industries, 1993-2008

NAICS	Title	1998-2003	1998-2003	2003-2008
1133	Logging	-1.6%	-3.9%	0.6%
3211	Sawmills and Wood Preservation	6.4%	4.5%	6.5%
3212	Veneer, Plywood, and Engineered Wood Product Mfg.	5.7%	0.1%	2.1%
3219	Other Wood Product Mfg.	3.3%	0.5%	3.5%
3221	Pulp, Paper, and Paperboard Mills	2.9%	-4.3%	-2.5%

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

Table 9-8 Output Location Quotients*—North Region's Driver Industries, 1993-2003

NAICS	Title	1993	1998	2001	2002	2003
3211	Sawmills and Wood Preservation	9.36	14.06	18.42	20.62	23.01
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	13.96	17.70	18.31	18.36	18.90
3219	Other Wood Product Manufacturing	12.61	12.85	14.66	15.28	16.10
3221	Pulp, Paper, and Paperboard Mills	9.78	10.88	10.09	11.00	7.93

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

NAICS	Title	1993	1998	2000	2001	2002	2003	2004	2008
1133	Logging	\$ 29,813	\$ 34,017	\$ 32,354	\$ 38,128	\$ 39,564	\$ 43,837	\$ 47,165	\$ 53,085
3211	Sawmills and Wood Preservation	\$ 42,846	\$ 45,653	\$ 46,199	\$ 50,987	\$ 54,197	\$ 59,345	\$ 64,349	\$ 79,291
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	\$ 39,555	\$ 43,985	\$ 42,980	\$ 46,741	\$ 48,281	\$ 53,434	\$ 56,362	\$ 67,818
3219	Other Wood Product Manufacturing	\$ 52,277	\$ 54,804	\$ 53,107	\$ 59,649	\$ 62,425	\$ 68,928	\$ 73,011	\$ 88,521
3221	Pulp, Paper, and Paperboard Mills	\$ 65,501	\$ 79,738	\$ 91,224	\$ 101,187	\$ 103,861	\$ 141,419	\$ 156,866	\$ 204,526

9.4 Wisconsin Executive Perspectives in the North Region

North 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?

Quality trained available welders and machinists

--President, Mobile and Stationary Hydraulic Recycling Equipment

The availability of skilled labor.

--Energetic Devices

We have had a downturn in business the last 2 years, so we haven't had to hire many unskilled workers. Our difficulty is finding skilled professionals willing to relocate to our rural area.

--Screen Printed Sportswear

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?

Honest[y].

--President, Mobile and Stationary Hydraulic Recycling Equipment

The quality of the education received has been top-notch.

--Energetic Devices

We have had to switch almost completely to outsourcing in order to compete. Our Wisconsin workforce has a strong work ethic, desire to change and improve our manufacturing processes . . .

--Screen Printed Sportswear

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?

Expand the school to work programs.

--President, Mobile and Stationary Hydraulic Recycling Equipment

It's a challenge, but grads are still coming out of higher institutions without a real desire to work hard and get ahead. There is still an entitlement mentality and wanting to start with unrealistic [goals].

--Screen Printed Sportswear

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

School to work programs.

--President, Mobile and Stationary Hydraulic Recycling Equipment

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

Competition is very keen. To compete I'm afraid that our quality reputation will go down.

--Energetic Devices

IMPORTS!! We have been in the clothing business for 40 plus years, proudly manufacturing here in Wisconsin. Pricing pressure got so great about 2 years ago, we had to make the tough decision to clos[e].

--Screen Printed Sportswear

Product liability lawsuits that a small manufacture is faced with, not being able to afford liability insurance. The legal system in America is unfair to small manufactures competing with products fro[m overseas].

--President, Mobile and Stationary Hydraulic Recycling Equipment

Personnel issues.

--Assistant General Manager, Hardwood Plywood

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

Honest hard working people, Quality of life, good transportation system, stable electrical grid,

--President, Mobile and Stationary Hydraulic Recycling Equipment

Located in rural area.

--Energetic Devices

We have great employees with a strong work ethic. Otherwise, our transportation is expensive, we're 3 hours from a major airport, and we're a company that needs skilled managers . . .

--Screen Printed Sportswear

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

--*Assistant General Manager, Hardwood Plywood*