

SHERBURNE COUNTY FUTURES WORKSHOP

MAY 8, 2014

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WELCOME!

- Sherburne County's economy
- Selecting industries for further analysis

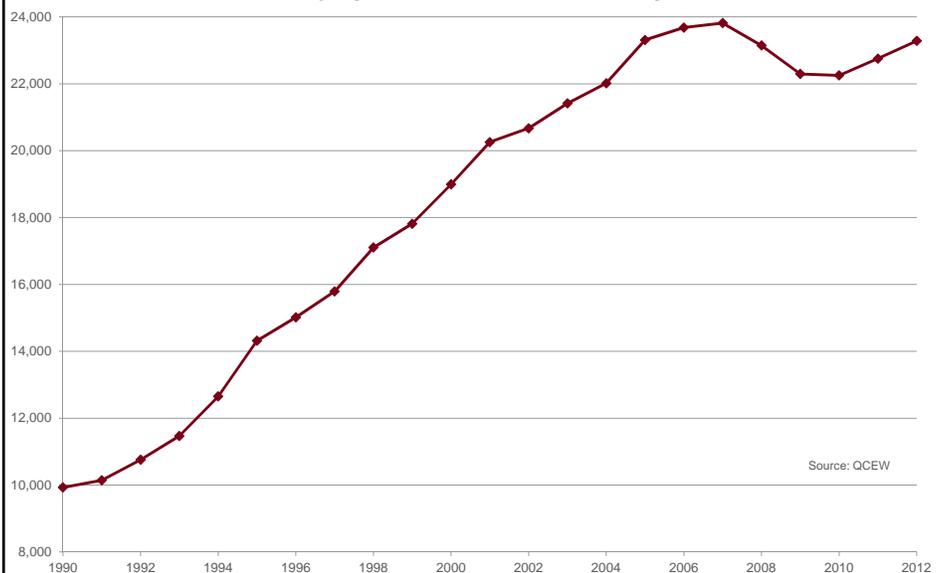


SHERBURNE COUNTY Employment Overview

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Employment in Sherburne County



Source: QCEW

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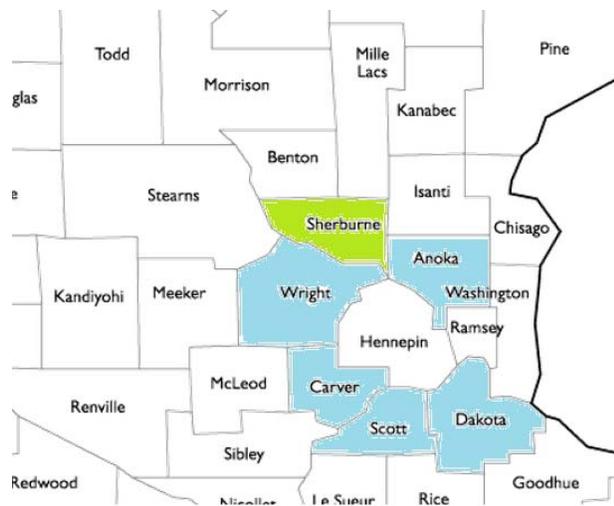
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EMPLOYMENT CHANGE

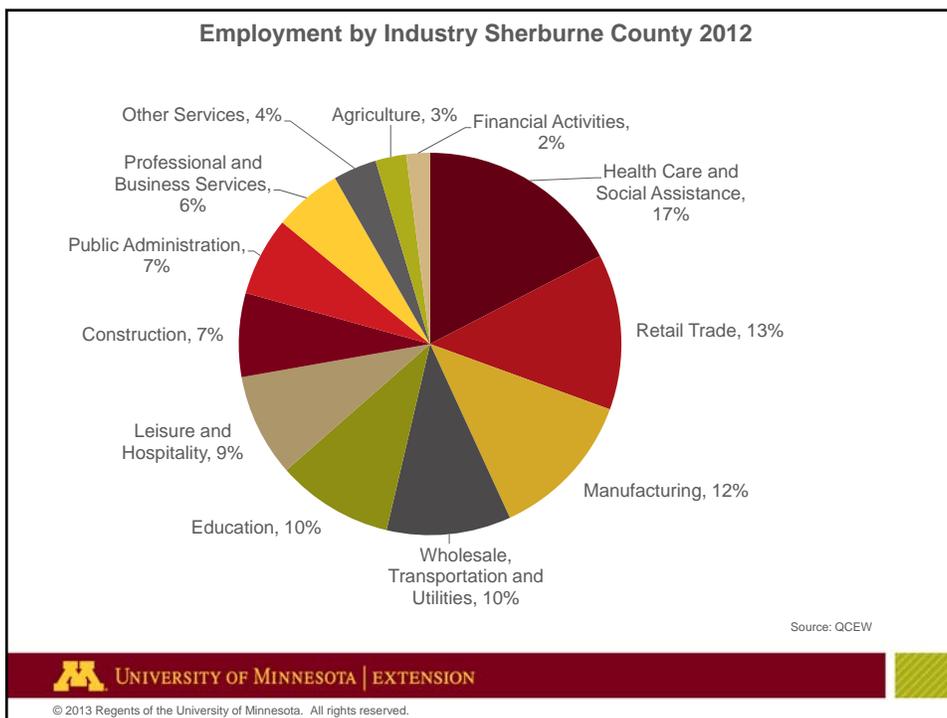
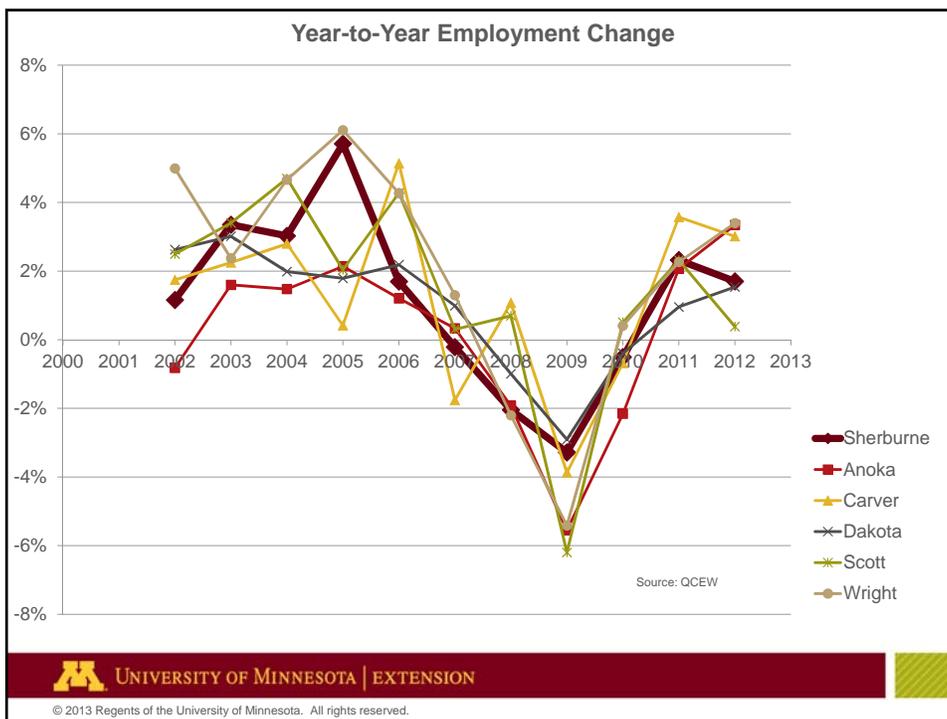
County	1990	2000	2012	Change 1990-2000	Change 2000-2012	Change 1990-2012
Sherburne	9,931	18,993	23,283	91%	23%	134%
Anoka	77,361	108,692	110,820	40%	2%	43%
Carver	16,975	28,729	33,732	69%	17%	99%
Dakota	102,609	153,031	172,715	49%	13%	68%
Scott	18,460	34,545	41,662	87%	21%	126%
Wright	17,574	28,675	37,092	63%	29%	111%

