

## ECONOMIC FUTURES WORKSHOP

# Yellow Medicine County Minnesota

To learn more about Yellow Medicine County's current economic situation and to explore opportunities for economic development, community leaders from Yellow Medicine County participated in the University of Minnesota's Economic Futures Workshop on Thursday, September 3, 2015 in Clarkfield, Minnesota. This report, summarizing the workshop, is presented in partnership with EDA Center at the University of Minnesota-Crookston (<http://www.edacenter.org/>).

### WHAT IS AN ECONOMIC FUTURES WORKSHOP?

The Economic Futures Workshop is designed to help community leaders look objectively at the state of their local economy. The workshop examines the interactions within an economy - among businesses and between businesses and consumers. Using information about how these linkages function, leaders can begin to understand the full implications of change on the local economy. The Futures Workshop can also help communities understand how efforts by different organizations can affect the economy.

The three-hour Futures Workshop provided a profile of the Yellow Medicine County economy, an analysis of how ten selected industries interact, and a facilitated exploration and discussion of the industries.

### PROFILE OF THE CURRENT ECONOMY

In 2014, there were 4,119 jobs in Yellow Medicine County.<sup>1</sup> During the early 2000s the number of jobs in Yellow Medicine County remained about the same with variations from year-to-year. Between 2004 and 2008, Yellow Medicine County businesses and enterprises consistently added jobs raising the total number of jobs in the county to a high of 4,770 in 2008. Consistent with the impacts of the Great Recession, Yellow Medicine County lost 510 jobs (11 percent decline) between 2008 and 2011. While Minnesota as a whole has begun adding jobs post-recession, Yellow Medicine County is not following the trend and growth in the number of jobs in the county has not kept pace with national and industry trends.<sup>2</sup> Unemployment rates in the county remain low.

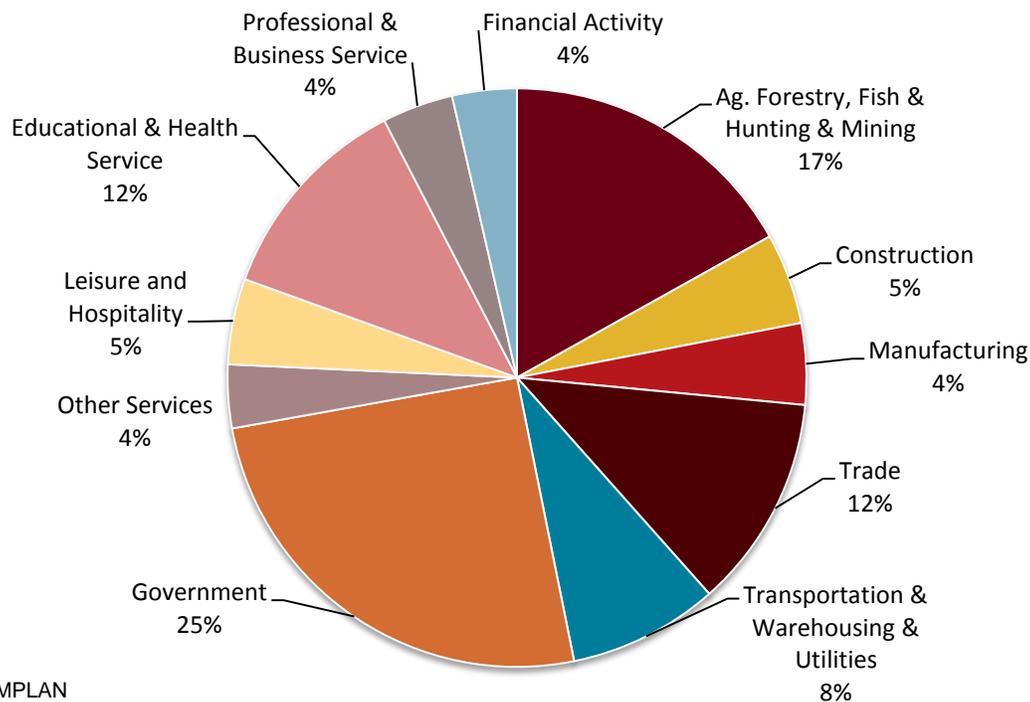
Chart 1 illustrates employment by industry in Yellow Medicine County. The largest industry is government, employing 25 percent of the workforce in Yellow Medicine County. Government, as defined by the IMPLAN database, includes federal, state, local, and tribal employment. All enterprises operated by a government are included in this category - for instance, municipal

<sup>1</sup> Source: Quarterly Census of Employment and Wages (QCEW), MN Department of Employment and Economic Development, <http://mn.gov/deed/>. The most current annual data is 2014.

<sup>2</sup> Source: Shift-share analysis from EMSI (Economic Modeling System), [www.economicmodeling.com](http://www.economicmodeling.com).

utilities, government-owned hospitals, and tribally-operated casinos. The agriculture, forestry, fishing, hunting, and mining industry employs 17 percent of all workers in the county.<sup>3</sup>

**Chart 1: Employment by Industry in Yellow Medicine County, 2013**



Source: IMPLAN

Industries adding the most jobs between 2001 and 2014 include construction (143 new jobs), health care and social assistance (74 jobs), and wholesale trade (52 jobs). Industries shedding the most jobs in the same period include manufacturing (-243 jobs), other services (-101 jobs), and accommodation and food services (-55 jobs).

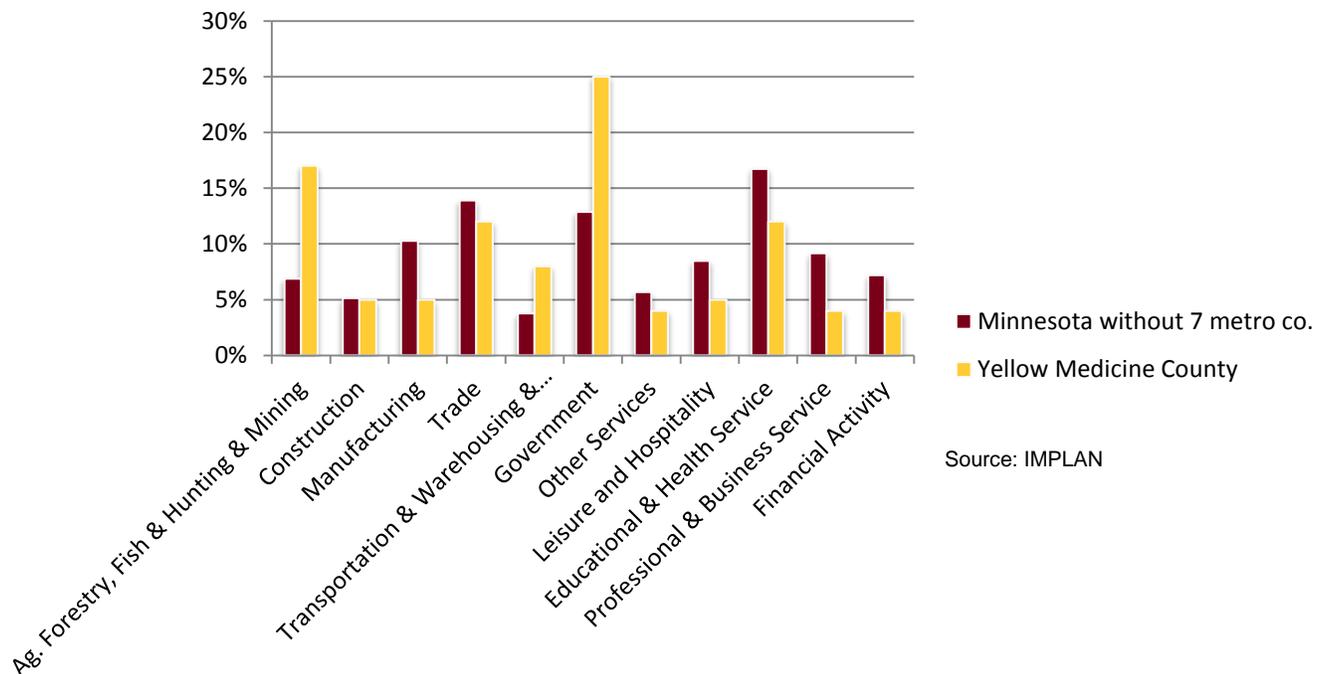
Employment by industry as compared to the average Greater Minnesota county is shown in chart 2. Yellow Medicine County has a higher percentage of its employment in government. While this is higher than the average Greater Minnesota county, it is in line with other counties with a tribal presence. Yellow Medicine County also has a higher percentage of employment in the agriculture, forestry, fishing, hunting, and mining industry and the transportation, warehousing, and utilities industry. Yellow Medicine County trails the average Greater Minnesota county in percentage of employment in the manufacturing and professional services industries.

