CHAPTER 6 – ECONOMIC DEVELOPMENT

As required by Wisconsin Statutes Sec 66.1001(2)(f), this element will address objectives, policies, goals, maps and programs to promote a strong business and employment climate in the MRRPC Region. This element will examine the labor force and economic base of the Region, including analysis of income levels, Gross Regional Product, employment in sectors that are major drivers of the Regional economy, poverty, and educational attainment. This element will identify categories or particular types of new businesses and industries that are desired in the Region, and will describe strategies such as industry clusters for strengthening existing economic sectors. The element shall assess the local governmental unit's strengths and weaknesses with respect to attracting and retaining businesses and industries, and shall designate an adequate number of sites for such businesses and industries. The element shall also evaluate and promote the use of environmentally contaminated sites for commercial or industrial uses, and will describe opportunities for green energy and sustainability. The element shall also identify county, regional and state economic development programs that apply to the local governmental unit.

LABOR FORCE MARKET ANALYSIS

Economic Base Analysis

Labor Force and Unemployment

From 2008 to 2012, Trempealeau, La Crosse, Jackson, and Vernon Counties recorded the highest percentage increases in labor force at 2.9%, 1.3%, 0.8%, and 0.8%, respectively (see Table 6.1). During the same period, Buffalo County recorded the largest decrease in labor force: 12.9%. Overall, the Region's labor force decreased at a rate of 0.5% during the same period, while the State of Wisconsin saw a loss of 1.3%, and the U.S. recorded labor force increase of 0.4%. The labor force is comprised of people who are working (either full- or part-time) and those who are unemployed but are actively looking for work. A troubling feature of the Great Recession that began in December 2007 was that unemployment rates began to decrease starting in 2010, but usually they were accompanied by a decrease in the number of people in the labor force along with a decrease in the number of unemployed. That is, people were not all leaving the ranks of the unemployed because they were joining the ranks of the employed; instead, many were merely leaving the labor force, and were thus no longer counted as unemployed because they were not actively looking for work. These trends have been observable nationwide, but they have been especially pronounced in the Mississippi River Region. Even though the unemployment rate has decreased from its high of 7.6% in 2009 to 5.9% in 2012, there were 889 fewer people in the Region's labor force in 2012 than there were in the first full year of the Great Recession, 2008. Similarly, there were 2,495 more people unemployed in the Region in 2012 than there were in 2008, and 3,384 fewer people employed in 2012 than in 2008.

From 2008 to 2012, La Crosse, Monroe, and Jackson Counties led the Region with increases in the percentage of people unemployed: 45.8%, 38.7%, and 37.6%, respectively. The percentage of people unemployed in the Region grew 32.0% during this time, while the percentage in the state of Wisconsin and the U.S. grew 41.4% and 40.1%, respectively. Crawford County had the highest unemployment rate in the Region between 2008 and 2010, and Jackson County had the highest rate in 2001 and 2012. Unemployment rates rose by at least 0.9 percentage points in all of the MRRPC counties from 2008 to 2012, with the largest rise of 2.1 percentage points in Monroe County.

The years since 2009 have been the worst period for employment and economic growth since the Great Depression of the 1930s. The MRRPC Region has been affected by this extended recession, but not at as badly as the state or the nation. The unemployment rate for the MRRPC Region was 4.4% in 2008, peaked at 7.6% in 2009, and gradually declined to 5.9 in 2012. The state's unemployment rate started at 4.8% in 2008, peaked at 8.7% in 2009, and was 6.9% in 2012. The national unemployment rate was 5.8% in 2008, peaked at 9.6 in 2010, and was 8.1% in 2012. Fewer people were unemployed in 2012 in the Region, state, and nation, than in the peak years of 2009 (for the Region and state) and 2010 (for the nation). One encouraging sign is that the number of people employed in the Region, state, and nation increased from 2010 to 2012. The national rate of increase for the number of people employed between 2010 and 2012 was 2.4%; it was much lower in the MRRPC Region (0.3%) and the state of Wisconsin (0.7%). The number of people employed increased in seven of the

Region's nine counties between 2010 and 2012. However, fewer people were employed in the Region, the state, and the nation in 2012 than in 2008.

So, while unemployment has been slowly decreasing since 2009, the trend in the Region, state, and nation has been one of more people leaving the labor force altogether, rather than a general increase in the number of people employed. Employment figures only began to rise in 2011. It remains to be seen if this rise continues in 2012 and beyond. Full recovery from the Great Recession is not complete.

Table 6.1 Labor Force and Employment Trends MRRPC Region, State and Nation, 2008-2012

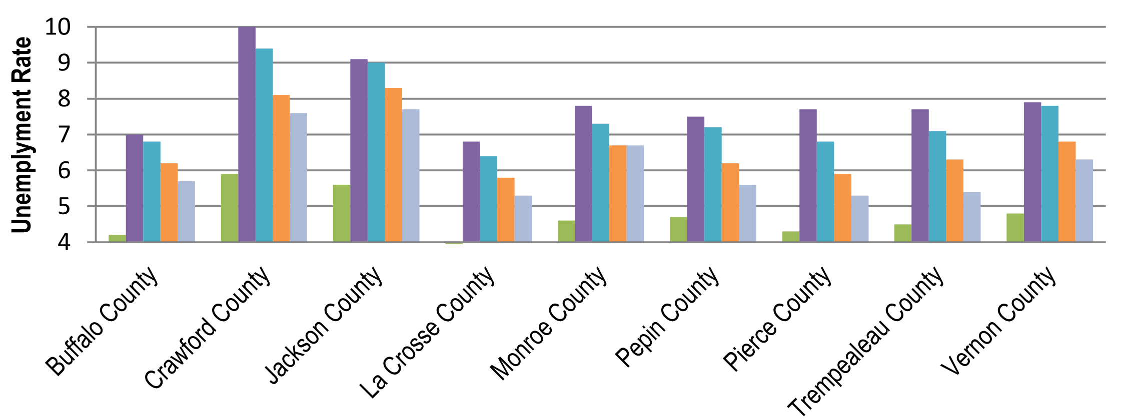
	2008	2009	2010	2011	2012	No. Chge 2010-2012	% Chge 2010-2012	No. Chge 2008-2012	% Chge 2008-2012
Buffalo									
Labor Force	8,134	8,355	7,968	7,439	7,088	-880	-11.0	-1,046	-12.9
Unemp	342	587	543	460	402	-141	-26.0	60	17.5
Unemp	4.2	7.0	6.8	6.2	5.7	-1.1	-16.8	1	34.9
Emp	7,792	7,768	7,425	6,979	6,686	-739	-10.0	-1,106	-14.2
Crawford									
Labor Force	9,583	9,434	9,222	9,216	9,047	-175	-1.9	-536	-5.6
Unemp	564	944	868	751	685	-183	-21.1	121	21.5
Unemp	5.9	10.0	9.4	8.1	7.6	-1.8	-19.6	1.7	28.6
Emp	9,019	8,490	8,354	8,465	8,362	8	0.1	-657	-7.3
Jackson									
Labor Force	9,787	10,032	9,811	9,750	9,867	56	0.6	80	0.8
Unemp	551	908	881	809	758	-123	-14.0	207	37.6
Unemp	5.6	9.1	9.0	8.3	7.7	-1.3	-14.4	2.1	36.5
Emp	9,236	9,124	8,930	8,941	9,109	179	2.0	-127	-1.4
La Crosse									
Labor Force	65,341	66,314	66,212	65,855	66,191	-21	0.0	850	1.3
Unemp	2,543	4,495	4,222	3,807	3,528	-694	-16.4	985	38.7
Unemp	3.9	6.8	6.4	5.8	5.3	-1.0	-16.4	1.4	37.0
Emp	62,798	61,819	61,990	62,048	62,663	673	1.1	-135	-0.2
Monroe									
Labor Force	24,455	24,903	24,623	24,577	24,042	-581	-2.4	-413	-1.7
Unemp	1,126	1,936	1,805	1,653	1,614	-191	-10.6	488	43.3
Unemp	4.6	7.8	7.3	6.7	6.7	-0.6	-8.4	2.1	45.8
Emp	23,329	22,967	22,818	22,924	22,428	-390	-1.7	-901	-3.9
Pepin									
Labor Force	4,095	4,153	4,079	4,010	4,011	-68	-1.7	-84	-2.1
Unemp	192	310	295	249	225	-70	-23.7	33	17.2
Unemp	4.7	7.5	7.2	6.2	5.6	-1.6	-22.4	0.9	19.6
Emp	3,903	3,843	3,784	3,761	3,786	2	0.1	-117	-3.0
Pierce									
Labor Force	24,026	23,606	23,682	23,534	23,706	24	0.1	-320	-1.3
Unemp	1,038	1,827	1,608	1,384	1,249	-359	-22.3	211	20.3
Unemp	4.3	7.7	6.8	5.9	5.3	-1.5	-22.4	0.9	22.0
Emp	22,988	21,779	22,074	22,150	22,457	383	1.7	-531	-2.3
Trempealeau									
Labor Force	16,178	16,395	16,480	16,473	16,647	167	1.0	469	2.9
Unemp	732	1,263	1,175	1,031	902	-273	-23.2	170	23.2
Unemp	4.5	7.7	7.1	6.3	5.4	-1.7	-24.0	0.9	19.8
Emp	15,446	15,132	15,305	15,442	15,745	440	2.9	299	1.9
Vernon									
Labor Force	14,656	15,324	14,992	14,988	14,767	-225	-1.5	111	0.8
Unemp	709	1,217	1,166	1,018	929	-237	-20.3	220	31.0
Unemp	4.8	7.9	7.8	6.8	6.3	-1.5	-19.1	1.5	30.0
Emp	13,947	14,107	13,826	13,970	13,838	12	0.1	-109	-0.8
MRRPC Region									
Labor Force	176,255	178,516	177,069	175,842	175,366	-1,703	-1.0	-889	-0.5
Unemp	7,797	13,487	12,563	11,162	10,292	-2,271	-18.1	2,495	32.0
Unemp	4.4	7.6	7.1	6.3	5.9	-1.2	-17.3	1.4	32.7
Emp	168,458	165,029	164,506	164,680	165,074	568	0.3	-3,384	-2.0

Table 6.1 Labor Force and Employment Trends MRRPC Region, State and Nation, 2008-2012

	2008	2009	2010	2011	2012	No. Chge 2010-2012	% Chge 2010-2012	No. Chge 2008-2012	% Chge 2008-2012
Wisconsin									
Labor Force	3,090,838	3,116,226	3,081,360	3,063,544	3,051,732	-29,628	-1.0	-39,106	-1.3
Unemp	149,515	272,369	260,907	230,718	211,444	-49,463	-19.0	61,929	41.4
Unemp	4.8	8.7	8.5	7.5	6.9	-1.5	-18.2	2.1	43.2
Emp	2,941,323	2,843,857	2,820,453	2,832,826	2,840,288	19,835	0.7	-101,035	-3.4
U.S.									
Labor Force	154,287,000	154,142,000	153,889,00	153,617,000	154,975,000	1,086,000	0.7	688,000	0.4
Unemp	8,924,000	14,265,000	14,825,000	13,747,000	12,506,000	-2,319,000	-15.6	3,582,000	40.1
Unemp	5.8	9.3	9.6	8.9	8.1	-1.6	-16.2	2.3	39.5
Emp	145,362,000	139,877,000	139,064,00	139,869,000	142,469,000	3,405,000	2.4	-2,893,000	-2.0

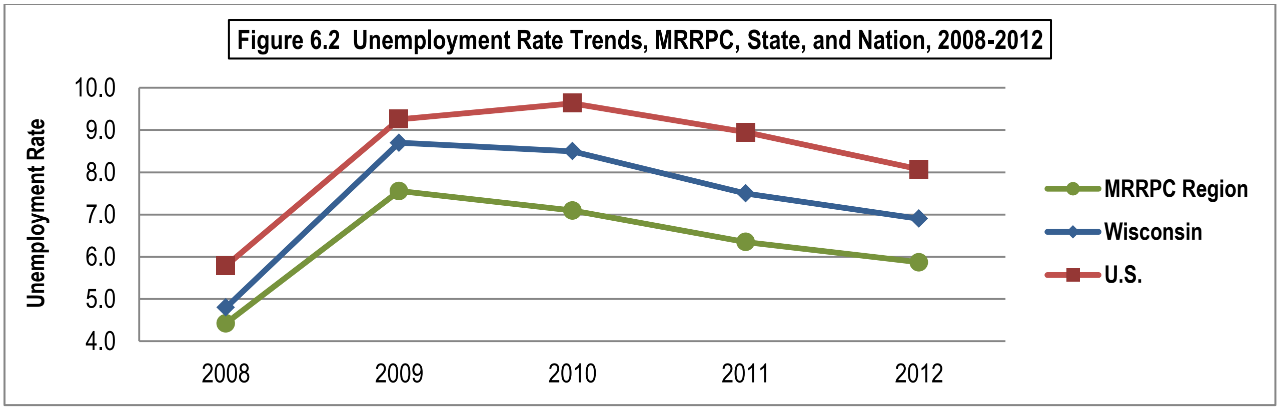
Figure 6.1 and 6.2 show unemployment rate trends in the Region, State and Nation from 2008-2012, based on data reported in Table 6.1. During this period, the lowest annual unemployment rates for the Region, state, and nation occurred in 2008. The MRRPC Region and the state experienced their highest unemployment rates in 2009, while the nation's highest rate was in 2010. The state had unemployment rates lower than the nation's for every year in this period, and the MRRPC Region had unemployment rates lower than the state's for every year during this period. Every county within the Region, along with the state and nation, experienced an increase in unemployment in 2009. The MRRPC Region, all of its counties, and the state as a whole experienced their worst year of unemployment during this period in 2009; for the nation, the worst year was 2010. The unemployment rates in the MRRPC Region counties and the state have been steadily decreasing since 2009, and in the nation since 2010; but nowhere during this period has the unemployment rate decreased to its pre-Great-Recession levels. Jackson County had the highest unemployment rate in the Region in 2012, at 7.7%, which was more than a third higher than its rate of 5.6% in 2008. Trempealeau County is the only county in the Region that showed an increase in the number of employed people from 2008 to 2012, indicating that the unemployment rate is declining in Trempealeau County because people are finding work, and not simply dropping out of the labor force.

Figure 6.1 Unemployment Rate Trends, 2008-2012



Source: Wisconsin Department of Workforce Development, Wisconsin Worknet; Local Area Unemployment Statistics, Not Seasonally Adjusted

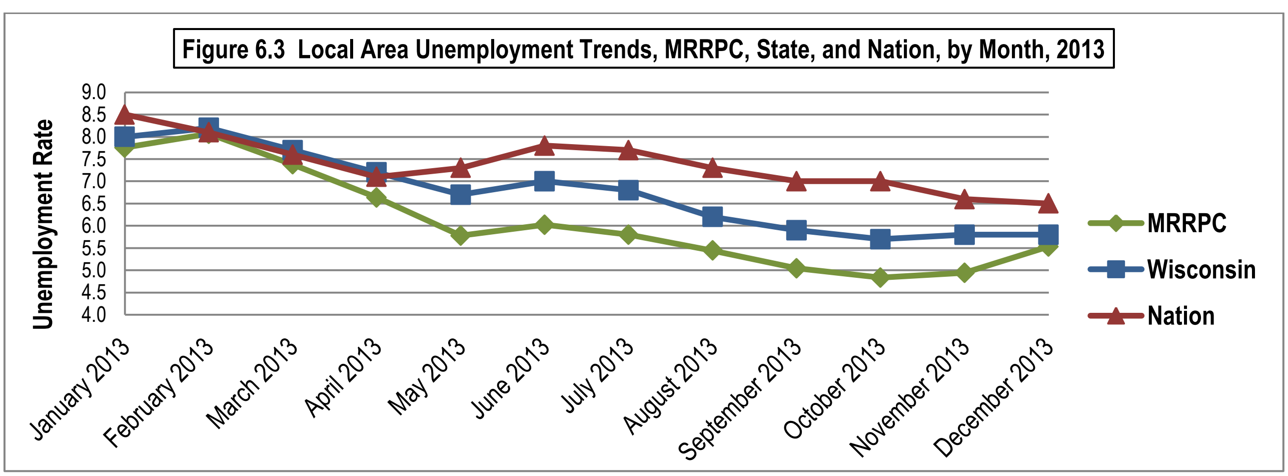
Figure 6.2 shows unemployment rate trends in the Region, State and Nation for the period of 2008-2012. The MRRPC Region and the state have generally followed the same pattern as the nation during these years, though the state's unemployment rate was always below the nations, and the Region's rate was always below the states during this period. While the national unemployment rate increased from 2008 through 2010, before beginning a gradual decline in 2011, the MRRPC Region and the state reached their peaks of unemployment in 2009, and have seen gradual declines in unemployment since then. Crawford and Jackson Counties have had unemployment rates above that of the state for each of these years. Unemployment has been falling in all these counties, as well as the Region and the state, since 2009; but the persistence of high unemployment in some of the Region's counties demonstrates that economic recovery from the Great Recession is a slow and on-going process.



Source: Wisconsin Department of Workforce Development, Wisconsin Worknet; Local Area Unemployment Statistics, Not Seasonally Adjusted

Figure 6.3 was prepared using labor force estimates from the Wisconsin Department of Workforce Development's Office of Economic Advisors. The unemployment rates in the MRRPC Region followed a pattern seen since the beginning of the Great Recession, in that unemployment rates dip in the spring, rise in the summer, dip again in the fall, and rise again heading into the end of the year. In years before the Great Recession, unemployment rates typically fell in the spring and stayed low until the fall, sometimes rising again toward the end of the year. The rise in unemployment rates in the summer months during recent years may reflect the well-documented problem of college graduates being unable to find jobs after completing their degrees. Nevertheless, the ups and downs during 2012 resulted in a net decline in unemployment rates in the Region, state, and nation.

In the MRRPC Region, the unemployment rate was 7.8% in January 2013, and rose to its highest monthly mark for the year in February, with 8.1%. It declined to 5.8% in May, before rising to 6.0% in June. It then gradually declined to the annual low of 4.8% in October, before rising to 5.5% in December. The state and nation followed the same basic contours of rise and decline, though the nation did not see the rise in unemployment in February 2013 that the Region and state did. This contributed to the unemployment rates for the Region (8.1%), state (8.2%) and nation (8.1%) for February 2013 being closer than at any other time during the year. In fact, in February, March, and April of 2013, the state was in the unusual position of having a higher unemployment rate than the nation. The difference between the Region's highest month (February) and lowest month (October) was 3.3 percentage points, while the difference between highest and lowest months for the state was 2.5 percentage points, and for the nation was 2.0 percentage points. The MRRPC Region ended 2012 with a December unemployment rate of 5.5%, 2.2 percentage points lower than at the beginning of the year. The state's rate in December was 6.5%, 2.2 percentage points lower than the rate in January. The national rate was 6.5% in December, 2.0 points lower than the rate in January.



Source: Wisconsin Department of Workforce Development, Wisconsin Worknet; Local Area Unemployment Statistics, Not Seasonally Adjusted

Per Capita Income Levels

The region's per capita income levels are consistently lower than the State and Nation (see Table 6.2 and Figure 6.4). Monroe, Crawford, and Vernon Counties had the lowest per capita income levels in the Region in 2008, ranking 51st, 60th, and 68th, respectively, out of the 72 counties in the state. The situation was improving, however, as Vernon, Crawford, and Monroe Counties showed, respectively, the second-, third-, and fifth-largest percentage increases in per capita income in the Region from 2000 to 2012 (Jackson County had the fourth-largest increase). Pepin County showed the largest percentage increase in per capita income during those same years (30.0%), and Pierce County recorded the lowest increase in the Region – 38.3% from 2000 to 2012. Between 2000 and 2012, the Region's per capita income levels increased at a rate (58.0%) faster than the State's (44.5%) and the nation's (44.2%). Figure 6.4 illustrates how the state followed roughly the same trend as the nation, declining in per capita income from 2008 to 2009, then rising steadily since 2009. Per capita income in the Region, meanwhile, rose from 2008 to 2009, and has risen every year since. The rate of increase in per capita income between 2008 and 2012 in the MRRPC Region has been higher than both the state and the nation. This signals that the MRRPC Region, in the aggregate, has improved its earning power faster than the state and the nation have.

Table 6.2 Per Capita Personal Income, in Dollars, 2008-2012

	2008	2009	2010	2011	2012	Rank in State in 2012	% Chge 2008-2012
Buffalo	39,383	39,238	39,334	41,605	43,733	8	11.5
Crawford	30,540	30,813	32,176	33,641	34,843	61	13.1
Jackson	32,913	33,168	33,485	35,958	37,594	41	13.3
La Crosse	36,968	37,034	37,528	39,213	40,514	19	9.4
Monroe	31,065	31,786	33,125	34,520	35,459	58	11.6
Pepin	32,908	33,166	34,477	38,164	40,204	25	21.2
Pierce	33,439	33,009	33,023	34,945	36,215	52	9.7
Trempealeau	32,802	33,163	34,175	36,068	37,494	42	13.1
Vernon	28,712	28,853	29,703	30,997	31,855	69	10.4
MRRPC Region	**33,192**	**33,359**	**34,114**	**36,123**	**37,546**	**N/A**	**12.6**
Wisconsin	**38,735**	**38,364**	**38,755**	**40,648**	**42,121**	**27(1)**	**9.8**
United States	**40,873**	**39,357**	**40,163**	**42,298**	**43,735**	**N/A**	**11.1**

(1) Wisconsin ranked 27th out of the 50 states in per capita income for 2011, 28th when the District of Columbia was included in the list.
Source: Regional Economic Information System, Bureau of Economic Analysis, U.S. Department of Commerce

Figure 6.4 Per Capita Income Trends, MRRPC Region, State, and Nation, 2008-2012

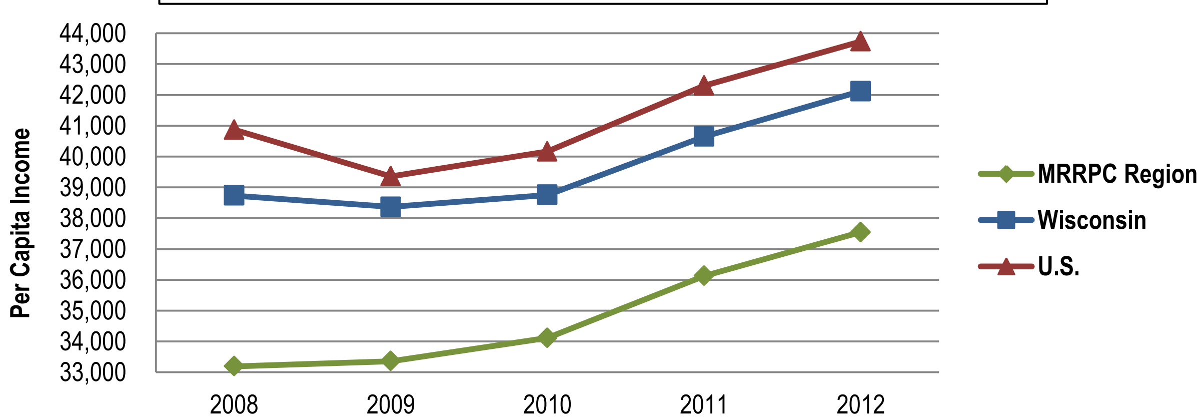


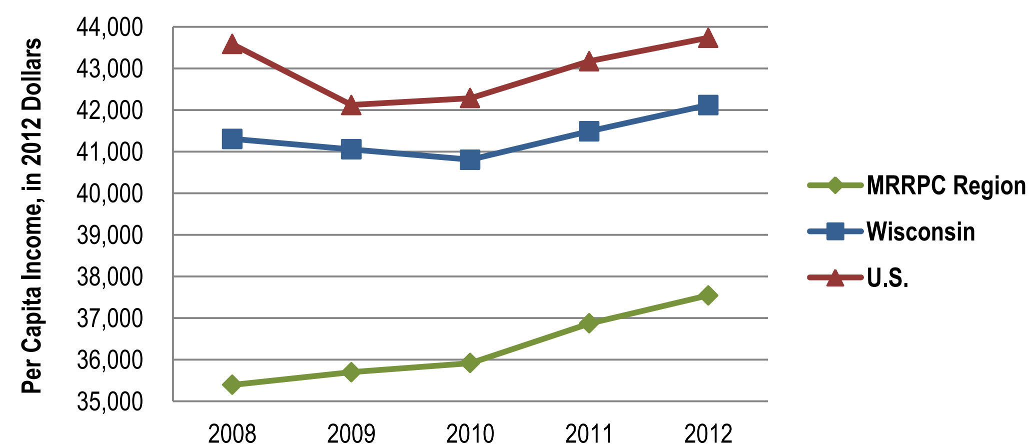
Table 6.2 and Figure 6.4 show nominal dollar amounts, meaning that they are simply the raw number of dollars, and are not adjusted for inflation. In 2000, the purchasing power of $1 was equal to about $1.33 in 2012 (this is the ratio of the Consumer Price Index Annualized value of $229.594 in 2012 and $172.2 for 2000), according to the Bureau of Labor Statistics. Looking at the per capita income from 2000 to 2012, the Region as a whole saw a per capita income rise of 21.5%, which was more than double the state's rate of 8.4% and the nation's rate of 8.2% (see Table 6.3). In that 12-year period, every county saw some gain in inflation-adjusted per capita income: Pepin County was highest with 30.0%, while Pierce County was lowest with 3.7%. In 2008, the purchasing power of $1 was equal to about $1.07 in 2012 (this is the ratio of the Consumer Price Index Annualized value of $229.594 in 2012 and $215.303 for 2008), according to the Bureau of Labor Statistics. Between 2008 and 2012, the Region saw a growth rate in inflation-adjusted per capita income (6.1%) that was more than triple the state rate (2.0%) and that eclipsed the national rate (0.3%). Every county saw an increase in inflation-adjusted per capita income between 2008 and 2012, with the largest in Pepin County (14.6%) and the smallest in Pierce County (1.6%). Unlike the state and nation, which both endured decreases in per capita buying power as a result of the onset of the Great Recession, only recouping those loses in 2011 and 2012, respectively, the MRRPC Region saw an increase in per capita buying power every year from 2008 to 2012 (see Figure 6.5).

Table 6.3 Per Capita Personal Income, in Dollars, Adjusted for Inflation, 2000-2012

	2000 (in 2012 dollars)*	2008	2009	2010	2011	2012	% Chge 2000 (in 2012 Dollars) – 2012	% Chge 2008 (in 2012 Dollars) – 2012
Buffalo	37,550	41,997	41,992	41,415	42,466	43,733	16.5	4.1
Crawford	28,283	32,567	32,976	33,879	34,337	34,843	23.2	7.0
Jackson	30,958	35,098	35,496	35,257	36,702	37,594	21.4	7.1
La Crosse	35,351	39,422	39,633	39,514	40,024	40,514	14.6	2.8
Monroe	29,361	33,127	34,017	34,878	35,234	35,459	20.8	7.0
Pepin	30,921	35,092	35,494	36,301	38,954	40,204	30.0	14.6
Pierce	34,926	35,659	35,326	34,770	35,668	36,215	3.7	1.6
Trempealeau	31,590	34,979	35,491	35,983	36,814	37,494	18.7	7.2
Vernon	26,205	30,618	30,878	31,275	31,638	31,855	21.6	4.0
MRRPC Region	**31,683**	**35,395**	**35,700**	**35,919**	**36,871**	**37,546**	**21.0**	**6.1**
Wisconsin	**38,854**	**41,306**	**41,057**	**40,806**	**41,489**	**42,121**	**8.4**	**2.0**
U.S.	**40,424**	**43,586**	**42,119**	**42,288**	**43,173**	**43,735**	**8.2**	**0.3**

Source: Regional Economic Information System, Bureau of Economic Analysis, U.S. Department of Commerce; Bureau of Labor Statistics

Figure 6.5 Per Capita Income Trends, MRRPC Region, State, and Nation, Adjusted for Inflation, 2008-2012



Sources: US Census 2000, 2006-2010 American Community Survey (ACS) 5-Year Estimates, 2008-2012 ACS 5-Year Estimates, Bureau of Labor Statistics

Median Household Income Levels

While per capita income is the amount of total income divided by the total population, median household income often gives a more useful description of economic reality. This is for two major reasons. First, since per capita income is simply the mean of all income divided by total population, it can be skewed by outliers. That is, a few people with very large incomes would bring up the per capita income figure, but that would not accurately reflect the income situation for most people. Since the median represents the data point exactly in the middle of the data set, with half of all data points above it and half below, it can give a more representative description of the characteristics of people at the center of the population. In terms of household income, measuring the median gives us a look at how much income a household has that is exactly at the middle of the income spectrum – one way to think of the "typical" household. The second reason that per capita income can be misleading is that it distributes the earnings of working-age people across the entire population, which includes many people who are not earning an income (especially children, but also some retirees and others). Since the median income figure is measured by households (families, groups of roommates, etc.), it better captures the economic realities in which most people operate.