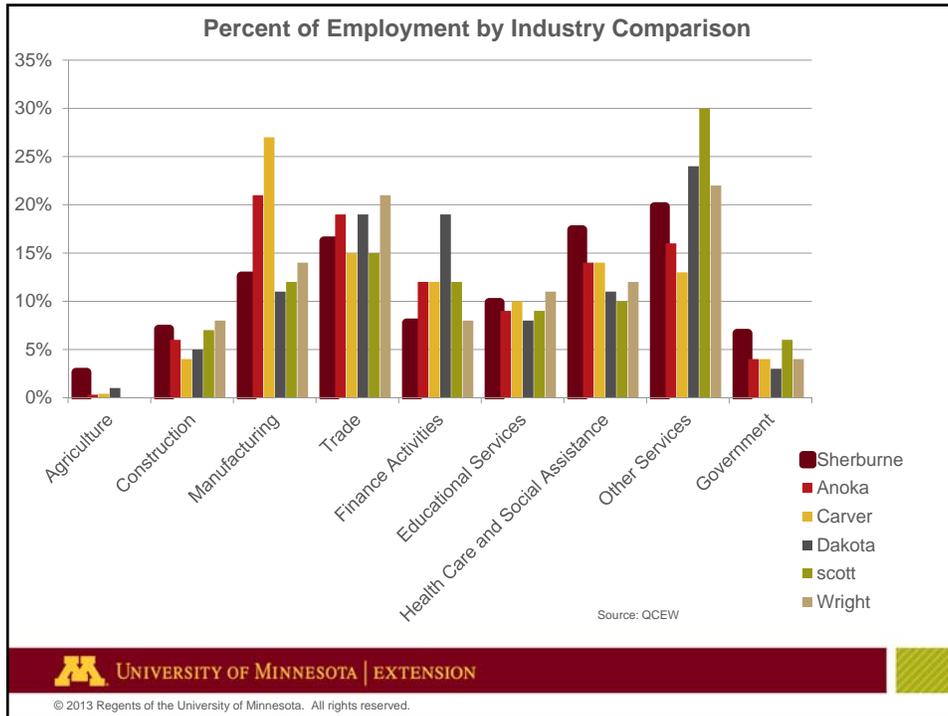
Source: QCEW

GEOGRAPHY WE ANALYZED



Characteristics:
Ring counties of the Twin Cities Metro area.





SHIFT-SHARE ANALYSIS: SHERBURNE CO.

Sector	Change 2001-2012	National Growth Component	Industrial Mix Component	Competitive Share Component
Education & Health Services	2,638	60	701	1,877
Government	1,093	1	1	1,091
Professional and Business Services	370	16	76	278
Other Services	180	11	49	120
Manufacturing	42	47	-837	832
Agriculture, Forestry, Fishing and Hunting	25	4	0	21
Leisure and Hospitality	-20	33	286	-339
Natural Resources and Mining	-65	7	60	-131
Trade, Transportation & Utilities	-114	92	-230	24
Financial Activities	-165	10	-24	-151
Construction	-169	29	-334	136
Information	-210	6	-94	-121

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Source: Georgia Stats, based on CEW data
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SHIFT-SHARE COMPARISON

SHIFT-SHARE COMPARISON					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Sherburne	3,028	320	-470	3,178	104.9%
Anoka	1,300	1,729	-4,745	4,316	332%
Carver	4,031	469	-1,902	5,464	135.5%
Dakota	17,046	2,458	-3,919	18,507	108.6%
Scott	5,578	570	-788	5,796	103.9%
Wright	7,160	473	-852	7,540	105.3%

Anoka – even though they had a bad industrial mix they still managed to add jobs



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EMPLOYMENT CHANGE – SHIFT SHARE COMPARISON

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Sherburne County's employment growth rate exceeded or was on par with similar counties.