Wages in Yellow Medicine County are lower than the Minnesota average. Yellow Medicine County's average weekly wage across all industries was \$656 in 2014. Minnesota's average weekly wage across all industries was \$992.<sup>4</sup>

<sup>3</sup> Source: IMPLAN (MIG, Inc), [www.implan.com](http://www.implan.com). The most current data available via IMPLAN is for 2013.

<sup>4</sup> Source: Quarterly Census of Employment and Wages (QCEW), MN Department of Employment and Economic Development, <http://mn.gov/deed/>.

**Chart 2: Employment by Industry, Yellow Medicine County versus Greater Minnesota, 2013**



## ANALYSIS OF INDUSTRIES

On July 16<sup>th</sup>, the Yellow Medicine County Futures Workshop planning committee selected ten industries to be analyzed and discussed during the facilitated workshop. The input-output model IMPLAN was used in the analysis.

Note: these industries were selected to represent a diverse range of economic activities in Yellow Medicine County. The workshop is designed to use these industries as examples.

Grain farming

Residential living facilities

Arts and recreation

Industrial machinery manufacturing

Non-traditional crop production

Residential construction

Insurance

Wholesale trade

Value-added agriculture

Beef cattle production

## EXPLORATION AND DISCUSSION OF INDUSTRIES

After reviewing the current structure of the Yellow Medicine County economy, attendees divided into groups to explore the economic interdependencies of the selected industries. Each group was assigned two industries and asked to address the following four questions:

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 Yellow Medicine County?

The small groups reported out to the full Task Force their summary thoughts and considerations. (Notes from each industry are provided in appendix two).

### **KEY CONCLUSIONS**

Following the large group discussions, the group identified several topics for future exploration to support industries in Yellow Medicine County. They are:

- Expand broadband
- Skills training
- Rail improvement/development
- Local foods/small farms
- Housing

In wrapping up the workshop, participants were asked to categorize the meeting as a rose (this is a fully developed idea), a bud (something exciting and possible was launched), or a thorn (this caused pain). Following is a selection of the responses:

1. Bud - this is an opportunity for growth
2. Rose - this was better than expectations
3. Bud - hearing perspectives across county; rural versus cities
4. Budding rose - identified major topics, some fit regional priorities while some are unique to the county
5. Bud - learned about new areas across county
6. Bud - potential to work together
7. Bud - ideas put forth
8. Rose - talk to each other; connecting with new people and applying local knowledge

### **NEXT STEPS**

Following the discussion of individual industries, the group expressed a desire to continue the conversation. The discussion brought to the forefront a variety of potential activities to support economic development in the county. Several participants clearly wished to identify specific future actions, which led to a conversation around next steps. Several ideas were offered. They include:

- Transform talk into action. What can we do?
- Prioritize and make decisions based on this information.
- Form a core group to continue to explore data and ideas
- Schedule 3 futures meetings. Yellow Medicine County staff is willing to organize and host these meetings. The county has set aside a budget to support economic development efforts in the county.

The meeting concluded with agreement to explore the options.

### **ACTION STEPS**

Following the workshop, each participant was asked to complete an action items worksheet. Participants were asked “what specific actions do you intend to take in the next few months?” Here are the responses.

1. Attend another meeting that leads to action
2. Use this information to create solutions/partnerships/plans
3. Focus on improving infrastructure (rail access)
4. Implement programs to attract the targeted middle age groups
5. Share information with tribal council
6. Continue to attend joint sessions
7. Continue to think of topics and work on them
8. Another group program
9. Working with county board
10. Shop local
11. Think about ways to support value-added agriculture
12. Lobby for broadband improvements
13. Share information with county board
14. Consider information in decisions on zoning, etc.
15. Advocate for improved broadband
16. Apply what I learned as background for future articles
17. Seek out stories about local businesses to provide exposure
18. Participate in more local economic events
19. Further the broadband discussion (case studies)
20. Support Yellow Medicine priorities by connecting to knowing resources

21. Look for examples of policies/regulations that support smaller lots (2, 5, 10 acres)
22. Work with MinnWest about developing programs
23. Encourage changes in zoning laws to allow for smaller lots
24. Broadband
25. Look at ways the county government can create a friendly environment
26. Work on broadband initiatives
27. Talk to others about things learned
28. Talk to my city administrator
29. Talk to my EDA
30. Talk to my Chamber
31. Use this information to inform our report of economic development
32. Focus on areas identified as concerns in this meeting
33. Arrange future meetings
34. Discuss information with local EDA
35. Act together again as a group
36. Try to find a business that will fit our community
37. Look for all the benefits our town has to offer
38. Try to attend future events

#### **EXTENSION STAFF**

The following University of Minnesota Extension staff participated in the planning, preparation, and presentation of the Economic Futures Workshop in Yellow Medicine County.

Brigid Tuck, Economic Impact Analyst, Presenter

Neil Linscheid, Extension Educator, Presenter

Gabriel Appiah, Community Economics Intern

Elizabeth Templin, Extension Educator, Program Manager

#### **YELLOW MEDICINE COUNTY FUTURES WORKSHOP PARTICIPANTS**

- Sharon Pazi Zea, Upper Sioux Community
- John Berends, Yellow Medicine County

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- Rebecca Haider, Center for Small Towns, University of Minnesota - Morris
  - Lyle Martin, City of Hazel Run
  - Jackie Anderson, Upper Minnesota Valley Regional Development Commission
  - Mary Gillespie, Granite Falls Chamber of Commerce
  - Ron Antony, Yellow Medicine County
  - Gary L Johnson, Yellow Medicine County
  - Richard Hagen, City of Hanley Falls
  - Becca Schrupp, City of Clarkfield
  - Juanita Lauritsen, Southwest Minnesota Private Industry Council
  - Peg Heglund, Yellow Medicine County
  - Adam Isaacs, City of Clarkfield EDA
  - Rachel Bohling, Center for Small Towns, University of Minnesota - Morris
  - Tony Ourada, Canby EDA
  - Doris Martin, City of Hazel Run
  - Joseph P Fagnano, City of Granite Falls
  - Justin Bentaas, City of Granite Falls
  - Nick Johnson, City of Canby

## APPENDIX ONE: DEFINITIONS OF TERMS

Ten of Yellow Medicine County's industries were analyzed to measure their economic linkages for the workshop. The results of the analysis are presented in this appendix. To allow for comparison, the analysis considers the economic impact of 100 jobs in each industry. This allows one to compare and contrast the types of impacts each industry has in the county. The IMPLAN model used in this analysis is linear; therefore, if a person wanted to consider the economic linkages of 10 jobs, it could be done by dividing the results for 100 job by 10.