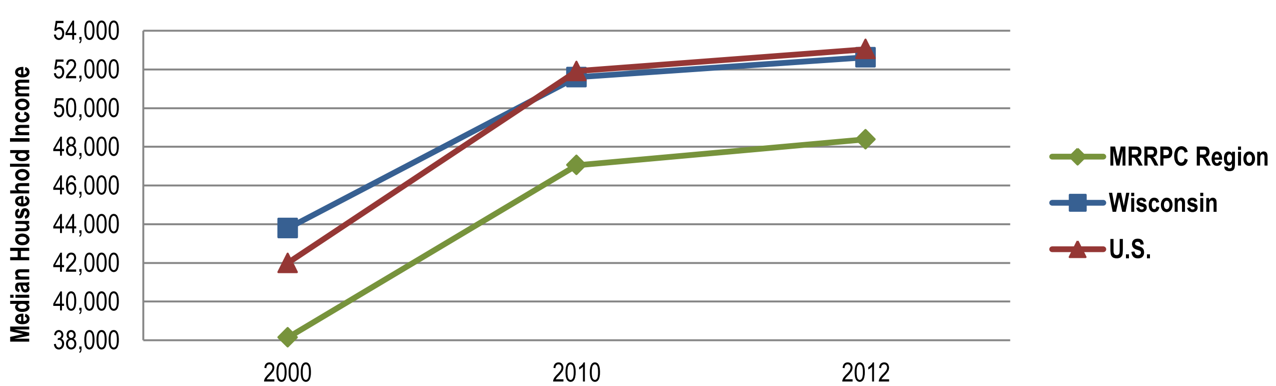
In the MRRPC Region, median household income increased by 2.8% from 2010 to 2012 (see Table 6.4). This was higher than the state's rate of 2.0% and the national rate of 2.2%. Crawford County had the highest increase with 5.7%, while Jackson County decreased by 0.2%. From 2000 to 2012, the median household in Jackson County saw the lowest increase, at 16.4%, and the median household in Vernon County saw the largest increase at 34.7%. Across the Region, the median household income rose by 26.9% from 2000 to 2012, a higher rate than the state (20.2%) and the nation (26.3%). All these dollar figures are absolute, however, meaning that they are not adjusted for inflation.

Table 6.4 Median Household Income, in Dollars, 2000-2012

	2000	2010	2012	% Change 2010-2012	% Change 2000-2012
Buffalo County	37,200	45,302	47,119	4.0	26.7
Crawford County	34,135	39,486	41,743	5.7	22.3
Jackson County	37,015	43,191	43,098	-0.2	16.4
La Crosse County	39,472	49,328	50,771	2.9	28.6
Monroe County	37,170	47,333	48,768	3.0	31.2
Pepin County	37,609	48,446	49,544	2.3	31.7
Pierce County	49,551	60,181	61,153	1.6	23.4
Trempealeau County	37,889	46,582	48,624	4.4	28.3
Vernon County	33,178	43,632	44,676	2.4	34.7
MRRPC Region	**38,135**	**47,053**	**48,388**	**2.8**	**26.9**
Wisconsin	**43,791**	**51,598**	**52,627**	**2.0**	**20.2**
U.S.	**41,994**	**51,914**	**53,046**	**2.2**	**26.3**

Sources: US Census 2000, 2006-2010 American Community Survey 5-Year Estimates, 2008-2012 American Community Survey 5-Year Estimates

Figure 6.6 Median Household Income, MRRPC Region, State, and Nation, 2000-2012



Sources: US Census 2000, 2006-2010 American Community Survey (ACS) 5-Year Estimates, 2008-2012 ACS 5-Year Est., Bureau of Labor Statistics

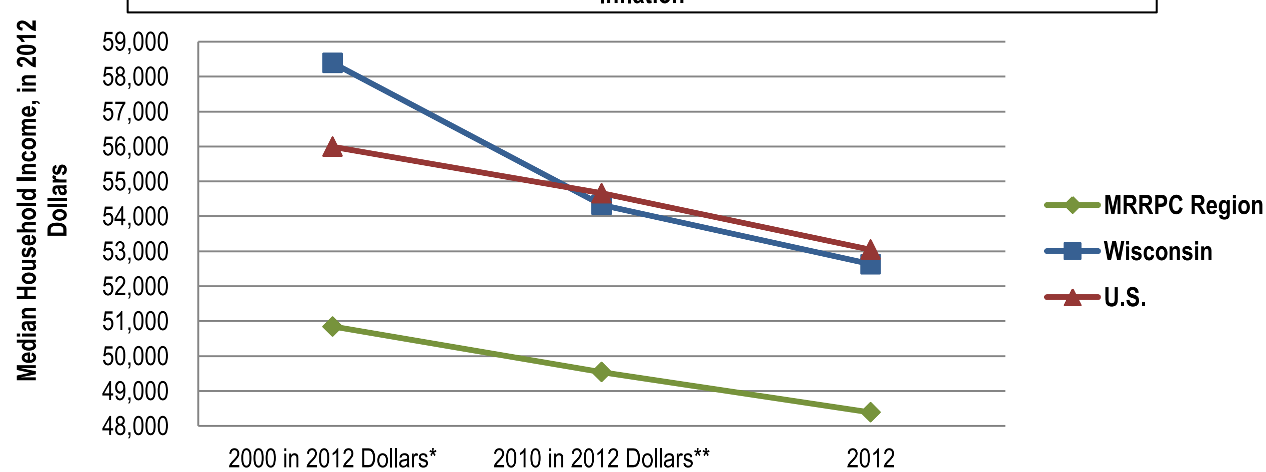
Table 6.4 and Figure 6.6 show nominal dollar amounts, meaning that they are simply the raw number of dollars, and are not adjusted for inflation. In 2000, the purchasing power of $1 was equal to about $1.33 in 2012 (this is the ratio of the Consumer Price Index Annualized value of $229.594 in 2012 and $172.2 for 2000), according to the Bureau of Labor Statistics. Looking at the median household income from 2000 to 2012, the Region as a whole saw a decrease of 4.8%, which was less than half the state's rate of decrease of 9.9%, and lower than the nation's rate of decrease of 5.3% (see Table 6.5). In that 12-year period, every county saw a decrease in inflation-adjusted per capita income, except Vernon County, which saw a 1.0% increase. Jackson County saw the greatest loss of median household income, at 12.7%. In 2010, the purchasing power of $1 was equal to about $1.05 in 2012 (this is the ratio of the Consumer Price Index Annualized value of $229.594 in 2012 and $218.056 for 2010), according to the Bureau of Labor Statistics. Between 2010 and 2012, the Region saw a decline in inflation-adjusted median household income of 2.3%, which was less of a decline than the state (-3.1%) and the national (-3.0) rate. Every county saw a decrease in inflation-adjusted median household income between 2010 and 2012, except for Crawford County, which saw a gain of 0.4%. Jackson County had the deepest decline in inflation-adjusted median household income from 2010 to 2012, at -5.2%.

Table 6.5 Median Household Income, in Dollars, Adjusted for Inflation, 2000-2012

	2000 in 2012 Dollars*	2010 in 2012 Dollars**	2012	% Change 2010-2012 in 2012-adjusted dollars	% Change 2000-2012 in 2012-adjusted dollars
Buffalo County	49,599	47,699	47,119	-1.2	-5.0
Crawford County	45,512	41,575	41,743	0.4	-8.3
Jackson County	49,352	45,476	43,098	-5.2	-12.7
La Crosse County	52,628	51,938	50,771	-2.2	-3.5
Monroe County	49,559	49,838	48,768	-2.1	-1.6
Pepin County	50,144	51,009	49,544	-2.9	-1.2
Pierce County	66,066	63,365	61,153	-3.5	-7.4
Trempealeau County	50,517	49,047	48,624	-0.9	-3.7
Vernon County	44,236	45,941	44,676	-2.8	1.0
MRRPC Region	**50,846**	**49,543**	**48,388**	**-2.3**	**-4.8**
Wisconsin	**58,386**	**54,328**	**52,627**	**-3.1**	**-9.9**
U.S.	**55,991**	**54,661**	**53,046**	**-3.0**	**-5.3**

Sources: US Census 2000, 2006-2010 American Community Survey 5-Year Estimates, 2008-2012 American Community Survey 5-Year Estimates

Figure 6.7 Median Household Income, MRRPC Region, State, and Nation, 2000-2012, Adjusted for Inflation



Per capita income alone can give a skewed view of how the economy is operating, since it is greatly influenced by the disproportionate effect of high-earning outliers. Median household income better reflects the economic realities in the middle of the income spectrum. Also, looking at any income measurement without adjusting for inflation is bound to give a distorted view of how the economy is actually experienced. For these reasons, inflation-adjusted median household income over time demonstrates how people of middle income are faring in the economy. Table 6.5 and Figure 6.7 show how middle-income people have been losing purchasing power since 2000, and this is true in the MRRPC Region, the state, and the nation. This is a complex reality, caused by many factors, including, among others, tax policy, financial regulations, free-trade policies, monetary policy, and era-defining shifts in the macro-economy. With regard to shifts in the macro-economy, one of the biggest changes to the American economy in the last generation is the widespread loss of industrial jobs, particularly in manufacturing. A combination of changes in technology, transportation, and trade agreements has resulted in many products which once were produced in the United States now being produced abroad and imported. This, of course, has meant that as production has gone overseas, manufacturing jobs in the United States have been lost. This has been an important economic force at work in the MRRPC Region, since manufacturing has long been a major driver of the Region's economy, and one that traditionally has created jobs that paid good wages and provided good benefits.

Gross Regional Product (GRP)

The Gross Regional Product (GRP) measures economic output by the final market value of all goods and services produced in the Region. It is similar in concept to the Gross Domestic Product (GDP), which measures the market price of finished goods and services produced in the United States. Similarly, Gross State Product (GSP) measures the market price of finished goods and services produced in Wisconsin. GRP, GSP, or GDP is the sum of earnings, property income, and taxes on production. According to the Bureau of Economic Analysis, Earnings include wages, salaries, supplements (additional employee benefits), and proprietor income for an industry in the Region; Property Income is the value of total dividends, interest, rent, corporate profits, and capital depreciation created in the region; Taxes on Production includes use taxes, sales taxes and other taxes, subtracting subsidies, but does not include corporate or personal income tax; and Total GRP measures the final market value of all goods and services produced in a region.

In the MRRPC Region, the leading economic sector in GRP in 2012 was manufacturing, which generated over $2 billion in economic activity that year (see Table 6.6). Manufacturing was followed by government ($1.6 billion), health care and social assistance ($1.3 billion), retail trade ($807 million), and other non-industries ($803 million). The top GSP categories for the state in 2012 were Manufacturing ($50.4 billion), Government ($27.9 billion), Finance and Insurance ($22.7 billion), Health Care and Social Assistance ($22.2 billion), and Other non-industries ($16.1 billion). The GDP in 2012 was led by the following industry categories: Government ($1.9 trillion), Manufacturing ($1.7 trillion), Finance and Insurance ($1.4 trillion), Professional, Scientific, and Technical Services ($1.1 trillion), Health Care and Social Assistance ($1.1 trillion).

Wisconsin's total economic output, measured by final market value, is 1.69% of the national GDP. Within Wisconsin, the MRRPC Region's total economic output, measured by final market value, is 4.71% of the GSP. The MRRPC's GRP is a mere 0.08% of the nation's GDP.

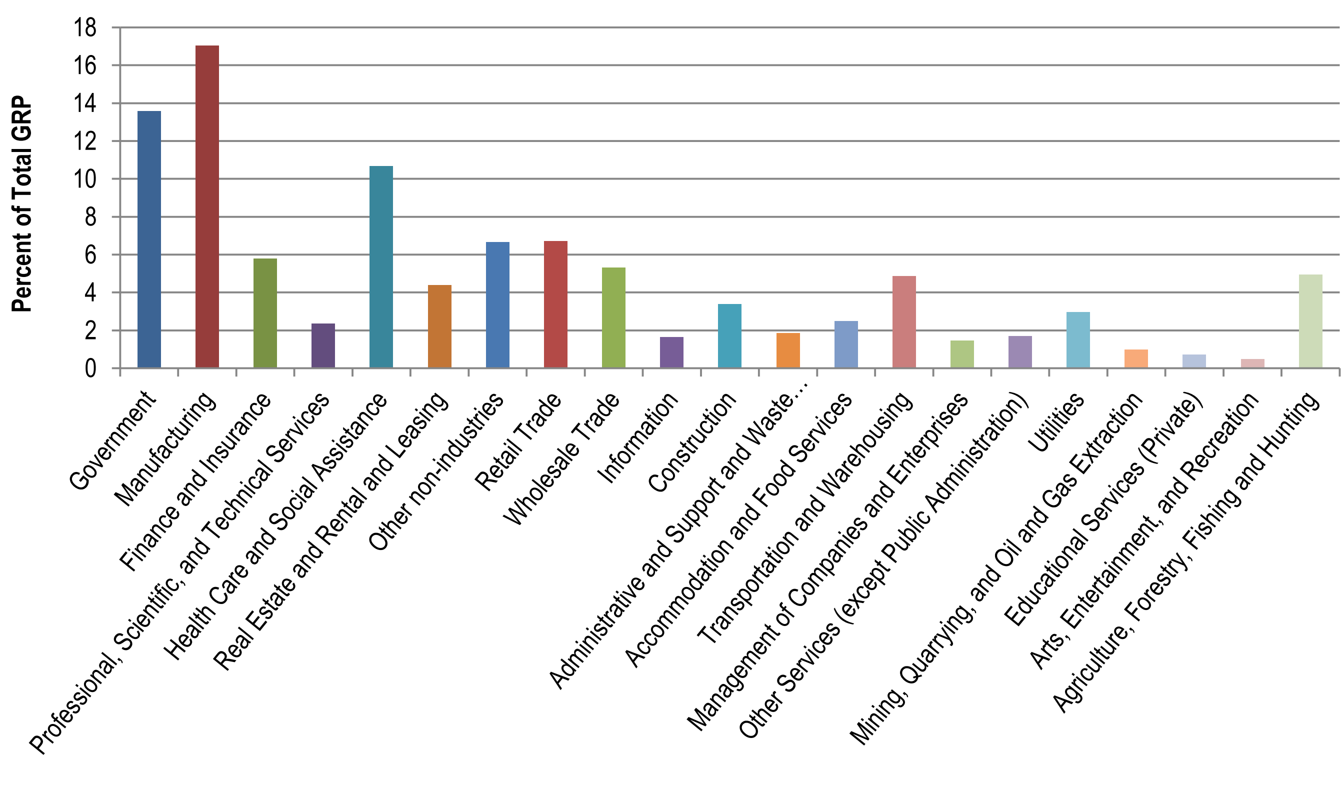
Table 6.6 Gross Regional, State, and Domestic Product (GRP, GSP, GDP), by Industry

NAICS	Industry	Gross Regional Product (2012)	% of Total	Gross State Product (2012)	% of Total	Gross National Product (2012)	% of Total
11	Agriculture, Forestry, Fishing and Hunting	$595,572,380	4.9	$4,589,258,215	1.8	$140,468,300,189	0.9
21	Mining, Quarrying, and Oil and Gas Extraction	$117,979,994	1.0	$951,127,210	0.4	$269,022,155,604	1.8
22	Utilities	$356,076,183	3.0	$5,743,351,766	2.2	$284,153,894,753	1.9
23	Construction	$407,679,333	3.4	$7,982,318,582	3.1	$464,879,470,940	3.1
31	Manufacturing	$2,051,511,489	17.0	$50,367,132,936	19.7	$1,737,857,776,880	11.5
42	Wholesale Trade	$640,471,793	5.3	$15,641,050,785	6.1	$856,122,215,201	5.7
44	Retail Trade	$806,649,345	6.7	$15,627,788,709	6.1	$894,525,664,613	5.9
48	Transportation and Warehousing	$585,070,075	4.9	$6,812,873,024	2.7	$429,699,531,559	2.8

Table 6.6 Gross Regional, State, and Domestic Product (GRP, GSP, GDP), by Industry

NAICS	Industry	Gross Regional Product (2012)	% of Total	Gross State Product (2012)	% of Total	Gross National Product (2012)	% of Total
51	Information	$196,470,029	1.6	$7,473,345,851	2.9	$631,179,394,624	4.2
52	Finance and Insurance	$695,481,784	5.8	$22,711,879,226	8.9	$1,359,398,987,420	9.0
53	Real Estate and Rental and Leasing	$529,764,037	4.4	$11,609,700,373	4.5	$1,088,336,951,650	7.2
54	Professional, Scientific, and Technical Services	$285,279,862	2.4	$11,686,465,055	4.6	$1,146,091,806,990	7.6
55	Management of Companies and Enterprises	$174,653,756	1.5	$6,599,481,902	2.6	$309,563,700,081	2.1
56	Administrative and Support and Waste Management and Remediation Services	$224,338,792	1.9	$6,162,427,067	2.4	$460,191,551,515	3.0
61	Educational Services (Private)	$88,030,928	0.7	$2,617,139,489	1.0	$186,680,141,146	1.2
62	Health Care and Social Assistance	$1,285,285,299	10.7	$22,228,096,819	8.7	$1,127,555,103,810	7.5
71	Arts, Entertainment, and Recreation	$58,919,740	0.5	$2,057,849,166	0.8	$153,509,683,731	1.0
72	Accommodation and Food Services	$298,342,750	2.5	$6,227,974,405	2.4	$432,490,308,013	2.9
81	Other Services (except Public Administration)	$202,602,465	1.7	$4,716,726,490	1.8	$298,461,534,656	2.0
90	Government	$1,633,214,718	13.6	$27,912,374,989	10.9	$1,887,179,370,370	12.5
	Other non-industries	$803,735,316	6.7	$16,072,282,495	6.3	$941,495,309,442	6.2
Total		**$12,037,130,068**	**100.0**	**$255,790,644,554**	**100.0**	**$15,098,862,853,187**	**100.0**

Figure 6.8 Gross Regional Product (GRP), MRRPC Region, by Industry



Manufacturing Employment Sector in the MRRPC Region

During the period from 2000 to 2012, the Region's manufacturing jobs decreased by 5.7%, compared to declines of 23.6% for the state and 29.0% for the nation (see Table 6.7). That indicates that, despite significant losses in manufacturing employment during the Great Recession that began in December 2007, the MRRPC Region has fared better than the state and the nation in the last decade. Manufacturing was one of the economic sectors hit hardest during the Great Recession all over the country, but while the state and nation were still shedding manufacturing jobs in 2010, the MRRPC Region was already seeing the sector recover. The manufacturing recovery has also happened in the state and nation – the first increases in manufacturing employment in many years – but the rebound has been much stronger in the MRRPC Region. While the state added manufacturing jobs at a rate of 5.7% from 2010 to 2012, and the nation at 4.1%, the Region saw manufacturing employment increase by 6.8% during those two years. Manufacturing employment declined rapidly in the MRRPC Region, state, and nation in the recession that began in March 2001. But while losses of manufacturing jobs in the state and nation only levelled off in the years between 2003 and 2007, the MRRPC Region saw gains in manufacturing employment until 2006 that nearly erased all the losses since 2001 (see Figures 6.9, 6-10 and 6.11). Manufacturing employment began to decline in the two-year period before the onset of the Great Recession in December 2007, and the Region, state, and nation saw precipitous drops from 2008 to 2009. But since then, the Region has seen a sharp increase in manufacturing employment, nearly reaching 2008 levels. In contrast, the state and nation continued losing manufacturing jobs in 2009, only beginning to recover those losses since 2010. Manufacturing in the MRRPC Region has proven to be more resilient than in the state or nation in terms of recovering from the worst economic downturn since the 1930s, and while manufacturing has suffered hard times elsewhere in the state and nation for many years before the Great Recession, it has been quite a success story in this Region.

Table 6.7 Manufacturing Employment MRRPC Region, State and Nation 2000-2012

	2000	2008	2009	2010	2011	2012	% Change 2010-2012	% Change 2000-2012
Buffalo	340	342	339	331	313	312	-5.7	-8.2
Crawford	1,983	1,587	1,385	1,471	1,564	1,650	12.2	-16.8
Jackson	844	881	751	749	913	980	30.8	16.1
La Crosse	10,148	8,849	7,855	7,809	7,810	7,801	-0.1	-23.1
Monroe	3,561	3,728	3,279	3,400	3,464	3,522	3.6	-1.1
Pepin	S	S	128	128	126	143	11.7	-22.3*
Pierce	1,009	980	993	1,069	1,190	1,229	15.0	21.8
Trempealeau	5,006	5,574	5,229	5,349	5,698	6,004	12.2	19.9
Vernon	777	799	630	596	640	686	15.1	-11.7
MRRPC Region	**23,668**	**22,740**	**20,589**	**20,902**	**21,718**	**22,327**	**6.8**	**-5.7**
Wisconsin	**594,389**	**492,461**	**434,901**	**429,454**	**443,632**	**453,959**	**5.7**	**-23.6**
United States	**17,750,600**	**13,980,300**	**12,489,200**	**12,102,900**	**12,386,700**	**12,596,500**	**4.1**	**-29.0**

S = Data suppressed to maintain confidentiality *Percent change from 2001 to 2012

Source: Wisconsin Dept. of Workforce Development, Quarterly Census of Employment and Wages (QCEW/ES-202); Bureau of Economic Analysis

Figure 6.9 Manufacturing Employment in the MRRPC Region, 2000-2012

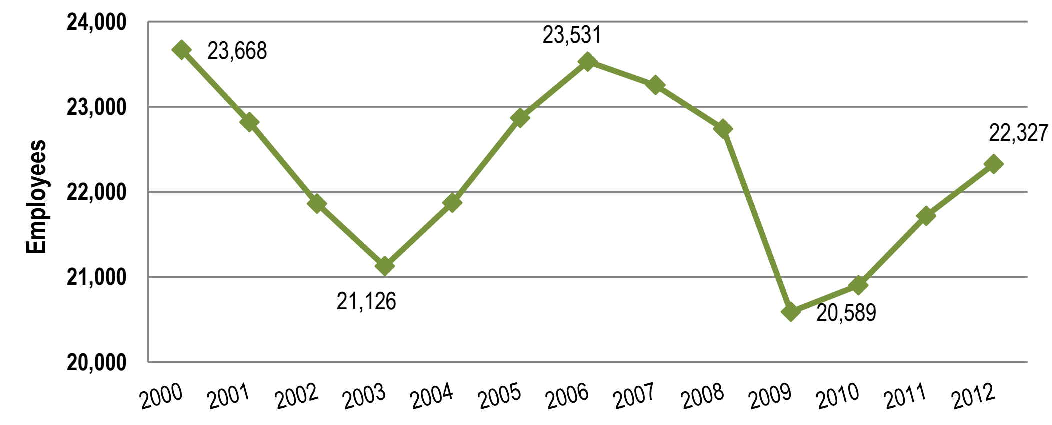


Figure 6.10 Manufacturing Employment in Wisconsin, 2000-2012

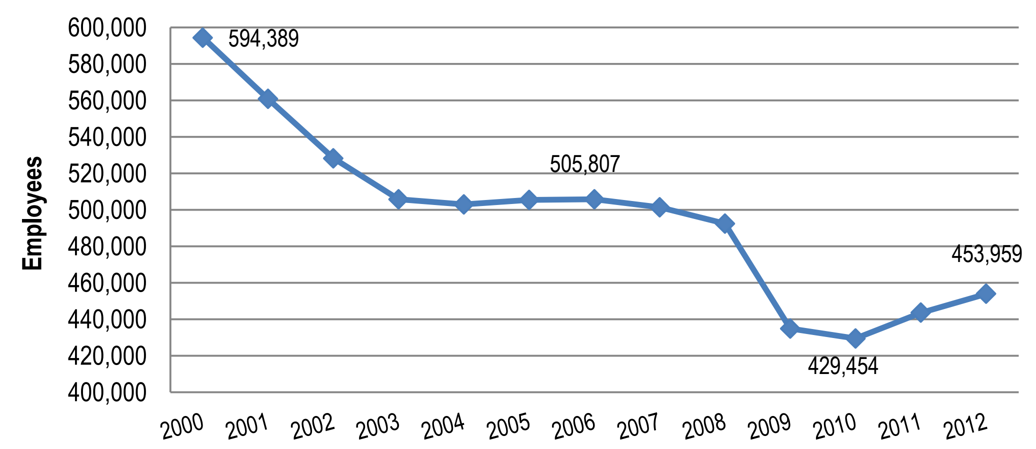
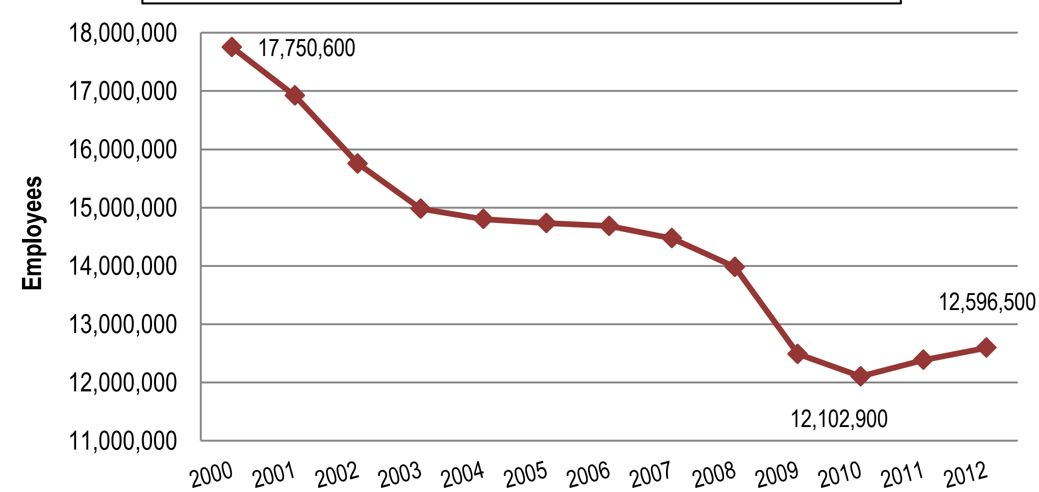


Figure 6.11 Manufacturing Employment in the United States, 2000-2012



Manufacturing provided more jobs in the Region in 2013 than any sector other than Government (see Table 6.8). Moreover, manufacturing tends to pay higher, family-supporting wages than many other economic sectors. This is reflected in the fact that Manufacturing paid an average of $53,981 per worker in the MRRPC Region in 2013; this was the sixth-highest sector (see Table 6.8), and a figure higher than the 2012 county median income in every county but one in the MRRPC Region (see Table 6.5). Manufacturing is the leading employment sector in the state (see Table 6.9), and the fifth-highest employment sector in the nation (see Table 6.10). As in the MRRPC Region, Manufacturing employment in the state and nation pays average wages higher than median incomes, though that difference is much larger in the state and nation than in the MRRPC Region, suggesting that manufacturing labor costs in this Region are lower than elsewhere. Higher compensation for these workers means that more money is available to them for spending in the local economy, which stimulates deep supply-chain economic multiplier effects. The MRRPC continues to pursue initiatives to keep the manufacturing sector strong because of its economic importance and its positive economic impact on all other sectors of the economy.

Manufacturing led the private sector in the number of people employed in 2013 in the MRRPC Region, and it was the second-highest employment sector overall. The top employment sector in the MRRPC Region in 2011 was Government (see Table 6.8). The other top sectors for employment in 2011 were health care and social assistance (third), Retail trade (fourth), and Accommodation and Food Services (fifth). These same five sectors are, in different combinations, the top-five employment sectors in the state (see Table 6.9) and the nation (see Table 6.10).