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Source: QCEW – Data is rounded

EMPLOYMENT CHANGE – SHIFT SHARE COMPARISON

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320 jobs were gained in the county as a result of the overall growth of employment nationally



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Source: QCEW – Data is rounded

EMPLOYMENT CHANGE – SHIFT SHARE COMPARISON

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The local industrial mix of Sherburne Co. declined nationally resulting in 470 job losses in the County.



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EMPLOYMENT CHANGE – SHIFT SHARE COMPARISON

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Businesses in Sherburne County added 3178 more jobs than would have been expected given national and industrial trends



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EMPLOYMENT CHANGE – SHIFT SHARE COMPARISON

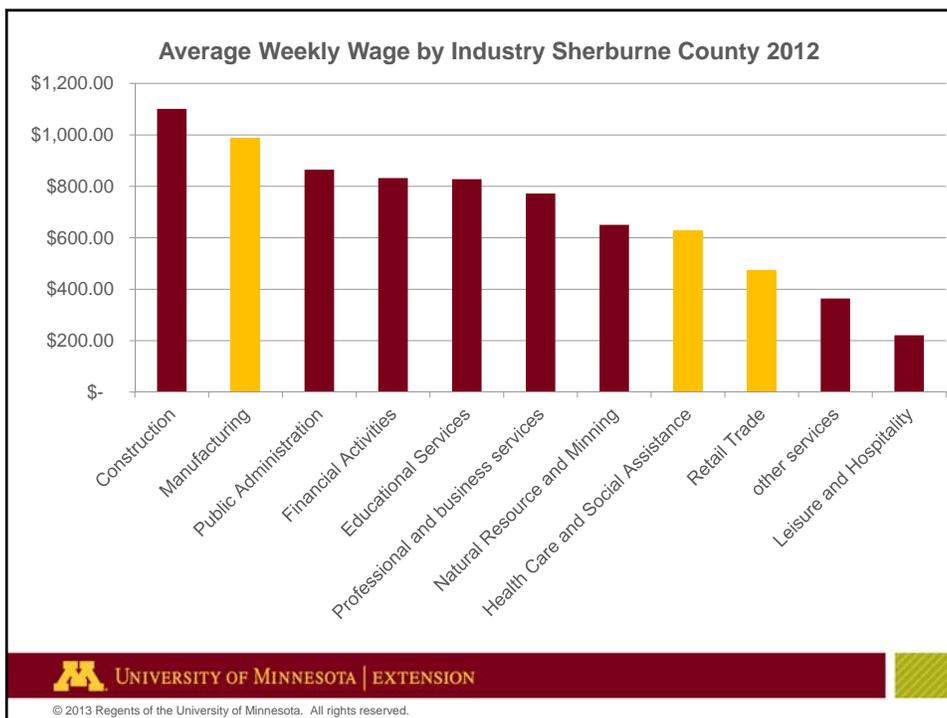
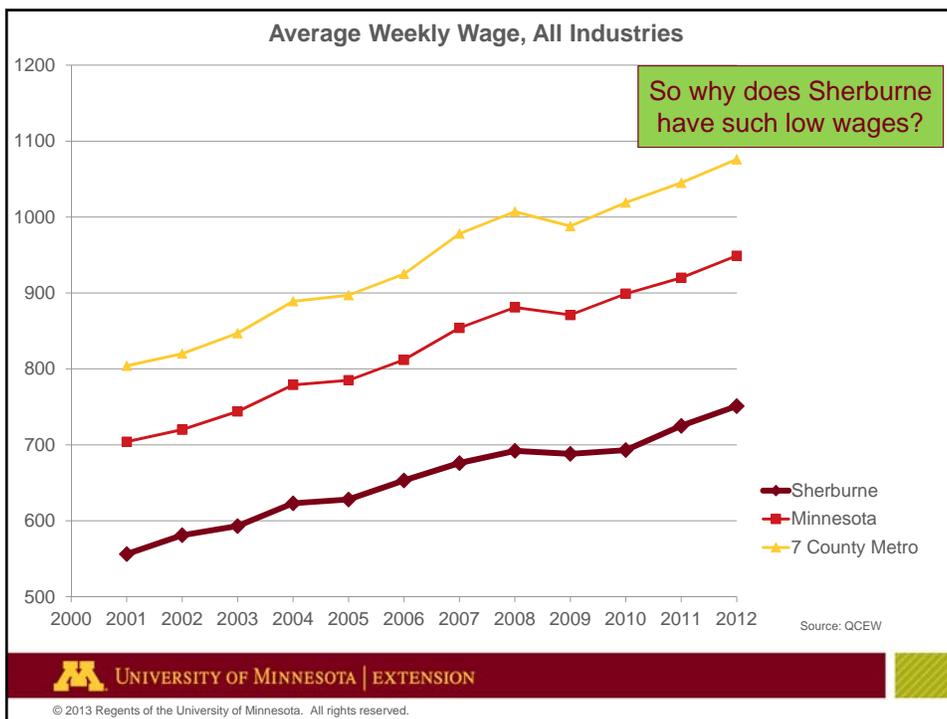
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Overall 104.9 % of the jobs during the time period were derived from the competitive share of the Sherburne County economy.