Interpreting the results requires knowing several definitions. Those are included here.

### Output

Output is measured in dollars and is equivalent to total sales.

### Employment

Employment includes full- and part-time workers and is measured in annual average jobs. Total wage and salaried employees as well as the self-employed are included in employment estimates in IMPLAN. Because employment is measured in jobs and not in dollar values, it tends to be a very stable metric.

### Direct Impact

The direct impact is equivalent to the initial change in the economy. For this workshop, the direct impact is 100 jobs.

### Indirect Impact

The indirect impact is the summation of changes in the local economy that occur due to **spending for inputs** (goods and services) by the industry or industries directly impacted. For instance, if employment in a manufacturing plant increases by 100 jobs, this implies a corresponding increase in output by the plant. As the plant increases output, it must also purchase more of its inputs, such as electricity, steel, and equipment. As it increases its purchase of these items, its suppliers must also increase their production, and so forth. As these ripples move through the economy, they can be captured and measured. Ripples related to the purchase of goods and services are indirect impacts.

### Induced Impact

The induced impact is the summation of changes in the local economy that occur due to **spending by labor** - by the employees in the industry or industries directly impacted. For instance, if employment in a manufacturing plant increases by 100 jobs, the new employees will have money to spend to purchase housing, buy groceries, and go out to dinner. As they spend their new income, more activity occurs in the local economy. This can be quantified and is called the induced impact.

### Total Impact

The total impact is the summation of the direct, indirect and induced impacts

## **APPENDIX TWO: SUMMARY OF INDUSTRY EXPLORATION AND DISCUSSION**

During small group discussions, the participants answered the following questions about ten selected industries. The responses, shared with the large group, are summarized below.

### **Questions for Discussion**

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 Yellow Medicine County?

### Insurance

1. Surprises?
  - a. Small number of establishments/employees, but high impact
  - b. Small change from 2001-2014
2. Favors industry
  - a. Strong ag economy
  - b. ACA and regulations that require insurance
3. Against industry
  - a. Small population of YMC
  - b. Removal of properties (demos, disasters, etc)
4. Support?
  - a. Continue to support the growth of the agricultural economy
  - b. Increase population
  - c. Develop more properties requiring insurance
  - d. Conduct educational support opportunities (help people learn more about insurance)
  - e. Improve broadband infrastructure
  - f. Importance may really be in maintaining the industry

### Residential Construction

1. Surprises?
  - a. Establishments reported (38) seems too low
  - b. Induced affect is only 10 jobs because ONLY 14% of expenditure are used for labor
  - c. Induced affect in food and beverage sector
    - i. Residential construction employees a lot of young workers→ this is how they spend their money
2. Favors industry
  - a. Climate
    - i. Minnesota has had the 2<sup>nd</sup> highest number of roof claims over past many years
      1. Creates more jobs in this sector
  - b. Good farm economy
    - i. Central to county

- ii. A lot of construction occurs on farms
- 3. Against industry
  - a. Poor farm economy
  - b. Low amounts of people
    - i. Less construction need
- 4. Support?
  - a. How to maintain the industry? Focus on other areas of growth and this will benefit too
  - b. Purchase properties via HRA/EDA and resell for \$1
  - c. Small city development grants
  - d. Focus on maintaining the stability of this industry

#### Wholesale Trade

- 1. Surprises?
  - a. Wages high
- 2. Favors industry
  - a. Ag based land
- 3. Against industry
  - a. Poor infrastructure
    - i. Limited rail
    - ii. Poor internet/broadband
- 4. Support?
  - a. Support existing rail - Minnesota Valley Regional Rail
  - b. CDL certification program

#### Grain Farming

- 1. Surprises?
  - a. Not as many employees as initially thought
  - b. Not as many jobs created
- 2. Favors industry
  - a. Open flat land
  - b. Good water resources
  - c. Stays in family
  - d. Infrastructure in place
- 3. Against industry
  - a. Low unemployment rate
  - b. Land prices increase
  - c. Crop prices decrease
- 4. Support?
  - a. Keep farms locally owned
  - b. Capture more local spending (farmers spending money in town)

#### Arts and Recreation (casino)

- 1. Surprises?
  - a. The amount of money for output
  - b. Low ripple effects
- 2. Favors industry

- a. Employs 350 people
- b. Source of entertainment
- c. Number of industries affected by having the casino
- 3. Against industry
  - a. Labor shortage
- 4. Support?
  - a. Potential infrastructure development
  - b. Open further dialogue about recreational opportunities with casino

### Industrial Machinery Manufacturing

- 1. Surprises?
  - a. Indirect is lower than induced. Hospitals are second highest affected?
- 2. Favors industry
  - a. Low cost of living
  - b. Good work ethic
  - c. County/city willing to support these jobs
- 3. Against industry
  - a. MN versus SD taxes
  - b. Labor shortage
  - c. Infrastructure access
    - i. Highway (one lane)
    - ii. Rail access
    - iii. Broadband
  - d. High land prices
- 4. Support?
  - a. Infrastructure development
  - b. Broadband
  - c. Skill development
    - i. Robotics training
    - ii. Tech schools - support hands-on training
    - iii. High school shop classes
    - iv. Could partner with manufacturers
  - d. Advocate for improving ability of tech schools to do customized training

### Cattle Ranching and Farming

- 1. Surprises?
  - a. Amount of indirect and induced jobs versus other industries
- 2. Favors industry
  - a. More localized job creation
  - b. Tradition
  - c. Low grain prices
  - d. Know where your food comes from
- 3. Against industry
  - a. High grain prices
  - b. Labor involved - hands-on job
- 4. Support?
  - a. Infrastructure/rail development

- b. Support local butcher shops, “know where your food comes from”
- c. Support small-scale, organic farming
  - i. Tap into Extension resources (new SNAP educator position)
  - ii. Catering companies using locally-sourced foods
- d. Feedlot regulations

### Non-Traditional Agriculture

1. Surprises?
2. Favors industry
  - a. New ideas for expansions
  - b. Leverage on what we already produce
3. Against industry
  - a. Hard to have a small farm with current zoning
  - b. Support for new ideas
4. Support?
  - a. Use non-traditional agriculture to attract new residents
    - i. Ex: breweries
    - ii. Connect people - who values this? Who wants to provide?
  - b. Review zoning laws - need minimum of 40 acres to have farm site
    - i. Variances can be done
    - ii. Perhaps set aside certain parts of county for 5 acre plots
    - iii. Review policies currently in place, what can be changed?
  - c. Explore the cooperative model to pool resources and access more

### Value-Added Agriculture

1. Surprises?
  - a. Big impact of a wet corn milling plant
2. Favors industry
  - a. Number of jobs created
3. Against industry
  - a. Shortage of labor
  - b. Government of regulations
  - c. Low oil prices
4. Support?
  - a. Switchgrass or algae can be better options for converting to ethanol
  - b. Might not be the best option to support due to other factors - competition, prices, etc.
  - c. Rail/infrastructure

### Residential Living Facilities

1. Surprises?
  - a. LOW induced/indirect jobs impact
  - b. A lot of these facilities are government owned → show up in different data set
2. Favors industry
  - a. Aging population
3. Against industry
  - a. Labor shortage

- 
- b. Low weekly wage compared to county average
  - 4. Support?
    - a. Internships/work study between colleges and schools
    - b. Models for bigger impacts
    - c. Capture caregivers - housing options for those providing care to older adults

## APPENDIX THREE: INDUSTRY ANALYSIS SLIDES

# GRAIN FARMING: YELLOW MEDICINE COUNTY

- 340 employees
- \$120.4 million in output generated
- 584 grain operations with sales (Census of Agriculture)
- 40% of expenditures are for inputs
  - Support services for agriculture, real estate, pesticides
- 60% for labor
  - Average weekly wage: \$786 (QCEW)
- This U.S. industry comprises establishments primarily engaged in growing grains and/or producing grain(s) seeds (except wheat, corn, rice, and oilseed(s) and grain(s) combinations).