Table 6.8 Number of Employees and Average Earnings per Worker in the MRRPC Region, by Industry, 2013

Industry	No. of Employees	Rank	Avg. Earnings per Worker	Rank
Agriculture, Forestry, Fishing and Hunting	5,097	11	$28,775	15
Mining, Quarrying, & Oil and Gas Extraction	377	20	$91,445	2
Utilities	802	19	$105,263	1
Construction	7,485	7	$47,094	12
Manufacturing	22,786	2	$53,981	6
Wholesale Trade	5,715	9	$51,723	7
Retail Trade	16,771	4	$25,973	17
Transportation and Warehousing	8,036	6	$51,670	8
Information	1,549	17	$57,247	4
Finance and Insurance	5,039	12	$54,455	5
Real Estate and Rental and Leasing	1,328	18	$30,328	14
Professional, Scientific, and Technical Services	3,457	13	$50,037	10
Management of Companies and Enterprises	1,998	15	$72,103	3
Admin & Support & Waste Mgt & Remediation Services	5,355	10	$28,510	16
Educational Services (Private)	2,264	14	$31,241	13
Health Care and Social Assistance	22,723	3	$50,579	9
Arts, Entertainment, and Recreation	1,728	16	$15,729	20
Accommodation and Food Services	13,558	5	$12,976	21
Other Services (except Public Administration)	6,559	8	$20,975	18
Government	27,885	1	$49,872	11
Unclassified Industry	0	21	$19,653	19
Total	**160,512**	**N/A**	**$42,483**	**N/A**

Source: Economic Modeling Specialists Inc. (EMSI)

Table 6.9 Number of Employees and Average Earnings per Worker in Wisconsin, by Industry, 2013

Industry	No. of Employees	Rank	Avg. Earnings per Worker	Rank
Agriculture, Forestry, Fishing and Hunting	54,914	14	$30,401	17
Mining, Quarrying, & Oil and Gas Extraction	2,838	21	$72,035	4
Utilities	10,588	19	$137,498	1
Construction	137,843	8	$53,816	10
Manufacturing	459,402	1	$67,380	7
Wholesale Trade	119,937	10	$67,175	8
Retail Trade	304,911	4	$28,471	19
Transportation and Warehousing	97,983	12	$49,659	13
Information	47,478	16	$70,164	5
Finance and Insurance	134,445	9	$75,698	3
Real Estate and Rental and Leasing	30,402	18	$38,364	14
Professional, Scientific, and Technical Services	117,179	11	$69,280	6
Management of Companies and Enterprises	54,693	15	$102,891	2
Admin & Support & Waste Mgt & Remediation Services	156,218	6	$30,517	16
Educational Services (Private)	60,330	13	$38,317	15
Health Care and Social Assistance	379,283	3	$52,377	12
Arts, Entertainment, and Recreation	42,688	17	$29,278	18
Accommodation and Food Services	239,659	5	$15,364	21
Other Services (except Public Administration)	148,400	7	$23,189	20
Government	415,637	2	$55,234	9
Unclassified Industry	10,057	20	$52,604	11
Total	**3,024,885**	**N/A**	**$49,764**	**N/A**

Source: Economic Modeling Specialists Inc. (EMSI)

Table 6.10 Number of Employees and Average Earnings per Worker in the Nation, by Industry, 2013

Industry	No. of Employees	Rank	Avg. Earnings per Worker	Rank
Agriculture, Forestry, Fishing and Hunting	1,862,004	18	$30,975	19
Mining, Quarrying, & Oil and Gas Extraction	834,082	19	$111,156	3
Utilities	553,619	20	$132,404	1
Construction	7,891,086	8	$54,289	13
Manufacturing	12,120,182	5	$76,860	8
Wholesale Trade	5,894,138	11	$78,385	7
Retail Trade	15,865,262	3	$32,978	18
Transportation and Warehousing	4,820,413	12	$58,149	11
Information	2,815,657	14	$97,724	5
Finance and Insurance	6,162,076	10	$104,625	4
Real Estate and Rental and Leasing	2,502,103	15	$51,870	14
Professional, Scientific, and Technical Services	9,416,716	6	$89,577	6
Management of Companies and Enterprises	2,043,229	17	$128,886	2
Admin & Support & Waste Mgt &d Remediation Services	9,272,183	7	$39,034	16
Educational Services (Private)	3,788,079	13	$42,488	15
Health Care and Social Assistance	18,154,931	2	$54,442	12
Arts, Entertainment, and Recreation	2,460,043	16	$35,543	17
Accommodation and Food Services	12,355,465	4	$20,712	21
Other Services (except Public Administration)	7,541,176	9	$28,169	20
Government	24,020,413	1	$64,135	9
Unclassified Industry	191,951	21	$62,833	10
Total	**150,564,808**	**N/A**	**$57,286**	**N/A**

Source: Economic Modeling Specialists Inc. (EMSI)

Other Major Employment by Sectors in the Region

The Public Administration (Government) employment sector provided the most jobs in the MRRPC Region in 2013 (see Table 6.8). Government employment ranked 11th in the Region in terms of average earnings per worker (see Table 6.8). Between 2000 and 2012, the sector grew by 7.2% Region-wide (see Table 6.11). During that period, Jackson County saw the largest increase, at 42.6%, while Buffalo County saw the steepest decrease at 16.6%. All counties recorded decreases in employment in the government sector from 2010 to 2012, except Monroe County, where the increase was a mere 0.4%. Buffalo County saw the steepest decline of government employment between 2010 and 2012, losing 5.5% of its jobs over that period. The state as a whole recorded a 1.9% decrease in government employment between 2010 and 2012, and the nation showed a 2.3% loss of jobs in this sector from 2010 to 2012.

Table 6.11 Public Administration (Government) Employment in the MRRPC Region, State, and Nation, 2000-2012

	2000	2008	2009	2010	2011	2012	% Change 2010-2012	%change 2000-2012
Buffalo	945	842	833	834	809	788	-5.5	-16.6
Crawford	1,062	1,089	1,067	1,075	1,058	1,052	-2.1	-0.9
Jackson	1,707	2,444	2,501	2,477	2,450	2,434	-1.7	42.6
La Crosse	8,107	8,317	8,365	8,380	8,310	8,341	-0.5	2.9
Monroe	4,512	4,677	4,895	5,024	5,137	5,043	0.4	11.8
Pepin	543	528	515	513	499	490	-4.5	-9.8
Pierce	2,776	2,924	3,160	3,196	3,140	3,133	-2.0	12.9
Trempealeau	2,000	2,116	2,145	2,140	2,093	2,101	-1.8	5.1
Vernon	1,810	1,790	1,812	1,828	1,816	1,761	-3.7	-2.7
MRRPC Region	**23,462**	**24,727**	**25,293**	**25,467**	**25,312**	**25,143**	**-1.3**	**7.2**
State	**357,502**	**383,752**	**386,411**	**386,922**	**381,527**	**379,636**	**-1.9**	**6.2**
United States	**22,937,000**	**24,605,000**	**24,692,000**	**24,672,000**	**24,277,000**	**24,101,000**	**-2.3**	**5.1**

Source: Wisconsin Dept. of Workforce Development, Quarterly Census of Employment and Wages (QCEW/ES-202); Bureau of Economic Analysis

The health care sector was the third-highest in the number of employees in 2013 in the MRRPC Region (see Table 6.8). It grew in employment by 28.8% from 2000 to 2012 (see Table 6.12), which was a rate higher than the state's (25.5%), but lower than the nation's (32.1%). Buffalo County showed a steep decrease in employment in this sector from 2000 to 2012, while every other county saw increases; Jackson County was the largest with 96.6%. The growth in this sector was much lower from 2010 to 2012, however. The Region saw only a 0.7% increase in employment in health care during this period, much lower than the state's 2.4% and the nation's 4.0%. Jackson County saw the largest increase in health-care employment from 2010 to 2012, with 9.6%, while several counties saw loses; Buffalo County had the most dramatic loss rate of 16.5%. The growth of the health care industry nationwide, especially due to the well-publicized aging of the population, makes its decline in the MRRPC Region surprising, since it is home to two regional hospital systems and numerous other medical facilities. However, the proportion of workers in the Region working in health care is 14.16% (see Table 6.8), which is higher than the state proportion of 12.54% (see Table 6.9) and the national proportion of 12.06% (see table 6.10). It is possible that the slowed growth in the MRRPC Region is an indicator that supply of medical workers in the Region has reach an equilibrium with demand, and that the state and nation are still approaching that equilibrium. Because of the sector's well-established presence in the MRRPC Region, it is a strength the Region can build on for future economic growth.

Table 6.12 Health Care Employment in the MRRPC Region, State, and Nation, 2000-2012

	2000	2008	2009	2010	2011	2012	% Change 2010-2012	%change 2000-2012
Buffalo	564	444	448	401	373	335	-16.5	-40.6
Crawford	1,018	1,073	1,062	1,070	1,055	1,041	-2.7	2.3
Jackson	498	788	803	893	901	979	9.6	96.6
La Crosse	11,086	14,372	14,590	14,448	14,320	14,651	1.4	32.2
Monroe	2,054	2,564	2,696	2,637	2,726	2,776	5.3	35.2
Pepin	294	354	349	334	342	344	3.0	17.0
Pierce	990	1,302	1,365	1,172	1,204	1,240	5.8	25.3
Trempealeau	1,240	1,569	1,769	1,740	1,602	1,562	-10.2	26.0
Vernon	1,372	1,703	1,742	1,752	1,691	1,697	-3.1	23.7
MRRPC Region	**19,116**	**24,169**	**24,824**	**24,447**	**24,214**	**24,625**	**0.7**	**28.8**
State	**310,050**	**371,103**	**376,903**	**379,948**	**383,910**	**389,010**	**2.4**	**25.5**
United States	**15,026,200**	**18,459,900**	**18,770,700**	**19,089,900**	**19,426,200**	**19,855,000**	**4.0**	**32.1**

Source: Wisconsin Dept. of Workforce Development, Quarterly Census of Employment and Wages (QCEW/ES-202); Bureau of Economic Analysis

The Retail employment sector increased dramatically in the Region (176.6%) and state (142.4%) between 2000 and 2012 (see Table 6.13). In contrast, the sector declined in employment nation-wide during that period by 1.5%. The Region and the state also experienced different trends from the nation from 2010 to 2012, when the Region's Retail employment decreased by 0.6% and the state's by 0.9%, while the national rate increased by 3.4%. The retail sector ranked 4th in the Region in number of employees in 2013, but 17th in terms of average earnings per worker (see Table 6.8). The number of retail jobs statewide declined every year from 2008 to 2011, before seeing an increase in 2012. At the national level, the number of retail jobs declined every year from 2008 to 2010, then increased in 2011 and 2012. While the Region has seen an overall decline in retail employment from 2010 to 2012, led by Jackson County's loss of 20.0%, Trempealeau County saw a 5.8% increase during that period.

Table 6.13 Retail Employment in the MRRPC Region, State, and Nation, 2000-2012

	2000	2008	2009	2010	2011	2012	% Change 2010-2012	%change 2000-2012
Buffalo	49	262	246	S	228	234	-4.9*	377.6
Crawford	537	2,298	2,207	1,911	1,846	1,853	-3.0	245.1
Jackson	193	977	926	901	755	721	-20.0	273.6
La Crosse	3,139	8,553	8,641	8,253	8,164	8,198	-0.7	161.2
Monroe	617	1,883	1,980	1,943	1,910	1,918	-1.3	210.9
Pepin	288	312	308	294	280	287	-2.4	-0.3
Pierce	110	925	947	910	891	862	-5.3	683.6
Trempealeau	108	967	964	932	945	986	5.8	813.0
Vernon	762	1,055	1,044	1,009	1,000	994	-1.5	30.4
MRRPC Region	**5,803**	**17,232**	**17,263**	**16,153**	**16,019**	**16,053**	**-0.6**	**176.6**
State	**121,321**	**314,901**	**309,854**	**296,853**	**292,559**	**294,130**	**-0.9**	**142.4**
United States	**18,455,400**	**18,609,900**	**17,889,700**	**17,591,600**	**17,966,300**	**18,184,800**	**3.4**	**-1.5**

S = Data suppressed to maintain confidentiality *Percent change from 2009 to 2012

Source: Wis. Dept. of Workforce Development, Quarterly Census of Employment and Wages (QCEW/ES-202); Bureau of Economic Analysis

From 2000 to 2012, employment numbers in the accommodation and food service sector increased by 12.9% in the MRRPC Region (see Table 6.14). This overall increase was the result of major gains in Pepin County (50.9%) and La Crosse County (17.6%) in this period, while every other county saw a decrease (the largest decrease was 13.2% in Pierce County). The state recorded a 7.2% increase from 2000 to 2012, while the nation saw in increase of 21.0%. Between 2010 and 2012, the employment in this sector increased in the Region (5.3%), the state (1.9%), and the nation (6.8%). La Crosse County saw the largest increase in this period, with 11.1%, while Monroe County saw the biggest decrease, with 15.2%. The accommodation and food service sector is not the top employment sector in any of the MRRPC's nine counties. It is, however, the 5th largest employment sector in the Region (see Table 6.8). Despite its relatively high level of employment, the sector ranks 21st in the Region for average earnings per worker (see Table 6.8).

Table 6.14 Accommodation and Food Service Employment in the MRRPC Region, State, and Nation, 2000-2012

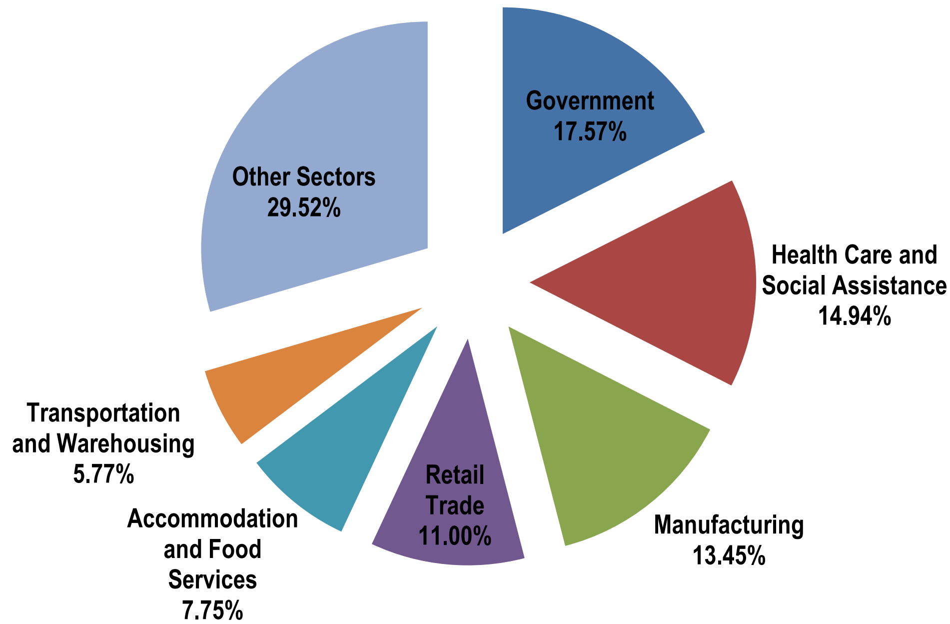
	2000	2008	2009	2010	2011	2012	% Change 2010-2012	%change 2000-2012
Buffalo	332	294	308	314	304	318	1.3	-4.2
Crawford	773	728	712	709	707	716	1.0	-7.4
Jackson	S	686	656	650	655	649	-0.2	-4.0*
La Crosse	5,623	6,015	5,856	5,952	6,094	6,614	11.1	17.6
Monroe	1,621	2,149	1,958	1,870	1,752	1,586	-15.2	-2.2
Pepin	173	244	S	S	S	261	7.0**	50.9
Pierce	1,134	930	882	967	944	984	1.8	-13.2
Trempealeau	673	661	644	671	671	652	-2.8	-3.1
Vernon	651	605	612	636	654	616	-3.1	-5.4
MRRPC Region	**10,980**	**12,312**	**11,628**	**11,769**	**11,781**	**12,396**	**5.3**	**12.9**
State	**206,429**	**224,569**	**218,610**	**217,332**	**217,782**	**221,360**	**1.9**	**7.2**
United States	**10,574,500**	**12,331,100**	**11,990,500**	**11,986,300**	**12,350,400**	**12,798,500**	**6.8**	**21.0**

S = Data suppressed to maintain confidentiality *Percent change from 2001 to 2012, **Percent change from 2008 to 2012

Source: Wisconsin Dept. of Workforce Development, Quarterly Census of Employment and Wages (QCEW/ES-202); Bureau of Economic Analysis

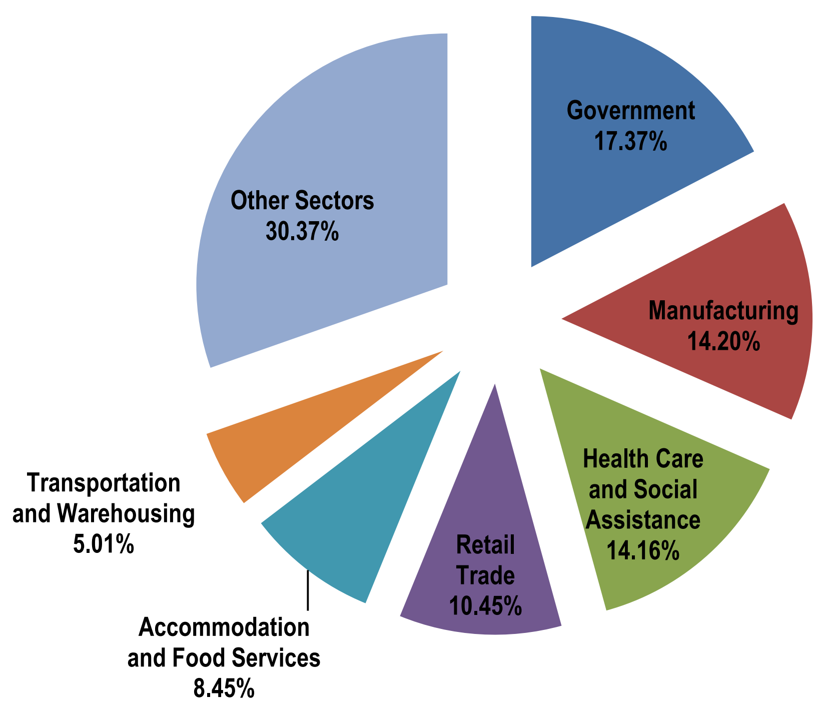
The following figures show the major sectors of the MRRPC Regional economy with 5% or more of the Region's total employment in relation to each other. Figure 6.12 shows the proportion of employment each sector provided in 2009, and Figure 6.13 shows the same information for 2013. Most of the sectors remained at the same proportion of Regional employment in 2013 as in 2009, though Manufacturing overtook Health Care and Social Assistance for second place. The growth of the "other sectors" part of the chart indicates that the Regional economy is diversifying, since the biggest increases among the "other sectors" is in finance and insurance; agriculture, forestry, fishing and hunting; other services (except public administration); management of companies and enterprises; utilities; construction; and wholesale trade. Some of these sectors, like manufacturing, tend to pay well and provide good benefits for employees. One economic development strategy would be identifying ways to increase employment in these sectors of the economy, so that well-paying jobs would be available to more people in the Region.

Figure 6.12 Employment by Sector in the MRRPC Region, 2009



Source: Economic Modeling Specialists Inc. (EMSI)

Figure 6.13 Employment by Sector in the MRRPC Region, 2013



Source: Economic Modeling Specialists Inc. (EMSI)

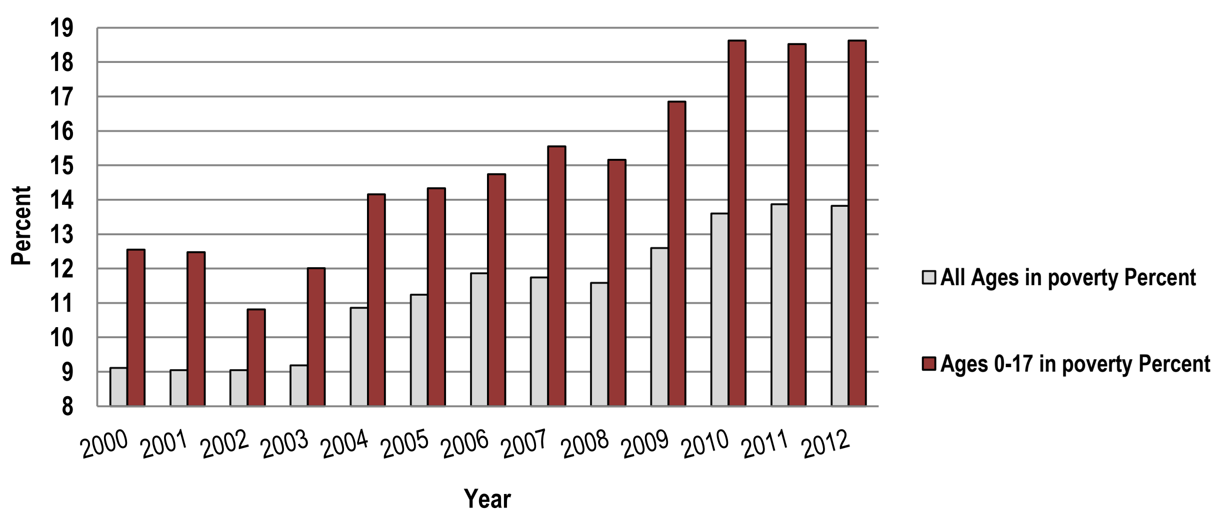
Poverty

Poverty has increased in the MRRPC Region since 2000, having grown steadily in the middle of the 2000s, and then rapidly during the years of the Great Recession (see Table 6.15 and Figure 6.14). The growth in poverty has been apparent across all ages, but has been much higher for children. The poverty rate among people under the age of 18 has consistently been between 25% and 40% higher than the poverty rate across all ages. The state and nation have seen similar growth in poverty since 2000, and have even higher disparities between the poverty rate for children versus the poverty rate for all ages. Poverty in the MRRPC Region has typically been slightly above the state average, but well below the national average. In 2000, Vernon County was the only county in the Region with poverty rates above the national average. In 2012, Vernon County still had poverty rates above the national average, but Monroe County's childhood poverty rate had also risen above the national average. The only county in 2000 with an all-ages poverty rate lower than the state's was Pierce; in 2012, Buffalo, Pepin, and Trempealeau Counties joined Pierce County on that list.

Table 6.15 Poverty Rates in the MRRPC Region, 2000-2012

	2000		2005		2010		2011		2012	
	All Ages in poverty Percent	Ages 0-17 in poverty Percent	All Ages in poverty Percent	Ages 0-17 in poverty Percent	All Ages in poverty Percent	Ages 0-17 in poverty Percent	All Ages in poverty Percent	Ages 0-17 in poverty Percent	All Ages in poverty Percent	Ages 0-17 in poverty Percent
Buffalo	8.5	11.5	8.8	12.0	12.0	16.8	12.2	17.6	12.4	18.1
Crawford	10.5	15.0	11.4	16.2	14.3	21.2	13.4	19.8	13.6	20.4
Jackson	10.2	13.6	10.1	14.7	18.2	27.4	14.8	22.3	14.8	22.4
La Crosse	8.7	10.1	12.6	12.8	12.9	14.2	14.7	15.4	14.6	15.4
Monroe	10.4	16.2	11.0	17.3	15.4	24.1	15.7	25.4	15.7	25.6
Pepin	8.8	14.3	9.0	14.8	12.3	20.7	12.2	21.6	12.2	22.0
Pierce	6.0	6.2	7.3	6.3	10.8	11.1	9.7	9.3	9.7	9.4
Trempealeau	8.2	10.6	9.4	12.7	13.6	19.4	11.8	17.9	11.7	17.5
Vernon	12.3	22.2	15.8	25.5	14.7	26.4	16.3	25.9	16.1	25.9
MRRPC Region	**9.1**	**12.6**	**11.2**	**14.3**	**13.6**	**18.6**	**13.9**	**18.5**	**13.8**	**18.6**
Wisconsin	**8.1**	**11.0**	**10.2**	**14.0**	**13.2**	**19.0**	**13.1**	**18.4**	**13.1**	**18.5**
U.S.	**11.3**	**16.2**	**13.3**	**18.5**	**15.3**	**21.6**	**15.9**	**22.5**	**15.8**	**22.6**

Figure 6.14 Poverty Rates in the MRRPC Region, 2000-2012



Educational Attainment

Levels of education in the MRRPC Region are lower in some categories associated with higher incomes and sought-after skills in the advanced economy of the 21st century. The Region has a lower percentage than the nation, and only slightly higher than that of the state, of people age 25 and older with no education past 8th grade (see Table 6.16). The Region is also below state and national levels of people with some high school education, but no diploma. While it is encouraging that the high-school drop-out population in the Region is lower than the state's or the nation's, the Region has a higher percentage (36.0%) than both the state (33.1%) and the nation (28.2%) of people with only a high school education. This pattern continues with college degrees. Lower percentages of people in the MRRPC Region have bachelor's (14.7%) or graduate (7.8%) degrees than is the case for the state (17.5% and 8.9%, respectively) and the nation (17.9% and 10.6%, respectively). Many studies have shown that a college degree is necessary for employment in many of the most lucrative fields, and the necessity of post-secondary education has only become more important over time. The people of the MRRPC Region are less prepared to take advantage of family-supporting employment due to their relative lack of education. One encouraging item in the discussion of educational attainment, however, is the higher rate of associate's degrees in the Region (11.3%) than is true for the state (9.4%) and the nation (7.7%). Many of quality jobs in growing industries like technology and medical care do not require a 4-year college degree, but they do often require an associate's degree. The population of the MRRPC Region seems to have seen the wisdom in opting for less-expensive and less-time-consuming 2-year degrees at technical colleges, and may be in a position to capitalize on those employment opportunities in the years to come.

Table 6.16 Highest level of Education, Population 25 years and over, MRRPC Region, State, and Nation

	MRRPC Region (%)	Wisconsin (%)	United States (%)
Less than 9th grade	3.9	3.5	6.0
9th to 12th grade, no diploma	5.6	6.4	8.2
High school graduate (includes equivalency)	36.0	33.1	28.2
Some college, no degree	20.8	21.3	21.3
Associate's degree	11.3	9.4	7.7
Bachelor's degree	14.7	17.5	17.9
Graduate or professional degree	7.8	8.9	10.6
Total high school graduate or higher	90.5	90.2	85.7
Total bachelor's degree or higher	22.4	26.4	28.5

Looking at individual counties in the MRRPC Region, it is evident that the presence of a university, college, or technical college campus encourages more residents to attend school beyond high school, since La Crosse and Pierce Counties have the lowest levels of education that stops at high school (see Table 6.17). These two counties also have the highest percentages of people with associate's, bachelor's, and graduate degrees. The three counties with the highest percentages of educational attainment stopping at high school – Buffalo, Crawford, and Pepin Counties – are also among the counties with the highest median age. It is well established that education beyond high school was much less common in generations past, and communities with higher concentrations of older residents would be expected to have a disproportionate number of people who had not attained post-secondary education. Unsurprisingly, La Crosse and Pierce Counties, with the highest levels of post-secondary educational attainment, are the top counties in median household income (see Table 6.5). Crawford County, with the lowest rate of post-secondary educational attainment, is also lowest in median household income. Drawing a causal relationship from these numbers is not advisable: levels of educational attainment do not necessarily determine levels of income. But in general, higher educational attainment does increase the likelihood of success for an area's residents in the employment market, which can lead to higher incomes; and the availability of skilled and educated workers encourages the development of more businesses in such an area, leading to more quality employment and a greater quality of life.

Table 6.17 Highest level of Education, Population 25 years and over, MRRPC Counties

	Buffalo Co. (%)	Crawford Co. (%)	Jackson Co. (%)	La Crosse Co. (%)	Monroe Co. (%)	Pepin Co. (%)	Pierce Co. (%)	Trempealeau Co. (%)	Vernon Co. (%)
Less than 9th grade	4.46	4.02	4.84	2.30	5.03	4.77	1.76	5.70	7.53
9th to 12th grade, no diploma	6.26	6.10	9.18	4.04	6.90	5.42	4.40	7.19	6.08
High school graduate (includes equivalency)	43.43	44.98	41.47	29.52	40.40	42.50	31.83	41.49	37.70
Some college, no degree	17.86	21.22	19.66	20.89	21.26	19.66	24.80	18.39	19.95
Associate's degree	10.59	7.97	8.71	13.95	9.78	10.23	10.67	10.13	10.04
Bachelor's degree	12.44	10.39	10.66	18.33	11.84	13.17	18.09	11.17	11.80
Graduate or professional degree	4.96	5.32	5.49	10.96	4.80	4.24	8.45	5.92	6.91
Total high school graduate or higher	89.3	89.9	86.0	93.7	88.1	89.8	93.8	87.1	86.4
Total bachelor's degree or higher	17.4	15.7	16.1	29.3	16.6	17.4	26.5	17.1	18.7

Industry Cluster Based Economic Development

Industry clusters typically include firms within the same geographic area that produce similar goods and services, their suppliers and distributors, other firms that employ related skills and technologies, and organizations that train workers for and conduct research in these fields. These companies, organizations, and institutions are interrelated and share interests with regard to their access to raw materials, supplies, workforce, and markets. Industry clusters exist in a Region because the businesses and support institutions have naturally grown in that place and have market-based reasons for being there; industry clusters cannot be artificially created in a Region with no heritage or existing presence in a particular industry. While clusters can include organizations that are in direct competition with each other, they are ultimately characterized by the gathering of various organizations that complement one another's operations. Cluster developments thrive and innovate with input from many companies within the industry, regional educational institutions, and even public-sector support. When companies, organizations, and institutions gather in a cluster because of shared interest or experience in a particular industry, they begin to exchange knowledge, capacity, and workers. This encourages innovation and productivity, with the cluster acting as a catalyst. Successful businesses within the cluster spawn new businesses, and regional infrastructure can be harnessed to maximize the cluster's potential. As the region grows and develops a critical mass of innovative companies, industry workers move to the region from elsewhere, either to accept new jobs at regional companies or to launch entrepreneurial ventures.

Industry clusters are organized to better position their members and their regions in the competitive global marketplace. Clusters with a formal organization can implement any number of programs to accomplish this goal. In order to meaningfully increase overall regional prosperity, innovative capacity must be built in many clusters. Strong leadership committed to regional economic development is needed to ensure that companies, educational institutions, governments, and economic development organizations contribute their full potential to cluster-based initiatives. An overarching organizational structure for economic development is needed to help coordinate and implement cluster initiatives. No single cluster strategy will work for all regions; each region must craft a distinctive approach based on its unique assets.