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INDUSTRIES FOR FURTHER STUDY

- Health services
 - Office of Health Practitioners
- Retail trade
 - General Merchandise
- Manufacturing
 - Fabricated metal
- Agriculture
 - Grain Farming
- Utilities
 - Electric power generation, transmission, and distribution



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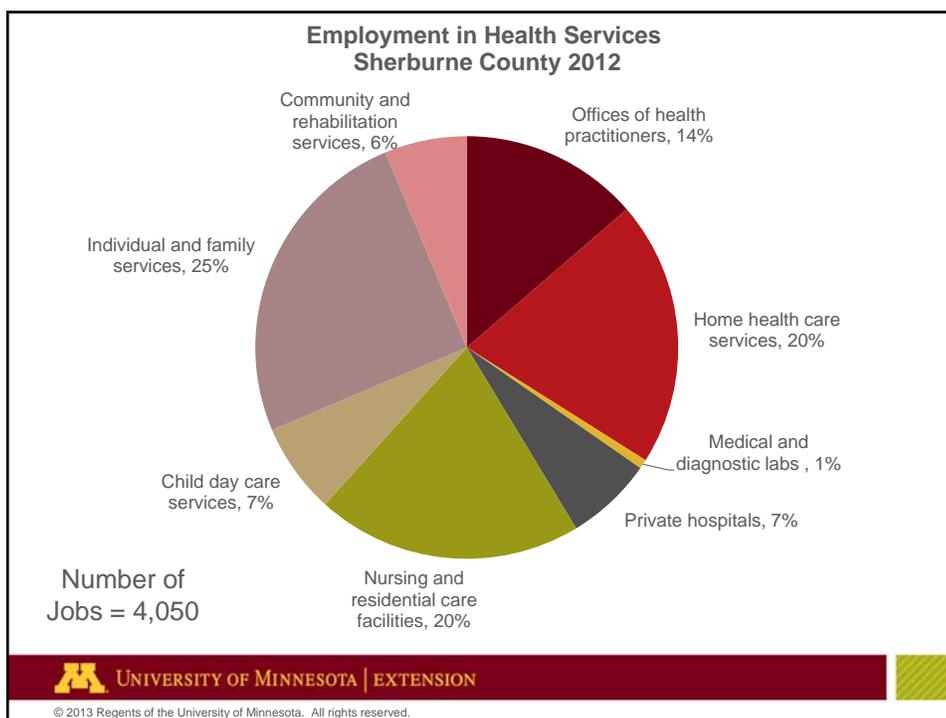
SHERBURNE COUNTY

A closer look at
“Health Services”



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HEALTH SERVICES: SHERBURNE COUNTY

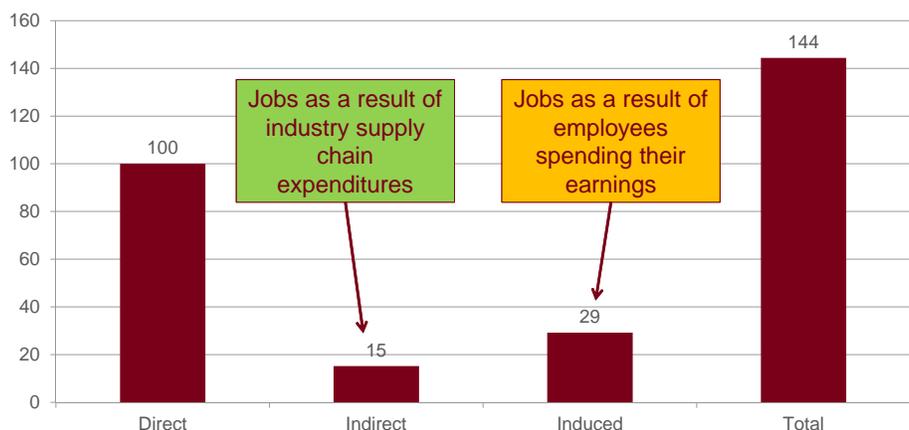
- 4,054 employees
- \$313 million in output generated
- \$165 million in labor income
- 140 establishments (QCEW)
- 35% of expenditures are for inputs
 - Pharmaceuticals, real estate, and insurance
- 65% are for labor
 - Average weekly wage: \$629 (QCEW)

SHIFT-SHARE ANALYSIS

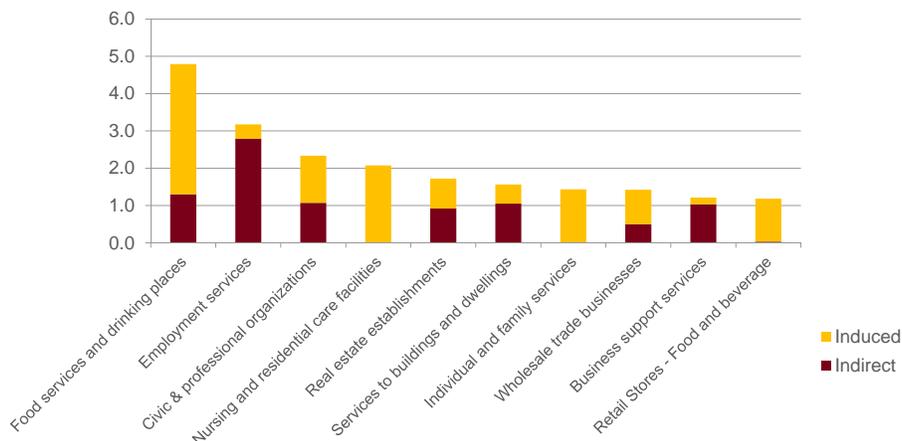
SHIFT-SHARE SHERBURNE COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Health Services	2,219	29	512	1,678	75.6%