## SHIFT-SHARE ANALYSIS

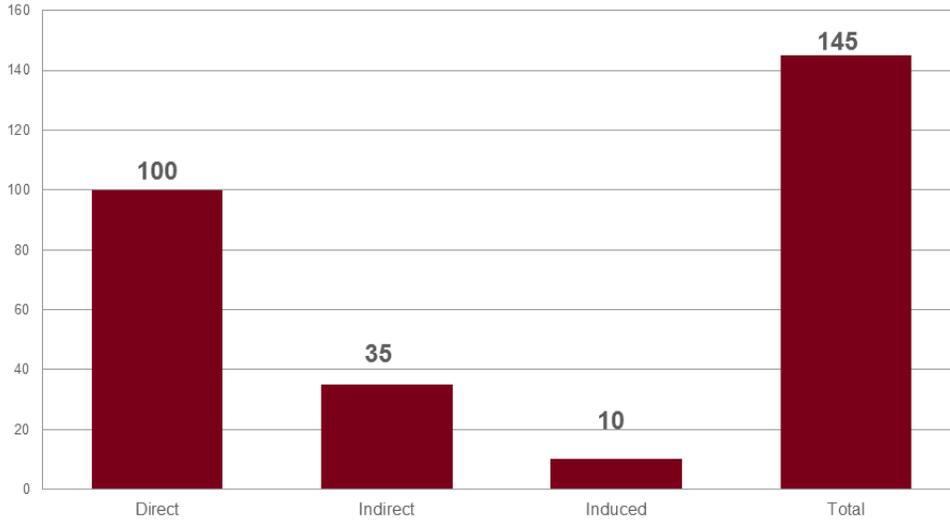
### SHIFT-SHARE YELLOW MEDICINE COUNTY

	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Crop Production	Insf. Data	0	0	16	Insf. data

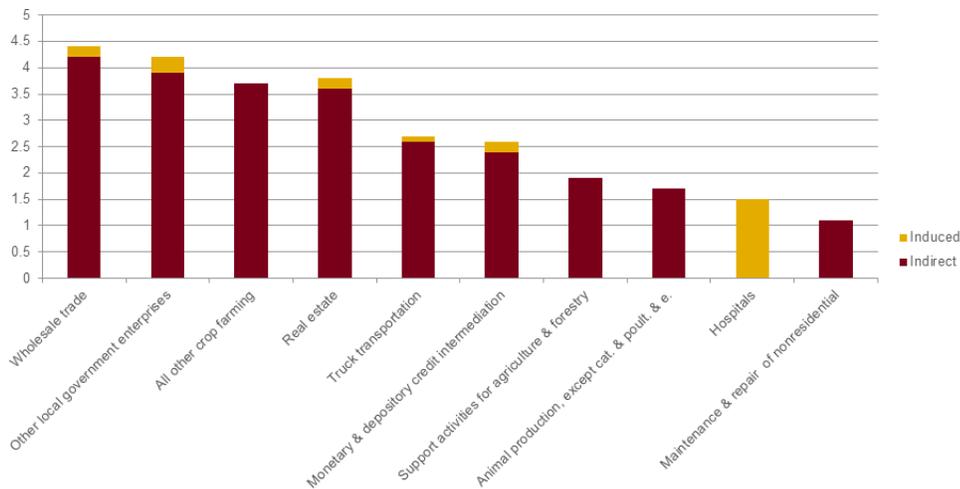
Source: EMSI, based on CEW data



# GRAIN FARMING: YELLOW MEDICINE COUNTY



# GRAIN FARMING: TOP INDUSTRIES AFFECTED



## RESIDENTIAL CONSTRUCTION: YELLOW MEDICINE COUNTY

- 277 employees (Construction, QCEW)
- 38 establishments (Construction, QCEW)
- \$66.4 million in output (Construction, IMPLAN)
- 86% of expenditures are for inputs
  - Retail Services, Wholesale, Refined petroleum product
- 14% for labor
  - Average weekly wage: \$ 1,065 (Construction, QCEW)
- The construction of buildings subsector comprises establishments primarily responsible for the construction of buildings.
- Business e.g.: Fagen, Inc., Renneke Enterprises Inc., H&H Construction Inc.



## SHIFT-SHARE ANALYSIS

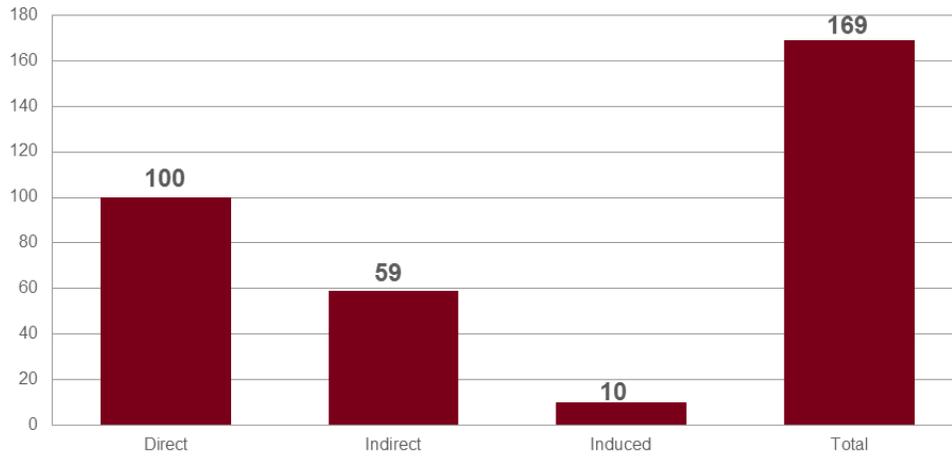
### SHIFT-SHARE YELLOW MEDICINE COUNTY

	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Construction	143	6	-18	156	109%

Source: EMSI, based on CEW data



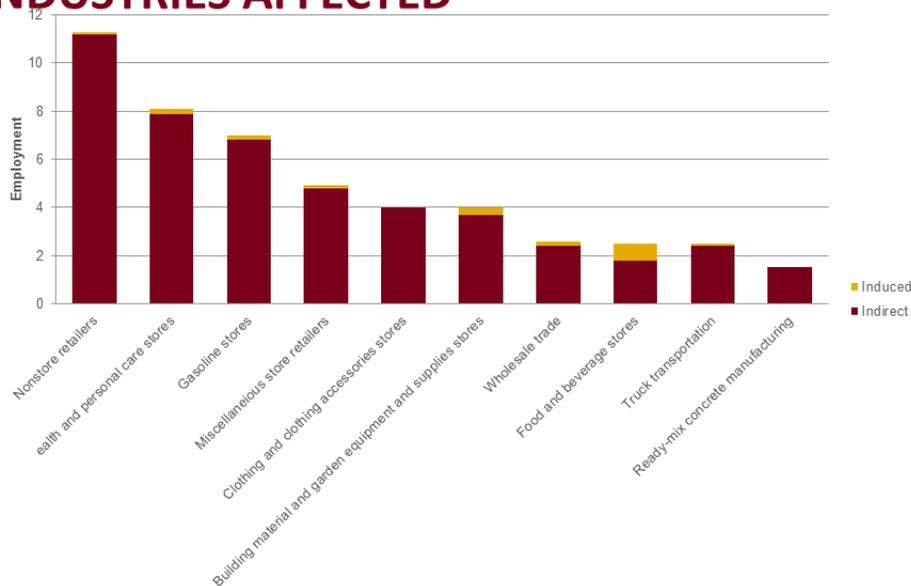
# CONSTRUCTION OF NEW RESIDENTIAL BUILDINGS: YELLOW MEDICINE COUNTY



