



Anoka County, MN

Economic Development Business Recruitment Roadmap

December 18, 2017



STRATEGY MATTERS

Provided to:

Bruce Sayler

Principal – Community and Economic Development

Connexus Energy

1461 Ramsey Blvd. NW

Ramsey, MN 55303

763.323.2685 o/ 763.350.5119 m

Bruce.sayler@connexusenergy.com

Provided by:

Janet Ady

President and CEO

Ady Advantage

301 S. Blount Street, Suite 103

Madison, WI 53703

608.663.9218 o/608.345.2510 m

jady@adyadvantage.com

Table of Contents

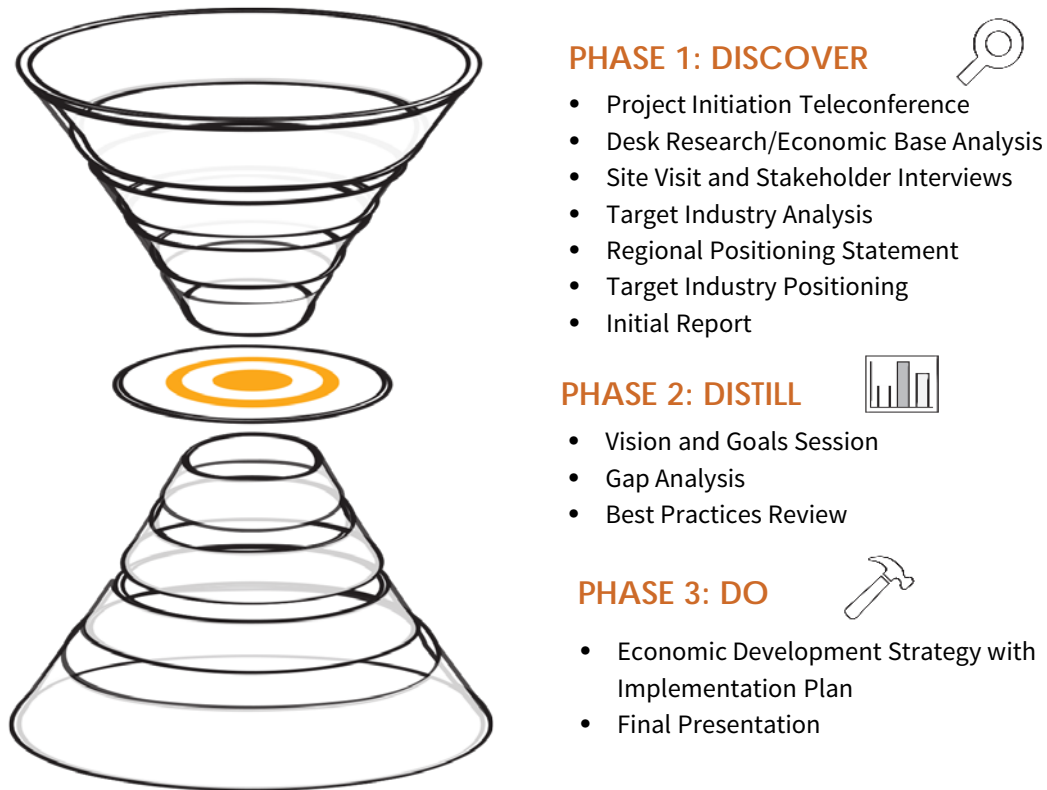
Section 1: Executive Summary	3
Section 2: Introduction	13
Section 3: The Anoka County Regional Economy	16
Section 4: Site Visit Analysis	31
Section 5: Stakeholder & Employer Input	43
Section 6: Target Industry Analysis	55
Section 7: Regional and Target Industry Positioning	172
Section 8: Goals for the Future	185
Section 9: Best Practices	187
Section 10: Economic Development Business Recruitment Roadmap	194

SECTION 1: EXECUTIVE SUMMARY



Executive Summary

Ady Advantage was retained by Connexus Energy to create an economic development business recruitment roadmap. The following graphic shows the various elements to this project.



This process consisted of on-site qualitative research with stakeholders and employers, desk research on the Anoka County economy and target industries, and the creation of positioning points for the region and for each target industry. The following pages serve as a summary of these findings.

Executive Summary

STAKEHOLDER AND EMPLOYER INPUT

During the on-site visit Ady Advantage conducted interviews with nearly 20 stakeholders to gain input. The stakeholders included a mix of local businesses, local economic developers, educational institutions and workforce representatives, real estate representatives, etc. These individuals provided input on strengths, weaknesses, opportunities and threats in the region. The following key themes emerged:

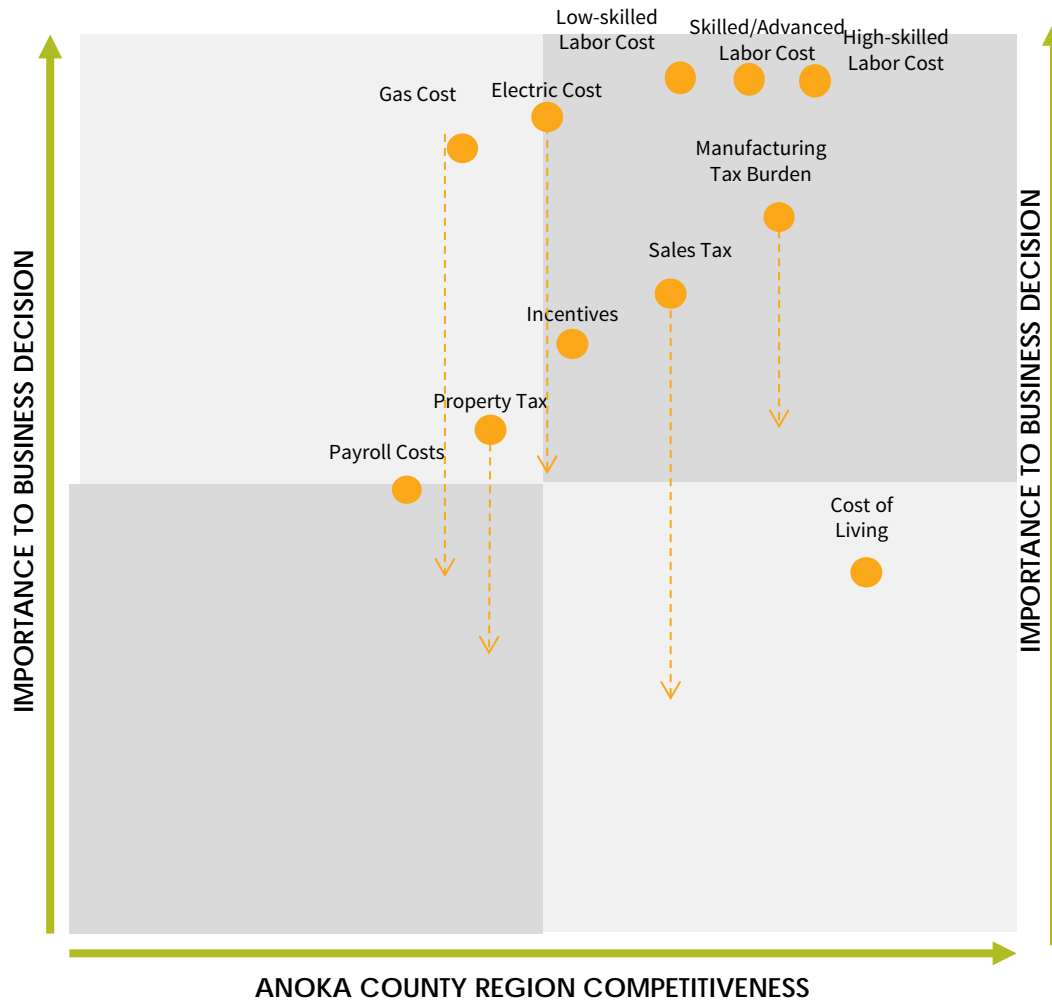
- Positive perceptions of the county revolve around doing business in the county and quality of life. Proximity to Minneapolis/St. Paul is a benefit to businesses as well as residents from a quality of life perspective. Other business advantages include supply chain opportunities, work ethic of employees and business engagement in the community. From a quality of life perspective, perceptions are that Anoka County has a variety of housing options available and good public schools. Many of the communities are also perceived to be safe with low crime and low poverty.
- The biggest negative perception of the county is that anything north of Minneapolis/St. Paul is extremely remote and rural, and that there is only blue collar jobs in this area.
- Talent is currently one of the biggest challenges for local employers, both attracting and retaining talent. The local educational institutions in the region have done a good job of responding to employers' needs, however, employers are competing for labor with Minneapolis/St. Paul.
- The biggest opportunities that stakeholders see for the county include changing the negative perceptions of the county, continuing to improve transportation infrastructure and developing clarity and cohesiveness between the cities and the county.

Executive Summary

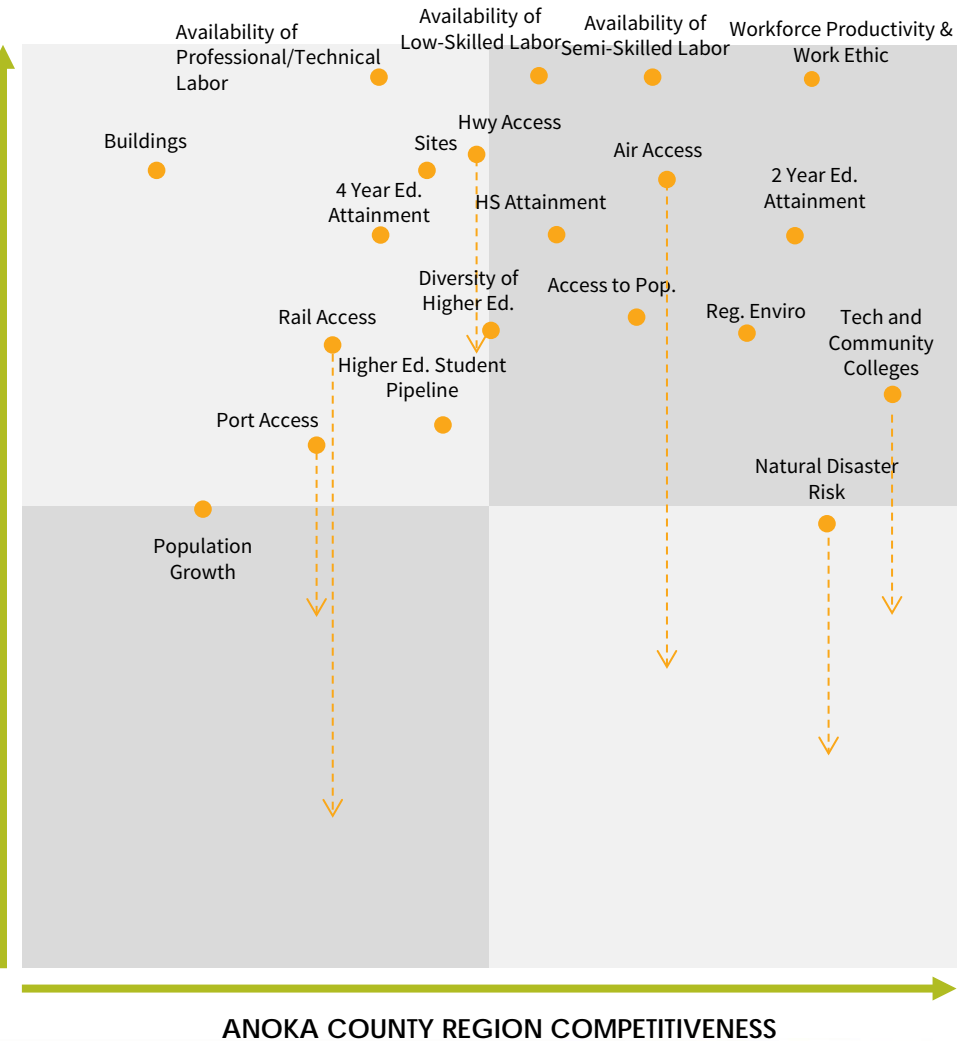
ANOKA COUNTY'S REGIONAL POSITIONING

The following asset maps depict key business costs and conditions and their importance in a business location decision, as well as how well Anoka County does on each factor. Essentially the assets in the upper right hand quadrant become the county's positioning and the assets in the upper left hand quadrant become the gaps that need to be improved, if in Anoka County's control.