The programs that follow are examples of cooperation, cost-sharing, and resource-pooling among members of the cluster:

- Jointly acquiring raw materials (inputs) for quantity discounts
- Development of supply-chain management efficiencies for inputs and products produced
- Developing plant and office production efficiencies (Lean Manufacturing, Lean Office, Six Sigma)
- Providing education and training assistance for technicians, engineers, scientists, analysts, assemblers, welders and fabricators or other commonly shared production or supervisory positions
- Enterprise Resource Planning (ERP) system training
- Developing mutually beneficial industry cluster contracts between industries and public economic development organizations to maximize each industry's production capacity in terms of:

- Floor space
- Machinery and equipment
- Laboratories
- Material and product testing services
- Research and development resources
- Transportation and warehousing services
- Technology

- Increase industrial park land and building inventory through public-private ventures
- Assist in expanding educational opportunities in the scientific, technological, engineering, and mathematics professions
- Initiatives to improve the image of manufacturing occupations as a career choice
- Health-care insurance pooling and administration initiatives
- Energy assistance
- Marketing assistance
- Pursuing federal, state, and private grants to assist in funding any of the above private, market-driven initiatives

While the MRRPC Region typically has lower unemployment rates than the state and the nation, the income levels are also typically lower in the MRRPC Region, indicating that many of the jobs available are not high-paying, family-supporting jobs. Building and growing industry clusters is an economic development strategy that aims at improving the economic competitiveness of companies in key economic sectors, which should stimulate growth in jobs in those industries. As the number of well-paying jobs increases, more talented workers would stay in the Region, and others would be attracted from outside the Region. Furthermore, as the industry cluster grows, new companies would start up, led by people in the Region with experience, knowledge, and new, innovative ideas. More companies in that industry would locate in the Region, identifying it as a center for talented workers, suppliers, customers, etc. Businesses that sell their products or services well beyond the area in which they are headquartered are known as traded companies. These companies essentially import capital by selling goods and services outside their Region (exporting). Since traded companies are not merely recirculating an unchanging amount of money within a Region, they stimulate an economic multiplier effect: as they import capital into the Region, they spend it buying from suppliers, paying workers, and maintaining their physical plant; their suppliers and workers, in turn, spend money in the Region for business and personal needs, creating greater demand and even stimulating business expansion to meet it; the businesses they buy from also spend the money they receive; and this process repeats. Due to the realities of a more service- and information-oriented economy in the early 21st century (as opposed to the product-oriented economy of the 19th and 20th centuries), traded companies are less likely to be dependent on a natural resource for their production, and are more likely to value the skills, creativity, and adaptability of their workforce. In seeking employees who would best fit their operations, traded industries tend to locate in areas where they find the workforce to be well educated, or in areas where they expect they can attract such a workforce from outside the area.

The MRRPC's 2012-2017 Comprehensive Economic Development Strategy calls for the encouragement of industry-cluster-based economic development, with an emphasis on the Region's existing traded company strengths. These are agriculture and food processing; equipment, machinery, and metal products; forest and wood products; software design, information, technology and composite industries; and health care. The first of these industries has been organized into the Food Resource and Agribusiness Network (FRAN), and the second has organized the Equipment and Metal Manufacturing Association (EMMA). FRAN and EMMA member companies work to build relationships through networking, seek joint ventures, explore opportunities for cost-sharing, and generally seek to improve the economic climate in the Region and their competitiveness in the global marketplace. The forest and wood products industry cluster exists, in the sense that many businesses involved in this industry are present in the Region; but there is no formal organization dedicated to serving that cluster's interests. A study of the Kickapoo Valley forests, which will include an examination of the feasibility of operating a pellet or wood-chip manufacturing facility in the Valley, could provide more information concerning the viability of this cluster, and might spur more interest in developing an organization to serve it. This study is due to be released in the fall of 2013. The software design, information, technology and composite cluster is nascent, and represented by only a few companies. However, these are emerging industries that have great potential for exporting products and services while importing capital to the Region, so there is value in nurturing the growth of these industries. If they are able to grow naturally here, they could be a source of new traded companies, providing a much-needed economic boost to the Region in years to come. The health care cluster is represented by two Regional medical centers in La Crosse, the educational institutions that train many of the medical support staff, and the supporting industries that these hospitals and clinics rely on. While not an exporting industry in the traditional sense, medical care is one of the fastest-growing fields in terms of employment and wages, and medical work does attract highly skilled, well-educated, and high-earning personnel to the Region, which has the potential to stimulate the Regional economy in ways similar to high technology industries. A formal organization to serve the health care cluster does not exist but it would be prudent to investigate what industry cluster opportunities exist that will help the health care-related businesses and institutions in the Region operate even more successfully.

A key Regional economic problem, and the source for much of the Region's economic decline in recent decades, is the lack of traded companies. An increase in the number of, or an expansion of existing, traded companies would result in more importation of capital from outside the Region; the creation of higher-wage jobs; and the recruitment of a younger, better-educated workforce that would contribute to an increase in income levels and help stem the Region's brain drain. Clusters concentrate local talent, technology, resources, and information, which can all then be exchanged. Members of a cluster inform one another about new developments, and as each of them learns about advances in the field, they improve their understanding of a rapidly changing marketplace, and better position themselves to succeed in it. If members of a cluster operated in isolation, they would not likely learn about these advances from each other or from their suppliers and customers. But this type of information exchange happens naturally when companies interact with each other in close proximity. A cluster organization is an attempt to formalize, focus, and efficiently direct this process of information exchange in a way that is more effective and targeted than would be the case where it happened informally and randomly. By gathering many companies, organizations, and institutions that are related by industry, clusters encourage dynamism. When one cluster member tries something innovative and succeeds, other members are likely to imitate those efforts and improve their own operations. After all, while companies are cooperating on a joint-venture within a cluster organization, they are still competing against one another in other areas of business (financing, workforce, etc.) The dynamism stimulated by cluster development feeds a cycle of more innovation, which leads to businesses seeing the need for more improvements to their equipment and workforce, which results in more hiring in higher-paying jobs that require more in-demand skills.

Location of Environmentally Contaminated Sites Suitable for Business Uses

The Wisconsin Department of Natural Resources (DNR) has the responsibility to clean up environmentally contaminated soils and water in the state. Any spills or other contamination due to the discharge of harmful substances (for example, oil, dry cleaning chemicals, etc.), whether recent or old, but only recently discovered, should be immediately reported to the DNR. Cleanup of agricultural contamination will be directed to the Department of Agriculture, Trade, and Consumer Protection; all other cleanups are the responsibility of the DNR. Brownfields are areas of previous commercial and especially industrial activity that were contaminated through the course of their earlier use, but now sit abandoned or underused. These sites need to be cleaned up before they can be reused or redeveloped. The DNR maintains several databases on environmentally contaminated areas, and these are searchable through DNR's Bureau for Remediation and Redevelopment Tracking System (BRRTS) on the Web (http://dnr.wi.gov/botw/SetUpBasicSearchForm.do). BRRTS on the Web shows a total of 2,849 closed (i.e., completed) environmental cleanups in the 9 counties of the MRRPC Region, going back several decades. There are 157 open or conditionally closed cleanups listed in the MRRPC Region. These are cleanup sites, not individual properties. The open or conditionally closed cleanups in BRRTS on the Web are listed in Table 6.18, below.

Table 6.18 Open or Conditionally Closed Cleanups in BRRTS on the Web

Name	Community	County	Type - Status
Marten Transport Ltd	Mondovi	Buffalo	Leaking Underground Storage Tank – Open
Korte Mobil	Waumandee	Buffalo	Leaking Underground Storage Tank – Open
Fountain City Conoco	Fountain City	Buffalo	Leaking Underground Storage Tank – Open
Marum, John Property	Mondovi	Buffalo	Leaking Underground Storage Tank – Open
Spur Station	Fountain City	Buffalo	Leaking Underground Storage Tank – Open
Alma Marina	Alma	Buffalo	Leaking Underground Storage Tank – Open
Dierauer Farm	Alma	Buffalo	Leaking Underground Storage Tank – Open
Garden Valley Cooperative-Cochrane	Cochrane	Buffalo	Environmental Repair – Open
Blackhawk Drycleaners	Prairie Du Chien	Crawford	Environmental Repair – Open
Herreid Property	Prairie Du Chien	Crawford	Environmental Repair – Open
Gays Mills Bp/Todds Kwik Stop	Gays Mills	Crawford	Leaking Underground Storage Tank – Open
Parkers Ioco	Prairie Du Chien	Crawford	Leaking Underground Storage Tank – Open
Northern Engraving	Prairie Du Chien	Crawford	Environmental Repair – Open

Table 6.18 Open or Conditionally Closed Cleanups in BRRTS on the Web

Name	Community	County	Type - Status
Featherson Property	Barnum	Crawford	Leaking Underground Storage Tank – Conditionally Closed
Gateway Project North Half	Prairie Du Chien	Crawford	Environmental Repair – Open
Eastman Salvage Yard	Prairie Du Chien	Crawford	Abandoned Container – Open
Prairie Du Chien Marina	Prairie Du Chien	Crawford	Environmental Repair – Open
Lucky Park	Prairie Du Chien	Crawford	Environmental Repair – Open
132 N Prairie St	Prairie Du Chien	Crawford	Environmental Repair – Open
Premier Cooperative	Eastman	Crawford	Environmental Repair – Open
M & E Development Center	Black River Falls	Jackson	Environmental Repair – Open
Federation Cooperative	Black River Falls	Jackson	Leaking Underground Storage Tank – Open
Hunters Corner Store	Hixton	Jackson	Leaking Underground Storage Tank – Open
Jenson Oil Property	Hixton	Jackson	Leaking Underground Storage Tank – Open
Daves Gas Station Former	Merrillan	Jackson	Leaking Underground Storage Tank – Open
Hale Salvage Yard	Melrose	Jackson	Environmental Repair – Open
Home Oil Bulk Tanks Winnebago Ave	Black River Falls	Jackson	Environmental Repair – Open
Potter, Brian Property	City Point	Jackson	Leaking Underground Storage Tank – Conditionally Closed
Rymenams Property	Pittsville	Jackson	Leaking Underground Storage Tank – Open
Staffs Corner Store	Taylor	Jackson	Leaking Underground Storage Tank – Open
Maisonet Residence Former Goschs Shell	Merrillan	Jackson	Leaking Underground Storage Tank – Open
GTE Property - Former	Black River Falls	Jackson	Leaking Underground Storage Tank – Open
Waughtal North Property	Black River Falls	Jackson	Leaking Underground Storage Tank – Open
Farmers Coop Oil Co/Cheese Hut	Hixton	Jackson	Leaking Underground Storage Tank – Open
Wi Dot Farmers Coop Oil/Cheese Hut	Hixton	Jackson	Leaking Underground Storage Tank – Open
Taylor, Joseph Residence	Northfield	Jackson	Spill – Open
Richter Property	Garfield Tnshp	Jackson	Leaking Underground Storage Tank – Open
W10984 Sand Rd	Merrillan	Jackson	Abandoned Container – Open
Castle Mound Salvage	Black River Falls	Jackson	Environmental Repair – Open
Wathen Property (Former)	Hixton	Jackson	Leaking Underground Storage Tank – Open
Merrillan Fmr Standard Gas Sta	Merrillan	Jackson	Leaking Underground Storage Tank – Open
Mobil Oil Terminal 48020	La Crosse	La Crosse	Environmental Repair – Conditionally Closed
Midwest Industrial Fuels	La Crosse	La Crosse	Environmental Repair – Open
Midwest Industrial Fuels	La Crosse	La Crosse	Leaking Underground Storage Tank – Open
Desmonds Mens Wear	La Crosse	La Crosse	Environmental Repair – Open
Kwik Trip Bakery Expansion	La Crosse	La Crosse	Voluntary Party Liability Exemption – Open
Chart Heat Exchangers	La Crosse	La Crosse	Environmental Repair – Open
One Hour Cleaners Former Caledonia St	La Crosse	La Crosse	Environmental Repair – Open
Onalaska Lf (Sf Npl)	Onalaska	La Crosse	Environmental Repair – Open
Stella-Jones (Fka: Webster Wood Preserving)	Bangor	La Crosse	Environmental Repair – Open
Onalaska Tn Shop	Onalaska	La Crosse	Environmental Repair – Open
Advanced Fiber Products Fmr	La Crosse	La Crosse	Environmental Repair – Open
Johns Auto Body Shop	La Crosse	La Crosse	Environmental Repair – Open
Hansens Iga/Farmers Coop Supply	West Salem	La Crosse	Leaking Underground Storage Tank – Conditionally Closed
WKTY Broadcast Studio	La Crosse	La Crosse	Leaking Underground Storage Tank – Open
Trane Plts 4 5 & Bldg 15 Tce	La Crosse	La Crosse	Environmental Repair – Open
Tenn Tom Towing Co	La Crosse	La Crosse	Spill – Open
Xcel Mfg Coal Gas Plt (Mgp) La Crosse	La Crosse	La Crosse	Environmental Repair – Open
James Martin Trucking	La Crosse	La Crosse	Environmental Repair – Open
Kane Oil	La Crosse	La Crosse	Leaking Underground Storage Tank – Open
Steel Supply Co Inc	La Crosse	La Crosse	Environmental Repair – Open
Patros Steel Supply Co Llc Fmr Parcel #1	La Crosse	La Crosse	Voluntary Party Liability Exemption – Open
Patros Steel Supply Co Llc Fmr Pcl #2	La Crosse	La Crosse	Voluntary Party Liability Exemption – Open
Isle La Plume Burn Tower	La Crosse	La Crosse	Environmental Repair – Open
La Crosse Municipal Well 10h	La Crosse	La Crosse	Environmental Repair – Open
Clinton St	La Crosse	La Crosse	Abandoned Container – Open
Swamp Rd Ac	West Salem	La Crosse	Abandoned Container – Open
Isle La Plume Lf	La Crosse	La Crosse	Environmental Repair – Open
Farmers Coop Supply & Shipping - West Salem	West Salem	La Crosse	Environmental Repair – Open
Johns Auto Body Parcel 2	La Crosse	La Crosse	Environmental Repair – Open
Psycle Werks Property Former	La Crosse	La Crosse	Environmental Repair – Open
Farmers Coop Supply & Shipping Assn	West Salem	La Crosse	Environmental Repair – Open
Kwik Trip #771	La Crosse	La Crosse	Leaking Underground Storage Tank – Open
Lakeview Farm	West Salem	La Crosse	Environmental Repair – Open
La Crosse County Spill	West Salem	La Crosse	Spill – Open
Fairground Substation - UW La Crosse Campus	La Crosse	La Crosse	Environmental Repair – Open
1549 Rose St	La Crosse	La Crosse	Leaking Underground Storage Tank – Open

Table 6.18 Open or Conditionally Closed Cleanups in BRRTS on the Web

Name	Community	County	Type - Status
Sparta Mfg Co Inc	Sparta	Monroe	Environmental Repair – Open
Sparta Mfg Co Inc	Sparta	Monroe	Voluntary Party Liability Exemption – Open
Northern Engraving Corp Waste Storage Shed	Sparta	Monroe	Environmental Repair – Conditionally Closed
Northern Engraving (Deleted Sf)	Sparta	Monroe	Environmental Repair – Open
Tomah Armory (Sf Npl)	Tomah	Monroe	Environmental Repair – Open
Tomah Fairgrounds (Deleted Sf)	Tomah	Monroe	Environmental Repair – Open
Blue Poly Drum	Tomah	Monroe	Abandoned Container – Open
Fort McCoy Lf #2	Sparta	Monroe	Environmental Repair – Open
Fort McCoy Fire Training Burn Pit #1	Sparta	Monroe	Environmental Repair – Open
Fort McCoy Central Fuels Facility	Sparta	Monroe	Environmental Repair – Open
Sparta Cty Sand Creek Lf	Sparta	Monroe	Environmental Repair – Open
Monroe Cnty Lf Interim Site	Sparta	Monroe	Environmental Repair – Open
Tomah Sanitary Lf (Sf Npl)	Tomah	Monroe	Environmental Repair – Open
Bandbox Cleaners & Laundry	Sparta	Monroe	Environmental Repair – Open
Lyles Spur	Tomah	Monroe	Leaking Underground Storage Tank – Open
Tomah Mini Mart	Tomah	Monroe	Leaking Underground Storage Tank – Open
Hoffmans Mobil Former	Cashton	Monroe	Leaking Underground Storage Tank – Open
Cmc Property 32b	Sparta	Monroe	Environmental Repair – Open
CP Railway Frog Shop Operations	Tomah	Monroe	Environmental Repair – Conditionally Closed
CP Rail System Tce Site	Tomah	Monroe	Environmental Repair – Open
S & I Cooper Scrap Yard	Tomah	Monroe	Environmental Repair – Open
CP Railway Burn Pit	Tomah	Monroe	Environmental Repair – Open
CP Railway Motor Car Repair Shop	Tomah	Monroe	Environmental Repair – Open
CP Railway Rail Mill	Tomah	Monroe	Environmental Repair – Open
CP Railway Motor Car Burn Area	Tomah	Monroe	Environmental Repair – Open
Holiday Station Store #150	Tomah	Monroe	Leaking Underground Storage Tank – Open
Citgo Oakdale Travel Center	Oakdale	Monroe	Leaking Underground Storage Tank – Open
Badger Restaurant	Tomah	Monroe	Leaking Underground Storage Tank – Open
Graces Store	Shennington	Monroe	Leaking Underground Storage Tank – Open
Clifton Service Center	Camp Douglas	Monroe	Leaking Underground Storage Tank – Open
Hillsboro Farmers Coop Bulk Plt Wilton	Wilton	Monroe	Environmental Repair – Open
Clark Service Station Former	Tomah	Monroe	Leaking Underground Storage Tank – Conditionally Closed
Midland Station Former	Tomah	Monroe	Leaking Underground Storage Tank – Open
Tomah Well #8	Tomah	Monroe	Environmental Repair – Open
Band Box Cleaners Inc	Tomah	Monroe	Environmental Repair – Open
Tomah Cty Garage	Tomah	Monroe	Environmental Repair – Open
Landmark Property	Tomah	Monroe	Leaking Underground Storage Tank – Open
Tomah Cooperative Services-Tomah	Tomah	Monroe	Environmental Repair – Open
Tomah Coop Services Inc @Tomah	Tomah	Monroe	Environmental Repair – Open
Cmc Property 33b	Sparta	Monroe	Environmental Repair – Open
Cmc Property 31b	Sparta	Monroe	Environmental Repair – Open
Tn Of Ridgeville Shop	Norwalk	Monroe	Leaking Underground Storage Tank – Open
Dx Service Station Former	Norwalk	Monroe	Leaking Underground Storage Tank – Open
Durand Lf	Town of Waubeek	Pepin	Environmental Repair – Open
Jahnke Custom Work Pesticide	Pepin	Pepin	Environmental Repair – Open
Beaver Slide Rd	Porcupine	Pepin	Abandoned Container – Open
River Falls Lf	River Falls	Pierce	Environmental Repair – Open
Brickner Oil Co Bulk Facility	Ellsworth	Pierce	Environmental Repair – Open
Standard Oil, Hager City Fmr	Hager City	Pierce	Leaking Underground Storage Tank – Open
Wilkens Salvage Yard	River Falls	Pierce	Environmental Repair – Open
Plum City Feed Mill	Plum City	Pierce	Leaking Underground Storage Tank – Open
Maiden Rock Oil Co	Maiden Rock	Pierce	Environmental Repair – Open
Precision Ag Services Llc-Ellsworth	Ellsworth	Pierce	Environmental Repair – Open
1301 N Cassen	Prescott	Pierce	Abandoned Container – Open
Arcadia Lf	Aracadia	Trempealeau	Environmental Repair – Open
Arcadia Farmers Coop	Arcadia	Trempealeau	Leaking Underground Storage Tank – Conditionally Closed
D & B Automotive Repair	Trempealeau	Trempealeau	Leaking Underground Storage Tank – Open
Mondovi Coop Equity Osseo Kv Pesticide	Osseo	Trempealeau	Environmental Repair – Open
Shepherd Oil Co Bulk Plt Operations	Whitehall	Trempealeau	Environmental Repair – Open
Whitehall Spur	Whitehall	Trempealeau	Leaking Underground Storage Tank – Open
Arcadia Pce	Arcadia	Trempealeau	Environmental Repair – Open
Gold N Plump Pellet Mill	Arcadia	Trempealeau	Environmental Repair – Open
Solberg Property Former Wbi Farmers Coop	Whitehall	Trempealeau	Environmental Repair – Open
Whitehall Service Station Former	Whitehall	Trempealeau	Leaking Underground Storage Tank – Open

Table 6.18 Open or Conditionally Closed Cleanups in BRRTS on the Web

Name	Community	County	Type - Status
Farmers Coop Chemical Storage	Galesville	Trempealeau	Environmental Repair – Open
Don Sham Residence	Osseo	Trempealeau	Abandoned Container – Open
WI DOT Burrows Rd Acquisition	Independence	Trempealeau	Environmental Repair – Open
Shepherd Oil Co Fmr Ast	Arcaida	Trempealeau	Environmental Repair – Open
Johnson Recycling	Hillsboro	Vernon	Environmental Repair – Open
AMPI Milk Coop Coon Valley	Coon Valley	Vernon	Environmental Repair – Open
AMPI Milk Coop Coon Valley	Coon Valley	Vernon	Leaking Underground Storage Tank – Open
G & F Distributing Property	Viroqua	Vernon	Leaking Underground Storage Tank – Open
Marshall Farm	La Farge	Vernon	Leaking Underground Storage Tank – Conditionally Closed
Forest Tn Salt Storage Facility	Mount Tabor	Vernon	Environmental Repair – Open
Westby Farmers Union/Heartland Cnty Coop	Viroqua	Vernon	Environmental Repair – Open
Howard Johnson Enterprise	Viroqua	Vernon	Environmental Repair – Open
Terrys Auto Sales	Westby	Vernon	Leaking Underground Storage Tank – Open
Cilley Property	Hillsboro	Vernon	Leaking Underground Storage Tank – Open
Todd Vesbach Spill	Viroqua	Vernon	Spill – Open

Sites that are listed as open require further environmental cleanup or have cleanup underway. Sites listed as conditionally closed have had their cleanup approved, but closure of the site has not yet been approved, usually due to lack of documentation on abandoned wells or disposal of soil. Leaking Underground Storage Tank (LUST) sites refer to sites contaminated with petroleum products that have been buried; given time, these toxic substances biodegrade. Environmental Repair (ERP) refers to sites contaminated with substances (including above-ground petroleum) other than underground petroleum. Spills refer to the discharge of a hazardous substance. Abandoned Container indicates that a container possibly containing a hazardous substance has been inspected and recovered, though no known discharge into the environment has been identified (such a discharge would likely be categorized as a Spill). Sites listed as Voluntary Party Liability Exemption (VPLE) are those that have undergone a voluntary examination of environmental contamination and remediation; when the cleanup process is finished, these properties receive limited immunity for future costs associated with that contamination and cleanup.

The sites listed in Table 6.18 are good candidates for business and industry expansion and development, and should be promoted as such by local governments and economic development organizations. By cleaning and utilizing brownfield sites like these, communities can encourage infill development, strengthen their downtown areas or central business districts, and improve the state of their soil and groundwater. The conditionally closed sites could be lacking closure simply because the current owners lack the resources to properly document any remaining wells or disposal of the soil. Interested buyers of those properties might be able to aid the seller in getting environmental closure as a condition of the sale. The Conditionally Closed sites in the MRRPC Region are the following: Featherson Property, Barnum (LUST); Brian Potter Property, City Point (LUST); Mobil Oil Terminal 48020, La Crosse (ERP); Hansen's IGA/Farmers Co-Op Supply, West Salem (LUST); Northern Engraving Corp Waste Storage Shed, Sparta (ERP); CP Railway Frog Shop Operations, Tomah (ERP); Former Clark Service Station, Tomah (LUST); Arcadia Farmers Co-Op, Arcadia (LUST); and Marshall Farm, La Farge (LUST). Of particular interest to potential buyers would be the VPLE sites, since once their cleanup is finished, their future liability is very limited with regard to any future discovery of contamination of the sort already cleaned up. The VPLE sites in the MRRPC Region are all in open status; but when they are closed, they could be very enticing for developers: Kwik Trip Bakery Expansion, La Crosse; Former Patros Steel Supply Co., LLC #1 and #2, La Crosse; and Sparta Manufacturing Co., Inc., Sparta.

Sites Suitable for Business and Industry Expansion

Industrial Parks

Industrial parks are areas developed specifically to attract manufacturing and other industrial businesses. Industrial parks usually have buildings that are suitable for industrial uses clustered together with large areas for parking, loading, and storage. They are usually built with funding from local, state, and federal governments, with the expectation that businesses will move into the available sites, expand their production, grow their workforce from the surrounding communities, and generally help the community prosper by stimulating economic multiplier effects. Many industrial businesses, especially manufacturers, seek sites that are near transportation nodes (such as interstate highways and railroad lines) and provide them with access to stable utilities, a skilled workforce, and a location convenient to their suppliers and customers. Industrial parks have traditionally been an effective way to attract manufacturers and other industrial businesses to a community, since they offer companies relatively new facilities, modern capacities with regard to utilities and transportation, and typically a location carefully chosen to be convenient to important transportation nodes. The communities benefit as well, not only from the potential source of new employment, but also from the opportunity to direct some disruptive industrial uses away from residential areas, but also to contain them in a designated area, rather than having them sprawl randomly through greenfields around the community.

As of 2012, there were 67 industrial parks in the MRRPC Region, with a total of 4,355.5 acres (see Table 6.19). The average size of industrial parks in the Region was 64.8 acres. About one third of all the acreage in the Region's industrial parks was available for sale, and the average acreage available for purchase at the Region's industrial parks was 22.3 acres. The largest industrial park in the Region was the C.E. (Pete) Bean Industrial Park in Tomah, Monroe County, with 640 acres. The smallest was the Alma Industrial Park in Buffalo County, with 3 acres. The oldest industrial park in the Region was the Viroqua Industrial Park in Vernon County, built in 1968, while the newest was Crossing Meadows Business Park in Ellsworth, Pierce County, built in 2006.