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# CONSTRUCTION OF NEW RESIDENTIAL: TOP INDUSTRIES AFFECTED



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## RESIDENTIAL & ASSISTED LIVING FACILITIES: YELLOW MEDICINE COUNTY

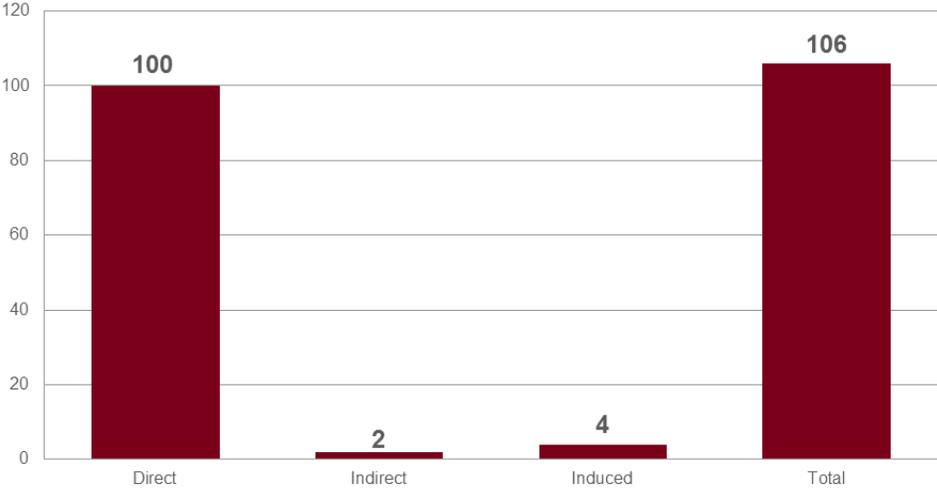
- 348 employees
- 6 establishments (QCEW)
- \$1 million in output generated
- 48% of expenditures for inputs
  - Real estate, meat (except poultry), insurance
- 52% of expenditures for labor
  - Average weekly wage: \$398 (QCEW)
- Includes nursing care, residential intellectual and development disability care, & assisting living facilities
- Business e.g.: Riverside, Serenity House, Lois Lensing

## SHIFT-SHARE ANALYSIS

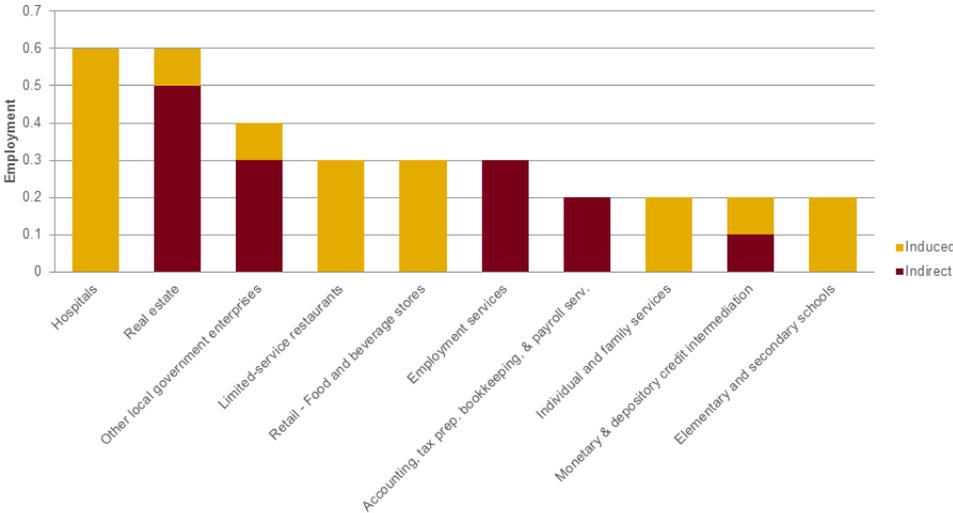
SHIFT-SHARE YELLOW MEDICINE COUNTY					
	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Nursing and residential care facilities	-113	7	27	-147	-130%

Source: EMSI, based on CEW data

# RESIDENTIAL & ASSISTING LIVING FACILITIES: YELLOW MEDICINE CO.



# RESIDENTIAL & ASSISTED LIVING FACILITIES: TOP INDUSTRIES AFFECTED



## INSURANCE: YELLOW MEDICINE COUNTY

- 37 employees
- 12 establishments (QCEW)
- \$5.9 million of output
- 64% of expenditures for inputs
  - Advertising, legal services, monetary authorities
- 36% for labor
  - Average weekly wage: \$654 (QCEW)
- Insurance businesses pool risk by underwriting insurance and annuities. Establishments engaged in this activity collect fees, insurance premiums, or annuity considerations; build up reserves; invest those reserves; and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.
- Business e.g.: Tony Ourada, South West, Freitag Lewison Agency



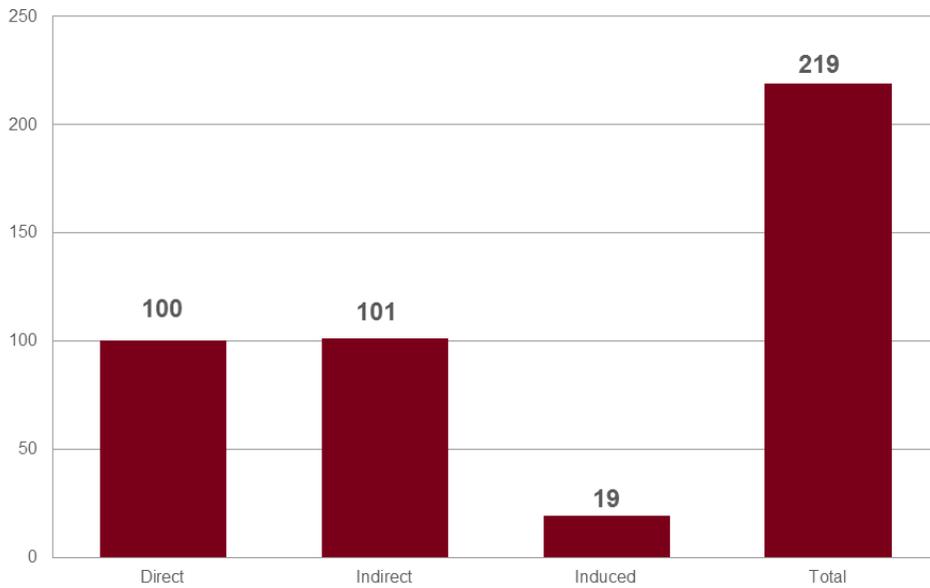
## SHIFT-SHARE ANALYSIS

SHIFT-SHARE YELLOW MEDICINE COUNTY					
	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Insurance Carriers and Related Activities	3	1	-1	3	100%