GENERAL BUSINESS COSTS ASSET MAP



GENERAL CONDITIONS ASSET MAP



Executive Summary

TARGET INDUSTRY ANALYSIS

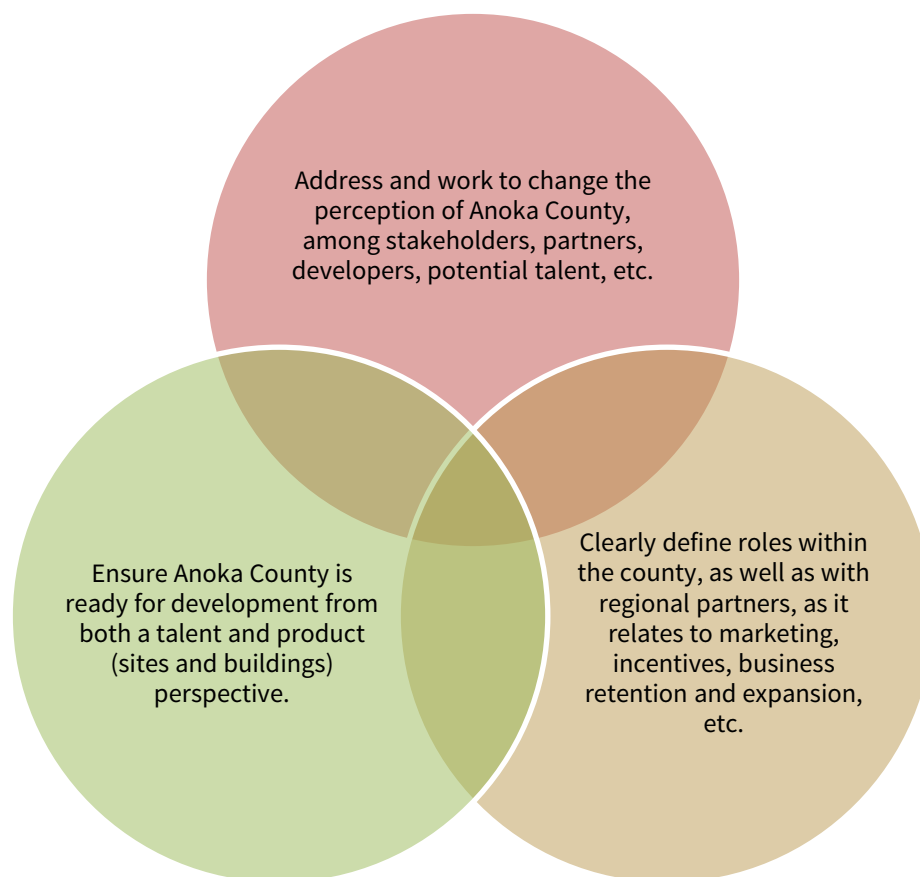
In order to determine which specific industries drive Anoka County's economy, a 6-digit NAICS code analysis was conducted on a number of industry groups. After analyzing and screening these industries, we came up with the following recommended target industries for Anoka County:

Target Industry	Subsectors of Focus	Comments
Light Manufacturing	Medical Device Manufacturing and Related Industries	<ul style="list-style-type: none">The medical device supply chain is well developed in the region.Technologic advances in medical devices are creating opportunities for metal and advanced materials fabrication and precision instrument manufacturing.
	Plastic Product Manufacturing	<ul style="list-style-type: none">Plastics manufacturing technologies are well established in the regionProducers are aligned with both advanced devices (e.g. medical devices) and commodity parts (e.g. food machinery, farm equipment, transportation equipment)
	Instrument Manufacturing	<ul style="list-style-type: none">Instrumentation and measuring devices are critical to manufacturing precision products including medical devices.There is growing demand for precision instruments.
	Metal Working, Machining and Specialized Materials	<ul style="list-style-type: none">The region has a strong tradition for precision machining and the fabrication of metal and other specialized materials.Advanced materials, such as carbon fiber, are growing in importance within the global economy.
	Chemical Manufacturing	<ul style="list-style-type: none">Minneapolis/St. Paul region has a long history around innovation and manufacturing of adhesives and other industrial supply chain specialty chemicals.Advances in medical devices, pharmaceuticals, coating technologies are present in the region and align with Anoka County skill sets.
Heavy Manufacturing	Machinery Manufacturing	<ul style="list-style-type: none">This includes machinery related to existing industries in the region including food processing and material handling equipment, and farm machinery.
Distribution and Trucking	Specialized Distribution and Warehousing	<ul style="list-style-type: none">The big box-type fulfillment centers are more likely to locate south of the city for better access to market; however, Anoka County has seen some small specialty distribution going on in the region and smaller trucking operations.
Data Centers	Smaller data centers	<ul style="list-style-type: none">Data centers are big users of electricity and Anoka County has the infrastructure to support this. However, this industry also requires fiber access, which is only available in some parts of the county. Recruitment should be limited to only those areas.
Back Office	Medical services Call centers	<ul style="list-style-type: none">Some available buildings for this; however, there will need to be a better inventory of these buildings in the future in order for Anoka County to realistically recruit this industry.

Executive Summary

GOALS AND VISIONING

The goals for the future were determined and thoroughly discussed during a Goals and Visioning work session on Wednesday, October 11. To ensure that stakeholder input was significantly considered in this process, Connexus Energy invited a number of key stakeholders.



Executive Summary

ECONOMIC DEVELOPMENT STRATEGIES

The following strategies were developed to help Anoka County meet its three goals, as outlined on the previous page. The strategies fall into the categories of alignment/regionalism, readiness and marketing. Tactics within each strategy can be found in the final section of this report – Economic Development Business Recruitment Roadmap.

Alignment/Regionalism			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
Articulate roles and responsibilities of Anoka County, Connexus Energy, and each local/regional economic development partner to help avoid duplication of efforts, identify gaps, and reach consensus on project coordination protocols.		X	XXX
Communicate regularly with economic development partners and other stakeholders about economic development initiatives, business news, county-wide successes, and quality of life improvements.	X		XX

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Executive Summary

ECONOMIC DEVELOPMENT STRATEGIES (CONT'D)

Readiness			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
Product Readiness			
Ensure sites and buildings are listed in LOIS or another sites and buildings database and information is accurate and up-to-date.	X	XXX	X
Determine the next sites/buildings for short-term, medium-term and long-term development that meet the needs of the target industries (as identified in this report)		XXX	X
Develop and maintain relationships with local developers and real estate brokers.	XX	XX	
Re-evaluate the city and county incentive policies to ensure they align with future goals.		XXX	X
Talent Readiness			
Continue to explore what Greater MSP is doing with regard to talent, and participate selectively.		XXX	X
Identify any gaps related to the Anoka County talent strategies and develop approaches to address.	X	XXX	

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Executive Summary

ECONOMIC DEVELOPMENT STRATEGIES (CONT'D)

Marketing/Differentiation			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
All Audiences			
Using this economic development plan as a base of information, outline the key assets of the region from both a talent and business retention/development perspective.	XXX	X	
Communicate a consistent county-wide economic development brand.	XXX	XX	
Internal Stakeholders			
Market the key assets of Anoka County to internal stakeholders to ensure that everyone is communicating a consistent message about the county and region.	XXX		X
Partners			
Market the key assets of Anoka County to partners so that they are aware of the unique assets of the county, as well as the types of projects Anoka County is best suited for.	XXX		

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Executive Summary

ECONOMIC DEVELOPMENT STRATEGIES (CONT'D)

Marketing/Differentiation			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
Existing Businesses			
Help existing businesses continue to grow in Anoka County.	XXX	XX	
Ensure existing businesses are aware of local, regional and state programs/initiatives that would benefit their business.	XXX		X
Developers/Real Estate Brokers			
Market the key assets of Anoka County to local/regional developers and real estate brokers so they are aware of the S&B product in the county, as well as the target industries that are best suited for Anoka County.	XXX		
Site Selectors			
Market the key assets of Anoka County to site selectors who work in the target industries identified in this report.	XXX		
Target Industries			
Communicate the benefits of doing business in Anoka County to companies within the specific target industries identified in this report.	XXX		
Identify companies in the recommended target industries to attract to Anoka County	XXX	XX	

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

SECTION 2: INTRODUCTION



Introduction – Background

BACKGROUND

Anoka County, Minnesota sits on the eastern border of the state north of Minneapolis-St. Paul. The county had an estimated population of 345,000 people in 2016. This is an increase of about 4% from the 2010 census.

The county participates in the Greater MSP Minneapolis Saint Paul Regional Economic Development Partnership. The region is host to a labor force of over 1.8 million people with low electricity costs and low taxes. The region also has an unemployment rate of 3.4% and a participation rate higher than the U.S. average. As a suburb to Minneapolis-St. Paul, Anoka County shares in the region's economic strengths. In addition, it has award winning schools and a small community feel.

Connexus Energy is a service provider to Anoka County and is working with a consortium of public and private entities to increase economic growth. The consortium is seeking to increase the number of RFIs and landed prospects in the county. It would like to strengthen Anoka's competitiveness with a strong strategic plan for targeting and marketing the county. In addition, the partners want to explore other strategies that will position Anoka for economic growth.

OBJECTIVES

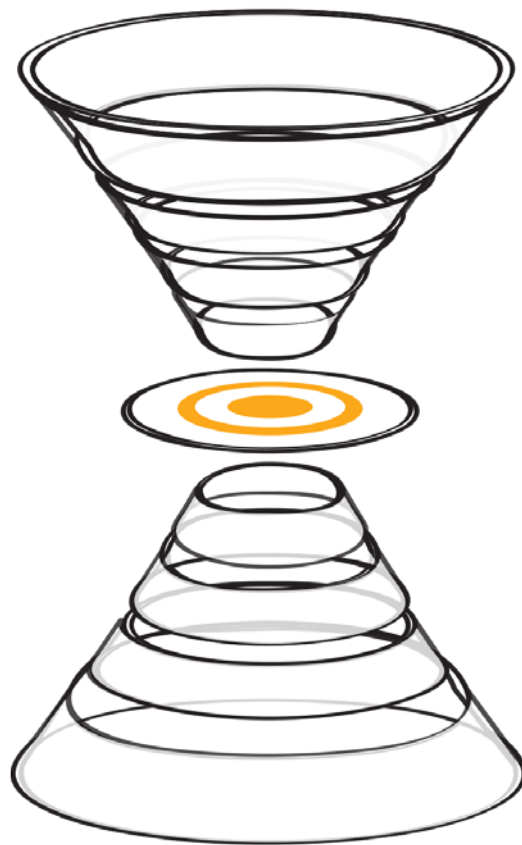
The objectives of this project are to:

- Gain a clear and objective understanding of Anoka County's assets and competitive position for attracting new business to the area.
- Develop strategies and an implementation plan that sets up Anoka County's economy for a successful future.