Source: EMSI, based on CEW data

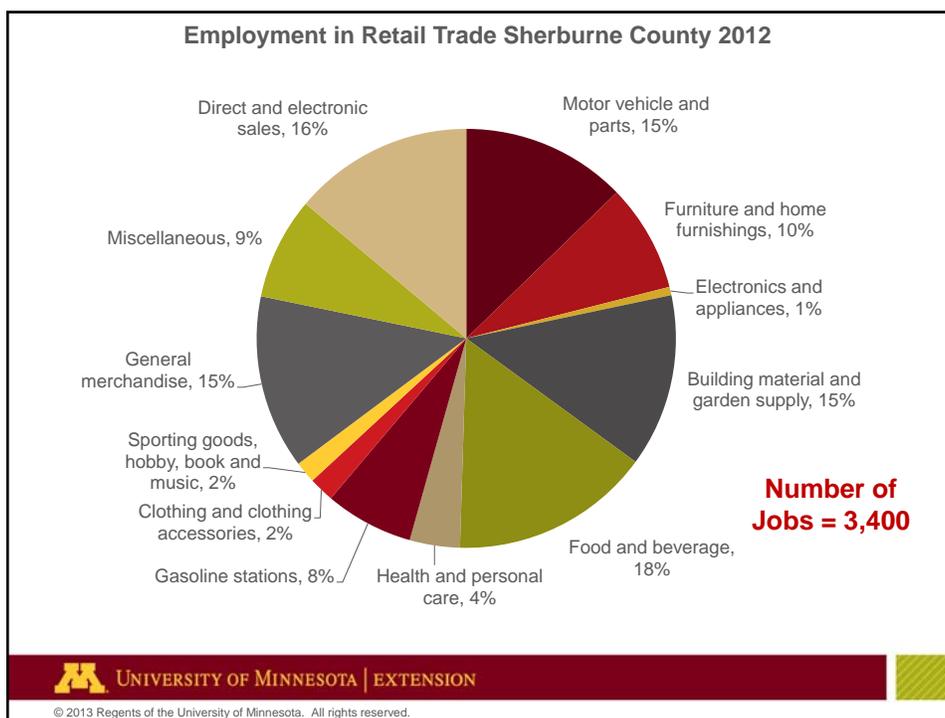
OFFICE OF HEALTH PRACTITIONERS: SHERBURNE COUNTY



OFFICE OF HEALTH PRACTITIONERS : TOP INDUSTRIES AFFECTED



SHERBURNE COUNTY Retail Trade



RETAIL TRADE: SHERBURNE COUNTY

- 3,442 employees
- 190 establishments (QCEW)
- \$209 million in output generated
- \$74 million in labor income
- 22% of expenditures for inputs
 - Real estate, advertising, and banking
- 78% of expenditures for labor
 - Average weekly wage: \$472 (QCEW)

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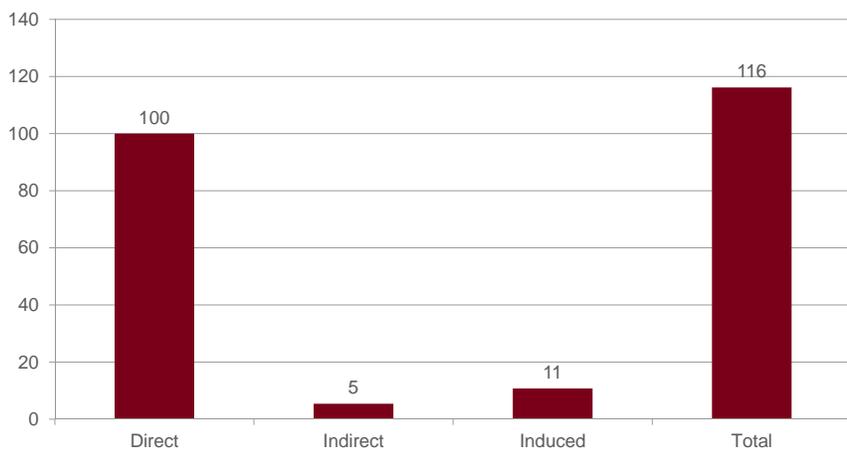
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SHIFT-SHARE ANALYSIS

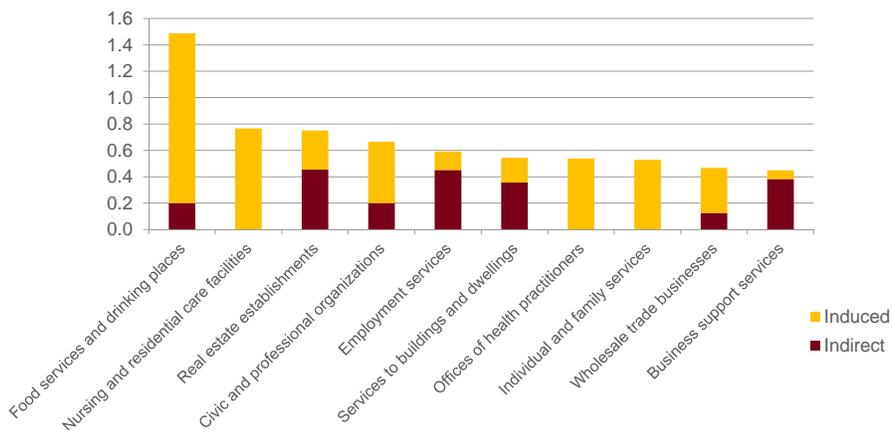
SHIFT-SHARE SHERBURNE COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Retail Trade	-393	54	-126	-321	-81.6%