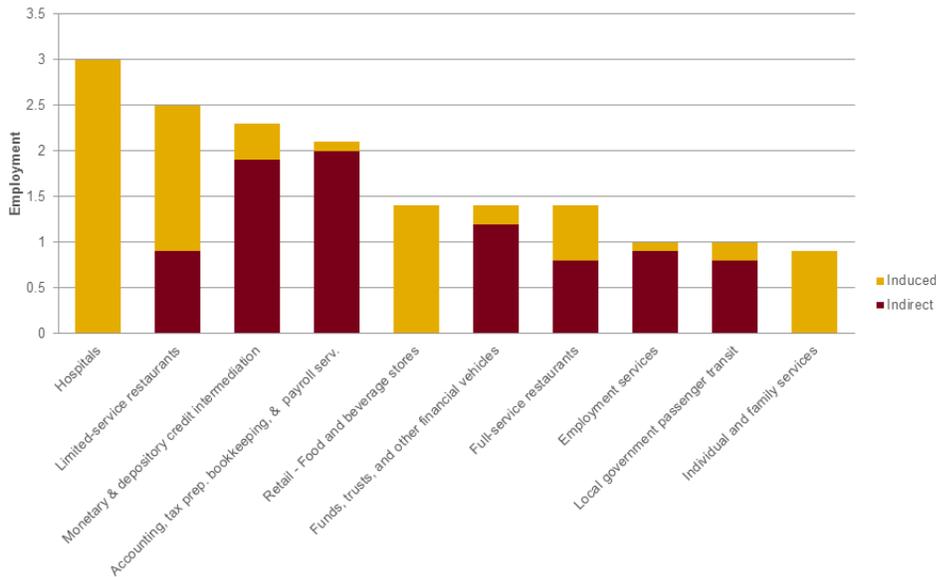
Source: EMSI, based on CEW data



# INSURANCE: YELLOW MEDICINE COUNTY



# INSURANCE: TOP INDUSTRIES AFFECTED



## RECREATION (CASINOS): YELLOW MEDICINE COUNTY

- 350 employees (QCEW)
- 1 establishments (QCEW)
- \$595,828 in output
- 59% of expenditures for inputs
  - Real estate, legal services, advertising
- 41% for labor
  - Average weekly wage: \$513 (QCEW)
- This industry group comprises establishments (except casino hotels) primarily engaged in operating gambling facilities, such as casinos, bingo halls, and video gaming terminals, or in the provision of gambling services, such as lotteries and off-track betting.
- Business e.g.: Prairie's Edge Casino Resort



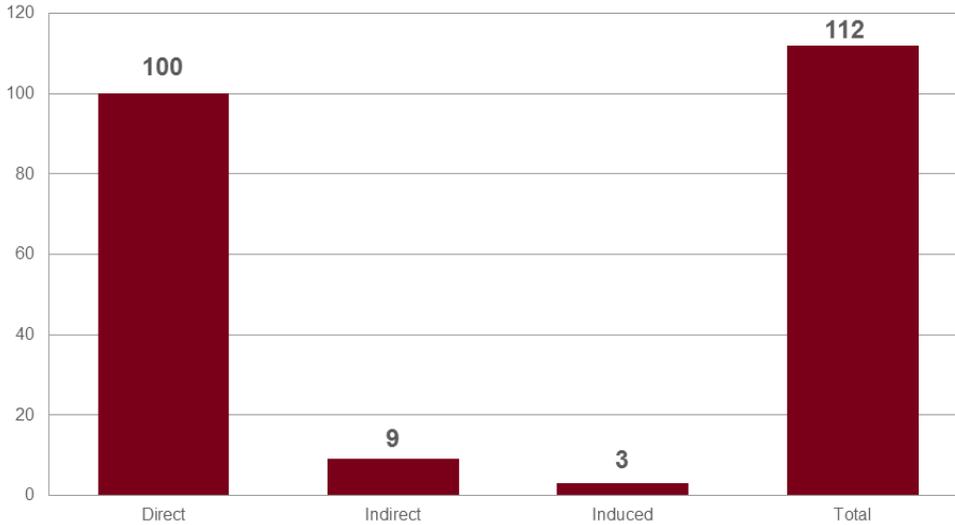
## SHIFT-SHARE ANALYSIS

SHIFT-SHARE YELLOW MEDICINE COUNTY					
	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Amusement, gambling, and recreation industries	Insufficient Data	0	1	-9	Inf. Data

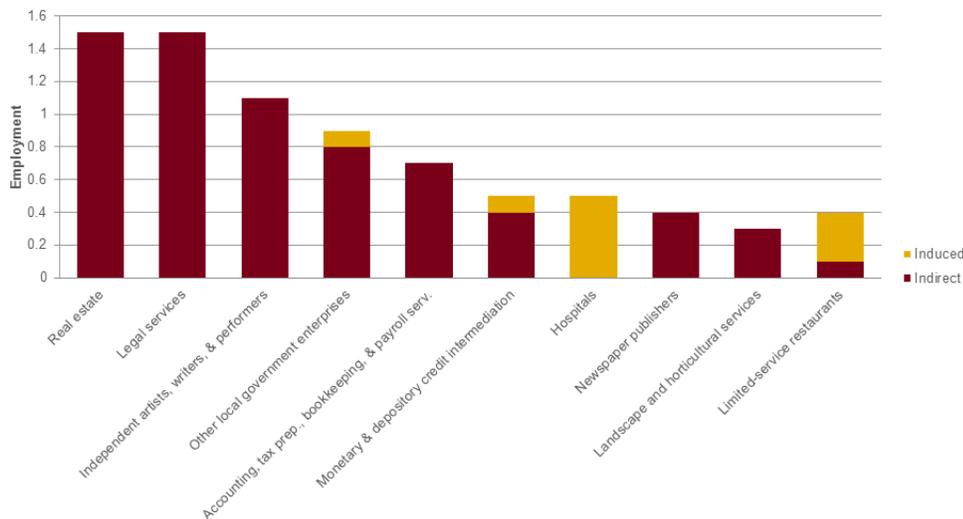
Source: EMSI, based on CEW data



# RECREATION (CASINOS): YELLOW MEDICINE COUNTY



# RECREATION (CASINOS): TOP INDUSTRIES AFFECTED



## WHOLESALE TRADE: YELLOW MEDICINE COUNTY

- 316 employees
- 19 establishments (QCEW, 2014)
- \$61.5 million in output generated
- 41% of expenditures are for inputs
  - Real estate, advertising, management of companies
- 59% for labor
  - Average weekly wage: \$955 (QCEW)
- The wholesale trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise supplies.
- Business e.g.: Multi-County AGLLC, Prairie Grain Partners LLC, Minnesota Feed Distributors Inc.