Introduction – Our Approach

ADY ADVANTAGE APPROACH

Our approach is practical and leverages our knowledge of how businesses make decisions. Our experience working with both EDOs and private companies gives us insight into how Connexus Energy can first inventory Anoka County's economic assets and then craft a vision unique to Anoka County.



PHASE 1: DISCOVER

- Project Initiation Teleconference
- Desk Research/Economic Base Analysis
- Site Visit and Stakeholder Interviews
- Target Industry Analysis
- Regional Positioning Statement
- Target Industry Positioning
- Initial Report

PHASE 2: DISTILL

- Vision and Goals Session
- Gap Analysis
- Best Practices Review

PHASE 3: DO

- Economic Development Strategy with Implementation Plan
- Final Presentation

SECTION 3: ANOKA COUNTY REGIONAL ECONOMY



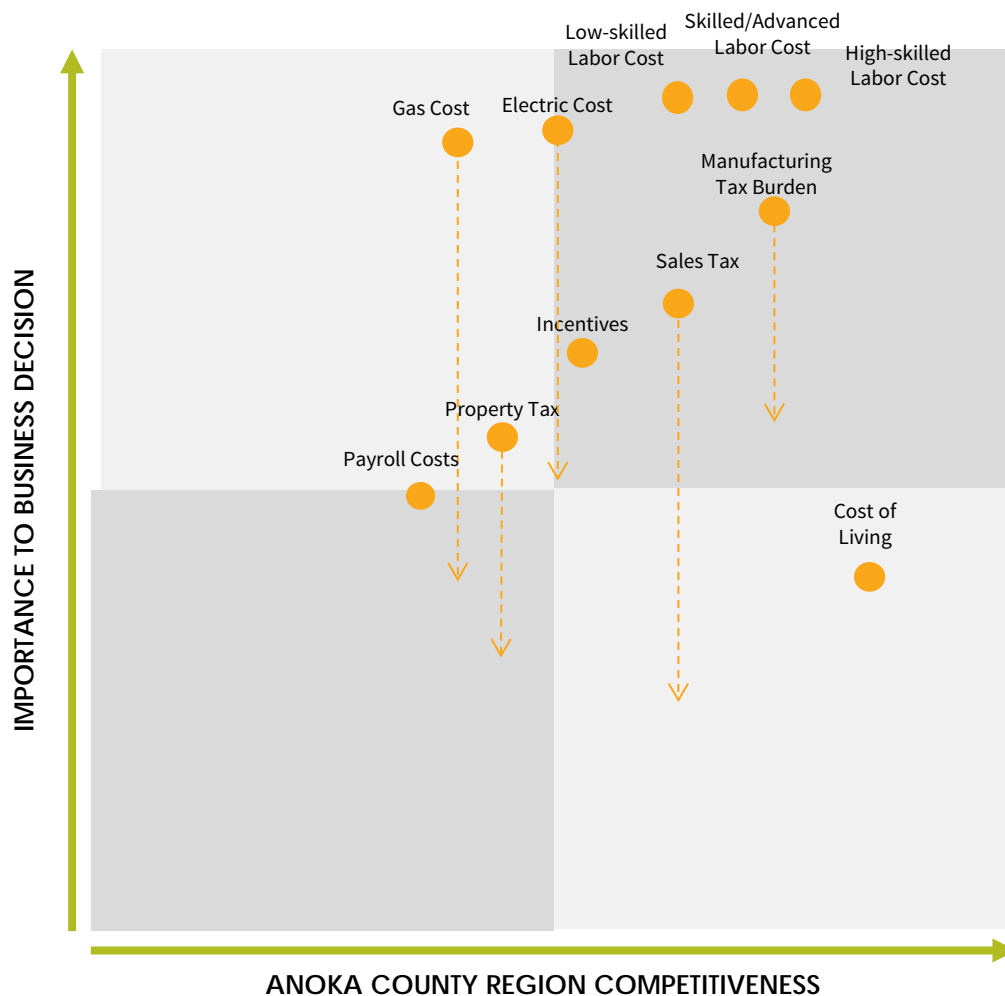
Core Economic Assets

GENERAL BUSINESS COSTS ASSET MAP COMMENTS

The asset map to the right depicts Anoka County's and the Minneapolis-St. Paul-St. Cloud MSA region's competitiveness compared to the state of Minnesota, surrounding states, as well as the United States as a whole. Where the local data is unavailable, the Minneapolis-St. Paul-St. Cloud MSA or Minnesota as a whole is compared to the other states.

- Labor costs in the Minneapolis-St. Paul-St. Cloud MSA are above average for the state of Minnesota and the U.S. average in all professions, most notably higher for skilled and technical professions. Wages are only slightly higher for low-skilled professions.
- Minnesota ranks the second best in the nation for the tax burden for mature capital intensive manufacturing (the 1st being Iowa, a surrounding state). Minnesota also ranks 9th for new capital intensive manufacturing (again, one spot behind Iowa (8th). Minnesota also ranks fairly well on mature labor intensive manufacturing (17th) and new labor intensive manufacturing (27th).
- Taxes are not especially favorable in Minnesota. It has the highest sales tax of the surrounding states (6.88%), as well as the highest individual income tax (9.85%). It also has the second highest corporate income tax in the region (9.80%).
- Industrial electricity costs in Minnesota are middling to the high end relative to the surrounding states, and above the national average. Industrial gas costs are the second lowest in the region after North Dakota, however, they are still just slightly above the national average.
- Minnesota has an average to low unemployment tax rate (1.44%) relative to the surrounding states. Minnesota also has average unemployment costs (22nd), however, they are the second highest in the region after Wisconsin (12th).
- The cost of living in Minnesota is 4% higher than the national average, and the cost of living in Anoka County 4% higher than the state average. The Minneapolis-St. Paul-St. Cloud MSA in which the county resides is a further 3% higher than Anoka County individually. Minnesota has the highest cost of living relative to the surrounding states, and is the only state in the region to have a cost of living higher than the national average.

GENERAL BUSINESS COSTS ASSET MAP



Core Economic Assets (continued)

Table 4.3: Select Supporting Data for Business Costs Asset Map	Anoka County, MN	Minneapolis-St. Paul-St. Cloud MSA	Minnesota	North Dakota	South Dakota	Iowa	Wisconsin	United States
Avg. Low-Skilled Labor Costs ¹	\$39,190	\$38,950	\$38,240	\$44,080	\$33,310	\$35,490	\$37,540	\$37,190
Avg. Skilled/Advanced Labor Costs ¹	\$94,190	\$102,045	\$96,730	\$84,845	\$85,220	\$81,365	\$86,880	\$101,160
Avg. Professional Technical Labor Cost ¹	\$84,605	\$97,245	\$91,665	\$74,710	\$71,310	\$73,895	\$80,245	\$92,570
Tax Burden Ranking – Mature Labor Intensive Manufacturing ²			17	25	8	16	42	
Tax Burden Ranking – New Labor Intensive Manufacturing ²			27	24	28	25	17	
Tax Burden Ranking – Mature Capital Intensive Manufacturing ²			2	18	5	1	46	
Tax Burden Ranking – New Capital Intensive Manufacturing ²			9	14	34	8	33	
Sales Tax ²			6.88%	5.00%	4.50%	6.00%	5.00%	
Individual Income Tax ²			9.85%	2.90%	NA	8.98%	7.65%	
Corporate Income Tax ²			9.80%	4.31%	NA	12.00%	7.90%	
Payroll Costs – Unemployment Tax ³ (New Employer Base Payroll Base)			1.44% \$32,000	2.34% \$35,100	1.2% - 1 st year, 1.0% - 2 nd & 3 rd year \$15,000	1.0% \$29,300	3.05-4.55% \$14,000	
Payroll Costs – Workers Comp. ⁴ (State Rank Avg. Rate per \$100 of payroll)			22 \$1.91	51 \$0.89	32 \$1.67	24 1.86	12 \$2.06	
Cost of Living ⁵	108	111	104	101	96	88	96	100
Average Industrial Electric Costs (Cents per Kilowatt-hour) ⁶			7.67	8.71	7.67	5.38	7.69	6.60
Average Industrial Gas Costs (Dollars per Thousand Cubic Feet) ⁶			4.28	2.87	4.66	4.89	5.82	4.19

Sources:

1. Bureau of Labor Statistics, May 2015, Minneapolis-St. Paul-St. Cloud MSA
2. Location Matters: A Comparative Analysis of State Tax Costs on Business. The Tax Foundation with KPMG, 2015
3. ADP 2017 Payroll Tax Rates by State, 2017
4. Oregon Workers' Compensation Premium Rate Ranking Summary, 2016 (ranked from 1=highest to 51=lowest)
5. Sperling's Best Places, 2017
6. EIA.gov, November 2016

Core Economic Assets (continued)

GENERAL BUSINESS CONDITIONS ASSET MAP COMMENTS

The asset map to the right depicts Anoka County's and the Minneapolis-St. Paul-St. Cloud MSA region's competitiveness compared to the state of Minnesota, surrounding states, as well as the United States as a whole. Where the local data is unavailable, the Minneapolis-St. Paul-St. Cloud MSA or Minnesota as a whole is compared to the other states.

- The population growth in the County has been fairly strong, exceeding the pace of Minnesota population growth as a whole, 4.60% to 3.93%. The greater Minneapolis-St. Paul-St. Cloud MSA region population growth has been especially strong, at 5.89%
- While population growth has been fairly strong in Anoka County, growth in labor force has not matched this pace, growing at only 1.90%. This does keep pace with Minnesota labor force growth at 1.86%. The Minneapolis-St. Paul-St. Cloud MSA region has outpaced its population growth however, growing at 5.96%.
- Anoka County's average educational attainment rates are slightly above the state average on high school attainment and 2-year degree, but below state average for 4-year degree and graduate degrees. This is true when comparing Anoka County to the national average as well. The Minneapolis-St. Paul-St. Cloud MSA has significantly higher 4-year degree and graduate degree levels than Anoka County.
- Stakeholders consistently noted the strong asset that they have in the local community college and technical college.
- Highway access in the region can be a challenge. The only major interstates in the county are in the Southern portion of the county. I-35 (to Duluth) and I-94 (to Fargo) connect the county to Minneapolis. There is also north-south highway 65 that runs through the whole county. Employers and stakeholders alike cited the issue with traffic in the county. Some also noted that there is currently no major east-west highway, which can make getting around the county difficult.