Table 6.19 Industrial Parks in MRRPC Region

County	Community	Name of Site	Date	# of Acres	Acres Sold	Acres For Sale	Zoning	Util. To Site?	Yr Utilities Installed	Absorp rate acres/yr
Buffalo	C Alma	Alma Indus. Park	1997	3	0	3	Industrial	Yes	1997	<5
Buffalo	C Mondovi	Mondovi Indus. Park I	1989	60	25	32	Industrial	Yes	1989-90	< 5
Buffalo	C Mondovi	Mondovi Indus. Park II	2006	30	24.5	5.5	Lt Indus/Com.	Yes	2006	< 5
Crawford	V Gays Mills	Applewood Bus. Park	2001	18	4	14	Industrial	Yes	2001	<5
Crawford	V Soldiers	Soldiers Grv. Ind. Prk	1983	16	5	11	Lt Indus.	Yes	1983	< 5
Crawford	V Wauzeka	Wauzeka Indus. Park	1984	44	12	32	Industrial	Yes	1982	< 5
Crawford	C Pr. du Chien	North Indus. Park	1975	100	100	0	Industrial	Yes	1975	< 5
Crawford	C Pr. du Chien	South Indus. Park I	1989	50	43	7	Industrial	Yes	1989	5-10
Crawford	C Pr. du Chien	South Indus. Park II	1997	160	0	160	Industrial	No	1997	< 5
Jackson	C Blk River Falls	BRF Indus. Park	1978	120	70	50	Industrial	Yes	1978	< 5
Jackson	C Blk River Falls	Andrews Rd Bus Park	2006	50	0	50	Lt Indus.	Yes	2006	< 5
Jackson	C Blk River Falls	I-94 Business Park	2006	20	6	14	Lt Indus.	Yes	2006	5-10
Jackson	V Taylor	Taylor Indus. Park	1979	46	26	5	Industrial	Yes	1979-98	<5
La Crosse	V Bangor	Bangor Indus. Park	2003	80	15	65	Industrial	No		<5
La Crosse	T Holland	Holland Bus. Park	1998	34	3	31	Commercial	Yes	1998	< 5
La Crosse	V Holmen	Holmen Indus. Park	1975	50	45	5	Industrial	Yes	1975	< 5
La Crosse	V Holmen	N Star Bus. Park	1997	21.5	21.5	0	Commercial	Yes	1997	< 5
La Crosse	V Holmen	Holmen Bus. Park	2000	7	7	0	Commercial	Yes	2000	< 5
La Crosse	V Holmen	Cedar Crssng Ind. Park	1991	25	17	8	Lt Indus.	Yes	1991	< 5
La Crosse	C La Crosse	Airport Indus. Park	1988	98	98	0	Industrial	Yes	1988	< 5
La Crosse	C La Crosse	Airport Interstate Park	1984	32	32	0	Industrial	Yes	1984	< 5
La Crosse	C La Crosse	Coulee Sites Indus. Prk	1983	60	60	0	Industrial	Yes	1983	< 5
La Crosse	C La Crosse	Interstate Indus. Park	1970	92	92	0	Industrial	Yes	1970-83	<5
La Crosse	C La Crosse	Int'l Business Park	1998	54	36	18	Industrial	Yes	1998-99	5-10
La Crosse	C Onalaska	Valley Vue Bus. Park	1985	40	37	3	Lt. Indus.	Yes	1985	<5
La Crosse	C Onalaska	Elmwood Bus. Ctr.	1992	56	41	15	Lt. Indus.	Yes	1992	<5
La Crosse	V West Salem	W. Salem Indus. Park	1972	60	60	0	Lt Indus.	Yes	1972	< 5
La Crosse	V West Salem	Lakeview Indus. Prk	1997	160	75	85	Industrial	Plned	2000-01	< 5
Monroe	V Cashton	Cashton Indus. Park	1993	20	13	7	Industrial	Yes	1993	< 5
Monroe	V Cashton	Cashton Indus. Park	1998	53	53	0	Industrial	Yes	1998	5-10
Monroe	V Cashton	Cashton Greens Energy Park	2005	122	90	32	Industrial	Yes	2005-07	< 5
Monroe	V Kendall	Kendall Indus. Park	1990	11	11	0	Industrial	Yes	1990	< 5
Monroe	C Sparta	Sparta Indus. Park	1978	80	80	0	Industrial	Yes	1978	< 5
Monroe	C Sparta	East Side Bus. Park	1997	250	120	130	Com/Ind	Yes	1997	< 5
Monroe	C Tomah	C.E. (Pete) Bean Industrial Prk	1969	640	629	9	Industrial	Yes	1969-92	5-10
Monroe	C Tomah	Interstate Indus. Park	1988	179	62	117	Industrial	Yes	1988	< 5

County	Community	Name of Site	Date	# of Acres	Acres Sold	Acres For Sale	Zoning	Util. To Site?	Yr Utilities Installed	Absorp rate acres/yr
Monroe	C Tomah	North Side Industrial Park	1990	49	39	10	Industrial	Yes	1989-93	< 5
Monroe	V Wilton	Wilton Indus. Park	1987	5	2	3	Commercial	Yes	1987	< 5
Monroe	V Wilton	Wilton Indus. Park II	1998	25	10	15	Commercial	Yes	-	<5
Pepin	V Pepin	Pepin Inds. Park	1997	8	2	6	Industrial	Yes	1997	< 5
Pierce	V Ellsworth	Ellsworth Indus. Park	1984	30	30	0	Industrial	Yes	1984	< 5
Pierce	V Ellsworth	E. End Indus. Park	1995	53	28	25	Industrial	Yes	1995	5-10
Pierce	V Ellsworth	Crossing Meadows Bus. Park	2006	18	12	6	Commercial	Yes	1996	< 5
Pierce	V Elmwood	Elmwood Indus. Park	1985	26	8	18	Industrial	Yes	1986-90	< 5
Pierce	V Spring Valley	Westland Meadows	1995	80	30	50	Industrial	Yes	1995	< 5
Pierce	C Prescott	Prescott Indus. Park	1981	19	17.4	1.6	Industrial	Yes	1981	< 5
Pierce	C Prescott	North Acres Indus Prk	2000	8	0	8	Industrial	Yes	2000	< 5
Pierce	C Prescott	Prescott Business Park	2006	81	0	81	Indust/Com.	No	No	NA
Pierce/St. Cr	C River Falls	River Falls Indus. Prk	1987	44	44	0	Industrial	Yes	1987	< 5
St. Croix	C River Falls	Whitetail Rdge Corp.	1995	110	60	50	Industrial	Plned	1995	< 5
Pierce	T River Falls	South Park	1999	10	0	10	Industrial	Plned	-	< 5
Trempealeau	C Arcadia	Arcadia Indus. Park	1990	120	55	35	Com/Ind	Yes	1998	< 5
Trempealeau	C Blair	Blair Indus. Park	1997	19	17	2	Industrial	Yes	1997	< 5
Trempealeau	C Galesville	Galesville Indus. Park	1979	6	5	1	Industrial	Yes	1979	< 5
Trempealeau	C Independence	Independence Indus. Prk	1988	62	30	32	Industrial	Yes	1988	< 5
Trempealeau	C Osseo	East Side Indus. Park	1985	130	83	47	Industrial	Yes	1989	< 5
Trempealeau	C Osseo	West Side Indus. Park	1974	19	18	1	Industrial	Yes	1974	< 5
Trempealeau	C Osseo	Osseo Commercial Prk	1993	18	6	12	Commercial	Yes	1993	< 5
Trempealeau	C Whitehall	Whitehall Bus. Park	1992	35	19	0	Commercial	Yes	1992	< 5
Trempealeau	C Whitehall	E. Side Indus. Park	1976	110	38	72	Industrial	Yes	1994	< 5
Vernon	V Coon Valley	Coon Valley Indus Prk	1996	57	35	22	Industrial	Yes	1996	<5
Vernon	C Hillsboro	Hillsboro Indus. Park	1995	20	10	10	Industrial	Yes	1995	< 5
Vernon	C Hillsboro	Merricks Indus. Park		10	10	0	Industrial	Yes		< 5
Vernon	V Viola	Viola Indus. Park	1983	9	6	3	Industrial	Yes	1983	< 5
Vernon	C Viroqua	Viroqua Indus. Park	1968	38	38	0	Industrial	Yes	1968	< 5
Vernon	C Viroqua	Viroqua Indus. Park II	1992	115	61	54	Industrial	Yes	1993	5-10
Vernon	C Westby	Westby Indus. Park	1997	80	70	10	Industrial	Yes	1997	5-10
TOTALS				**4,355.50**	**2,796.40**	**1,493.10**				

Locate in Wisconsin

Locate in Wisconsin is a web-based tool, made available by the Wisconsin Economic Development Corporation (WEDC), which attempts to gather in one location information about available industrial and commercial sites that would be attractive to businesses considering a relocation to Wisconsin. The site relies on realtors, property owners, local governments, and economic development organizations to identify available industrial and commercial sites and enter the information into the Locate in Wisconsin page on the WEDC website (http://inwisconsin.com/why-wisconsin/available-sites/locate-in-wisconsin/#). In addition to listing available sites, Locate in Wisconsin gives users valuable information on communities' size, demographics, labor force, economy, and other measures.

Table 6.20 Available Commercial and Industrial Sites in MRRPC Region Listed on Locate in Wisconsin (July 2014)

Address	City	County	Type
428 S Washington St	Mondovi	Buffalo	Office
457 Canal Street:	Mondovi	Buffalo	Industrial, Whse Dist.
120 Sunset Ridge Avenue	Gays Mills	Crawford	Executive Suites, Office, R&D, Commercial, Mixed Use, Restaurant, Retail, Shopping Center, Other, General
38037 Industrial Boulevard	Prairie du Chien	Crawford	Heavy Mfg, Industrial, Business Park, Light Mfg, Whse Dist.
Lot 3 Cabelas Industrial Park	Prairie du Chien	Crawford	Business Park
204 Pleasant Street	Soldiers Grove	Crawford	Industrial, Light Mfg, Whse Dist.
41120 State Highway 60	Wauzeka	Crawford	Hotel
119 N Marquette Rd	Prairie du Chien	Crawford	Retail

Table 6.20 Available Commercial and Industrial Sites in MRRPC Region Listed on Locate in Wisconsin (July 2014)

Address	City	County	Type
109 W Legion Street	Holmen	La Crosse	Industrial, Commercial
1524 Flat Road	Holmen	La Crosse	Industrial
3803 Creekside Lane	Holmen	La Crosse	Call Ctr, Exec. Suites, Flex, Incubator, Mixed Use, Office, R&D, General
3917 Circle Drive	Holmen	La Crosse	Retail, Gas Station
500 North Holmen Drive	Holmen	La Crosse	Call Ctr, Flex, Incubator, Office, Commercial, Mixed Use, Retail, Shopping Ctr, Data Ctr, General
N6411 Co Rd HD	Holmen	La Crosse	Office, Retail
N6411 County Highway HD	Holmen	La Crosse	Office, Retail, General
110 Causeway Blvd	La Crosse	La Crosse	Mixed Use, Light Mfg, Whse Dist.
1100 Kane St.	La Crosse	La Crosse	Office, Incubator, Mixed Use
124 6th Street N	La Crosse	La Crosse	Office, Whse Dist.
1401 St. Andrew St.	La Crosse	La Crosse	Office, Industrial, Whse Dist., General
1404 Green Bay Street	La Crosse	La Crosse	Industrial
1416 S Losey Blvd	La Crosse	La Crosse	Retail
1809 St James St	La Crosse	La Crosse	Industrial
1816 George Street	La Crosse	La Crosse	Office, Industrial, Retail
201 Main Street	La Crosse	La Crosse	Office
205 5th Avenue S.	La Crosse	La Crosse	Office
2133 Sunset Lane	La Crosse	La Crosse	General
215 State St	La Crosse	La Crosse	Retail
2414 & 2416 State Road	La Crosse	La Crosse	Office, Retail, Shopping Center, Other, General
2418 State Road	La Crosse	La Crosse	Retail
2919 East Ave South	La Crosse	La Crosse	Flex, Office, Industrial, Light Mfg, Mixed Use, Whse Dist., General
2967 Airport Road	La Crosse	La Crosse	Flex, Whse/Dist
302 Pearl Street	La Crosse	La Crosse	Restaurant, Retail
315 South 3rd Street	La Crosse	La Crosse	Mixed Use, Office, Commercial, Restaurant, General, Other
3181 Berlin Drive	La Crosse	La Crosse	Commercial, Mixed Use, Retail, Whse Dist., Medical, General
3209 Airport Rd	La Crosse	La Crosse	Industrial
3209 Airport Road	La Crosse	La Crosse	Flex, Industrial, Mixed Use, Whse Dist.
3305 Mormon Coulee Road	La Crosse	La Crosse	Retail, Redevelopment Area
3400 Losey Blvd S	La Crosse	La Crosse	Office, Retail
3800 State Hwy 16	La Crosse	La Crosse	Retail
40 Copeland Avenue	La Crosse	La Crosse	Retail
432 Division Street	La Crosse	La Crosse	Office
505 King Street	La Crosse	La Crosse	Flex, Mixed Use, Office
518 State St.	La Crosse	La Crosse	Office, Commercial
58 Copeland Ave	La Crosse	La Crosse	Office
712 Main Street	La Crosse	La Crosse	Office
719 Copeland Ave	La Crosse	La Crosse	Retail, Whse Dist.
Jackson & 19th Streets	La Crosse	La Crosse	Retail
N4502 French Road	Medary (town)	La Crosse	Office, Retail
1009-1129 Riders Club Road	Onalaska	La Crosse	Executive Suites, Office
1104 Venture Place	Onalaska	La Crosse	Whse/Dist
1227 Crossing Meadows Drive	Onalaska	La Crosse	Retail
1230 Crossing Meadows Drive	Onalaska	La Crosse	Retail
200 Mason St	Onalaska	La Crosse	Office
2845 Midwest Drive	Onalaska	La Crosse	Executive Suites
306 Sand Lake Road	Onalaska	La Crosse	Office, Retail, General
548 Lester Ave	Onalaska	La Crosse	Office
548 Lester Avenue	Onalaska	La Crosse	Office
611 Main St	Onalaska	La Crosse	Office
704 Sand Lake Road	Onalaska	La Crosse	Office
Hwy 35, next to Dairy Queen and I-90	Onalaska	La Crosse	Office
N5549 County Hwy Z	Onalaska	La Crosse	Whse Dist., Flex, Heavy Mfg, Industrial, Mixed Use, Refrigerated/Cold Storage
N5549 County Hwy Z	Onalaska	La Crosse	Light Mfg
N5589 Commerce Road	Onalaska	La Crosse	Office
1500 State Highway 16	West Salem	La Crosse	Office, Retail, General
1508 Heritage Blvd	West Salem	La Crosse	Retail
1508 Heritage Boulevard	West Salem	La Crosse	Retail, General
1580 Heritage Blvd	West Salem	La Crosse	Office
365 Oak Avenue	West Salem	La Crosse	Industrial
551 Brickl Road	West Salem	La Crosse	Office, Retail, General
1309 Townline Rd	Tomah	Monroe	Industrial, Light Mfg, Whse Dist.

Table 6.20 Available Commercial and Industrial Sites in MRRPC Region Listed on Locate in Wisconsin (July 2014)

Address	City	County	Type
625 E. Clifton Street	Tomah	Monroe	Commercial, Retail, Other
113 N. Main Street	River Falls	Pierce	Mixed Use
1173 Benson St	River Falls	Pierce	Light Mfg
123 S. Main Street	River Falls	Pierce	Mixed Use
186 County Rd U	River Falls	Pierce	Mixed Use
215 N. Second St	River Falls	Pierce	Office
303 S. Main Street	River Falls	Pierce	Mixed Use, Retail, Shopping Center
219 S Main Street	Blair	Trempealeau	General
11364 Main Street	Trempealeau	Trempealeau	Retail
23965 11TH ST	Trempealeau	Trempealeau	Light Mfg, Commercial, General
23965 11th Street	Trempealeau	Trempealeau	Whse Dist., Other
1201 North Main Street	Viroqua	Vernon	Mixed Use, R&D, Whse Dist., Flex, Incubator
100 Majestic Dr	Westby	Vernon	Office, Retail

County, Regional and State Economic Development Programs

Revolving Loan Funds

Revolving loan funds (RLFs) are sources of business financing set up through collaboration among governments, lenders, and economic development organizations in order to promote more commercial activity by helping businesses obtain funding that will make them more competitive. Typically, RLFs make loans only within a specific geographical area. This can be within a municipality, a county, or a multi-county region. Money repaid by borrowers is lent to other borrowers, thus revolving through the fund. RLFs usually make small loans to start-up businesses or to small businesses that are expanding. Occasionally, RLFs will make a large loan to a business, usually in cases where a large number of jobs will be created. Some RLFs provide microloans or façade loans directly to the borrower for small improvements to business operations or building exteriors. Most RLFs focus on gap financing. Gap financing occurs when a business (either a start-up or an expansion of an existing business) requires more money than a lending institution is willing to lend. The gap between the project's cost and the lower amount that commercial lenders will make available is usually the result of low levels of collateral on the part of the borrower. This is especially true in cases where the loan would finance items like inventory and working capital, which are difficult, if not impossible, to collateralize. RLFs can help fill these gaps in business financing, helping new businesses to get started and growing businesses to expand to the next level. All RLFs are intended to stimulate more economic activity and contribute to a more dynamic and prosperous local economy.

Most RLFs are created with a combination of funds from federal and local governments, and sometimes local private-sector investments. Because of the federal source of some of these investments, the RLFs are governed by federal regulations, and these can be different for different federal-originating agencies. Also, each RLF will have a stated purpose or mission, which means that it may favor loans to businesses in certain industries because it expects these loans will stimulate deeper multiplier effects in the local economy, and therefore will make a more valuable contribution to the overall economy. Most of the RLFs in the MRRPC Region are funded, at least in part, by contributions from the US Department of Commerce – Economic Development Administration (EDA) or the US Department of Housing and Urban Development (HUD). All of them follow the same basic outlines: they provide gap financing, so a majority of the project costs must come from the private sector (usually a bank, but it can also be a group of investors, partners, etc.); the borrower pledges to create a certain number of jobs based on the amount borrowed; the borrower cannot be relocating from another area (it can, though, be an expansion or additional location for a business already operating elsewhere), nor can the borrower leave the area during the term of the loan (if they do leave, they must pay back the loan in full, immediately); and the RLF is willing to take a subordinate position (after the lead lender or other investors) on collateral. Some RLFs require that the borrower inject a percentage of the project costs themselves, and even those that do not require this look favorably upon it. Some of the specific requirements will be different from one RLF to another, since they have to operate within the economic situation of their communities.

The Mississippi River Regional Planning Commission administers the EDA-funded Business Capital Fund, CMV Growth Development Fund, and the La Crosse County Economic Development Fund. These three funds ensure that businesses in all nine counties in the MRRPC Region have access to these RLF loans. Most of the HUD-funded RLFs are administered by the local government in the municipality or county in which they are located. The Wisconsin Economic Development Corporation (WEDC) had been leading an effort since January 2012 to gather the HUD-funded RLFs throughout the state into multi-county organizations organized around regional planning commission (RPC) boundaries, based on the success of three such multi-county RLFs led by other Wisconsin RPCs. The MRRPC has worked closely with the Wisconsin Economic Development Corporation (WEDC), the Wisconsin Department of Administration (DOA), the 12 eligible municipal and county governments, and interested economic development organizations to shape a method by which the HUD-funded RLFs in the Region could pool resources and join forces to build a more efficient, effective, and economically potent source of funding for businesses in the Region. At present, DOA is confirming that the proposals for multi-county RLFs throughout the state are in compliance with HUD regulations and expectations.

The Mississippi River Regional Planning Commission maintains a *Business Financing Guide* on its website. This guide has brief descriptions of: all business RLFs in the 9-county Region; some programs sponsored by the Small Business Administration (SBA), the US Department of Agriculture (USDA), the Wisconsin Economic Development Corporation (WEDC), and the Wisconsin Housing and Economic Development Authority (WHEDA); and state and federal tax credits. The guide can be downloaded at http://mrrpc.com/Misc_pdfs/Business_Financing_Guide.pdf It contains information on the following RLFs:

Name of RLF	Service Area
Buffalo County RLF	Buffalo County
Business Capital Fund	Buffalo, Jackson, Pepin, Pierce, and Trempealeau Counties
Community Development Authority (CDA) of the City of Hillsboro Business Grant/Loan Fund	Corporate limits of Village of Hillsboro
City of La Crosse Small Business Development Loan Program	Corporate limits of the City of La Crosse
City of Mondovi Business Development Fund (MBDF)	City of Mondovi
City of Osseo RLF	City of Osseo
City of Sparta RLF	Corporate limits of the City of Sparta
City of Tomah RLF	Corporate limits of the City of Tomah
City of Viroqua Business Loan Fund	City of Viroqua
City of Whitehall Community Development Fund	City of Whitehall
CMV Growth Development Fund	Crawford, Monroe, and Vernon Counties
CouleeCAP Job and Business Development Program	Crawford, La Crosse, Monroe and Vernon Counties
Impact Seven – Greater Wisconsin Fund	Statewide
Jackson County Loan Fund	Jackson County
La Crosse County Economic Development Fund	La Crosse County
Monroe County RLF	Monroe County
Pepin County RLF	Pepin County
Pierce County Small Business Revolving Loan Fund	Pierce County
USDA Rural Economic Development Loan Program/Touchstone Energy Cooperative/Dairyland Power System Economic Development Loan Program	Borrowers must be member-consumers of a Touchstone Energy Cooperative, Dairyland Power System
Vernon County Loan Fund	Vernon County
Village of Kendall RLF	Village of Kendall municipal limits

WEDC programs

The Wisconsin Economic Development Corporation (WEDC) administers various programs that aim to improve the economic health of Wisconsin, attract and retain important employers, and tap into the economic potential of individual communities.

Main Street and Connect Communities

The national Main Street program was established in 1980 by the National Trust for Historic Preservation with the aim of revitalizing downtown commercial strips in small communities and in large urban neighborhoods. The program focuses on renewing the original physical character of downtown areas by developing its business climate for the modern economy. This economic development effort centers on marketing, business recruitment and retention, real estate development, market analysis, and public improvements. The Wisconsin Main Street Program follows the same basic guidelines. The Wisconsin Main Street Program involves helping a community establish a Main Street organization that is representative of its civic and business constituencies. WEDC provides technical assistance to the Main Street organization in training staff, volunteers, and downtown merchants in the most effective ways to represent their downtown in a positive light. The program also focuses on design issues that a downtown must address, in order to make itself an inviting place for people to gather, shop, and live. The program also assists communities in market analysis of its downtown area, how the business mix downtown could be improved, and how best to market Main Street in order to attract more people downtown.

While the Main Street Program requires that a community have a Main Street Organization with at least a part-time director, not every community is ready for that level of involvement or commitment to downtown revitalization. The Connect Communities program provides an abbreviated version of the Main Street Program's technical assistance for communities that want to improve their downtown or Main Street area, but do not have the need or desire for a permanent, dedicated organization to that end.

Certified Sites

The Certified Sites program seeks to build a portfolio of sites around the state of Wisconsin that have features that are in demand for businesses interested in relocating. By investigating a site early, identifying its attractive features, and being able to present them up-front, WEDC hopes to give the state a competitive advantage by providing access to low-risk, quick-turnaround, high-quality development sites to businesses that potentially could relocate to Wisconsin.

Community Development Investment Grant

The Community Development Investment Grant is aimed at providing communities with the financing necessary to improve potential business sites, especially in downtown areas. The grant requires that the community as a whole, not just one business, will benefit from the project, through increases in employment, property values, or other private-sector investment that is leveraged because of the project.

Idle Industrial Site Redevelopment Program

The Idle Industrial Site Redevelopment Program is a grant of up to $1 million to a local unit of government, redevelopment authority, economic-development special district, or other government body that has a plan for reuse of a former industrial site of 10 acres or more that has been vacant or underused for at least 5 years. The grant funds can be used for demolition, environmental cleanup, or redevelopment. The grant process is competitive, and preference is given to projects in high-density urban areas or central business districts, and to those projects that are expected to generate new jobs and/or other measurable economic benefits for the community.

Historic Preservation Tax Credit

The Historic Preservation Tax Credit is designed to encourage the rebuilding and reuse – rather than demolition and removal – of historic and architecturally valuable properties. The program awards property owners a 20% credit on their state tax returns for eligible work on eligible buildings. As of June 2014, the state is not accepting further applications for this program.

Brownfield Program and Brownfield Site Assessment Grant

Brownfields are sites that are known to be environmentally contaminated and must be cleaned up before any development or redevelopment on them occurs. In cases where the party responsible for the contamination cannot be identified, be located, or afford to pay for cleanup, the WEDC Brownfield Program can award a grant to a local government, business, or individual to reimburse the expenses associated with cleaning up a site after Phase I and Phase II Environmental Reports have been completed.

The Brownfield Site Assessment Grant is awarded to local governments or public-sector redevelopment authorities that seek to conduct initial environmental assessments or demolition of abandoned or underutilized industrial sites. The grant is only awarded in cases where the party responsible for the contamination cannot be identified, be located, or afford to pay for cleanup. Eligible activities include: investigation of environmental contamination on an eligible site or facility for the purpose of reducing or eliminating soil and or groundwater contamination; demolition of any structures or buildings located on an eligible site; asbestos abatement associated with demolition activities; removal of abandoned containers and the removal of underground hazardous storage tank systems.

Capacity Building Grant
The Capacity Building Grant is awarded to economic development organizations for studies of their local or regional economies, development of economic development strategies, and implementation of strategies that will strengthen the organization or its members. Ongoing operational costs, salaries, and equipment purchases are not eligible expenses for the grant. The recipient organization must provide at least a 30% match for the award, with 10% of the award amount coming from the recipient organization itself. The maximum award is $50,000, and an organization that is granted the award will remain ineligible to receive it again for 12 months.

Desired New Business and Industries

One measure of the strength of an industry is its location quotient (LQ). LQ compares the concentration of employment in an industry one geographical area, as a percentage of all employment, with the percentage of employment in that industry nationwide with the following formula:

$$\mathrm{LQ} = \frac{\dfrac{\text{Number of employees in industry } x \text{ in geography } y}{\text{Number of all employees in geography } y}}{\dfrac{\text{Number of employees in industry } x \text{ nationwide}}{\text{Number of all employees nationwide}}}$$

This formula yields one percentage in the numerator and another percentage in the denominator. When the numerator is divided by the denominator, a final percentage is calculated, which is the LQ. Since LQ is a percentage, it is easy to understand that an LQ of less than 1 means that geography *y* has a lower concentration of employment in industry *x* than the nation as a whole. For example, if the percentage of employment in auto manufacturing in a county is 1%, but the percentage of employment in auto manufacturing nationwide is 2.5%, then the LQ for employment in that industry in the county is 0.01/0.025 = 0.4. This means that the county has about two-fifths (0.4/1 = 4/10 = 2/5) as much employment in auto manufacturing as the nation as a whole does. Similarly, an LQ of greater than 1 indicates that geography *y* has a higher concentration of employment in industry *x* than the nation as a whole. For example, if the percentage of employment in farm machinery and equipment manufacturing in a county is 1%, but the percentage of employment in farm machinery and equipment manufacturing nationwide is 0.06%, then the LQ for employment in that industry in the county is 0.01/0.0006 = 16.67. This means that the county has over 16 times (and almost 17 times) as much employment in farm machinery and equipment manufacturing as the nation as a whole does. An LQ of exactly 1 means that geography *y* has a concentration of employment in industry *x* that perfectly matches the nation as a whole, since the percentages in the numerator and denominator would be the same. Most economists view a location quotient of greater than 1.25 as an indication that such an industry in an area could be considered an exporter of its products (though it could simply mean that there is a huge local demand for that product). Table 6.21 shows the 6-digit North American Industry Classification System (NAICS) code industrial sectors that have a nation LQ in the MRRPC Region of 1.25 or above in 2014, and ranks them in descending order of national LQ. Nonupholstered Wood Household Furniture Manufacturing has the highest national LQ in the Region, at 87.18. That means that the Region has over 87 times as many jobs in Nonupholstered Wood Household Furniture Manufacturing than the nation as a whole. That is an extremely high concentration of employment in an industry in a Region, and it has increased since 2009. There also is a state LQ, which is calculated the same way as the national LQ, except with a statewide percentage in the denominator instead of a national percentage.

Table 6.21 Top 6-Digit NAICS Code Employment Industries in the MRRPC Region, by 2014 Location Quotient

NAICS Code	Description	2009 Jobs	2014 Jobs	2009 State Location Quotient	2014 State Location Quotient	Change	2009 National Location Quotient	2014 National Location Quotient	Change
337122	Nonupholstered Wood Household Furniture Manufacturing	2,916	3,790	14.15	15.59	1.44	57.31	87.18	29.87
327910	Abrasive Product Manufacturing	624	734	13.84	12.82	(1.02)	62.98	67.30	4.32
212322	Industrial Sand Mining	179	287	13.06	7.26	(5.80)	45.16	56.72	11.56
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	421	741	4.74	6.22	1.48	27.73	46.70	18.97
323111	Commercial Gravure Printing	239	237	8.12	7.47	(0.65)	18.24	23.30	5.06
311513	Cheese Manufacturing	989	1,065	1.49	1.50	0.01	23.14	23.12	(0.02)
311423	Dried and Dehydrated Food Manufacturing	172	220	8.77	11.90	3.13	14.86	20.58	5.72
333415	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	2,065	1,684	10.31	8.74	(1.57)	22.13	19.16	(2.97)
315228	Men's and Boys' Cut and Sew Other Outerwear Manufacturing	152	117	18.82	18.43	(0.39)	18.95	18.21	(0.74)
332410	Power Boiler and Heat Exchanger Manufacturing	330	472	5.00	5.98	0.98	13.90	17.97	4.07
322225	Laminated Aluminum Foil Mfg for Flexible Packaging Uses	0	28	0.00	18.91	18.91	0.00	17.73	17.73
327215	Glass Product Manufacturing Made of Purchased Glass	699	776	6.31	7.74	1.43	15.58	16.68	1.10
321912	Cut Stock, Resawing Lumber, and Planing	129	250	7.13	14.89	7.76	8.98	16.13	7.15
333999	All Other Miscellaneous General Purpose Machinery Manufacturing	574	678	3.84	3.75	(0.09)	14.54	16.06	1.52
321992	Prefabricated Wood Building Manufacturing	198	201	3.67	4.16	0.49	12.32	14.42	2.10
312120	Breweries	361	560	4.28	4.74	0.46	13.33	14.22	0.89
325314	Fertilizer (Mixing Only) Manufacturing	77	127	4.33	7.99	3.66	9.07	14.11	5.04
339994	Broom, Brush, and Mop Manufacturing	127	96	3.72	3.57	(0.15)	13.14	10.61	(2.53)
424590	Other Farm Product Raw Material Merchant Wholesalers	173	88	7.72	5.65	(2.07)	18.41	10.27	(8.14)
334412	Bare Printed Circuit Board Manufacturing	193	345	2.34	3.93	1.59	4.38	9.71	5.33
323113	Commercial Screen Printing	617	672	3.15	3.11	(0.04)	9.02	9.14	0.12
333414	Heating Equipment (except Warm Air Furnaces) Manufacturing	113	150	6.48	12.04	5.56	6.25	8.75	2.50
333111	Farm Machinery and Equipment Manufacturing	611	605	2.65	2.33	(0.32)	10.23	8.67	(1.56)
423390	Other Construction Material Merchant Wholesalers	62	217	1.63	2.39	0.76	2.46	8.26	5.80
337121	Upholstered Household Furniture Manufacturing	325	477	10.46	13.40	2.94	5.60	8.15	2.55
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	436	530	1.22	1.21	(0.01)	7.14	7.97	0.83
311230	Breakfast Cereal Manufacturing	57	118	18.85	18.91	0.06	3.77	7.84	4.07
212321	Construction Sand and Gravel Mining	<10	202	--	4.25	--	--	7.76	--
424910	Farm Supplies Merchant Wholesalers	620	904	2.18	2.94	0.76	5.27	7.27	2.00
316213	Men's Footwear (except Athletic) Manufacturing	28	43	0.99	1.22	0.23	4.32	6.85	2.53
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	176	292	0.75	1.03	0.28	4.00	6.51	2.51
339920	Sporting and Athletic Goods Manufacturing	268	296	3.36	3.42	0.06	5.17	6.05	0.88
532220	Formal Wear and Costume Rental	30	61	1.99	4.42	2.43	2.51	5.93	3.42
112000	Animal Production	2,240	2,575	1.46	1.57	0.11	4.69	5.81	1.12
221112	Fossil Fuel Electric Power Generation	183	558	0.61	2.78	2.17	1.25	5.39	4.14
454113	Mail-Order Houses	728	803	0.91	1.13	0.22	4.44	5.34	0.90
524292	Third Party Administration of Insurance and Pension Funds	802	990	2.90	2.25	(0.65)	5.14	5.33	0.19
561910	Packaging and Labeling Services	266	269	2.09	2.53	0.44	4.74	5.05	0.31
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	453	556	2.01	2.33	0.32	4.23	5.03	0.80
335312	Motor and Generator Manufacturing	210	197	1.05	0.94	(0.11)	4.60	4.77	0.17
332322	Sheet Metal Work Manufacturing	303	473	1.90	2.61	0.71	3.02	4.43	1.41
321999	All Other Miscellaneous Wood Product Manufacturing	176	114	2.05	1.34	(0.71)	7.02	4.33	(2.69)
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	200	230	1.39	1.31	(0.08)	3.81	4.10	0.29
722410	Drinking Places (Alcoholic Beverages)	1,663	1,619	1.41	1.54	0.13	4.32	4.09	(0.23)
484121	General Freight Trucking, Long-Distance, Truckload	4,070	2,491	3.29	2.37	(0.92)	6.40	4.01	(2.39)
114210	Hunting and Trapping	16	23	3.13	8.22	5.09	3.34	3.93	0.59
321213	Engineered Wood Member (except Truss) Manufacturing	<10	23	--	1.21	--	--	3.78	--
311991	Perishable Prepared Food Manufacturing	50	154	1.58	4.54	2.96	1.37	3.73	2.36
337125	Household Furniture (except Wood and Metal) Manufacturing	22	20	17.96	9.25	(8.71)	3.87	3.70	(0.17)
336370	Motor Vehicle Metal Stamping	170	291	3.46	5.20	1.74	2.84	3.68	0.84
311111	Dog and Cat Food Manufacturing	74	87	2.87	2.57	(0.30)	3.44	3.67	0.23