Source: EMSI, based on CEW data

GENERAL MERCHANDISE: SHERBURNE COUNTY



GENERAL MERCHANDISE: TOP INDUSTRIES AFFECTED



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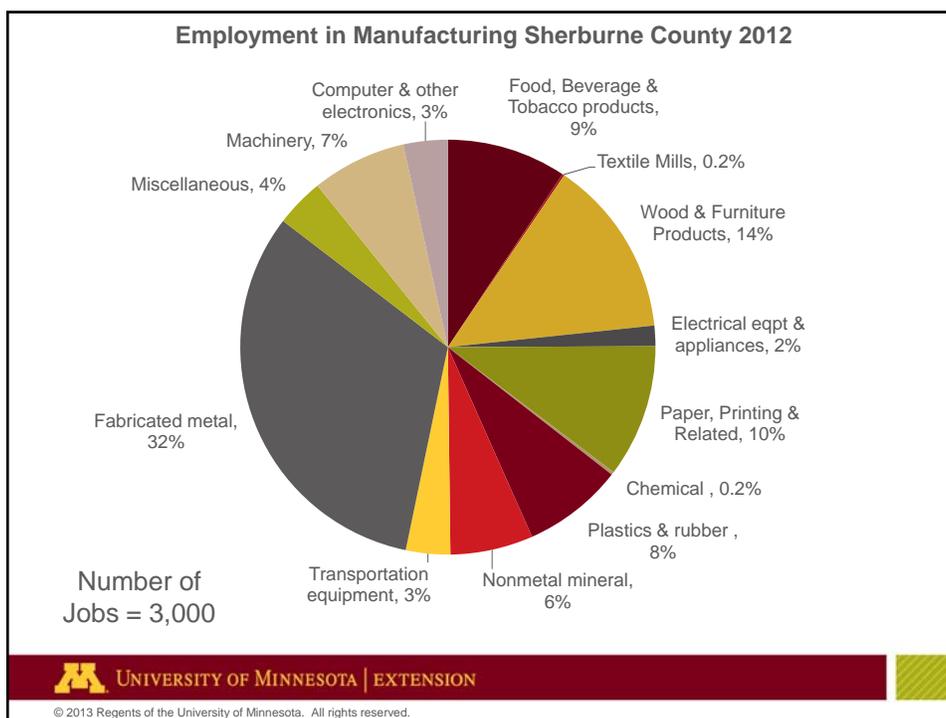
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SHERBURNE COUNTY

Employment in Manufacturing

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MANUFACTURING: SHERBURNE COUNTY

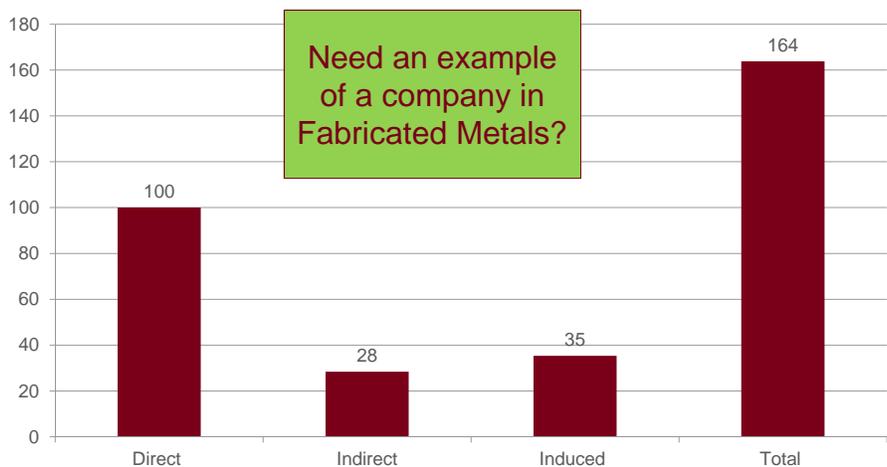
- 3,035 employees
- 139 establishments (QCEW)
- \$1.07 billion in output generated
- \$212 million in labor income
- 68% of expenditures for inputs
 - Iron and steel, aluminum, wholesale trade
- 32% of expenditures for labor
 - Average weekly wage: \$988 (QCEW)

SHIFT-SHARE ANALYSIS

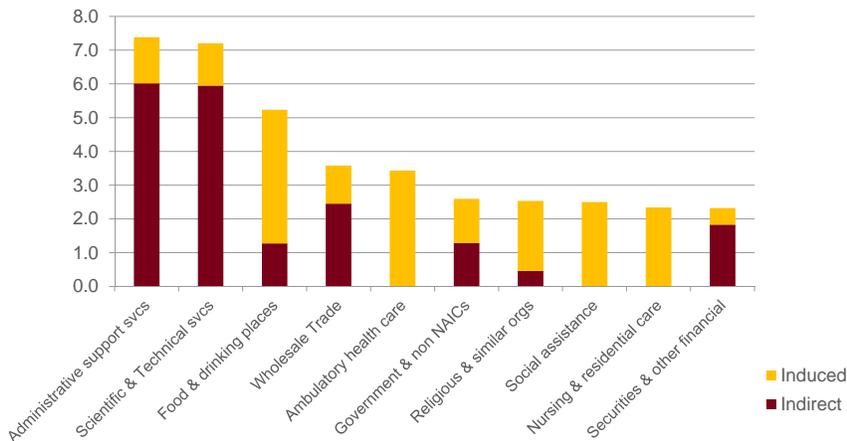
SHIFT-SHARE SHERBURNE COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Manufacturing	48	46	-836	838	1,745%