GENERAL CONDITIONS ASSET MAP



Core Economic Assets (continued)

Table 4.4: Select Supporting Data for Business Conditions Asset Map	Anoka County, MN	Minneapolis-St. Paul-St. Cloud MSA	Minnesota	North Dakota	South Dakota	Iowa	Wisconsin	United States
Population ¹	345,957	3,496,288	5,519,952	757,952	865,454	3,134,693	5,778,708	321,418,820
Labor Availability ¹	190,604	1,935,586	3,024,000	416,227	453,069	1,700,683	3,120,229	
Population Growth (<i>Since 2010</i>) ¹	4.60%	5.89%	3.93%	12.37%	6.02%	2.75%	1.55%	3.90%
Labor Force Growth (2011-2015) ¹ (county-level)	1.90%	5.96%	1.86%	7.10%	2.75%	2.30%	1.31%	
Access to Population ¹ (<i>Population within 500 Miles of Anoka County</i>)	43,767,164							
Population with High School Degree ²	93.4%	93.1%	92.3%	91.3%	90.7%	91.3%	90.7%	86.33%
Population with 2-Year Degree ²	12.1%	9.9%	10.5%	13.0%	10.5%	10.8%	9.9%	7.93%
Population with 4-Year Degree ²	27.3%	39.0%	33.2%	27.3%	26.7%	26.4%	27.4%	29.28%
Population with Graduate Degree ²	7.7%	13.0%	10.9%	7.7%	8.1%	8.4%	9.3%	11.10%

Sources:

1. Stats America, United States Census Bureau
2. Sperling's Best Places, 2016

Business Environment

LABOR AND TALENT

Availability of Low-Skilled Labor



Anoka County has a large manufacturing base and a high level of high school degree attainment to supply these types of positions.

Availability of Semi-Skilled/Skilled Labor



The county has a strong technical college and community college that can provide a workforce pipeline for these types of positions. Some employers noted labor needs in this area, such as more machinists in the labor pool.

Availability of Professional/Technical Labor



Anoka County has been slowly evolving from a significant amount of blue collar to include some white collar type jobs as well. This type of labor tends to be employed in Minneapolis. Because Anoka County has been known as blue collar for so many years, it can be hard to attract this type of talent to live or work in the County.

Technical Training Programs

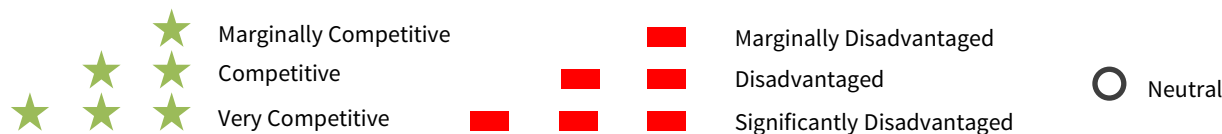


Anoka Technical College offers a certificate program for welding that output 34 students in 2015-2016. This college also offers popular associate's degrees in Computer Technology/Computer Systems Technology, and Electrical, Electronic and Communications Engineering Technology/Technician. Anoka-Ramsey Community College also offers certificate programs for Network and System Administration and a significant number of associates degrees in liberal arts, nursing and business.

K-12 Education



The Anoka-Hennepin School District is one of the largest in the state, serving 37,000 students. There are also several smaller school districts in the county. Anecdotally, employers and stakeholders agreed that the area schools are generally good schools.



Business Environment (continued)

INFRASTRUCTURE

Highway



The only major interstates in the county are in the Southern portion of the county. I-35 (to Duluth) and I-94 (to Fargo) connect the county to Minneapolis. There is also north-south highway 65 that runs through the whole county. Employers and stakeholders alike cited the issue with traffic in the county. Some also noted that there is currently no major east-west highway, which can make getting around the county difficult.

Anoka County is served by two railroads, class 1 Burlington Northern Santa Fe (BNSF) and class 3 Minnesota Commercial (MNNR). BNSF operates a regional classification yard in Columbia Heights. BNSF mainline tracks head north splitting in Coon Rapids, a eastern line going to Duluth and a western line to Fargo. There are a handful of switches and side tracks and little evidence BNSF rail is being used by industry. MNNR operates a spur off of class 1 Canadian Pacific in New Brighton, Ramsey County. MNNR serves one customer in Anoka County, International Paper.

Anoka County team did not submit a site with rail for evaluation by the Ady Team.

Anoka County has a small public use airport options available, Anoka County-Blaine Airport located in the city of Blaine. It has two runways, one 5000 feet and the other 4855 feet. Located less than an hour south is the Minneapolis-St. Paul International Airport (MSP), the largest and busiest airport in the Upper Midwest region.

Anoka County has no port access in it's immediate vicinity; however there are two Port Authorities within an hour drive distance, the Saint Paul Port Authority and the Bloomington Port Authority. Saint Paul features four terminals. Also located two hours drive to the north is the Port of Duluth-Superior.

Utilities in the area appear to be sufficient and competitive as far as electric and water; however, there are issues with fiber availability in the region.

Rail



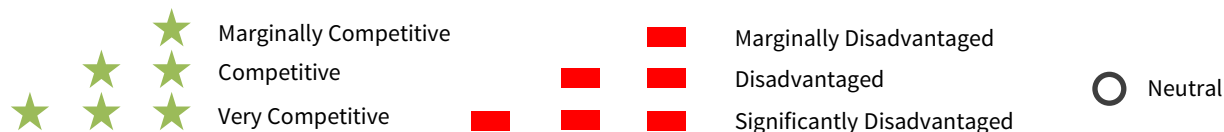
Air



Port



Utilities



Business Environment (continued)

KEY STATEWIDE INCENTIVES (from the Minnesota Department of Employment and Economic Development)

- **Angel Tax Credit:** Businesses headquartered in Minnesota with fewer than 25 employees and engaged in the research or development of qualifying high-technology can qualify for up to \$1 million in angel tax credits.
- **Small Business Credit Initiative:** The fund stimulates private-sector lending and improves access to capital for small businesses and manufacturers that are credit worthy but not getting loans they need to expand and create jobs. The initiative allocates up to \$15.4 million into three state programs.
- **Minnesota Investment Fund:** Offering a maximum of \$500,000 per grant, the fund focuses on industrial, manufacturing, and technology-related industries. We award grants to local units of government, which use the money to provide below-market rate loans to help companies expand. Funding may be used to purchase land, machinery and equipment.
- **Small Business Development Loan Program:** The program provides loans for business expansions that result in the creation of new jobs. Loans are up to \$5 million.
- **Indian Business Loan Program:** The program supports the development of Indian-owned and operated businesses and promotes economic opportunities for Indian people in Minnesota. Loans may be up to 75 percent of project costs and feature favorable interest rates and repayment terms.
- **Minnesota Job Creation Fund:** The fund provides up to \$1 million in grants to approved businesses after specified job creation and capital investment goals are achieved. Minimum requirements: 10 jobs created and \$500,000 capital investment. Actual job creation and capital investment rebates are based on project parameters.
- **Minnesota Growth Acceleration Program:** The program provides consulting services to help small manufacturers that employ up to 100 workers become more efficient, more competitive, and more likely to thrive and grow. GAP provides grants of up to \$50,000, which are matched dollar-for-dollar by companies.
- **Minnesota Job Skills Partnership Program:** The program partners strategically with businesses and schools to train or retrain workers, expand opportunities, and keep high-quality jobs in the state. Grants of up to \$400,000 are awarded to educational institutions that partner with businesses to develop new-job training or retraining for existing employees. Training grants are offered in five different program areas.
- **Scitechsperience Internship Program:** SciTechsperience is a paid internship program that connects college students in science, technology, engineering and math disciplines with rewarding hands-on opportunities at Minnesota companies that need their skills. The focus is on strengthening Minnesota's STEM industries and developing an experienced and well trained workforce
- **Data Center Incentive Program:** Companies that build data or network operation centers of at least 25,000 square feet and invest \$30 million qualify for sales tax exemptions for 20 years on computers and servers, cooling and energy equipment, energy use and software, and they pay no personal property tax ever. Companies have 48 months to complete the project.
- **Bioscience Incentive Program:** The program provides production payments to encourage commercial-scale production of advanced biofuels, renewable chemicals, and thermal energy production from biomass.

Business Environment (continued)

KEY REGIONAL INCENTIVES (from Greater MSP)

- **Greater Minnesota Business Expansion Tax Credits:** Greater Minnesota Business Expansion program will provide sales tax exemptions of up to 12 years to eligible existing businesses located in Greater Minnesota that meet eligibility requirements including specified job creation and wage level.
- **Research and Development Tax Credit:** The tax credit for R&D expenditures is 10 percent, up to the first \$2 million in eligible expenses. The credit is 2.5 percent for eligible expenses above \$2 million. Individuals involved in partnerships, S-corporations and limited liability companies are allowed to claim the credit against their individual income taxes. This opens up the tax credit to more small and medium-sized businesses.
- **Greater Minnesota Internship Tax Credit:** Employers may claim a refundable credit of up to \$2,000 for each internship provided to eligible students in Greater Minnesota. The credit is available for tax years that begin in 2014 or later.

KEY LOCAL INCENTIVES

The localities within the county tend to have their own economic development tools, such as tax abatements and TIF.