NAICS Code	Description	2009 Jobs	2014 Jobs	2009 State Location Quotient	2014 State Location Quotient	Change	2009 National Location Quotient	2014 National Location Quotient	Change
314129	Other Household Textile Product Mills	74	47	10.52	9.02	(1.50)	4.60	3.63	(0.97)
321113	Sawmills	220	299	2.23	3.19	0.96	2.63	3.55	0.92
321214	Truss Manufacturing	66	84	2.61	3.47	0.86	2.87	3.55	0.68
323110	Commercial Lithographic Printing	506	614	0.64	0.79	0.15	2.29	3.49	1.20
611691	Exam Preparation and Tutoring (Private)	53	426	0.63	4.54	3.91	0.47	3.37	2.90
321918	Other Millwork (including Flooring)	94	142	0.85	1.16	0.31	2.09	3.30	1.21
522130	Credit Unions	682	832	1.71	2.07	0.36	2.78	3.27	0.49
337110	Wood Kitchen Cabinet and Countertop Manufacturing	392	406	2.28	2.81	0.53	2.92	3.24	0.32
485310	Taxi Service	151	219	2.32	3.28	0.96	2.37	3.23	0.86
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	187	213	1.01	1.00	(0.01)	2.99	3.05	0.06
561611	Investigation Services	92	135	3.95	5.87	1.92	1.83	2.93	1.10
113310	Logging	185	237	1.62	2.08	0.46	2.27	2.91	0.64
326191	Plastics Plumbing Fixture Manufacturing	13	36	3.13	12.54	9.41	0.86	2.82	1.96
332312	Fabricated Structural Metal Manufacturing	139	269	1.36	2.49	1.13	1.50	2.80	1.30
311511	Fluid Milk Manufacturing	91	155	1.82	3.09	1.27	1.56	2.78	1.22
332431	Metal Can Manufacturing	158	56	1.80	0.69	(1.11)	7.08	2.78	(4.30)
321114	Wood Preservation	113	27	10.27	3.11	(7.16)	11.06	2.75	(8.31)
326212	Tire Retreading	13	19	4.37	5.91	1.54	1.89	2.75	0.86
311812	Commercial Bakeries	361	372	2.67	2.09	(0.58)	2.57	2.74	0.17
333210	Sawmill and Woodworking Machinery Manufacturing	11	13	1.41	2.15	0.74	2.12	2.74	0.62
311119	Other Animal Food Manufacturing	113	91	1.40	1.09	(0.31)	3.28	2.71	(0.57)
484220	Specialized Freight (except Used Goods) Trucking, Local	552	646	1.54	1.73	0.19	2.54	2.70	0.16
712190	Nature Parks and Other Similar Institutions	12	27	1.68	3.56	1.88	1.41	2.64	1.23
903612	Colleges, Universities, and Professional Schools (Local Gov't)	1,881	2,019	1.56	1.64	0.08	2.57	2.63	0.06
424490	Other Grocery and Related Products Merchant Wholesalers	506	602	1.56	2.16	0.60	2.10	2.57	0.47
423620	Electrical & Electronic Appliance, Television, & Radio Set Merchant Wholesalers	55	74	1.96	1.87	(0.09)	1.77	2.55	0.78
445291	Baked Goods Stores	34	77	0.81	1.49	0.68	1.16	2.50	1.34
488330	Navigational Services to Shipping	25	49	3.50	7.74	4.24	1.15	2.49	1.34
332313	Plate Work Manufacturing	120	125	1.09	0.98	(0.11)	2.50	2.46	(0.04)
447110	Gasoline Stations with Convenience Stores	2,053	1,980	1.79	1.69	(0.10)	2.62	2.42	(0.20)
423730	Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers	14	149	0.16	1.81	1.65	0.23	2.42	2.19
484122	General Freight Trucking, Long-Distance, Less Than Truckload	538	623	1.55	1.34	(0.21)	2.34	2.41	0.07
424520	Livestock Merchant Wholesalers	51	43	1.71	1.60	(0.11)	2.32	2.39	0.07
713950	Bowling Centers	203	172	0.99	1.03	0.04	2.63	2.33	(0.30)
332919	Other Metal Valve and Pipe Fitting Manufacturing	15	40	0.64	1.34	0.70	0.85	2.33	1.48
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers	58	50	3.77	3.64	(0.13)	2.38	2.30	(0.08)
115113	Crop Harvesting, Primarily by Machine	27	30	4.06	2.56	(1.50)	2.41	2.29	(0.12)
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing	<10	36	--	5.00	--	--	2.27	--
493110	General Warehousing and Storage	1,255	1,466	1.98	2.30	0.32	2.18	2.26	0.08
441210	Recreational Vehicle Dealers	53	82	1.90	2.48	0.58	1.70	2.23	0.53
424440	Poultry and Poultry Product Merchant Wholesalers	<10	24	--	5.44	--	--	2.14	--
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	316	204	2.63	1.95	(0.68)	2.94	2.12	(0.82)
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	123	137	1.66	1.74	0.08	1.97	2.11	0.14
423990	Other Miscellaneous Durable Goods Merchant Wholesalers	119	168	2.29	2.20	(0.09)	1.57	2.09	0.52
111000	Crop Production	1,651	1,763	1.82	2.09	0.27	1.89	2.08	0.19
622110	General Medical and Surgical Hospitals (Private)	10,204	9,709	1.81	1.83	0.02	2.19	2.07	(0.12)
334310	Audio and Video Equipment Manufacturing	31	44	2.27	2.92	0.65	1.25	2.07	0.82
424950	Paint, Varnish, and Supplies Merchant Wholesalers	41	41	1.61	1.96	0.35	1.69	2.05	0.36
621310	Offices of Chiropractors	313	313	1.50	1.59	0.09	2.09	2.04	(0.05)
561422	Telemarketing Bureaus and Other Contact Centers	717	993	1.88	1.98	0.10	1.72	2.03	0.31
445299	All Other Specialty Food Stores	178	191	0.98	1.07	0.09	2.00	2.02	0.02
624221	Temporary Shelters	69	139	1.16	1.99	0.83	1.05	2.01	0.96

NAICS Code	Description	2009 Jobs	2014 Jobs	2009 State Location Quotient	2014 State Location Quotient	Change	2009 National Location Quotient	2014 National Location Quotient	Change
813410	Civic and Social Organizations	809	837	1.17	1.17	0.00	1.91	1.99	0.08
311811	Retail Bakeries	146	186	1.39	1.56	0.17	1.80	1.96	0.16
812331	Linen Supply	201	150	2.03	1.49	(0.54)	2.63	1.95	(0.68)
441221	Motorcycle, ATV, and Personal Watercraft Dealers	105	120	1.08	1.25	0.17	1.57	1.94	0.37
515112	Radio Stations	179	158	1.48	1.52	0.04	2.02	1.93	(0.09)
454312	Liquefied Petroleum Gas (Bottled Gas) Dealers	88	72	1.43	1.15	(0.28)	1.97	1.92	(0.05)
339999	All Other Miscellaneous Manufacturing	135	114	1.19	0.98	(0.21)	2.25	1.92	(0.33)
541922	Commercial Photography	23	28	1.81	1.37	(0.44)	1.81	1.85	0.04
482110	Rail Transportation	467	474	2.75	2.76	0.01	1.98	1.85	(0.13)
327390	Other Concrete Product Manufacturing	73	101	0.99	1.56	0.57	1.34	1.84	0.50
484110	General Freight Trucking, Local	607	582	1.66	1.58	(0.08)	2.01	1.83	(0.18)
523991	Trust, Fiduciary, and Custody Activities	18	44	0.19	0.43	0.24	0.74	1.83	1.09
713920	Skiing Facilities	39	88	1.08	1.56	0.48	1.04	1.82	0.78
326199	All Other Plastics Product Manufacturing	518	520	0.57	0.51	(0.06)	1.91	1.80	(0.11)
721211	RV (Recreational Vehicle) Parks and Campgrounds	102	47	1.86	0.91	(0.95)	3.58	1.79	(1.79)
325998	All Other Miscellaneous Chemical Product and Preparation Mfg	<10	69	--	1.56	--	--	1.79	--
115210	Support Activities for Animal Production	53	74	0.59	0.75	0.16	1.20	1.77	0.57
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	69	42	2.58	1.95	(0.63)	2.46	1.77	(0.69)
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	13	52	0.38	1.28	0.90	0.51	1.77	1.26
453930	Manufactured (Mobile) Home Dealers	11	23	0.79	2.55	1.76	0.63	1.77	1.14
452990	All Other General Merchandise Stores	482	749	1.20	0.88	(0.32)	1.31	1.76	0.45
326121	Unlaminated Plastics Profile Shape Manufacturing	<10	45	--	0.75	--	--	1.75	--
311615	Poultry Processing	473	398	3.05	2.60	(0.45)	1.93	1.70	(0.23)
488490	Other Support Activities for Road Transportation	18	66	0.56	1.91	1.35	0.50	1.69	1.19
238170	Siding Contractors	66	83	0.72	1.04	0.32	1.08	1.66	0.58
451140	Musical Instrument and Supplies Stores	68	63	1.40	1.36	(0.04)	1.72	1.66	(0.06)
326140	Polystyrene Foam Product Manufacturing	56	49	1.67	2.39	0.72	1.96	1.65	(0.31)
443111	Household Appliance Stores	123	108	1.75	1.46	(0.29)	1.71	1.64	(0.07)
423320	Brick, Stone, &Related Construction Material Merchant Wholesalers	44	81	1.20	2.56	1.36	0.78	1.63	0.85
624310	Vocational Rehabilitation Services	1,064	600	1.96	1.26	(0.70)	2.80	1.62	(1.18)
623312	Homes for the Elderly	685	659	0.78	0.63	(0.15)	1.86	1.59	(0.27)
811411	Home and Garden Equipment Repair and Maintenance	11	14	1.30	1.57	0.27	1.26	1.59	0.33
561790	Other Services to Buildings and Dwellings	127	200	1.41	1.92	0.51	1.05	1.55	0.50
713120	Amusement Arcades	<10	38	--	1.19	--	--	1.55	--
326111	Plastics Bag and Pouch Manufacturing	66	47	0.89	0.71	(0.18)	2.01	1.55	(0.46)
623210	Residential Mental Retardation Facilities	674	644	1.29	1.15	(0.14)	1.67	1.52	(0.15)
623220	Residential Mental Health and Substance Abuse Facilities	323	335	2.10	1.82	(0.28)	1.62	1.52	(0.10)
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	191	197	0.96	1.00	0.04	1.47	1.52	0.05
903999	Local Government, Excluding Education and Hospitals	8,891	8,758	1.29	1.31	0.02	1.46	1.51	0.05
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	69	138	0.76	1.66	0.90	0.75	1.51	0.76
562111	Solid Waste Collection	125	218	1.42	1.98	0.56	0.95	1.50	0.55
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers	53	50	0.78	0.79	0.01	1.65	1.50	(0.15)
327320	Ready-Mix Concrete Manufacturing	141	132	1.20	1.18	(0.02)	1.41	1.49	0.08
336399	All Other Motor Vehicle Parts Manufacturing	108	216	1.16	2.12	0.96	0.94	1.49	0.55
237990	Other Heavy and Civil Engineering Construction	138	187	0.74	3.15	2.41	1.05	1.48	0.43
611692	Automobile Driving Schools (Private)	29	40	0.73	1.13	0.40	1.18	1.48	0.30
451110	Sporting Goods Stores	392	464	1.31	1.34	0.03	1.45	1.47	0.02
561210	Facilities Support Services	431	206	10.66	7.07	(3.59)	2.99	1.47	(1.52)
532292	Recreational Goods Rental	10	19	0.84	1.80	0.96	0.94	1.46	0.52
237310	Highway, Street, and Bridge Construction	552	465	2.28	1.87	(0.41)	1.63	1.45	(0.18)
445210	Meat Markets	100	78	1.20	0.88	(0.32)	1.88	1.44	(0.44)
561440	Collection Agencies	94	209	0.95	2.25	1.30	0.57	1.44	0.87
453110	Florists	153	119	1.35	1.41	0.06	1.54	1.43	(0.11)

NAICS Code	Description	2009 Jobs	2014 Jobs	2009 State Location Quotient	2014 State Location Quotient	Change	2009 National Location Quotient	2014 National Location Quotient	Change
623110	Nursing Care Facilities	2,510	2,411	1.25	1.32	0.07	1.42	1.39	(0.03)
811111	General Automotive Repair	527	618	1.13	1.17	0.04	1.22	1.38	0.16
333319	Other Commercial and Service Industry Machinery Manufacturing	86	68	0.68	0.47	(0.21)	1.65	1.38	(0.27)
331511	Iron Foundries	46	58	0.15	0.17	0.02	1.09	1.37	0.28
812220	Cemeteries and Crematories	44	44	1.47	1.58	0.11	1.35	1.36	0.01
238290	Other Building Equipment Contractors	131	205	0.88	1.45	0.57	0.87	1.36	0.49
541340	Drafting Services	31	23	1.72	2.69	0.97	1.53	1.35	(0.18)
511110	Newspaper Publishers	290	321	0.71	1.17	0.46	0.91	1.34	0.43
444210	Outdoor Power Equipment Stores	24	46	0.59	0.98	0.39	0.71	1.32	0.61
711212	Racetracks	93	57	1.80	1.52	(0.28)	1.84	1.32	(0.52)
812332	Industrial Launderers	74	78	1.18	1.30	0.12	1.24	1.32	0.08
236115	New Single-Family Housing Construct. (except Operative Builders)	668	580	1.27	1.39	0.12	1.18	1.31	0.13
238910	Site Preparation Contractors	566	653	1.23	1.47	0.24	1.04	1.31	0.27
238160	Roofing Contractors	234	288	1.16	1.46	0.30	1.02	1.31	0.29
238110	Poured Concrete Foundation and Structure Contractors	300	302	1.58	1.44	(0.14)	1.29	1.29	0.00
722310	Food Service Contractors	606	687	1.75	1.52	(0.23)	1.31	1.29	(0.02)
452910	Warehouse Clubs and Supercenters	644	1,900	1.85	2.15	0.30	0.51	1.29	0.78
532230	Video Tape and Disc Rental	66	26	0.60	0.69	0.09	0.71	1.29	0.58
424710	Petroleum Bulk Stations and Terminals	41	44	2.05	3.30	1.25	1.14	1.29	0.15
541191	Title Abstract and Settlement Offices	86	98	1.20	1.31	0.11	1.29	1.28	(0.01)
713990	All Other Amusement and Recreation Industries	278	228	1.37	1.13	(0.24)	1.76	1.27	(0.49)
515210	Cable and Other Subscription Programming	50	98	4.95	9.11	4.16	0.53	1.27	0.74
333315	Photographic and Photocopying Equipment Manufacturing	39	10	7.33	2.61	(4.72)	3.55	1.27	(2.28)
624190	Other Individual and Family Services	329	590	0.69	1.34	0.65	0.71	1.26	0.55
901199	Federal Government, Civilian, Excluding Postal Service	2,952	2,980	3.27	3.16	(0.11)	1.25	1.25	0.00
532210	Consumer Electronics and Appliances Rental	31	37	6.58	10.20	3.62	1.07	1.25	0.18

Source: EMSI Analyst

An indicator of a Region's economic strength is how much "leakage" occurs due to companies in the Region having to purchase supplies and raw materials from outside the Region, thus exporting capital. If those companies could buy their materials from other companies within the Region, less capital would "leak" out of the Regional economy, and would remain in the Region to circulate, stimulate more economic activity, and grow demand for more employment. Table 6.22 lists the same industries as the previous table (those NAICS codes in the MRRPC Region with a national LQ of at least 1.25), but organizes them by how much they purchase from outside the Region. The final column shows the result when the amount in the "Satisfied Outside Region" column is subtracted from the "Satisfied in Region" column. The federal government is listed at the top, with the largest difference between its requirements that are satisfied inside the Region and those requirements that are satisfied outside the Region. This means that all the federal government's activities in the Region are funded from sources outside the 9-county Region (i.e., Washington, DC). Animal production Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables has $4.5 million in annual expenditures, only $115,315 of which are met by suppliers in the MRRPC Region. The other 97% of the industry's expenditures are with suppliers and vendors outside the Region.

Table 6.22 Six-Digit NAICS Code Industries in the MRRPC Region, by Percentage of Requirements Satisfied Outside the Region

NAICS Code	Description	Total Requirements	Satisfied in region	Satisfied outside region	% Satisfied outside the Region
901199	Federal Government, Civilian, Excluding Postal Service	$2,697,314,973	$0	$2,697,314,973	100.00
334513	Instruments & Related Prod. Mfg for Measuring, Displaying,& Controlling Industrial Process Variables	$4,552,828	$115,315	$4,437,513	97.47
326111	Plastics Bag and Pouch Manufacturing	$14,108,412	$446,689	$13,661,722	96.83
333319	Other Commercial and Service Industry Machinery Manufacturing	$11,297,745	$383,247	$10,914,498	96.61
336399	All Other Motor Vehicle Parts Manufacturing	$18,742,994	$783,594	$17,959,400	95.82

Table 6.22 Six-Digit NAICS Code Industries in the MRRPC Region, by Percentage of Requirements Satisfied Outside the Region

NAICS Code	Description	Total Requirements	Satisfied in region	Satisfied outside region	% Satisfied outside the Region
454113	Mail-Order Houses	$18,436,249	$797,369	$17,638,880	95.67
326199	All Other Plastics Product Manufacturing	$75,062,124	$3,653,278	$71,408,846	95.13
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing	$13,767,316	$732,710	$13,034,605	94.68
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	$19,239,331	$1,064,166	$18,175,166	94.47
326140	Polystyrene Foam Product Manufacturing	$7,047,284	$413,212	$6,634,072	94.14
311119	Other Animal Food Manufacturing	$138,694,550	$8,645,823	$130,048,727	93.77
334310	Audio and Video Equipment Manufacturing	$3,838,888	$248,536	$3,590,353	93.53
335312	Motor and Generator Manufacturing	$17,610,138	$1,200,002	$16,410,136	93.19
333210	Sawmill and Woodworking Machinery Manufacturing	$702,747	$49,380	$653,367	92.97
332919	Other Metal Valve and Pipe Fitting Manufacturing	$3,219,515	$230,592	$2,988,923	92.84
326121	Unlaminated Plastics Profile Shape Manufacturing	$7,479,382	$561,379	$6,918,003	92.49
331511	Iron Foundries	$20,734,952	$1,929,995	$18,804,957	90.69
334412	Bare Printed Circuit Board Manufacturing	$2,402,018	$237,649	$2,164,369	90.11
112000	Animal Production	$804,111,183	$83,267,032	$720,844,150	89.64
311511	Fluid Milk Manufacturing	$71,483,244	$8,392,089	$63,091,154	88.26
323110	Commercial Lithographic Printing	$19,316,144	$2,426,857	$16,889,287	87.44
111000	Crop Production	$221,933,010	$28,162,106	$193,770,903	87.31
311812	Commercial Bakeries	$25,896,842	$3,365,183	$22,531,659	87.01
339999	All Other Miscellaneous Manufacturing	$14,419,748	$1,914,521	$12,505,227	86.72
326212	Tire Retreading	$1,117,258	$148,790	$968,469	86.68
333111	Farm Machinery and Equipment Manufacturing	$24,460,237	$3,259,037	$21,201,200	86.68
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	$8,197,359	$1,158,123	$7,039,235	85.87
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	$18,611,467	$2,796,237	$15,815,230	84.98
333315	Photographic and Photocopying Equipment Manufacturing	$1,047,373	$157,583	$889,790	84.95
311230	Breakfast Cereal Manufacturing	$11,090,692	$1,792,960	$9,297,732	83.83
561910	Packaging and Labeling Services	$4,700,995	$798,998	$3,901,996	83.00
327390	Other Concrete Product Manufacturing	$7,098,242	$1,301,484	$5,796,758	81.66
332322	Sheet Metal Work Manufacturing	$18,506,989	$3,530,187	$14,976,803	80.93
337110	Wood Kitchen Cabinet and Countertop Manufacturing	$12,736,579	$2,534,886	$10,201,693	80.10
339994	Broom, Brush, and Mop Manufacturing	$1,885,396	$381,494	$1,503,902	79.77
332312	Fabricated Structural Metal Manufacturing	$17,781,484	$3,764,847	$14,016,637	78.83
337121	Upholstered Household Furniture Manufacturing	$5,752,459	$1,232,962	$4,519,497	78.57
339920	Sporting and Athletic Goods Manufacturing	$10,139,071	$2,258,546	$7,880,525	77.72
321113	Sawmills	$62,083,168	$14,319,859	$47,763,309	76.93
337125	Household Furniture (except Wood and Metal) Manufacturing	$788,037	$184,121	$603,916	76.64
424490	Other Grocery and Related Products Merchant Wholesalers	$34,168,473	$8,037,365	$26,131,108	76.48
424440	Poultry and Poultry Product Merchant Wholesalers	$1,383,456	$329,065	$1,054,390	76.21
316213	Men's Footwear (except Athletic) Manufacturing	$323,540	$79,189	$244,351	75.52
326191	Plastics Plumbing Fixture Manufacturing	$2,868,216	$715,669	$2,152,547	75.05
311811	Retail Bakeries	$7,709,703	$1,925,106	$5,784,597	75.03
424950	Paint, Varnish, and Supplies Merchant Wholesalers	$3,528,064	$910,779	$2,617,285	74.18
332431	Metal Can Manufacturing	$33,673,372	$8,830,181	$24,843,191	73.78
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	$12,897,315	$3,405,635	$9,491,679	73.59
321918	Other Millwork (including Flooring)	$7,872,848	$2,186,964	$5,685,884	72.22
321114	Wood Preservation	$7,072,622	$1,987,818	$5,084,804	71.89
333999	All Other Miscellaneous General Purpose Machinery Manufacturing	$5,985,106	$1,697,121	$4,287,985	71.64
423620	Electrical and Electronic Appliance, Television, and Radio Set Merchant Wholesalers	$5,111,905	$1,466,244	$3,645,661	71.32
311111	Dog and Cat Food Manufacturing	$16,079,121	$4,784,305	$11,294,816	70.25
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	$14,114,485	$4,225,951	$9,888,534	70.06
332812	Metal Coating, Engraving (except Jewelry & Silverware), & Allied Services to Manufacturers	$10,979,553	$3,322,147	$7,657,406	69.74
115210	Support Activities for Animal Production	$8,588,956	$2,613,198	$5,975,758	69.57
488490	Other Support Activities for Road Transportation	$2,446,471	$755,706	$1,690,766	69.11

Table 6.22 Six-Digit NAICS Code Industries in the MRRPC Region, by Percentage of Requirements Satisfied Outside the Region

NAICS Code	Description	Total Requirements	Satisfied in region	Satisfied outside region	% Satisfied outside the Region
321213	Engineered Wood Member (except Truss) Manufacturing	$731,053	$233,745	$497,308	68.03
113310	Logging	$21,075,320	$6,839,629	$14,235,691	67.55
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers	$4,164,518	$1,354,826	$2,809,693	67.47
711212	Racetracks	$2,083,931	$692,638	$1,391,293	66.76
713120	Amusement Arcades	$1,016,688	$343,059	$673,629	66.26
484122	General Freight Trucking, Long-Distance, Less Than Truckload	$53,694,302	$19,124,156	$34,570,147	64.38
238170	Siding Contractors	$3,652,542	$1,306,162	$2,346,381	64.24
327320	Ready-Mix Concrete Manufacturing	$18,245,808	$6,647,262	$11,598,547	63.57
238290	Other Building Equipment Contractors	$19,613,335	$7,174,049	$12,439,286	63.42
336370	Motor Vehicle Metal Stamping	$11,917,768	$4,417,742	$7,500,027	62.93
484121	General Freight Trucking, Long-Distance, Truckload	$124,011,894	$46,103,248	$77,908,646	62.82
484110	General Freight Trucking, Local	$57,475,450	$21,502,525	$35,972,925	62.59
322225	Laminated Aluminum Foil Manufacturing for Flexible Packaging Uses	$762,674	$289,358	$473,317	62.06
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing	$5,743,541	$2,186,387	$3,557,155	61.93
712190	Nature Parks and Other Similar Institutions	$674,857	$262,944	$411,913	61.04
314129	Other Household Textile Product Mills	$2,249,023	$878,692	$1,370,331	60.93
237310	Highway, Street, and Bridge Construction	$41,861,207	$16,436,539	$25,424,668	60.74
332313	Plate Work Manufacturing	$10,896,204	$4,365,192	$6,531,013	59.94
311991	Perishable Prepared Food Manufacturing	$10,070,038	$4,076,502	$5,993,537	59.52
212321	Construction Sand and Gravel Mining	$8,052,313	$3,263,296	$4,789,017	59.47
493110	General Warehousing and Storage	$54,237,558	$22,408,705	$31,828,853	58.68
311615	Poultry Processing	$57,387,918	$24,146,690	$33,241,228	57.92
321214	Truss Manufacturing	$2,352,137	$994,612	$1,357,525	57.71
323113	Commercial Screen Printing	$5,507,470	$2,338,765	$3,168,705	57.53
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers	$5,435,890	$2,322,347	$3,113,543	57.28
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	$15,722,431	$6,814,163	$8,908,268	56.66
424590	Other Farm Product Raw Material Merchant Wholesalers	$1,679,371	$741,743	$937,628	55.83
447110	Gasoline Stations with Convenience Stores	$37,287,549	$17,007,988	$20,279,561	54.39
333414	Heating Equipment (except Warm Air Furnaces) Manufacturing	$8,421,305	$3,857,642	$4,563,663	54.19
325314	Fertilizer (Mixing Only) Manufacturing	$8,876,982	$4,095,895	$4,781,087	53.86
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	$64,701,338	$29,927,180	$34,774,159	53.75
722310	Food Service Contractors	$34,579,327	$16,005,869	$18,573,458	53.71
238910	Site Preparation Contractors	$44,954,200	$21,165,101	$23,789,099	52.92
562111	Solid Waste Collection	$19,006,317	$8,977,239	$10,029,078	52.77
453930	Manufactured (Mobile) Home Dealers	$1,738,526	$822,643	$915,883	52.68
321999	All Other Miscellaneous Wood Product Manufacturing	$3,641,818	$1,746,316	$1,895,501	52.05
485310	Taxi Service	$2,862,444	$1,395,930	$1,466,514	51.23
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	$6,314,925	$3,090,908	$3,224,017	51.05
623312	Homes for the Elderly	$19,055,469	$9,445,735	$9,609,734	50.43
321992	Prefabricated Wood Building Manufacturing	$2,271,086	$1,127,854	$1,143,232	50.34
444210	Outdoor Power Equipment Stores	$2,943,832	$1,476,977	$1,466,854	49.83
523991	Trust, Fiduciary, and Custody Activities	$8,185,392	$4,202,246	$3,983,145	48.66
423990	Other Miscellaneous Durable Goods Merchant Wholesalers	$18,475,311	$9,701,749	$8,773,562	47.49
424710	Petroleum Bulk Stations and Terminals	$6,510,456	$3,448,549	$3,061,907	47.03
315228	Men's and Boys' Cut and Sew Other Outerwear Manufacturing	$644,093	$342,072	$302,021	46.89
488330	Navigational Services to Shipping	$2,754,612	$1,482,816	$1,271,796	46.17
238110	Poured Concrete Foundation and Structure Contractors	$18,214,078	$9,832,713	$8,381,365	46.02
561440	Collection Agencies	$9,195,749	$4,964,442	$4,231,307	46.01
238160	Roofing Contractors	$18,780,302	$10,192,692	$8,587,610	45.73
115113	Crop Harvesting, Primarily by Machine	$1,593,034	$867,243	$725,790	45.56
515210	Cable and Other Subscription Programming	$25,091,574	$13,716,552	$11,375,022	45.33
561210	Facilities Support Services	$13,129,604	$7,186,742	$5,942,861	45.26

Table 6.22 Six-Digit NAICS Code Industries in the MRRPC Region, by Percentage of Requirements Satisfied Outside the Region