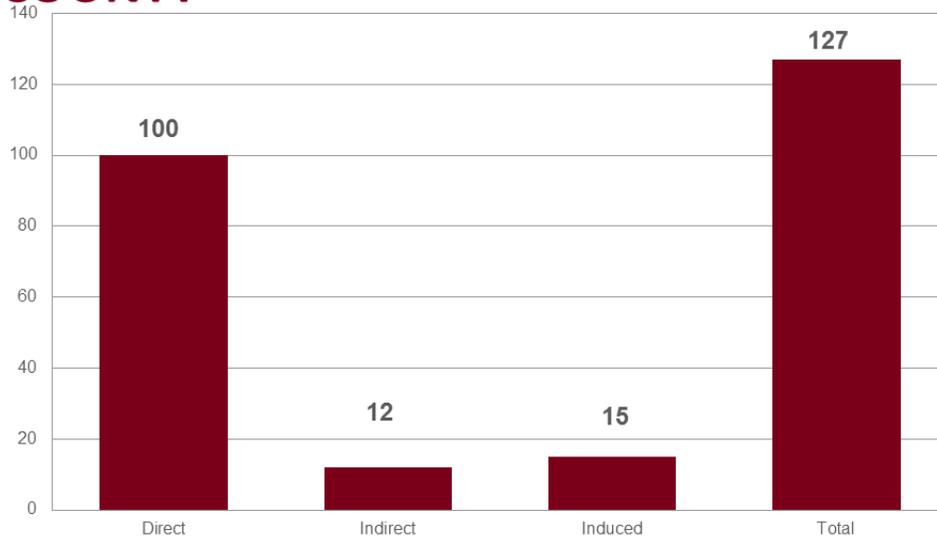
## SHIFT-SHARE ANALYSIS

SHIFT-SHARE YELLOW MEDICINE COUNTY					
	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Wholesale trade	52	11	-8	50	96%

Source: EMSI, based on CEW data



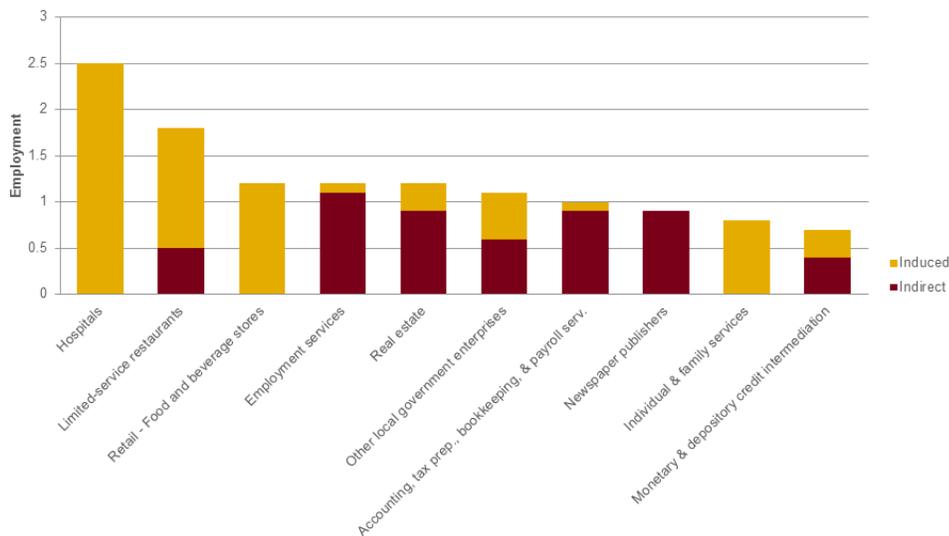
# WHOLESALE TRADE: YELLOW MEDICINE COUNTY



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# WHOLESALE TRADE: TOP INDUSTRIES AFFECTED



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## INDUSTRIAL MACHINERY MANUF.: YELLOW MEDICINE COUNTY

- 59 employees
- 5 establishments (QCEW)
- \$11.7 million in output generated
- 74% of expenditures are for inputs
  - Air and gas compressors, iron & steel & ferroalloy products, management of companies
- 26% are for labor
  - Average weekly wage: \$580 (QCEW)
- This industry comprises establishments primarily engaged in manufacturing industrial machinery, such as food and beverage manufacturing machinery, semiconductor and others
- Business e.g.: Granite Fluid Power Mach. & Fabri., Peters KRP & Electric



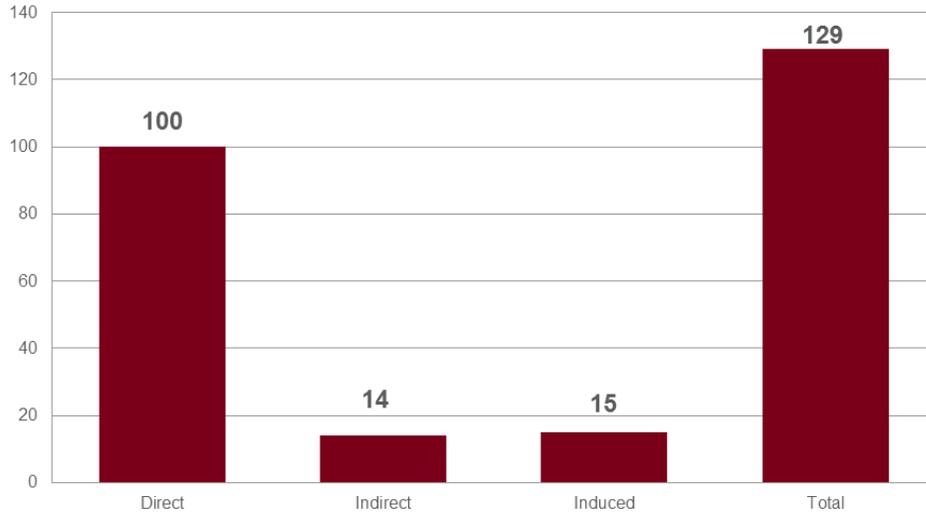
## SHIFT-SHARE ANALYSIS

SHIFT-SHARE Yellow Medicine COUNTY					
	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Industrial machinery manuf.	56	0	0	57	102

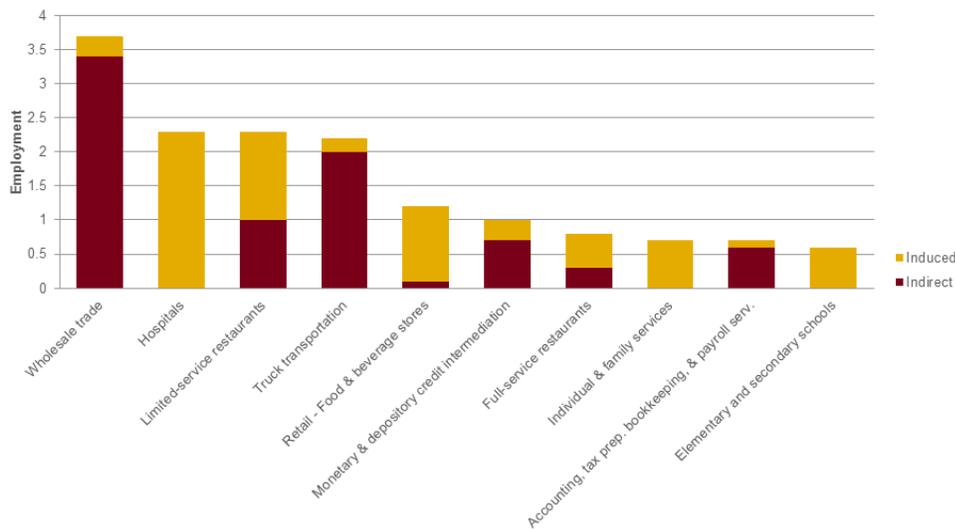
Source: EMSI, based on CEW data



# INDUSTRIAL MACHINERY MANUF.: YELLOW MEDICINE COUNTY



# INDUSTRIAL MACHINERY: TOP INDUSTRIES AFFECTED



## NON-TRADITIONAL CROP FARMING: YELLOW MEDICINE COUNTY

- 46 employees in “other crop farming”
- \$6.5 million in output generated
- 75 operations with sales in “other crops”
- 40% of expenditures are for inputs
  - Support activities for agriculture, refined petroleum products, & pesticides
- 61% for labor
  - Average weekly wage: \$779 (Natural resource & mining, 2014 QCEW)
- Currently includes crops such as hay, barley, sunflowers, and beans. Could include crops such as hemp and switchgrass.