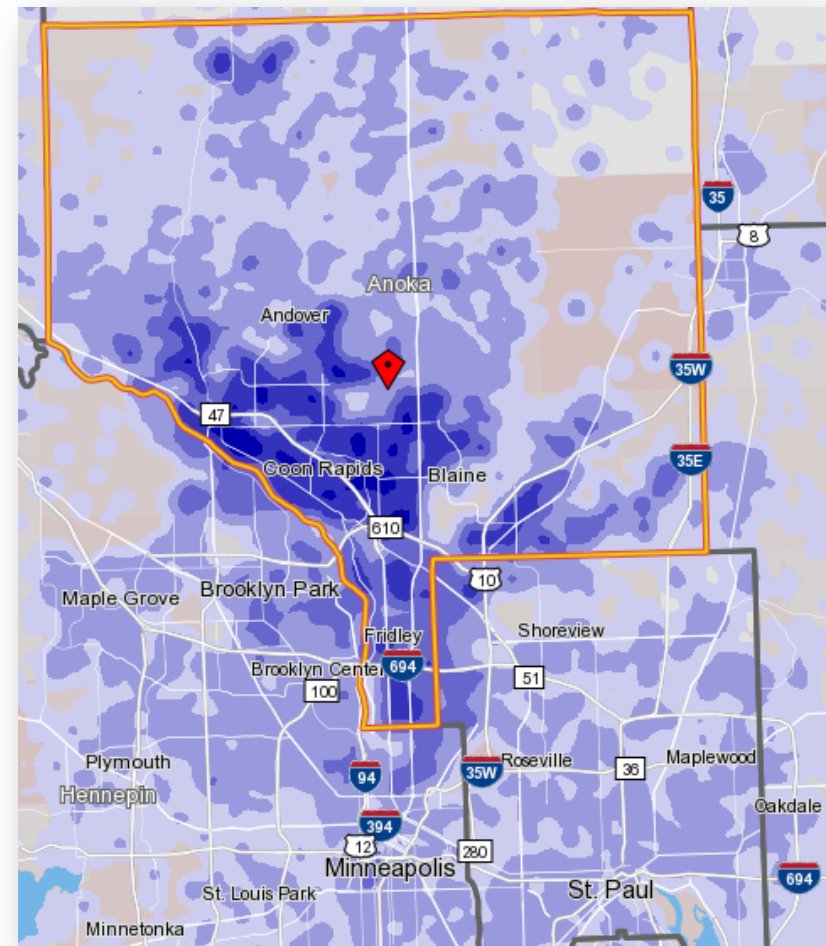
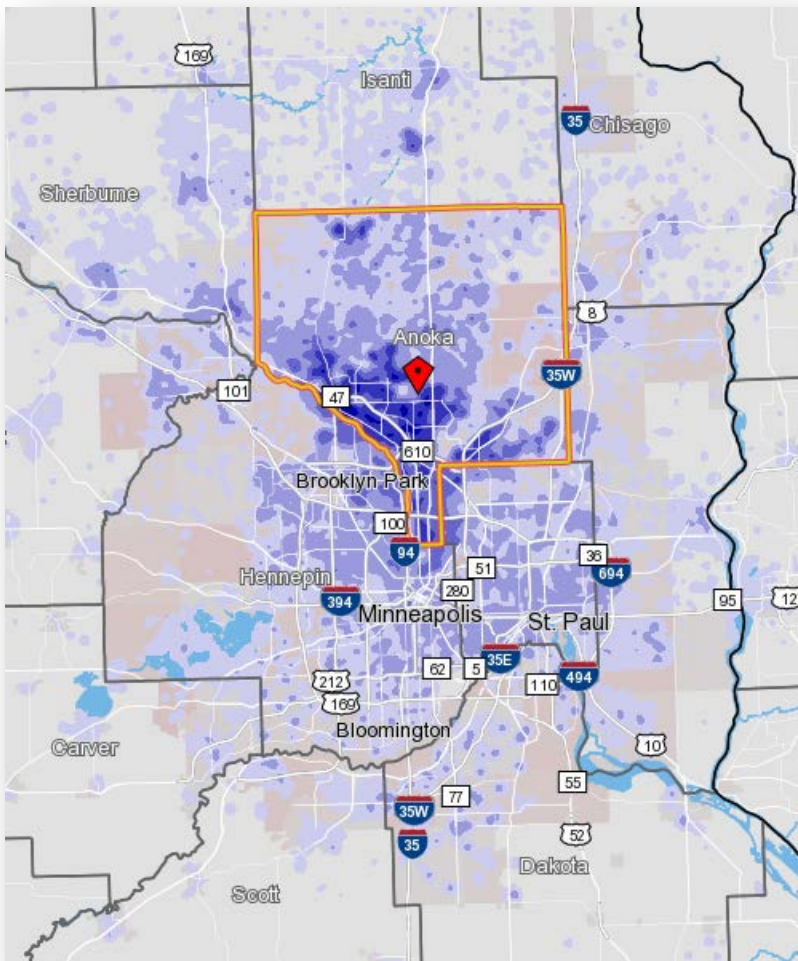
COMMUTING PATTERNS



Employment Distribution

In order to analyze the current workforce in Anoka County, we looked at major employment centers within the county, as well as some commuting patterns. The results of this analysis are presented on this page, as well as the following pages.

The maps below highlights the job concentrations in and around the county. The greatest amount of job concentration is in the southwest portion of the county around Anoka City, Coon Rapids, Andover and Blaine, as well as the southern panhandle stretching from Fridley down in to the Twin Cities of Minneapolis and St. Paul.



Workforce Demographics

The data below reflects some basic demographics about the workforce within Anoka County and how the major cities of employment compare to each other. Just over half the population in the county is aged 30 to 54; Ham Lake has a slightly younger workforce, and Anoka City has a slightly older.

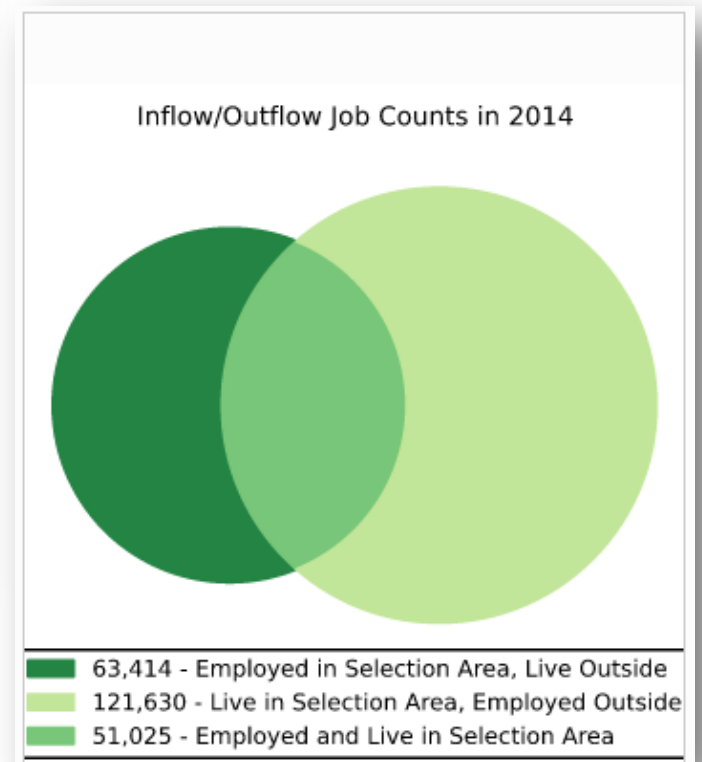
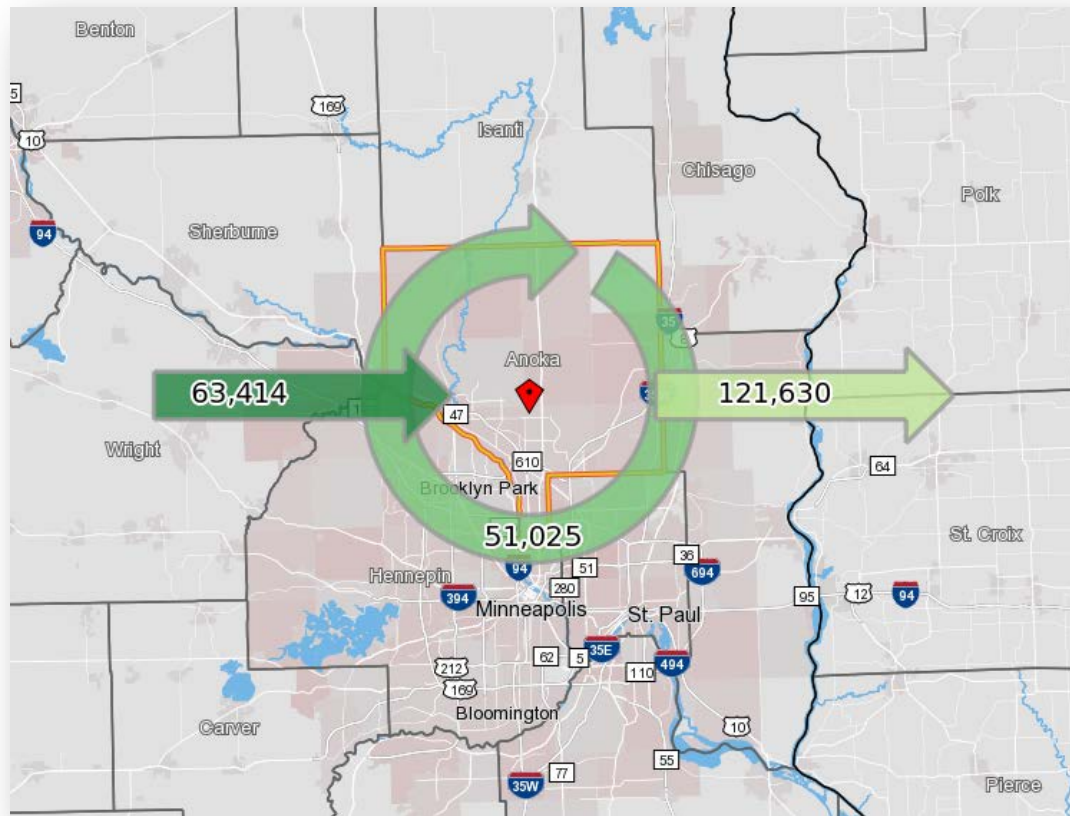
Education levels are fairly consistent across Anoka County and the cities within it; Anoka City and Fridley have slightly higher levels of four-year and bachelor's attainment. Not surprisingly, these two cities also have the highest percentages of workers earning more than \$3,333 per month.

Most cities within Anoka County are split fairly evenly between males and females in the workforce; however, Ramsey, Fridley, and especially Ham Lake have significantly more men in the workforce than women.

	Anoka County Total	Coon Rapids City	Blaine City	Andover City	Ramsey City	Anoka City	Fridley City	Ham Lake City
Total Jobs	114,439	22,188	24,687	4,019	5,200	13,535	27,397	3,492
Worker Age								
Age 29 or younger	23.5%	26.2%	25.0%	27.2%	22.8%	18.1%	18.7%	28.2%
Age 30 to 54	55.1%	52.4%	55.5%	54.3%	56.8%	57.3%	56.9%	57.2%
Age 55 or older	21.4%	21.4%	19.5%	18.4%	20.5%	24.6%	24.4%	14.6%
Earnings								
\$1,250 per month or less	21.1%	23.0%	23.8%	29.1%	18.8%	14.9%	15.8%	21.5%
\$1,251 to \$3,333 per month	30.4%	32.1%	28.3%	32.3%	33.7%	25.2%	28.6%	33.0%
More than \$3,333 per month	48.5%	44.9%	47.9%	38.5%	47.6%	59.9%	55.7%	45.4%
Worker Race								
White Alone	90.4%	90.0%	90.4%	95.6%	94.2%	92.3%	87.2%	93.7%
Black or African American Alone	3.9%	4.0%	3.5%	1.5%	2.2%	3.7%	5.0%	2.4%
American Indian or Alaska Native Alone	0.6%	0.6%	0.5%	0.5%	0.4%	0.5%	0.7%	0.4%
Asian Alone	3.8%	3.9%	4.2%	1.4%	2.4%	2.5%	5.7%	2.2%
Native Hawaiian or Other Pacific Islander Alone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Two or More Race Groups	1.3%	1.4%	1.3%	0.9%	0.7%	0.9%	1.3%	1.3%
Hispanic or Latino	2.5%	2.4%	2.5%	1.5%	2.3%	2.1%	3.2%	2.6%
Worker Educational Attainment								
Less than high school	5.9%	5.0%	5.7%	4.7%	6.1%	5.5%	6.4%	6.8%
High school or equivalent, no college	21.6%	19.0%	21.2%	19.1%	24.1%	22.6%	22.6%	22.9%
Some college or Associate degree	26.8%	26.3%	25.4%	25.0%	26.5%	29.9%	27.8%	26.9%
Bachelor's degree or advanced degree	22.3%	23.5%	22.7%	24.0%	20.6%	24.0%	24.6%	15.2%
Worker Sex								
Male	53.9%	43.3%	54.5%	44.9%	60.5%	52.8%	60.7%	66.1%
Female	46.1%	56.7%	45.5%	55.1%	39.5%	47.2%	39.3%	33.9%