NAICS Code	Description	Total Requirements	Satisfied in region	Satisfied outside region	% Satisfied outside the Region
561422	Telemarketing Bureaus and Other Contact Centers	$20,509,258	$11,406,055	$9,103,203	44.39
532210	Consumer Electronics and Appliances Rental	$2,966,147	$1,650,464	$1,315,683	44.36
423730	Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers	$11,709,401	$6,543,438	$5,165,963	44.12
452990	All Other General Merchandise Stores	$19,078,856	$10,749,882	$8,328,974	43.66
311513	Cheese Manufacturing	$218,022,441	$123,208,026	$94,814,415	43.49
811111	General Automotive Repair	$33,090,901	$18,735,656	$14,355,245	43.38
423320	Brick, Stone, and Related Construction Material Merchant Wholesalers	$7,133,434	$4,068,794	$3,064,640	42.96
624190	Other Individual and Family Services	$25,765,309	$14,885,932	$10,879,377	42.22
511110	Newspaper Publishers	$30,652,578	$17,913,600	$12,738,978	41.56
445291	Baked Goods Stores	$2,552,040	$1,499,285	$1,052,755	41.25
713950	Bowling Centers	$2,898,527	$1,726,331	$1,172,196	40.44
236115	New Single-Family Housing Construction (except Operative Builders)	$39,753,392	$23,687,560	$16,065,832	40.41
812220	Cemeteries and Crematories	$2,553,554	$1,529,436	$1,024,118	40.11
624221	Temporary Shelters	$3,449,075	$2,083,072	$1,366,002	39.60
623220	Residential Mental Health and Substance Abuse Facilities	$13,574,429	$8,279,809	$5,294,621	39.00
311423	Dried and Dehydrated Food Manufacturing	$4,961,993	$3,045,806	$1,916,186	38.62
237990	Other Heavy and Civil Engineering Construction	$18,278,362	$11,263,456	$7,014,906	38.38
541191	Title Abstract and Settlement Offices	$5,762,095	$3,581,747	$2,180,348	37.84
561790	Other Services to Buildings and Dwellings	$10,598,032	$6,592,726	$4,005,305	37.79
713920	Skiing Facilities	$1,696,990	$1,061,654	$635,336	37.44
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	$14,269,686	$8,943,153	$5,326,533	37.33
451110	Sporting Goods Stores	$15,989,159	$10,096,444	$5,892,714	36.85
812332	Industrial Launderers	$3,085,986	$1,982,843	$1,103,143	35.75
611692	Automobile Driving Schools (Private)	$893,533	$575,054	$318,479	35.64
812331	Linen Supply	$3,524,991	$2,302,156	$1,222,835	34.69
623210	Residential Mental Retardation Facilities	$21,196,877	$13,870,930	$7,325,947	34.56
452910	Warehouse Clubs and Supercenters	$79,705,594	$52,200,895	$27,504,699	34.51
813410	Civic and Social Organizations	$15,739,763	$10,374,276	$5,365,487	34.09
441210	Recreational Vehicle Dealers	$3,745,195	$2,484,740	$1,260,455	33.66
721211	RV (Recreational Vehicle) Parks and Campgrounds	$2,646,256	$1,796,602	$849,654	32.11
333415	Air-Conditioning & Warm Air Heating Equip. & Commercial & Indus. Refrig. Equipment Mfg	$50,273,550	$34,195,377	$16,078,173	31.98
624310	Vocational Rehabilitation Services	$16,993,295	$11,577,534	$5,415,761	31.87
312120	Breweries	$28,995,636	$20,198,138	$8,797,499	30.34
532230	Video Tape and Disc Rental	$2,655,087	$1,869,367	$785,720	29.59
441221	Motorcycle, ATV, and Personal Watercraft Dealers	$5,461,953	$3,933,573	$1,528,380	27.98
623110	Nursing Care Facilities	$103,016,214	$74,208,860	$28,807,353	27.96
114210	Hunting and Trapping	$996,716	$718,311	$278,406	27.93
424520	Livestock Merchant Wholesalers	$1,146,400	$830,525	$315,876	27.55
443111	Household Appliance Stores	$5,585,865	$4,110,860	$1,475,005	26.41
484220	Specialized Freight (except Used Goods) Trucking, Local	$42,585,601	$31,367,948	$11,217,653	26.34
323111	Commercial Gravure Printing	$1,182,673	$874,715	$307,958	26.04
561611	Investigation Services	$3,146,537	$2,339,392	$807,146	25.65
445299	All Other Specialty Food Stores	$5,704,351	$4,269,092	$1,435,259	25.16
423390	Other Construction Material Merchant Wholesalers	$3,781,894	$2,853,208	$928,686	24.56
515112	Radio Stations	$13,455,721	$10,185,697	$3,270,025	24.30
541922	Commercial Photography	$2,469,263	$1,870,751	$598,512	24.24
621310	Offices of Chiropractors	$9,741,171	$7,395,462	$2,345,709	24.08
903612	Colleges, Universities, and Professional Schools (Local Government)	$39,316,468	$29,863,455	$9,453,012	24.04
454312	Liquefied Petroleum Gas (Bottled Gas) Dealers	$4,069,473	$3,144,318	$925,155	22.73
445210	Meat Markets	$3,400,877	$2,648,596	$752,280	22.12
424910	Farm Supplies Merchant Wholesalers	$18,450,977	$14,383,571	$4,067,406	22.04
541340	Drafting Services	$1,175,992	$920,912	$255,080	21.69

Table 6.22 Six-Digit NAICS Code Industries in the MRRPC Region, by Percentage of Requirements Satisfied Outside the Region

NAICS Code	Description	Total Requirements	Satisfied in region	Satisfied outside region	% Satisfied outside the Region
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	$58,646,411	$46,013,365	$12,633,046	21.54
451140	Musical Instrument and Supplies Stores	$2,773,481	$2,189,984	$583,497	21.04
327215	Glass Product Manufacturing Made of Purchased Glass	$12,344,537	$9,807,735	$2,536,801	20.55
212322	Industrial Sand Mining	$1,420,005	$1,131,660	$288,345	20.31
453110	Florists	$5,119,887	$4,081,710	$1,038,176	20.28
532220	Formal Wear and Costume Rental	$663,601	$534,721	$128,880	19.42
622110	General Medical and Surgical Hospitals (Private)	$550,109,442	$443,467,698	$106,641,744	19.39
532292	Recreational Goods Rental	$998,144	$808,619	$189,526	18.99
337122	Nonupholstered Wood Household Furniture Manufacturing	$4,381,675	$3,687,472	$694,203	15.84
811411	Home and Garden Equipment Repair and Maintenance	$689,751	$589,912	$99,839	14.47
221112	Fossil Fuel Electric Power Generation	$58,929,172	$50,823,243	$8,105,929	13.76
522130	Credit Unions	$49,342,378	$42,988,480	$6,353,898	12.88
713990	All Other Amusement and Recreation Industries	$8,777,001	$7,657,854	$1,119,148	12.75
321912	Cut Stock, Resawing Lumber, and Planing	$2,427,531	$2,154,001	$273,530	11.27
327910	Abrasive Product Manufacturing	$12,377,217	$11,395,499	$981,718	7.93
722410	Drinking Places (Alcoholic Beverages)	$18,927,943	$17,700,609	$1,227,334	6.48
524292	Third Party Administration of Insurance and Pension Funds	$12,315,027	$11,594,014	$721,013	5.85
611691	Exam Preparation and Tutoring (Private)	$4,086,539	$3,862,175	$224,364	5.49
903999	Local Government, Excluding Education and Hospitals	$1,081,662,382	$1,038,911,013	$42,751,369	3.95
332410	Power Boiler and Heat Exchanger Manufacturing	$10,047,736	$9,659,133	$388,602	3.87

Source: EMSI Analyst

When businesses in the Region sell their goods and services to buyers outside the Region (exporting), the result is the importation of capital. If "leakage" in a Regional economy is minimized, more of those imported dollars are circulated among other businesses in the Region, many of which are not exporters themselves. That recirculation of capital in the Regional economy stimulates more demand for goods and services in the Region, spurring the creation of more jobs, higher wages, and ultimately more businesses that create even more jobs with higher wages. This is called a multiplier effect, and different economic activities have larger or smaller multipliers, depending on their size, how much capital they import through sales outside the Region, and how much economic activity they generate in support of their operations. A manufacturing company with several hundred well-paid employees, that sells most of its goods outside the Region, and relies on many local vendors for its raw materials and supplies will have a large multiplier, since its operations will require many other businesses in the Region to support it. On the other hand, a small, one-person consulting firm has a small multiplier because it is small, probably has clients that are mostly within the Region, and has insignificant needs for supplies and raw materials. But even that one-person firm will have a multiplier, since that entrepreneur is drawing a salary and will spend his or her money in the Region for housing, food, entertainment, etc. The larger manufacturing company has a larger multiplier, but there are going to be fewer such companies, since they require vast amounts of capital to establish and large cash flow to maintain. The smaller, entrepreneurial businesses can be much more numerous, since they are relatively easy and inexpensive to establish and can nimbly adapt to changing economic circumstances. Enough small-multiplier businesses together can have a similar effect to a single large-multiplier business. Thus, both large and small multipliers are important to the economy. When it comes to investing limited time, money, and effort in economic development, however, it makes sense to focus on the large-multiplier businesses, since they will show a higher rate of return (more units gained for each unit invested) than the smaller-multiplier businesses. Furthermore, those small-multiplier businesses often will grow naturally in support of other businesses, especially when regulatory environments are favorable to them.

Table 6.23 shows the same 6-digit NAICS code industries as Tables 6.21 and 6.22, but ranked in descending order of total jobs multiplier. There is one multiplier for jobs that are directly the result of a job in the given NAICS code, another multiplier for jobs that are the indirect result, and a third multiplier for jobs that are induced by each job in the given NAICS code. This table shows the total of all three multipliers. Similarly, there are three multipliers (direct, indirect, and induced) for earnings per worker in each NAICS code. Again, this table shows the total earnings multiplier for those three measures. Subtract one from each of these numbers to see how many additional jobs or dollars are generated. For example, a jobs multiplier of 2.5 means that for every one job created in the given NAICS code, an additional 1.5 jobs are created throughout the economy (the one subtracted represents the original job created, so the *change* in jobs includes that one). Also for example, an earnings multiplier of 3.2 means that for every one new dollar earned in an industry, an additional $2.20 is earned throughout the economy (the dollar subtracted represents the original new dollar earned, so it is included in the total *change* in earnings).

Table 6.23 Six-Digit NAICS Code Industries in the MRRPC Region, by Highest Jobs Multiplier

NAICS Code	Description	Establishments	Total Jobs Multiplier	Total Earnings Multiplier
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	4	8.5620	4.8902
312120	Breweries	3	3.1752	2.7892
221112	Fossil Fuel Electric Power Generation	7	2.7608	1.5866
515210	Cable and Other Subscription Programming	4	2.5665	1.4131
903999	Local Government, Excluding Education and Hospitals	395	2.4577	2.3679
311513	Cheese Manufacturing	17	2.2335	1.8525
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	6	2.0281	1.6765
424710	Petroleum Bulk Stations and Terminals	1	2.0094	1.4106
311230	Breakfast Cereal Manufacturing	1	1.9962	1.4950
331511	Iron Foundries	1	1.9674	1.4771
332431	Metal Can Manufacturing	1	1.9559	1.3885
311111	Dog and Cat Food Manufacturing	2	1.9402	1.4938
331210	Iron and Steel Pipe and Tube Manufacturing from Purchased Steel	1	1.9376	1.2909
333415	Air-Conditioning & Warm Air Heating Equipment & Commercial & Indus Refrig Equip Mfg	4	1.8990	1.4225
212322	Industrial Sand Mining	10	1.8990	1.2576
423730	Warm Air Heating & Air-Conditioning Equip. & Supplies Merchant Wholesalers	5	1.8922	1.4193
522130	Credit Unions	39	1.8591	1.5684
311511	Fluid Milk Manufacturing	2	1.8360	1.5805
325314	Fertilizer (Mixing Only) Manufacturing	2	1.8072	1.4324
423620	Electrical & Electronic Appliance, Television, & Radio Set Merchant Wholesalers	1	1.7700	1.4169
901199	Federal Government, Civilian, Excluding Postal Service	70	1.7640	1.3693
321114	Wood Preservation	1	1.7633	1.5387
334310	Audio and Video Equipment Manufacturing	1	1.7519	1.2289
311615	Poultry Processing	1	1.7331	1.4897
332313	Plate Work Manufacturing	4	1.6918	1.3385
332410	Power Boiler and Heat Exchanger Manufacturing	2	1.6887	1.3077
333414	Heating Equipment (except Warm Air Furnaces) Manufacturing	2	1.6745	1.3848
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	5	1.6658	1.4189
327910	Abrasive Product Manufacturing	1	1.6373	1.3576
423390	Other Construction Material Merchant Wholesalers	3	1.6256	1.3844
311423	Dried and Dehydrated Food Manufacturing	1	1.6202	1.4604
339999	All Other Miscellaneous Manufacturing	9	1.6190	1.2402
321113	Sawmills	14	1.6160	1.5051
327390	Other Concrete Product Manufacturing	2	1.6136	1.2181
423320	Brick, Stone, and Related Construction Material Merchant Wholesalers	4	1.6115	1.4139
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	8	1.5860	1.4115
311119	Other Animal Food Manufacturing	5	1.5827	1.5301
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers	3	1.5823	1.4134
311991	Perishable Prepared Food Manufacturing	1	1.5814	1.6130
237310	Highway, Street, and Bridge Construction	7	1.5807	1.1832
333315	Photographic and Photocopying Equipment Manufacturing	2	1.5762	1.1812
622110	General Medical and Surgical Hospitals (Private)	11	1.5737	1.2464
327320	Ready-Mix Concrete Manufacturing	14	1.5701	1.3989
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	38	1.5689	1.3560
524292	Third Party Administration of Insurance and Pension Funds	9	1.5559	1.3381
488330	Navigational Services to Shipping	2	1.5490	1.2895
423990	Other Miscellaneous Durable Goods Merchant Wholesalers	6	1.5485	1.4089
339920	Sporting and Athletic Goods Manufacturing	3	1.5391	1.2768
212321	Construction Sand and Gravel Mining	4	1.5371	1.2954
311812	Commercial Bakeries	5	1.5214	1.5062
515112	Radio Stations	10	1.5198	1.3778

Table 6.23 Six-Digit NAICS Code Industries in the MRRPC Region, by Highest Jobs Multiplier

NAICS Code	Description	Establishments	Total Jobs Multiplier	Total Earnings Multiplier
424440	Poultry and Poultry Product Merchant Wholesalers	1	1.5122	1.3127
445291	Baked Goods Stores	4	1.5121	1.3538
424950	Paint, Varnish, and Supplies Merchant Wholesalers	1	1.5054	1.4124
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	6	1.5049	1.3579
321214	Truss Manufacturing	1	1.4992	1.3498
327215	Glass Product Manufacturing Made of Purchased Glass	6	1.4974	1.3192
424490	Other Grocery and Related Products Merchant Wholesalers	12	1.4953	1.3633
237990	Other Heavy and Civil Engineering Construction	4	1.4735	1.2412
424910	Farm Supplies Merchant Wholesalers	68	1.4726	1.3490
322225	Laminated Aluminum Foil Manufacturing for Flexible Packaging Uses	1	1.4721	1.2125
488490	Other Support Activities for Road Transportation	1	1.4663	1.2322
333111	Farm Machinery and Equipment Manufacturing	6	1.4655	1.2798
323111	Commercial Gravure Printing	6	1.4625	1.3116
311811	Retail Bakeries	9	1.4621	1.4662
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing	1	1.4502	1.2534
335312	Motor and Generator Manufacturing	1	1.4493	1.1769
326121	Unlaminated Plastics Profile Shape Manufacturing	1	1.4488	1.2886
336399	All Other Motor Vehicle Parts Manufacturing	1	1.4461	1.2520
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	14	1.4460	1.3643
484122	General Freight Trucking, Long-Distance, Less Than Truckload	41	1.4442	1.2828
326191	Plastics Plumbing Fixture Manufacturing	2	1.4439	1.3531
326111	Plastics Bag and Pouch Manufacturing	1	1.4365	1.2707
333319	Other Commercial and Service Industry Machinery Manufacturing	4	1.4363	1.2267
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to	6	1.4347	1.2838
323110	Commercial Lithographic Printing	16	1.4330	1.2997
541922	Commercial Photography	2	1.4299	1.2754
562111	Solid Waste Collection	11	1.4279	1.3481
484220	Specialized Freight (except Used Goods) Trucking, Local	88	1.4243	1.2771
484110	General Freight Trucking, Local	35	1.4237	1.2882
561210	Facilities Support Services	11	1.4211	1.2422
323113	Commercial Screen Printing	17	1.4192	1.3277
326140	Polystyrene Foam Product Manufacturing	1	1.4187	1.3316
332312	Fabricated Structural Metal Manufacturing	4	1.4111	1.2732
611691	Exam Preparation and Tutoring (Private)	4	1.4094	1.2345
332322	Sheet Metal Work Manufacturing	8	1.4053	1.2344
333999	All Other Miscellaneous General Purpose Machinery Manufacturing	4	1.4042	1.2280
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing	1	1.3908	1.4053
441221	Motorcycle, ATV, and Personal Watercraft Dealers	11	1.3843	1.3429
321213	Engineered Wood Member (except Truss) Manufacturing	2	1.3812	1.2332
484121	General Freight Trucking, Long-Distance, Truckload	79	1.3803	1.2499
441210	Recreational Vehicle Dealers	7	1.3791	1.3172
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	15	1.3785	1.2111
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	11	1.3778	1.2748
812332	Industrial Launderers	1	1.3767	1.2003
337110	Wood Kitchen Cabinet and Countertop Manufacturing	14	1.3614	1.2789
321918	Other Millwork (including Flooring)	6	1.3548	1.2637
321912	Cut Stock, Resawing Lumber, and Planing	4	1.3532	1.3029
454312	Liquefied Petroleum Gas (Bottled Gas) Dealers	18	1.3502	1.3103
332919	Other Metal Valve and Pipe Fitting Manufacturing	1	1.3501	1.2223
532210	Consumer Electronics and Appliances Rental	2	1.3456	1.3334
443111	Household Appliance Stores	10	1.3455	1.3442
326199	All Other Plastics Product Manufacturing	13	1.3434	1.2987
541340	Drafting Services	2	1.3413	1.2330
337122	Nonupholstered Wood Household Furniture Manufacturing	5	1.3366	1.2135
238160	Roofing Contractors	22	1.3312	1.2447
314129	Other Household Textile Product Mills	3	1.3237	1.3340
238290	Other Building Equipment Contractors	10	1.3215	1.2160
333210	Sawmill and Woodworking Machinery Manufacturing	1	1.3176	1.2070
321999	All Other Miscellaneous Wood Product Manufacturing	6	1.3163	1.3239
321992	Prefabricated Wood Building Manufacturing	2	1.3159	1.2581

Table 6.23 Six-Digit NAICS Code Industries in the MRRPC Region, by Highest Jobs Multiplier

NAICS Code	Description	Establishments	Total Jobs Multiplier	Total Earnings Multiplier
452910	Warehouse Clubs and Supercenters	9	1.3105	1.3357
111000	Crop Production	88	1.2975	1.3506
424590	Other Farm Product Raw Material Merchant Wholesalers	3	1.2956	1.3184
339994	Broom, Brush, and Mop Manufacturing	2	1.2942	1.2914
493110	General Warehousing and Storage	14	1.2895	1.2031
336370	Motor Vehicle Metal Stamping	2	1.2876	1.3286
113310	Logging	16	1.2856	1.2933
561440	Collection Agencies	4	1.2818	1.2503
511110	Newspaper Publishers	14	1.2724	1.3447
453930	Manufactured (Mobile) Home Dealers	1	1.2659	1.3150
811111	General Automotive Repair	100	1.2648	1.2831
112000	Animal Production	107	1.2627	1.3557
451140	Musical Instrument and Supplies Stores	6	1.2619	1.3470
337125	Household Furniture (except Wood and Metal) Manufacturing	1	1.2617	1.2304
238110	Poured Concrete Foundation and Structure Contractors	37	1.2612	1.2069
444210	Outdoor Power Equipment Stores	7	1.2586	1.3207
532230	Video Tape and Disc Rental	4	1.2563	1.4879
316213	Men's Footwear (except Athletic) Manufacturing	1	1.2545	1.1527
326212	Tire Retreading	1	1.2538	1.2347
712190	Nature Parks and Other Similar Institutions	3	1.2513	1.2691
445210	Meat Markets	11	1.2425	1.3004
541191	Title Abstract and Settlement Offices	16	1.2345	1.2055
334412	Bare Printed Circuit Board Manufacturing	2	1.2296	1.1543
337121	Upholstered Household Furniture Manufacturing	1	1.2294	1.1881
238910	Site Preparation Contractors	68	1.2293	1.2023
561910	Packaging and Labeling Services	2	1.2290	1.2234
624221	Temporary Shelters	2	1.2272	1.2064
623110	Nursing Care Facilities	24	1.2259	1.2233
236115	New Single-Family Housing Construction (except Operative Builders)	106	1.2213	1.2124
561611	Investigation Services	2	1.2213	1.2189
315228	Men's and Boys' Cut and Sew Other Outerwear Manufacturing	2	1.2212	1.2213
454113	Mail-Order Houses	8	1.2209	1.3044
721211	RV (Recreational Vehicle) Parks and Campgrounds	11	1.2187	1.3084
424520	Livestock Merchant Wholesalers	6	1.2177	1.3210
812331	Linen Supply	2	1.2146	1.1912
561422	Telemarketing Bureaus and Other Contact Centers	4	1.2129	1.2515
114210	Hunting and Trapping	1	1.2111	1.4776
447110	Gasoline Stations with Convenience Stores	148	1.2095	1.3234
713990	All Other Amusement and Recreation Industries	21	1.2062	1.3229
451110	Sporting Goods Stores	30	1.2007	1.3301
623210	Residential Mental Retardation Facilities	31	1.1999	1.2263
621310	Offices of Chiropractors	88	1.1924	1.1755
623220	Residential Mental Health and Substance Abuse Facilities	12	1.1923	1.2087
115210	Support Activities for Animal Production	9	1.1907	1.1278
624190	Other Individual and Family Services	32	1.1853	1.2069
532292	Recreational Goods Rental	6	1.1848	1.2921
532220	Formal Wear and Costume Rental	2	1.1831	1.3273
903612	Colleges, Universities, and Professional Schools (Local Government)	8	1.1785	1.1531
445299	All Other Specialty Food Stores	14	1.1762	1.3373
452990	All Other General Merchandise Stores	36	1.1744	1.3029
623312	Homes for the Elderly	38	1.1709	1.2114
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling	1	1.1594	1.1529
523991	Trust, Fiduciary, and Custody Activities	3	1.1577	1.2609
811411	Home and Garden Equipment Repair and Maintenance	2	1.1524	1.1875
624310	Vocational Rehabilitation Services	21	1.1498	1.2050
561790	Other Services to Buildings and Dwellings	10	1.1462	1.2048
812220	Cemeteries and Crematories	13	1.1448	1.2481
722310	Food Service Contractors	19	1.1440	1.3138
238170	Siding Contractors	13	1.1385	1.2084
423920	Toy and Hobby Goods and Supplies Merchant Wholesalers	2	1.1376	1.3417

Table 6.23 Six-Digit NAICS Code Industries in the MRRPC Region, by Highest Jobs Multiplier

NAICS Code	Description	Establishments	Total Jobs Multiplier	Total Earnings Multiplier
453110	Florists	24	1.1273	1.3314
722410	Drinking Places (Alcoholic Beverages)	275	1.1237	1.3027
713920	Skiing Facilities	1	1.1213	1.3277
115113	Crop Harvesting, Primarily by Machine	2	1.1156	1.1302
713120	Amusement Arcades	2	1.1046	1.3174
813410	Civic and Social Organizations	27	1.1039	1.3159
713950	Bowling Centers	11	1.1037	1.3213
485310	Taxi Service	3	1.0830	1.1626
611692	Automobile Driving Schools (Private)	3	1.0406	1.2058
711212	Racetracks	2	1.0306	1.2675

Source: EMSI Analyst

Actions to Promote the Stabilization, Retention and Expansion of the Economic Base and Quality Employment Opportunities

There are two major complementary outlooks on economic development: attraction of new businesses by giving them incentives to relocate here from outside the Region ("smokestack chasing"); and building on already existing economic strengths by nurturing development in industries that already have a natural presence ("economic gardening"). Both strategies have benefits, but in different respects. Smokestack chasing is unlikely to result in a big, new employer coming to the area very often; but when it does, the impact can be significant and will usually be felt immediately. As its colloquial name implies, smokestack chasing is associated with "old-economy" manufacturing and other industrial businesses that operated with hundreds of workers in a large, bricks-and-mortar location. Economic gardening, on the other hand, can result in many entrepreneurial, small employers getting established, but the results are likely to be gradual and hardly perceptible by casual observers of the economy, especially since such businesses were traditionally a visible part of the Region's economy. It is a view of economic development that has risen in prominence in recent decades, especially with the shift from a manufacturing to a services economy, and with the ability afforded by the internet for businesses to function without a physical location. Economic gardening involves encouraging and modestly accelerating business activities that would have happened anyway, while smokestack chasing involves the deliberate investment of time, money, and effort in the active pursuit of a business that would not otherwise be located in the Region.

Both perspectives have their place, but when resources are limited, it is prudent to invest them in efforts that will yield higher returns that could spill over into other areas of the economy. This is why the multiplier is an important factor to consider. It is also important to consider how often, and to what extent, businesses in the Region import their supplies and raw materials from outside the Region, and what opportunities exist for businesses within the Region to supply them instead. Finally, it is usually more cost-effective to build on already existing industries that are ready for grown than it is to seek out entirely new industries with which the workers, financial markets, and customers in the Region are unfamiliar. LQ is an important measurement for this consideration, since it will show which industries already have a strong concentration (and, one assumes, a competitive advantage) in the Region. A comparison of Tables 6.21, 6.22, and 6.23 shows which industries are already concentrated in the MRRPC Region, which ones seek their supplies and raw materials outside the Region, and which ones have the highest jobs and earnings multipliers.

One strategy is to target businesses that could move into the Region from elsewhere. The ideal businesses to encourage to move to the Region would be those that already have a high and/or growing LQ (so we know that the business environment for them is good), satisfy much of their supply and material requirements within the Region (so they would minimize "leakage" of capital), and have high jobs and earnings multipliers (so they would stimulate greater economic activity and prosperity in the larger economy).

Another strategy is to encourage businesses to establish themselves to offer import substitution. That is, when a major industry in the Region is buying a large amount of its supply and raw material requirements from outside the Region, there is an opportunity for a business in the Region to step in and supply it instead. That would reduce "leakage" in the Region's economy, and stimulate economic multiplier effects.

A third strategy is to encourage the growth or relocation of businesses in industries with high jobs and/or earnings multipliers. Higher LQ for that industry would again show that the business climate is favorable in the Region, and a lower level of satisfying its requirements outside the Region would indicate that the industry does not contribute to "leakage" in the Region's economy. Some common sense should guide this effort, however, since some industries have very high multipliers, but are unsuitable in the Region for any number of reasons. For example, the Region may lack a critical natural resource for that industry: oil and gas drilling could have a large jobs multiplier, but since there is no oil or gas to drill for in the MRRPC Region, oil exploration companies are a poor fit. Also, the Region's climate or landscape could be inhospitable for some industries. Certain cold-water fisheries could have a large jobs multiplier, but since the MRRPC Region is not along the shores of a cold ocean, businesses in that industry would be a poor fit.

Some creativity also has to go into the decision on which industries to target for economic development. If one industry is already well established and highly visible in the Region, but another industry usually closely associated with it is nearly absent (very low LQ), then perhaps that associated industry should be targeted for development. For example, it could start as a side project of a leading business in the well-established industry.

Analysis of Strengths and Weaknesses to Attract and Retain Desired Businesses and Industries

The five NAICS codes in the MRRPC Region with an LQ of at least 1.25 with the highest LQ, lowest percentage of requirements satisfied outside the Region, and highest total jobs multiplier are listed in Table 6.24.

Table 6.24 Industries in MRRPC Region with highest LQ, Lowest Percentages of Requirements Satisfied Outside the Region, and Highest Total Jobs Multiplier

NAICS Code*	Description	2014 National Location Quotient (LQ)	% of Requirements Satisfied outside the Region	Total Jobs Multiplier
212322	Industrial Sand Mining	56.72	20.31	1.90
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	46.70	21.54	2.03
327910	Abrasive Product Manufacturing	67.30	7.93	1.64
332410	Power Boiler and Heat Exchanger Manufacturing	17.97	3.87	1.69
423390	Other Construction Material Merchant Wholesalers	8.26	24.56	1.63

* NAICS codes with LQ < 1.25 were excluded from this analysis.

Source: EMSI Analyst

All five of these NAICS codes grew in national LQ in the Region from 2009 to 2014. Not only have these industries grown in the Region and strengthened Regional specialties in the skills and knowledge associated with them, but they did so during the aftermath of the Great Recession, the longest, deepest, and worst economic downturn in the United States since the Great Depression of the 1930s. These industries have shown resilience and promise for the future, and would be good candidates for economic development efforts.

Green Energy & Sustainability Resources and Opportunities

Chapter 4, Utilities and Community Facilities, examines opportunities for energy generation in ways that do not rely on burning fossil fuels. In addition to reducing the amount of greenhouse gases released into the environment, generating energy through alternative means can have a positive impact on the Regional economy, since fossil fuels are extracted and refined outside this Region, and paying for them represents a large proportion of the "leakage" in the Regional economy. Energy produced in the MRRPC Region would be cheaper than fossil fuels to access and transport, sustainable, and more stable in price than fossil fuels.