Source: EMSI, based on CEW data

FABRICATED METAL PRODUCTS : SHERBURNE COUNTY



FABRICATED METAL PRODUCTS : TOP INDUSTRIES AFFECTED



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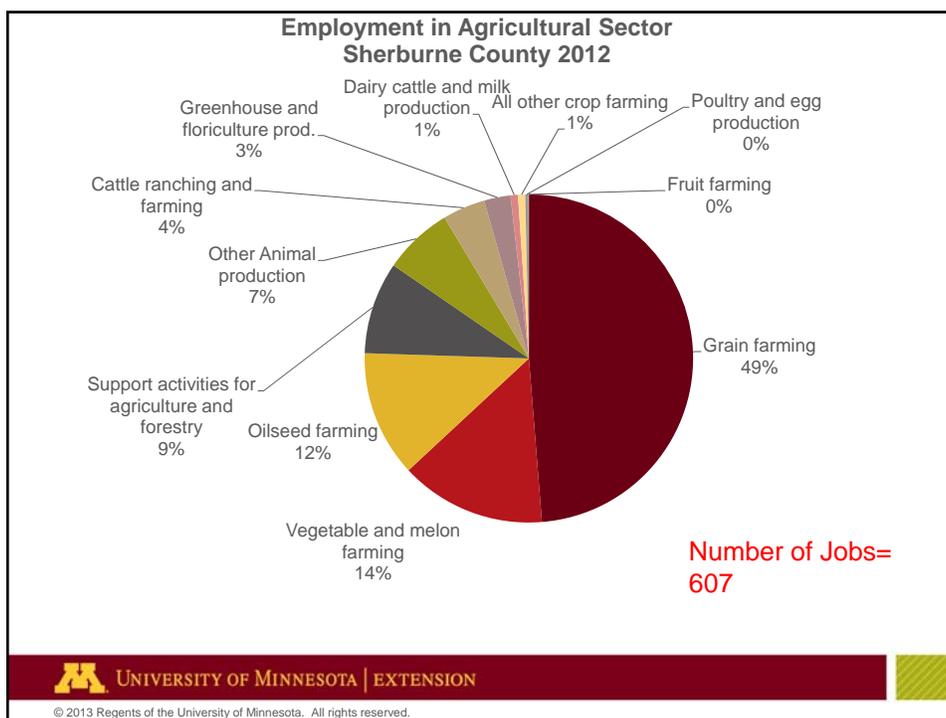
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SHERBURNE COUNTY

Employment in Agriculture

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AGRICULTURE: SHERBURNE COUNTY

- 607 employees
- 27 establishments (QCEW)
- \$110 million in output generated
- \$50 million in labor income
- 77% of expenditures for inputs
 - Real estate, fertilizer, agriculture support services
- 22% of expenditures for labor
 - Average weekly wage: \$650 (QCEW)

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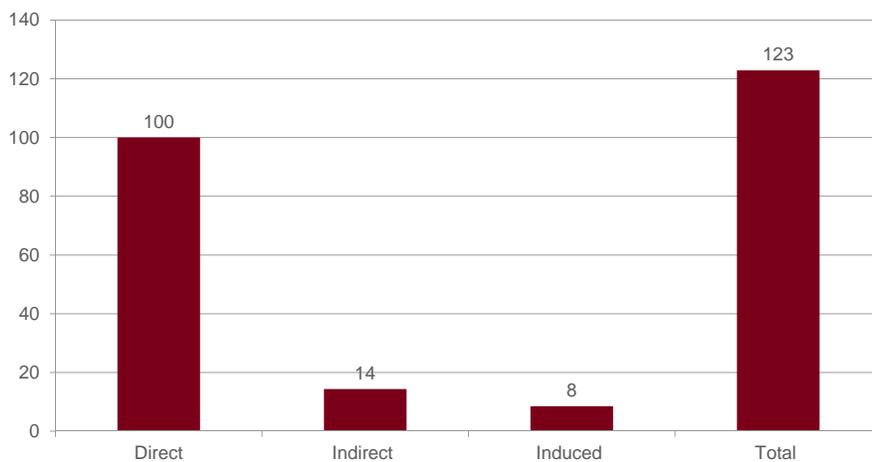
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SHIFT-SHARE ANALYSIS

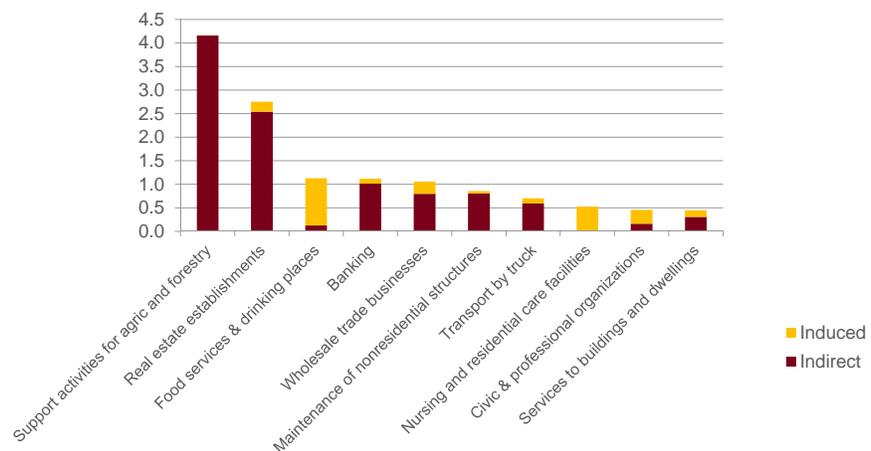
SHIFT-SHARE SHERBURNE COUNTY					
	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Agriculture	25	4	0	21	84%