Commuting Patterns

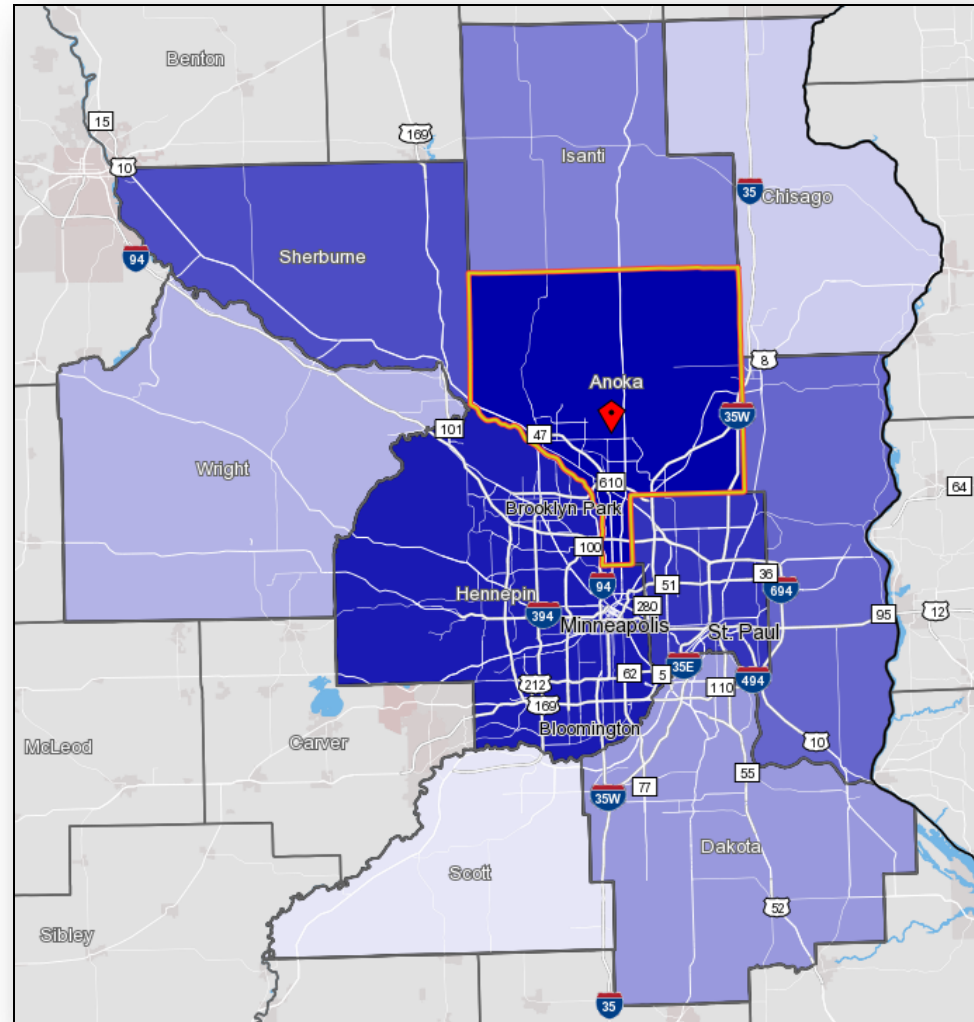
The map and graphic below illustrates the balance between the inflow and outflow on employment in Anoka County. There is significantly more people who live in the county but commute out for work (121,630), twice that of the people who live outside the county but work inside it (63,414), as well as those who both live in the county and work within in (51,025).



Commuting Patterns

The data in the table below shows the worker flow for Anoka County in 2014, illustrating that just under half of the people employed within Anoka County also live within the county. Talent is also being drawn into the county, primarily from Hennepin County (the bulk of which is likely from Minneapolis and St. Paul), but also the surrounding counties of Ramsey, Sherburne, Washington and Isanti. Thereafter, the representation starts to become increasingly small.

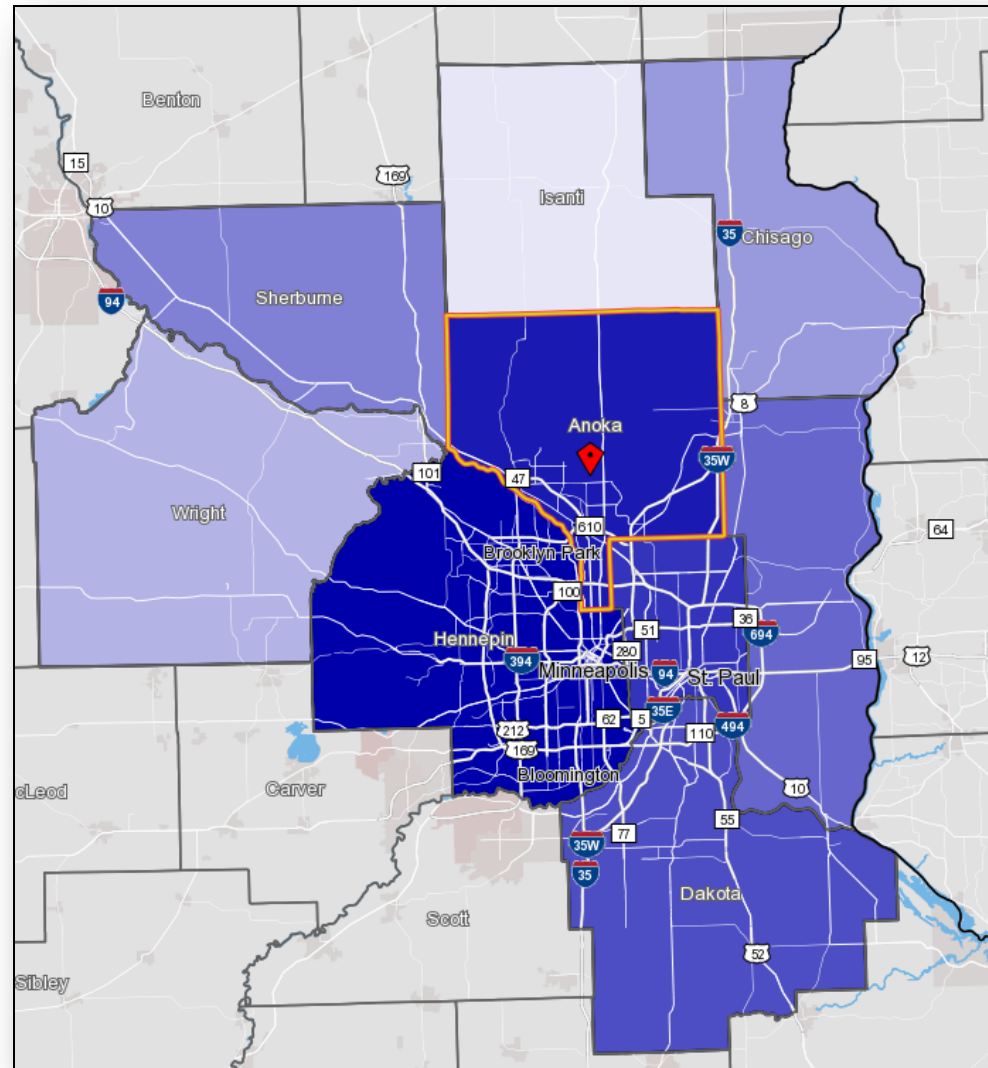
Workers who are Employed in Anoka County		
County of Residence	Count (2014)	Share (2014)
Anoka County, MN	51,025	44.6%
Hennepin County, MN	21,117	18.5%
Ramsey County, MN	10,056	8.8%
Sherburne County, MN	4,548	4.0%
Washington County, MN	4,536	4.0%
Isanti County, MN	3,440	3.0%
Dakota County, MN	2,776	2.4%
Wright County, MN	2,689	2.3%
Chisago County, MN	2,522	2.2%
Scott County, MN	976	0.9%
All Other Locations	10,754	9.4%



People who live in Anoka work in these places

Similar to the previous slide, the data in the table below shows the worker flow for Anoka County in 2014, this time illustrating where people who live in Anoka county commute to work. By far the number one worker outflow for employment is Hennepin County (again, most likely to Minneapolis and St. Paul). There is also a significant amount of employment commuting to Ramsey County. Descending in order after this is Dakota, Washington and Sherburne.

Workers who Live in Anoka County		
County of Employment	Count (2014)	Share (2014)
Hennepin County, MN	68,720	39.8%
Anoka County, MN	51,025	29.6%
Ramsey County, MN	30,914	17.9%
Dakota County, MN	3,859	2.2%
Washington County, MN	3,664	2.1%
Sherburne County, MN	2,264	1.3%
Chisago County, MN	1,220	0.7%
Wright County, MN	1,024	0.6%
St. Louis County, MN	1,006	0.6%
Isanti County, MN	960	0.6%
All Other Locations	7,999	4.6%



SECTION 4: SITE VISIT ANALYSIS

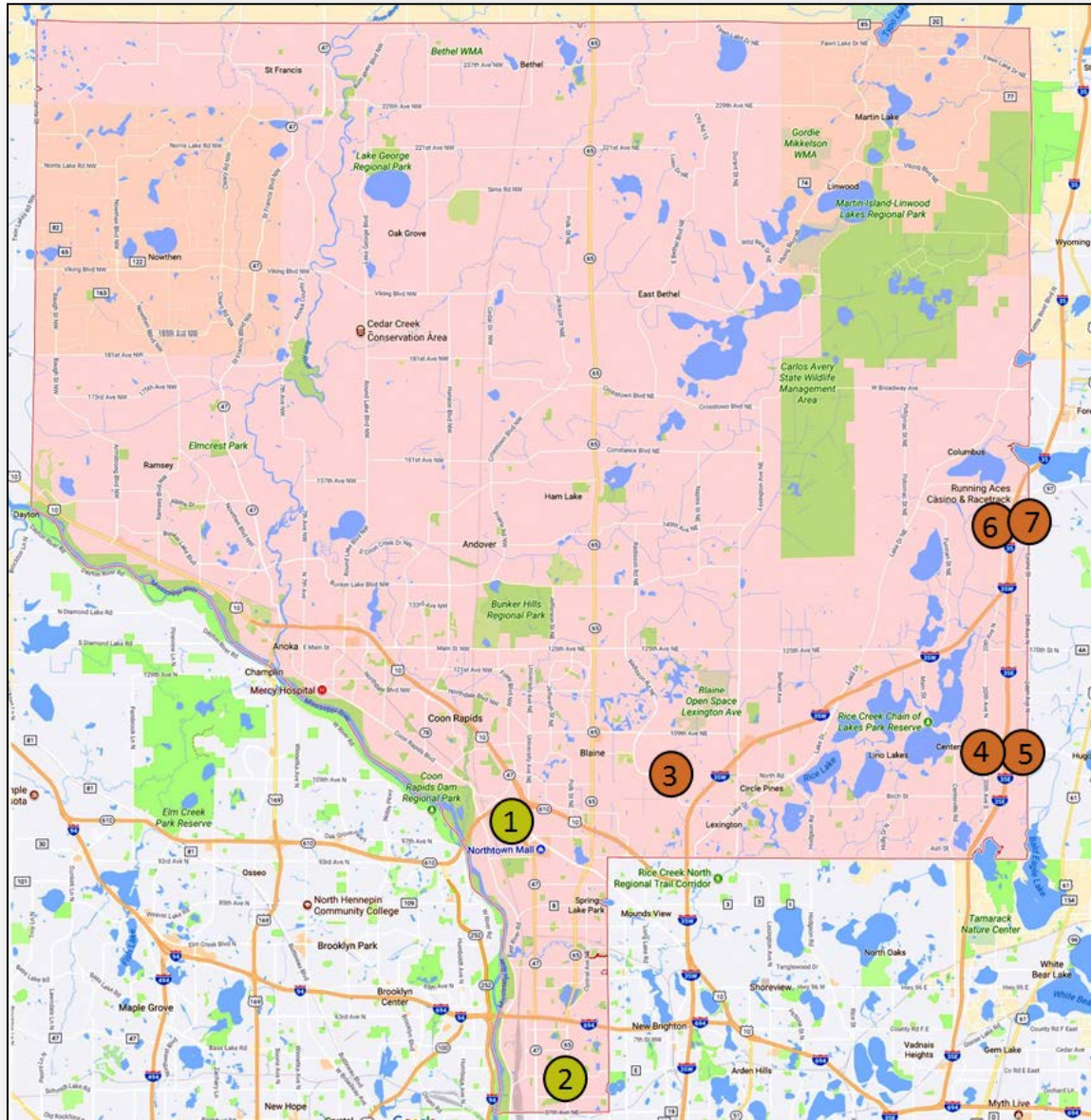


Site Visit Analysis - Introduction

In recent decades Minneapolis urban sprawl has favored southern, eastern and westward expansion over northern expansion into Anoka County; however, Anoka County's open lands and available industrial properties are closer to the metro urban center compared with these assets elsewhere in the region. The county is reported to offer lower land prices, a faster and less confrontational permitting process, lower wages, and less traffic as compared to other parts of the metro area. Utility services in Anoka County are reported to be competitively priced, reliable, and with sufficient capacity to support growth.