As discussed in Chapter 4, the Region's alternative energy-generation resources, in the form of solar, wind, hydroelectric, and biofuels, are very small in comparison with its energy-generation from fossil fuels. Some of the Region's reluctance to adopt greener energy technology is explained by climate and topography: the sun and wind resources here are not as rich as they are in, say, Arizona and North Dakota, respectively. Hydroelectric generation on dams in the Mississippi River raise concerns about transportation, tourism, wildlife, utilities, and recreation; but the prospect of hydroelectric energy generation shows promise to provide enough energy to power perhaps a quarter of the homes in the MRRPC Region. Currently, however, the coal-fired power plants in the Region produce such a surplus of energy that the Region's needs are well met by them, and their excess energy is sold in areas outside the Region. Therefore, the demand for energy generation from non-fossil-fuel sources is not economically driven, but instead comes from motivations regarding environmental protection, preventing economic leakage, etc.

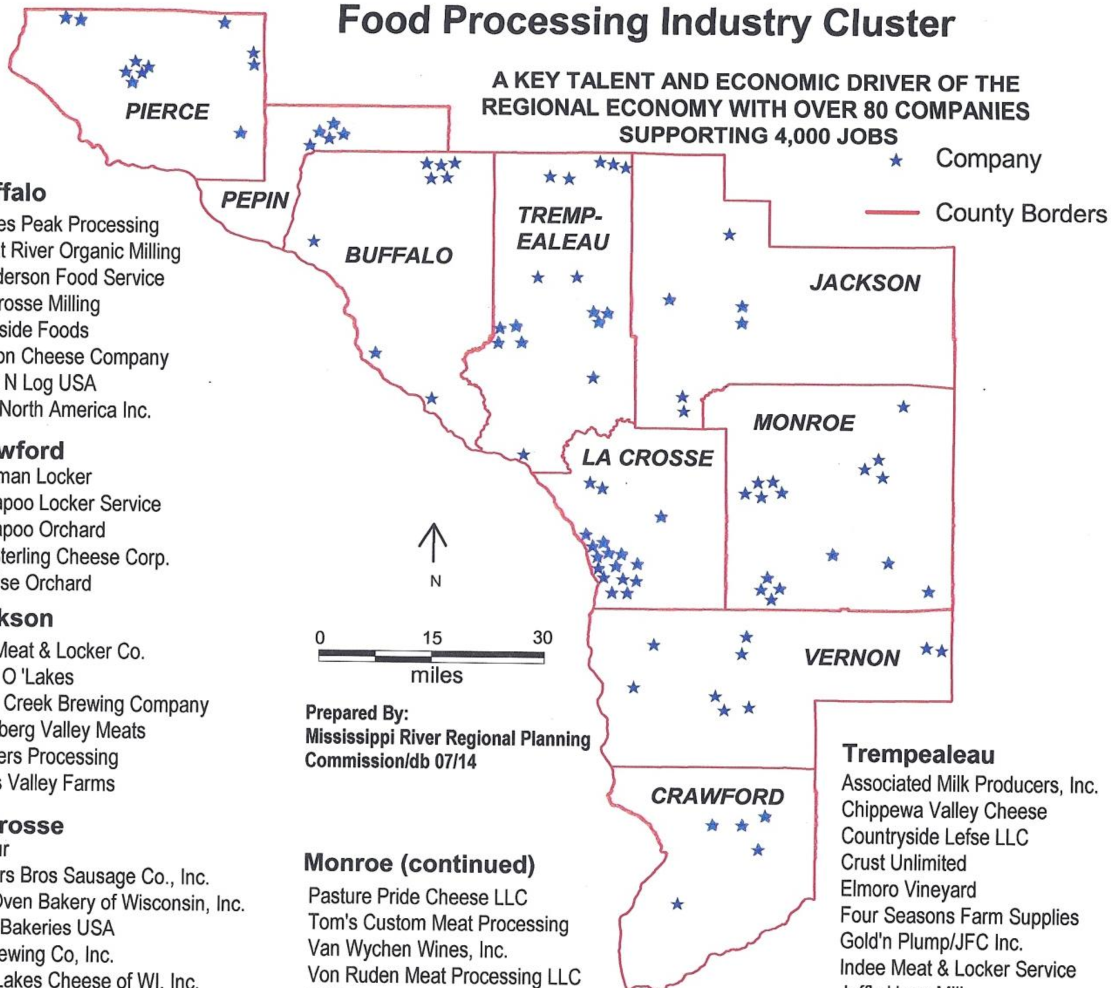
The economic potential for alternative energy in the fimmediate future does not lie with utility-scale power generation, but instead with individual homeowners and businesses who see a benefit in being more energy-independent, less tied to an energy source that fluctuates in price and has insecure sources, and pollutes the environment with greenhouse gases and other dangerous chemicals. One area of alternative fuels that shows real economic promise in the MRRPC Region is woody biomass, specifically wood pellets. The *Kickapoo Valley Solid Biofuel and Wood Product Feasibility Study* examined the forest and wood products businesses that exist in an informal cluster in the Kickapoo Valley, and found that a wood-pellet production operation could be economically feasible there if it were established as a sideline of an existing wood products business. Wood waste generated by the company's production would currently be something the business would have to dispose of at some cost. Instead, the business could invest in a pellet press and use the wood waste to produce pellets, which could be sold locally. Enough energy users in the Kickapoo Valley counties, especially in rural parts, use more expensive forms of heating, such as electricity, fuel oil, and propane, that switching to wood pellets to heat their homes could be economically feasible. The study recommends the establishment of a modest, 10,000-ton-per-year pellet plant as an adjunct to an existing and established wood products company. The study indicates that such a plant could stimulate the creation of 18 jobs (less than half of those would be at the plant) and have a total economic impact of $2.2 million per year.

Regional Economic Development Goals and Recommendations

Regional economic development goals and recommendations are listed in Chapter 9 – Implementation.

MAP 6.01
Food Processing Industry Cluster

A KEY TALENT AND ECONOMIC DRIVER OF THE REGIONAL ECONOMY WITH OVER 80 COMPANIES SUPPORTING 4,000 JOBS



Buffalo
- Eagles Peak Processing
- Great River Organic Milling
- Gunderson Food Service
- La Crosse Milling
- Lakeside Foods
- Nelson Cheese Company
- Peck N Log USA
- SPF North America Inc.

Crawford
- Eastman Locker
- Kickapoo Locker Service
- Kickapoo Orchard
- Mt. Sterling Cheese Corp.
- Sunrise Orchard

Jackson
- A-C Meat & Locker Co.
- Land O 'Lakes
- Sand Creek Brewing Company
- Sandberg Valley Meats
- Shelters Processing
- Swiss Valley Farms

La Crosse
- Agropur
- Bakalars Bros Sausage Co., Inc.
- Brick Oven Bakery of Wisconsin, Inc.
- Bimbo Bakeries USA
- City Brewing Co, Inc.
- Great Lakes Cheese of WI, Inc.
- Holmen Locker Service
- Kwik Trip Bakery
- Kwik Trip Dairy
- Linda's Salem Bakery Inc.
- Mark's Meats & Processsing
- Pearl Street Brewery
- Pleasing Seasonings
- Ranison Ice Cream and Candy
- St. Joes's Country Market
- Sweet-Shop
- WIS-PAK, Inc.

Monroe
- Century Foods Int'l LLC
- Coulee Country Wines
- Don's Quality Meat Service
- Foremost Farms USA
- Foss Fine Meats Inc.
- JD's Country Meats
- K & K Cheese
- Mars Petcare US Inc.
- Old Country Cheese
- Ocean Spray Cranberries, Inc.

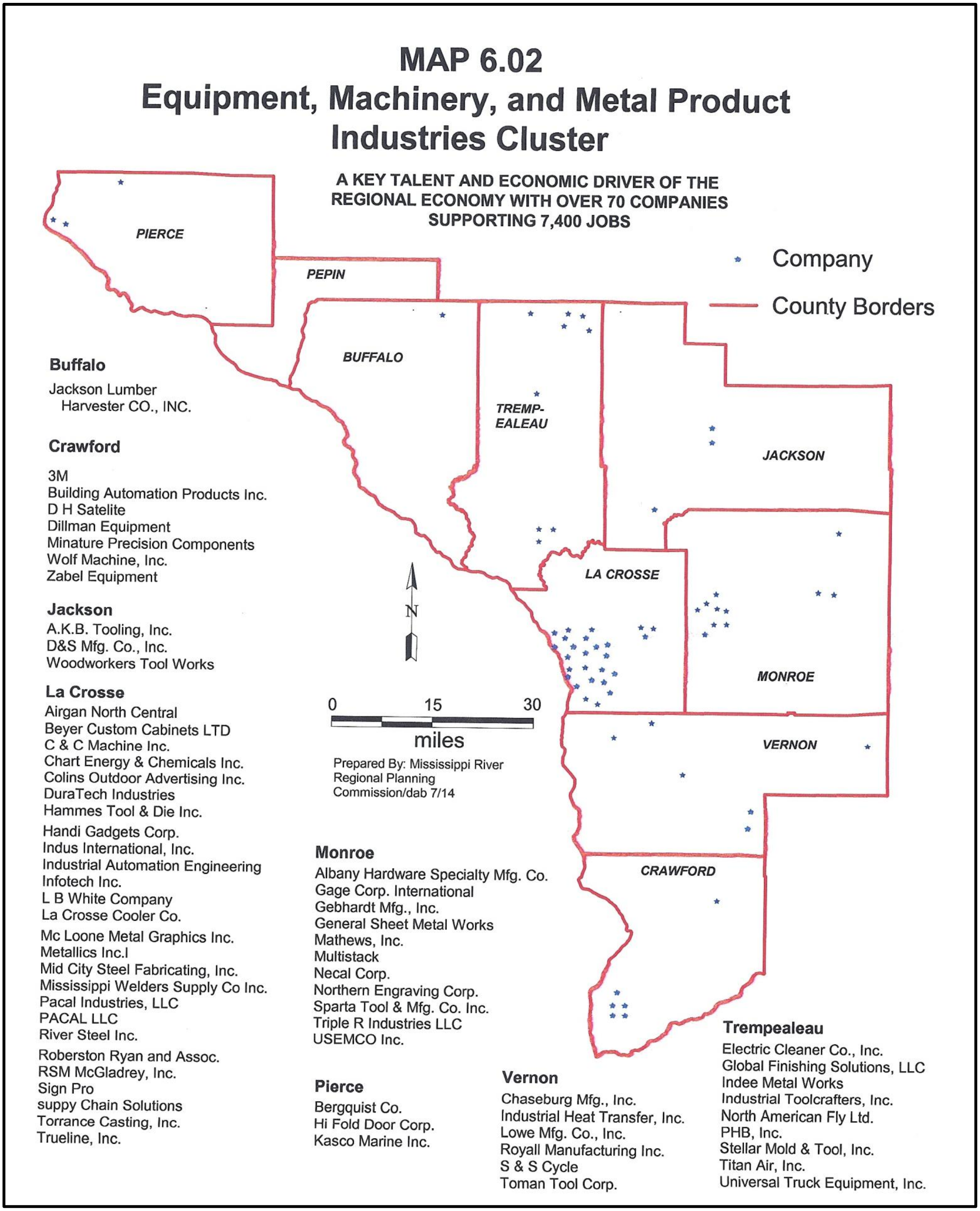
Monroe (continued)
- Pasture Pride Cheese LLC
- Tom's Custom Meat Processing
- Van Wychen Wines, Inc.
- Von Ruden Meat Processing LLC
- VPP Group, Inc.
- Wally's Block LLC
- Wisconsin Hill & Valley Cheese

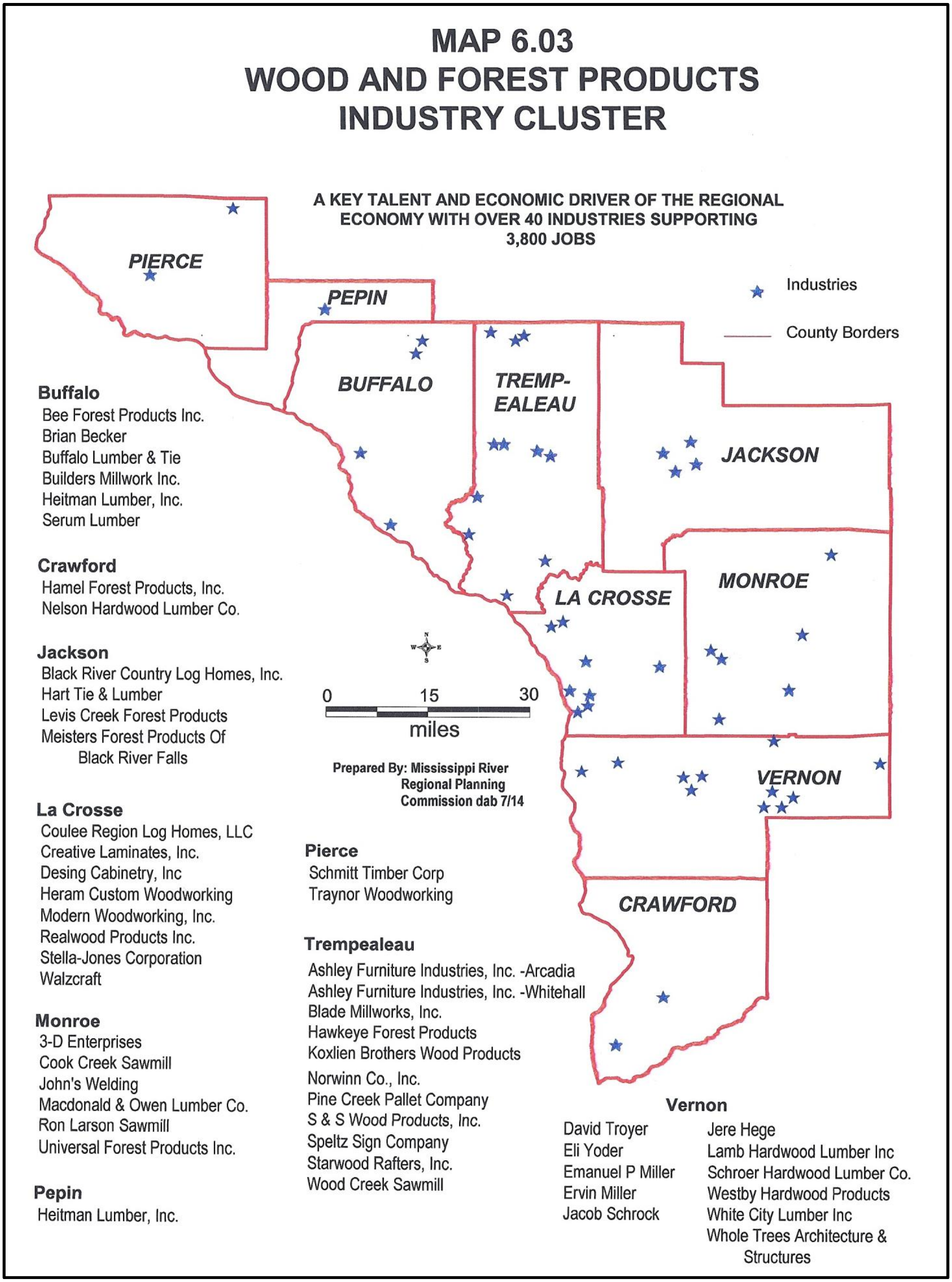
Pepin
- Durand Bakery
- Durand Smokehouse
- Eau Galle Cheese Factory, Inc.
- Maloney's Baloney
- The MBP Co. LLC

Pierce
- Best Maid Cookie Co., Inc.
- Deaton Nutrition
- Ellsworth Co-op Creamery, Inc.
- Kaufolds Kurd's Inc.
- Nat'l Nut Company of America LTD
- Pierce County Meats
- River Chocolate Co. LLC
- Sailer's Food Market & Meat Proc, Inc.
- Spring Valley Bakery
- Watkins Locker Inc.
- Western WI Dried Products

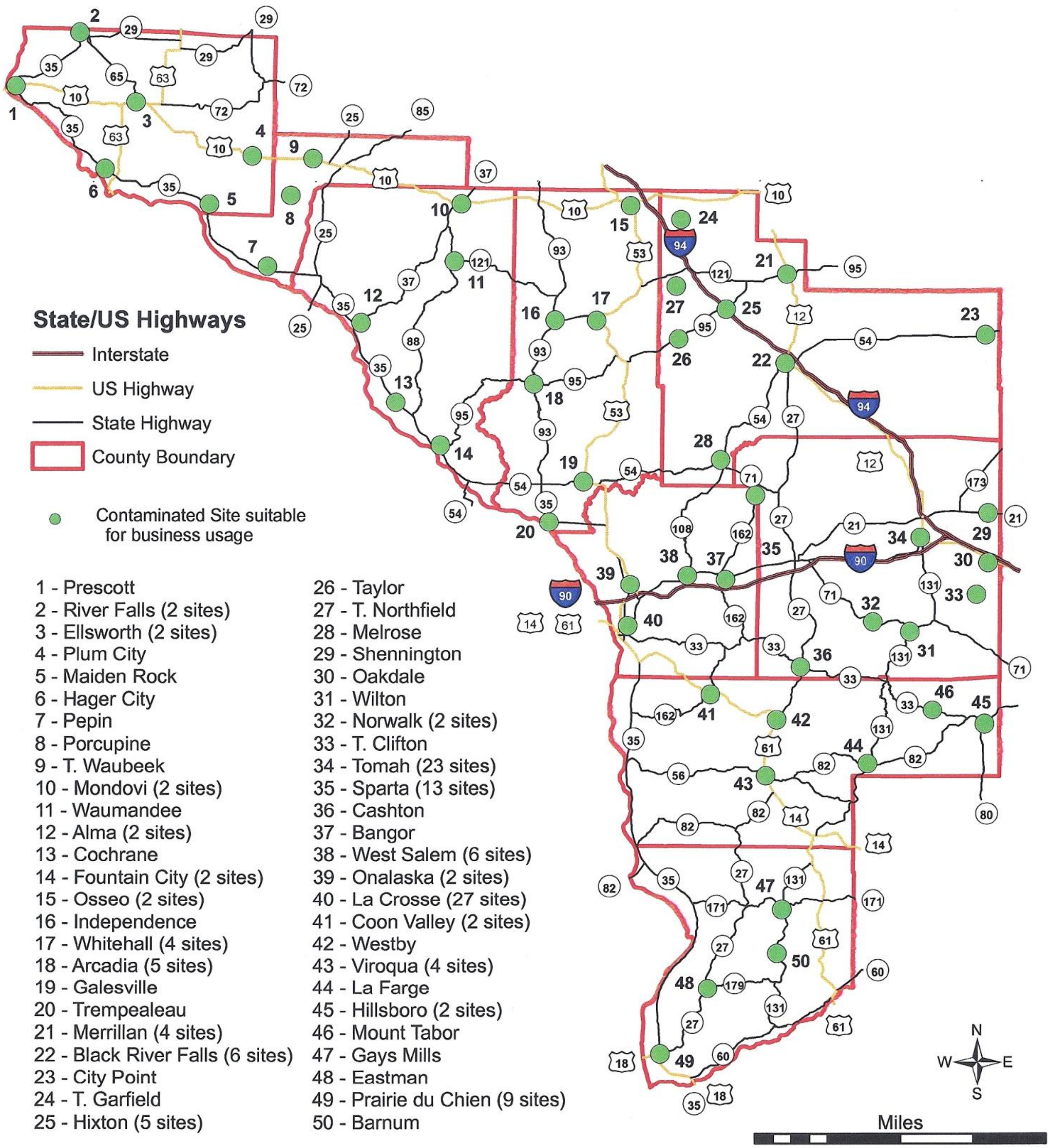
Trempealeau
- Associated Milk Producers, Inc.
- Chippewa Valley Cheese
- Countryside Lefse LLC
- Crust Unlimited
- Elmoro Vineyard
- Four Seasons Farm Supplies
- Gold'n Plump/JFC Inc.
- Indee Meat & Locker Service
- Jeff's Hegg Mill
- Norske Nook Bakery
- Ocean Nutrition (US) Inc.
- Pat & Sons, LTD
- Pats Country Market LLC
- Quality Meats
- Sandstone Ridge Vineyard
- Strum Locker Plant
- Tenba Ridge Winery
- Whitehall Specialties Inc.
- Wildwood Speciality Foods Inc.

Vernon
- Cakery & Bake Shop LLC
- Key Ingredients LLC
- Hidden Springs Creamery
- Morning Glory Farms
- Nordic Creamery Cheese
- Organic Valley Chaseburg Creamery
- Steve's Country Meats
- Vernon Vineyards LTD
- Westby Co-op Creamery
- Westby Locker & Meats


MAP 6.02
Equipment, Machinery, and Metal Product Industries Cluster
A KEY TALENT AND ECONOMIC DRIVER OF THE REGIONAL ECONOMY WITH OVER 70 COMPANIES SUPPORTING 7,400 JOBS
Company
County Borders
PIERCE
PEPIN
BUFFALO
TREMP-EALEAU
JACKSON
LA CROSSE
MONROE
VERNON
CRAWFORD
N
0 15 30
miles
Prepared By: Mississippi River Regional Planning Commission/dab 7/14
Buffalo
Jackson Lumber
Harvester CO., INC.
Crawford
3M
Building Automation Products Inc.
D H Satelite
Dillman Equipment
Minature Precision Components
Wolf Machine, Inc.
Zabel Equipment
Jackson
A.K.B. Tooling, Inc.
D&S Mfg. Co., Inc.
Woodworkers Tool Works
La Crosse
Airgan North Central
Beyer Custom Cabinets LTD
C & C Machine Inc.
Chart Energy & Chemicals Inc.
Colins Outdoor Advertising Inc.
DuraTech Industries
Hammes Tool & Die Inc.
Handi Gadgets Corp.
Indus International, Inc.
Industrial Automation Engineering
Infotech Inc.
L B White Company
La Crosse Cooler Co.
Mc Loone Metal Graphics Inc.
Metallics Inc.l
Mid City Steel Fabricating, Inc.
Mississippi Welders Supply Co Inc.
Pacal Industries, LLC
PACAL LLC
River Steel Inc.
Roberston Ryan and Assoc.
RSM McGladrey, Inc.
Sign Pro
suppy Chain Solutions
Torrance Casting, Inc.
Trueline, Inc.
Monroe
Albany Hardware Specialty Mfg. Co.
Gage Corp. International
Gebhardt Mfg., Inc.
General Sheet Metal Works
Mathews, Inc.
Multistack
Necal Corp.
Northern Engraving Corp.
Sparta Tool & Mfg. Co. Inc.
Triple R Industries LLC
USEMCO Inc.
Pierce
Bergquist Co.
Hi Fold Door Corp.
Kasco Marine Inc.
Vernon
Chaseburg Mfg., Inc.
Industrial Heat Transfer, Inc.
Lowe Mfg. Co., Inc.
Royall Manufacturing Inc.
S & S Cycle
Toman Tool Corp.
Trempealeau
Electric Cleaner Co., Inc.
Global Finishing Solutions, LLC
Indee Metal Works
Industrial Toolcrafters, Inc.
North American Fly Ltd.
PHB, Inc.
Stellar Mold & Tool, Inc.
Titan Air, Inc.
Universal Truck Equipment, Inc.

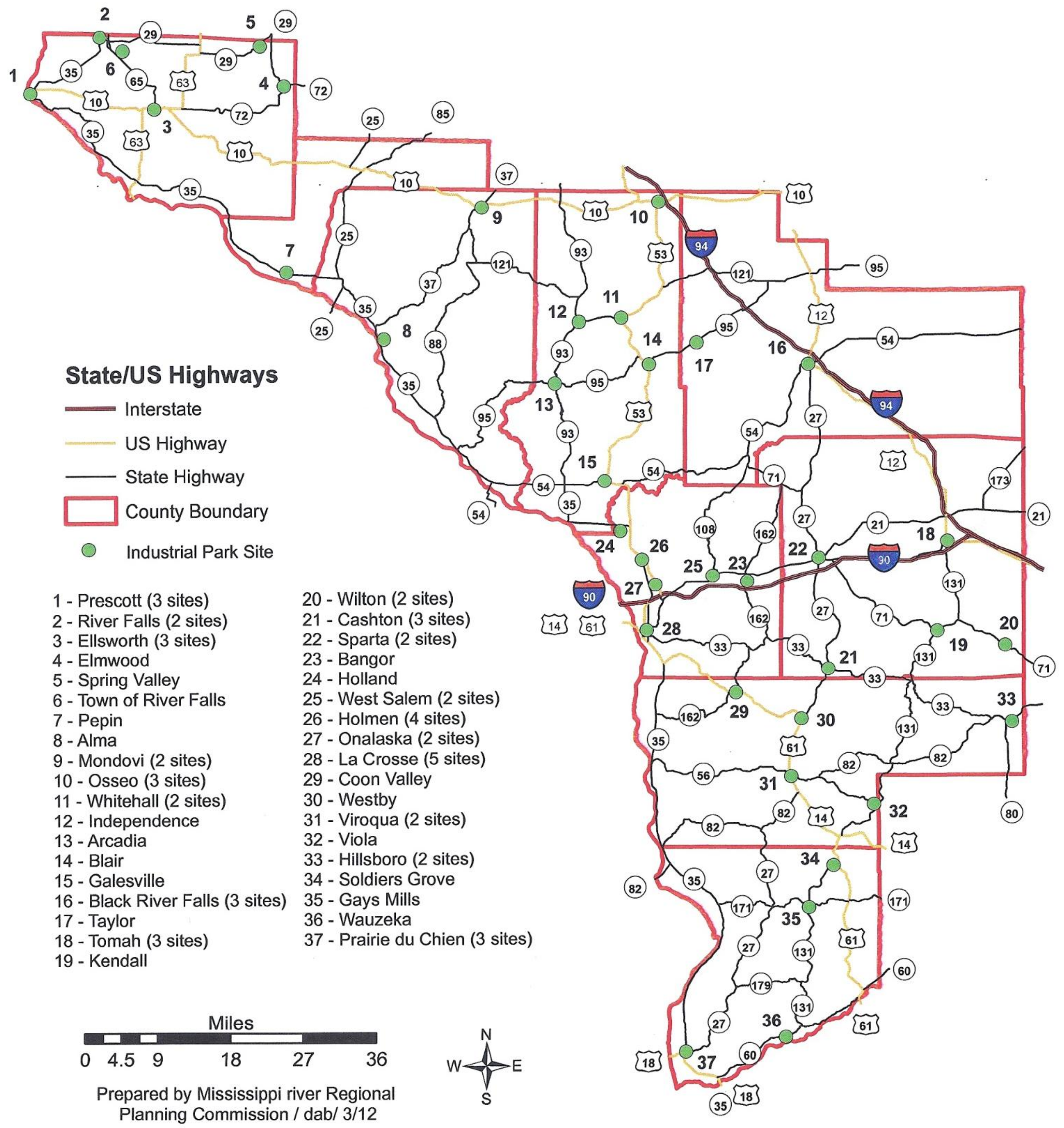

MAP 6.03
WOOD AND FOREST PRODUCTS
INDUSTRY CLUSTER
A KEY TALENT AND ECONOMIC DRIVER OF THE REGIONAL
ECONOMY WITH OVER 40 INDUSTRIES SUPPORTING
3,800 JOBS
Industries
County Borders
PIERCE
PEPIN
BUFFALO
TREMP-
EALEAU
JACKSON
MONROE
LA CROSSE
VERNON
CRAWFORD
0
15
30
miles
Prepared By: Mississippi River
Regional Planning
Commission dab 7/14
Buffalo
Bee Forest Products Inc.
Brian Becker
Buffalo Lumber & Tie
Builders Millwork Inc.
Heitman Lumber, Inc.
Serum Lumber
Crawford
Hamel Forest Products, Inc.
Nelson Hardwood Lumber Co.
Jackson
Black River Country Log Homes, Inc.
Hart Tie & Lumber
Levis Creek Forest Products
Meisters Forest Products Of
Black River Falls
La Crosse
Coulee Region Log Homes, LLC
Creative Laminates, Inc.
Desing Cabinetry, Inc
Heram Custom Woodworking
Modern Woodworking, Inc.
Realwood Products Inc.
Stella-Jones Corporation
Walzcraft
Monroe
3-D Enterprises
Cook Creek Sawmill
John's Welding
Macdonald & Owen Lumber Co.
Ron Larson Sawmill
Universal Forest Products Inc.
Pepin
Heitman Lumber, Inc.
Pierce
Schmitt Timber Corp
Traynor Woodworking
Trempealeau
Ashley Furniture Industries, Inc. -Arcadia
Ashley Furniture Industries, Inc. -Whitehall
Blade Millworks, Inc.
Hawkeye Forest Products
Koxlien Brothers Wood Products
Norwinn Co., Inc.
Pine Creek Pallet Company
S & S Wood Products, Inc.
Speltz Sign Company
Starwood Rafters, Inc.
Wood Creek Sawmill
Vernon
David Troyer
Eli Yoder
Emanuel P Miller
Ervin Miller
Jacob Schrock
Jere Hege
Lamb Hardwood Lumber Inc
Schroer Hardwood Lumber Co.
Westby Hardwood Products
White City Lumber Inc
Whole Trees Architecture &
Structures

Map 6.04
Environmentally Contaminated Sites Suitable for Business Usage



Prepared by Mississippi river Regional Planning Commission / dab/ 7/14

Map 6.05
Mississippi River Region
Industrial Park Locations



MAP 6.06
SITES SUITABLE FOR BUSINESS & INDUSTRY EXPANSION IN THE MISSISSIPPI RIVER REGION
LISTED ON "LOCATE IN WISCONSIN" JULY 2014