Source: EMSI, based on CEW data

GRAIN FARMING: SHERBURNE COUNTY



GRAIN FARMING: TOP INDUSTRIES AFFECTED



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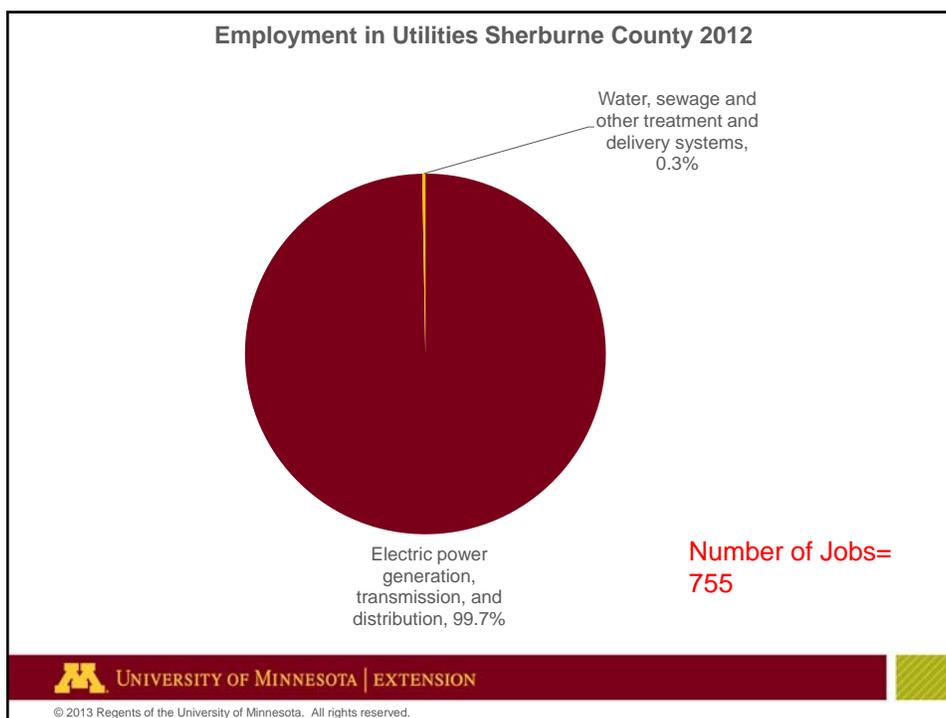
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SHERBURNE COUNTY

Employment in Utilities

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UTILITIES: SHERBURNE COUNTY

- 755 employees
- 9 establishments (QCEW)
- \$481 million in output generated
- \$100 million in labor income
- 38% of expenditures for inputs
 - Coal, maintained non-residential structures, rail transportation
- 62% of expenditures for labor
 - Average weekly wage: \$1,910 (QCEW)

SHIFT-SHARE ANALYSIS

SHIFT-SHARE SHERBURNE COUNTY

	Employment Change 2001-2012	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Utilities	-149	13	-84	-77	-51.7%

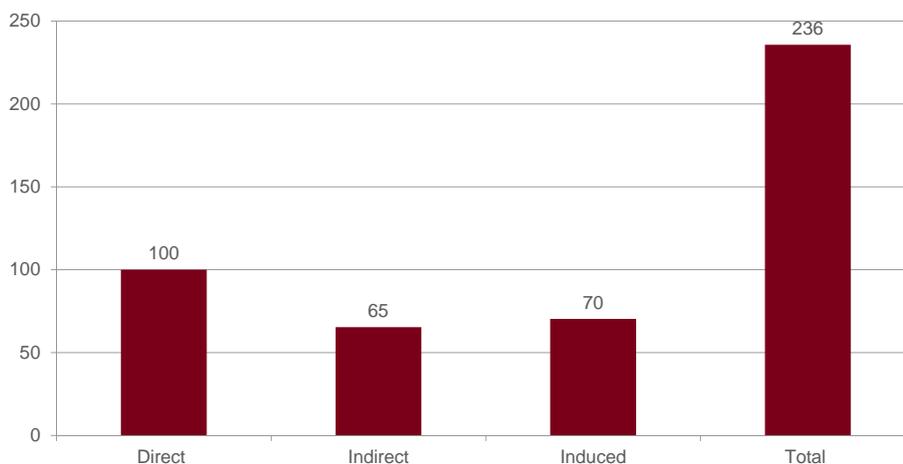
Source: EMSI, based on CEW data



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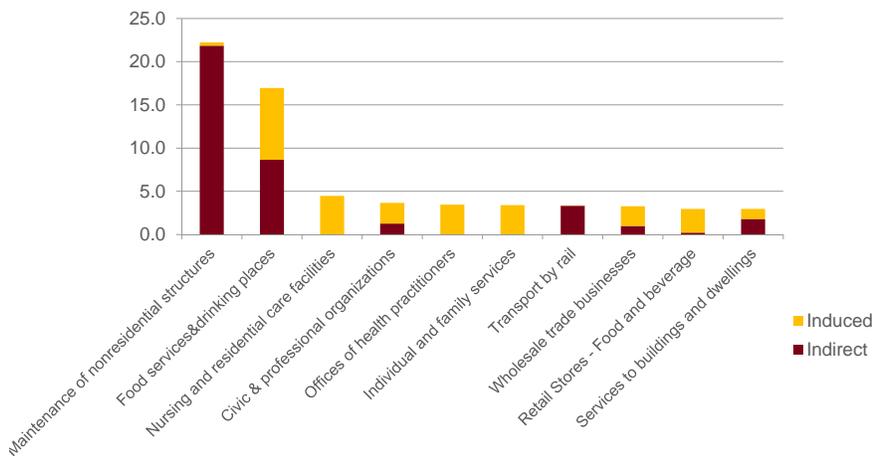
ELECTRIC POWER: SHERBURNE COUNTY



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ELECTRIC POWER: TOP INDUSTRIES AFFECTED



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Wrapping Up

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WHAT CAN WE LEARN FROM THIS?

- Type of expenditures by a business matter
 - Labor versus inputs
- Availability of local supplies increases economic impact
- Induced (labor related) impacts more likely to affect service-related industries
- Sector variety and diversity positively affect impact



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QUESTIONS FOR CONTEMPLATION

- In today's discussions, what stood out for you?
- What patterns or trends did you observe?
- How did today's discussion change or affirm how you think about economic development in Sherburne County?



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Final Thoughts or Questions?



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Driven to DiscoverSM

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MAKING A DIFFERENCE IN MINNESOTA: ENVIRONMENT + FOOD & AGRICULTURE + COMMUNITIES + FAMILIES + YOUTH

QUESTIONS FOR CONTEMPLATION

1. What surprises you about this information?
2. What information favors this industry in the region?
3. What information works against this industry in the region?
4. What *could be done* to support this industry in Sherburne County?