The Ady Advantage team conducted an on-site visit on Friday, August 18th, 2017. The purpose of this visit was to review sites and buildings in the region, as well as interview local stakeholders and employers to determine strengths, weaknesses, opportunities and threats to Anoka County. The following section serves as a summary of the sites that we visited and an objective analysis of each. **Note: The sites that were evaluated are not the county's "premium sites".**

Site Visit Analysis – Investigated Sites



- ① Boston Scientific
- ② Northeast Business Center
- ③ 1021 Xylite Street NE
Clearwater Creek Business Park
- ④ 21st Avenue North
- ⑤ Otter Lake Road
City of Columbus
- ⑥ Gander Drive/Zurich Street
- ⑦ Feller Street NE

● Building ● Site

Site Visit Analysis – Summary Comments and Recommendations

Building/Site	Grade and Key Deficiencies	Comments
Building #1 8880 Evergreen City of Coon Rapids	Grade: A- Deficiencies: <ul style="list-style-type: none"> • No marketing material presented • Pricing information not provided 	<p>As presented, this property appears to be a high-quality building that is suitable for scientific R&D and other technical operations. Combining the building's great location near highways and in an attractive industrial/office park with worker amenities nearby, makes this a property aligned with high paying technical jobs. The building is multi-tenant with approximately 1/3 available space.</p> <ul style="list-style-type: none"> • Limited information on building provided • Tour of building not available • Pricing information not provided • Parking lot needs repair
Building #2 Northeast Business Center City of Columbia Heights	Grade: B Deficiencies: <ul style="list-style-type: none"> • No marketing material presented • Property is showing signs of abandonment due to lack of maintenance • Pricing information not provided 	<p>Anoka County has attracted few large office operations in recent years. The Northeast Business Center offers an opportunity to change that trend. The building is located near the Minneapolis urban core and within an emerging downtown district. The building has attached deck parking, an open interior ready for tenant improvements, and reliable utility services.</p> <ul style="list-style-type: none"> • This is an attractive building that can support a single user or multiple tenants; however, some exterior maintenance has been neglected. • The building has reportedly undergone interior tear down, positioning the building ready for new tenant improvements (TI) • The adjacent city owned parking deck includes a covered walkway to the building. Ownership of the parking deck can revert to the building owner for \$1 • The building is located along Central Avenue, Columbia Heights' historic commercial center which is now undergoing a renaissance • The building is close to downtown Minneapolis and easily accessible by road and bike trail • The owners do not appear to have a plan for repurposing the building and little information was offered including asking price

Site Visit Analysis – Summary Comments and Recommendations

Building/Site	Grade and Key Deficiencies	Comments
<p>Site #3</p> <p>2017 Xylite</p> <p>City of Blaine</p>	<p>Grade: D</p> <p>Deficiencies:</p> <ul style="list-style-type: none"> • High asking price without commensurate property advantages • Wetlands greatly limit site development • Access road in poor condition • Contamination of site suspected 	<p>The tone of recent development along Radisson Road NE west of I-35W, northeast of Anoka County Airport, is class B light industrial – buildings with some architectural and landscaping integrity. Development along Xylite Road is indicative of earlier development. these properties are heavy industrial in tone. Site #3 is bordered by a recycling center and a trucking cross dock.</p> <ul style="list-style-type: none"> • Excellent access to I-35W • Convenient to Anoka County Airport and concentrations of light duty industrial operations • Wetlands dominate the site • On-site access road is light duty and in poor condition • Site is located in a heavy industrial environment but is priced as Class A light industrial land • Stored equipment on the property increases the possibility there is contamination
<p>Site #4</p> <p>Clearwater Creek Business Park – 3 parcels</p> <p>City of Centerville</p>	<p>Grade: A-</p> <p>Deficiencies:</p> <ul style="list-style-type: none"> • Unattractive industrial storage operations on road leading to parcels • Wetlands on Parcel C 	<p>A new I-35E interchange at Main Street in Centerville has created a new center for commercial, industrial, and residential development. Improvements to 21st Street North and construction of a quality warehouse building, the first building in Clearwater Creek Business Park, sets the tone for future development. Holding true to these standards will be important to maintain high quality in the future.</p> <ul style="list-style-type: none"> • Mix of sites apparently ready for development <ul style="list-style-type: none"> Parcel A: 10 acres Parcel B: 15 acres Parcel C: 39.6 acres • Build-to-suit properties, like the new building on 21st Street North, are needed in the MSP market • New Main St/I-35E interchange and improved 21st Street N. provide excellent highway access • Possible presence of wetlands on Parcel C will limit development • No asking price provided • Unattractive industrial storage operations on 21st Street North are incompatible with quality development

Site Visit Analysis – Summary Comments and Recommendations

Building/Site	Grade and Key Deficiencies	Comments
Site #5 Clearwater Creek Business Park – 72 acres Lino Lakes	Grade: B Deficiencies: <ul style="list-style-type: none"> • Development concept showing proposed ingress/egress not presented • Presence of wetlands will limit development 	<p>A new I-35E interchange at Main Street in Centerville has created a new center for commercial, industrial, and residential development. The 72-acre Clearwater Creek Business Park, located east of I-35E, is raw agricultural ground. Neighboring development includes a mix of old and new, light industrial, commercial. The tone of development at this location has yet to be established.</p> <ul style="list-style-type: none"> • Presence of wetlands on north side of property will limit development • No asking price provided • New Main St/I-35E interchange provides excellent highway access
Site #6 West of I-35 parcels City of Columbus	Grade: B+ Deficiencies: <ul style="list-style-type: none"> • Development concept for the area not presented • Asking price not presented • Limited broadband capacity 	<p>Developable land in Columbus southwest of the I-35 interchange and Lake Drive NE is largely confined to the area between I-35 and Zurich Street. Wetlands and flood plain surround the area. The convergence of I-35W and I-35E just south of Columbus delivers thousands of cars daily passing this highway visible property. Both highway commercial and industrial development are appropriate.</p> <ul style="list-style-type: none"> • Large site apparently ready for development • Access will be improved by Lake Drive NE/I-35 interchange improvements underway • Visibility from I-35 possible • No development masterplan for property or attraction strategy for community • Possible wetlands could limit development • No price or property information provided • Broadband capacity in the area is insufficient to meet commercial/industrial needs

Site Visit Analysis – Summary Comments and Recommendations

Building/Site	Grade and Key Deficiencies	Comments
Site #7 East of I-35 parcel City of Columbus	Grade: B- Deficiencies: <ul style="list-style-type: none"> • Unattractive neighboring properties – no apparent design standards for highway commercial development • Scant information provided about property including price • Limited broadband capacity 	<p>Developable land in Columbus southeast of the I-35 interchange and Lake Drive NE is largely confined to the area between I-35 and Hornsby Street NE. Wetlands and flood plain surround the area. The convergence of I-35W and I-35E just south of Columbus delivers thousands of cars daily passing this highway visible property. Both highway commercial and industrial development are appropriate.</p> <ul style="list-style-type: none"> • Large site with visibility from I-35 • Lake Drive NE/I-35 interchange improvements underway • Neighboring development is unattractive, lacking design standards • No information providing details about property and pricing • Broadband capacity in the area is insufficient to meet commercial/industrial needs

Site Visit Analysis – Boston Scientific Building – City of Coon Rapids

Strengths

- Excellent highway access
- Quality building, cleanroom and other specialized space
- Attractive light industrial/office park

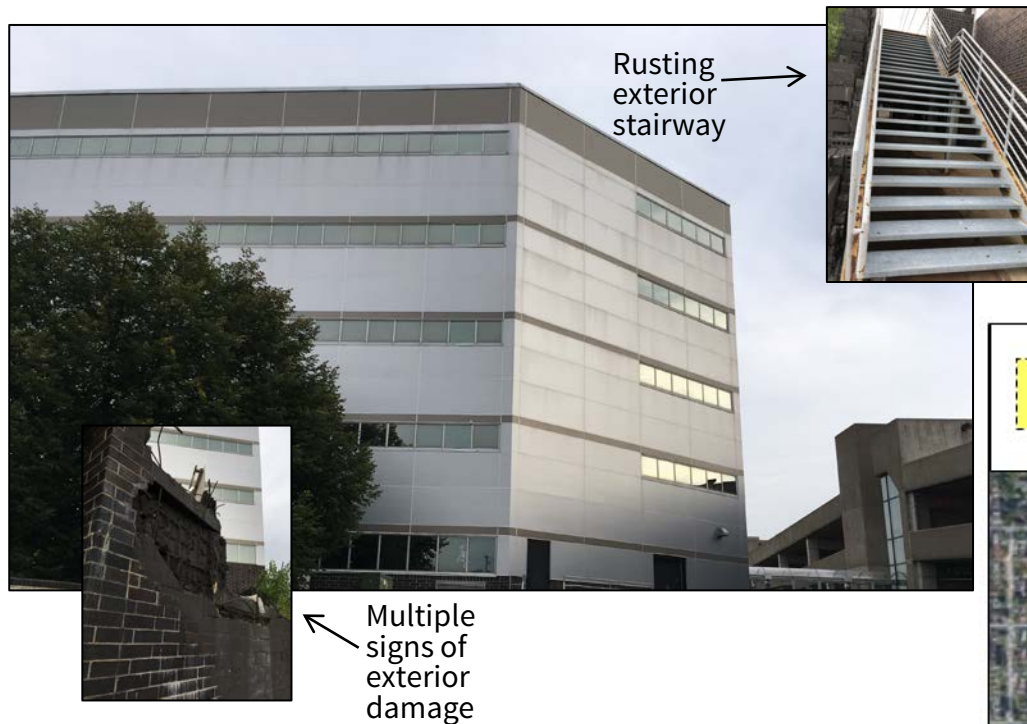


Weaknesses

- Multi-tenant, limited space available
- Information on building not provided, including pricing
- Tour of building not available
- Parking lot is in need of repair