## SHIFT-SHARE ANALYSIS

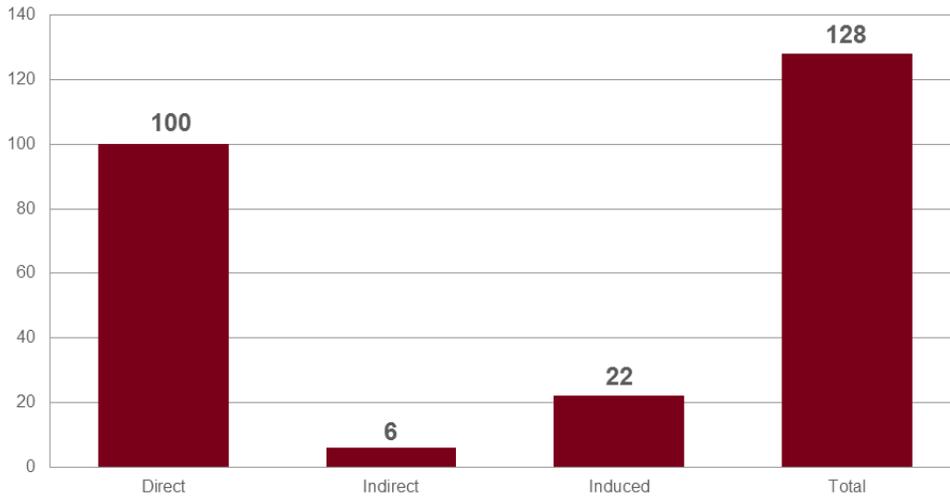
### SHIFT-SHARE YELLOW MEDICINE COUNTY

	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Crop Production	Insf. Data	0	0	16	Insf. Data

Source: EMSI, based on CEW data



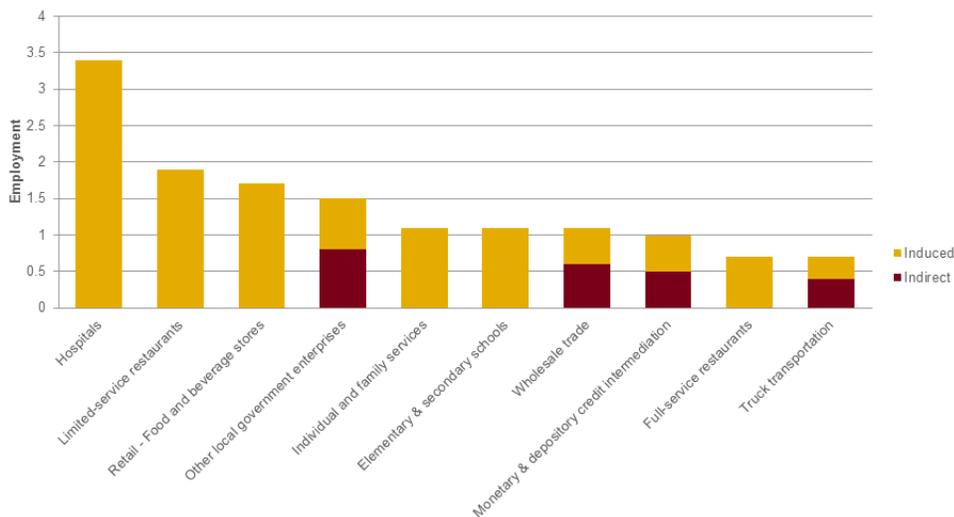
# NON-TRADITIONAL CROP FARMING: YELLOW MEDICINE COUNTY



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# NON-TRADITIONAL CROP FARMING: TOP INDUSTRIES AFFECTED



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## VALUE ADDED AGRICULTURE (WET CORN MILLING): YELLOW MEDICINE COUNTY

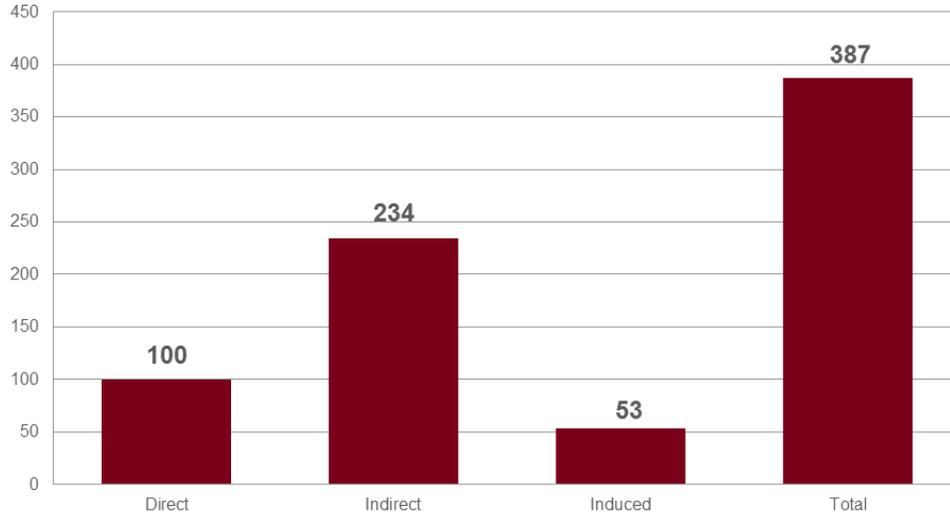
- No wet corn milling currently in YMC
- 85% of expenditures are for inputs
  - Grains, wholesale, natural gas distribution
- 15% are for labor
  - Average weekly wage: \$185 (QCEW)
- This industry does not exist in Yellow Medicine County at this time. It is a good example, however, of value-added agriculture.

## SHIFT-SHARE ANALYSIS

SHIFT-SHARE YELLOW MEDICINE COUNTY					
	Employment Change 2001-2014	National Growth	Industrial Mix	Competitive Share	Competitive Share Percent
Food Manufacturing	10	1	-2	11	110%

Source: EMSI, based on CEW data

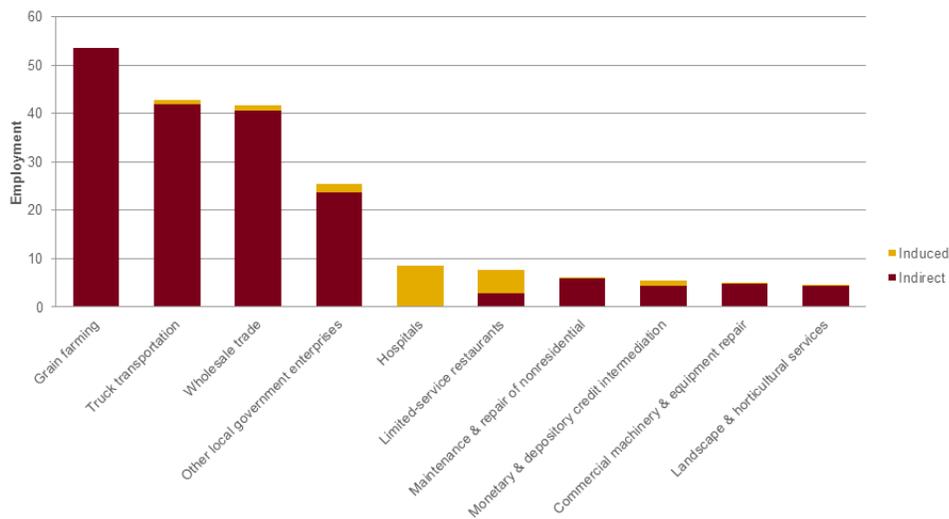
# VALUE ADDED AG. (WET CORN MILLING): YELLOW MEDICINE COUNTY



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# VALUE ADDED AG. (WET CORN MILLING): TOP INDUSTRIES AFFECTED



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