Site Visit Analysis – Northeast Business Center Building - City of Columbia Heights



Strengths

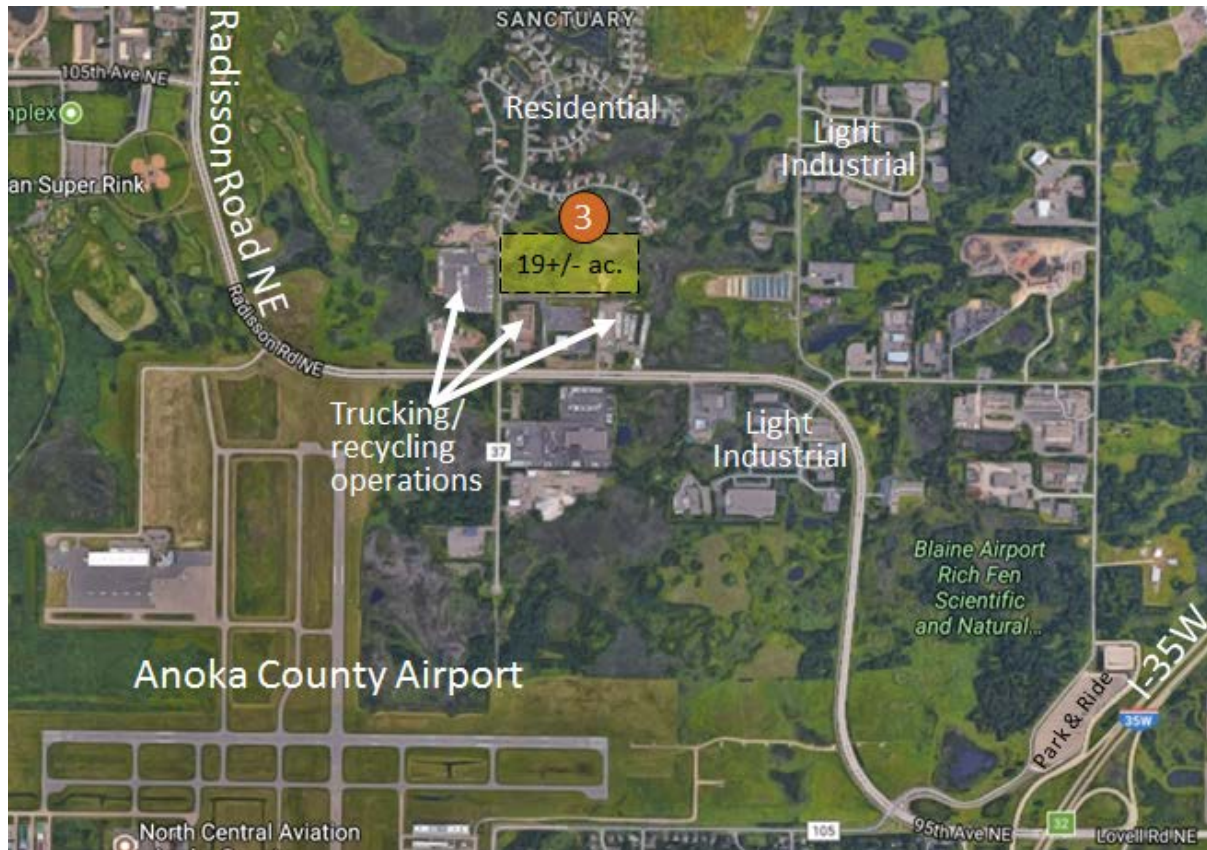
- Attractive building; however, some exterior maintenance has been neglected
- Single or multi-tenant uses
- Open and ready for new tenant
- Parking deck attached
- Columbia Heights has an emerging downtown
- Close to Minneapolis city center
- Bike trail connects to Minneapolis

Weaknesses

- No apparent marketing plan in place
- Scant information about building available, no pricing offered

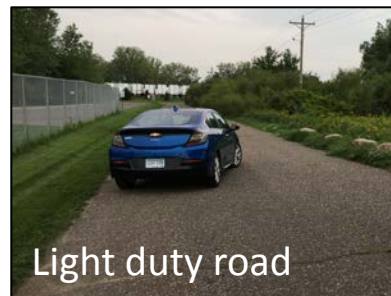


Site Visit Analysis – 1021 Xylite Street NE - City of Blaine



Strengths

- Excellent access to I-35W
- Convenient access to Anoka County Airport and concentrations of light-duty industrial operations



Weaknesses

- Recycling/ trucking operations and residential properties border site
- Wetlands make much of the property unusable and difficult to develop
- Asking pricing seems excessive for the limited development potential

Site Visit Analysis – Clearwater Creek Business Park – Lino Lakes

Strengths

- Mix of sites apparently ready for development
- Build-to-suit properties on 21st Street N. are needed in the market
- New Main St/I-35E interchange and improved 21st Street N.



Weaknesses

- Possible presence of wetlands could limit development
- No asking price provided
- Limited information on 72 acre parcel
- Unattractive industrial storage operations on 21st Street North are incompatible with quality development



Site Visit Analysis – Highway Commercial Frontage - City of Columbus

6 Strengths

- Large site apparently ready for development
- Access will be improved by Lake Drive NE/I-35 interchange improvements underway
- Visibility from I-35 possible

Weaknesses

- No development master plan for property or attraction strategy for community
- Possible wetlands could limit development
- No price or property information provided



7 Strengths

- Large site with visibility from I-35
- Lake Drive NE/I-35 interchange improvements underway

Weaknesses

- Neighboring development is unattractive, lacking design standards
- No information provided detailing property and pricing

SECTION 5: STAKEHOLDER AND EMPLOYER INPUT AND ANALYSIS



Section 4: Stakeholder and Employer Input and Analysis

Employer Key Themes	46
Stakeholder Key Themes	50

Stakeholder and Employer Input – Introduction

The Ady Advantage team conducted an on-site visit on Friday, August 18th, 2017. We were able to interview a variety of stakeholders that are included in the following analysis. In order to see differences in opinions, perceptions, needs and trends, we looked at employer responses versus other stakeholder responses. Below is a list of the individuals interviewed.

The following section contains the key themes that emerged from these conversations.

Company/Organization	Name	Title
Aggressive Hydraulics	Paul Johnson	CEO
Anoka County	Karen Skepper	Director of Community and Government Relations
Anoka Technical College	Pete Gravett	Development Director
City of Blaine	Erik Thorvig	Economic Development Coordinator
City of Columbia Heights	Keith Dahl	Economic Development Manager
City of Columbus	Elizabeth Mursko	City Administrator
City of Coon Rapids	Matt Brown	Economic Development Coordinator
City of Lino Lakes	Michael Grochala	Community Development Director
City of Ramsey	Pat Brama	Economic Development Manager
CMDC Business Loans	Mike Mulrooney	President/CEO
Colliers	Dan Friedner	Vice President
Connexus	John Rikkes	Social Media Specialist
Connexus	Don Haller	VP of Member Services, Products and Sales
DSTI	Jeff Meister	President
Infinite Campus	Charlie Kratsch	CEO
LISI Medical	Clinton Schneider	CEO
Metro North Chamber	Lori Higgins	President
National Sports Center	Todd Johnson	Associate Executive Director

Employer Interviews - Key Themes



Employer Interviews – Key Themes

Employers all had generally positive things to say about the county. From a quality of life perspective, these companies enjoy being close to the metro area, but still able to live a more rural and/or suburban lifestyle. There are also some cost of living benefits of living outside of the metro area. From a business perspective, the proximity to the metro is also a big advantage. Companies also noted the available supply chain in this industry for certain types of manufacturing, the strong work ethic of employees and overall business engagement in the community.

The negative perceptions of the region, which can make it hard for employers to recruit employees, include the rural nature of the county, the perception that there are only blue collar jobs in the county, traffic issues and perceptions about the types of people that live north of the metro area.

POSITIVE PERCEPTIONS OF THE COUNTY	NEGATIVE PERCEPTIONS OF THE COUNTY
<p>Quality of Life</p> <ul style="list-style-type: none">• Housing variety and costs• Public schools• Rural lifestyle or suburban lifestyle• Proximity to metro• Low crime and low poverty• Growth <p>Doing Business</p> <ul style="list-style-type: none">• Supply chain opportunities• Proximity to metro• Work ethic• Business engagement	<ul style="list-style-type: none">• Redneck• Extremely rural and remote, on the way up to your cabin• Traffic issues on some of the major routes that our employees take• Only blue-collar here

Employer Interviews – Key Themes

After probing further into the costs and conditions of doing business in the region, we found that overall, costs of doing business are average. Minnesota can be known for higher taxes, but not so much so that these companies would leave. Most utilities are reliable and competitively-priced; however, there are issues with fiber availability in some areas of the county.

Costs of Doing Business

- At a state-level, taxes here are higher than many parts of the country.
- Real estate costs are moderate to high
- Nothing alarming compared to the other places we were looking at expanding to (Hennepin County, Isanti County)
- Costs are pretty average

Infrastructure

- Fiber has been a little bit of a challenge when we expanded
- Good access to power
- Good availability of water

Employer Interviews – Key Themes

Biggest Challenges

The main challenges noted by employers is related to attracting and retaining talent. Fiber also came up in at least one interview as being an issue.

- Hiring qualified employees
 - Hardest positions to hire for:
 - Software engineers
 - Machinists
- Have to pay higher wages to compete with Minneapolis
- Need better access to fiber

How could the local EDOs and the county better serve existing businesses?

When asked what the local EDOs or the county could do better to support existing businesses, we got a variety of responses. Two responses were related to costs: incentives and property taxes, while the others were related to talent and infrastructure.

- Provide more incentives and promote their current services to businesses
- Better promote the high tech infrastructure that already exists, but also work to improve overall fiber access in the county
- Help us change the perceptions of manufacturing at the K12 level and develop the younger generations to consider trades – high schools are abandoning trade classes and too heavily promoting four-year colleges
- Lower property taxes

Potential Target Industries

Finally, we asked about potential target industries. Most employers answered from their industry's perspective. Industries included a variety of manufacturing.

- Manufacturing
- High-tech
- Machining
- Light industrial
- Metal processing, plating and coating

Stakeholder Interviews - Key Themes



Stakeholder Interviews – Key Themes

The perceptions of the stakeholders tended to mirror those of the employers, but also went more in-depth on some of the specific positives and negatives. Many of the positive perceptions were similar; however, stakeholders also mentioned the lack of available buildings, which employers may not see from their perspective.

POSITIVE PERCEPTIONS OF THE COUNTY	NEGATIVE PERCEPTIONS OF THE COUNTY
<ul style="list-style-type: none"> • Access to metro area • Lower priced land • Closer to cabin in the north • It is becoming less and less blue collar • Selective high-end neighborhoods emerging • Reduced conflict intersections (RCI) are increasing • Inventory of available industrial land (10 or fewer acre sites) • Strong manufacturing core • Water infrastructure • Electric is reliable and affordable • Good public schools and technical schools • Nice parks system and golf courses • Supportive community • Lower cost of living compared to Minneapolis – affordable housing • Sports complex is a good asset, but needs upgrades • Regional airport 	<ul style="list-style-type: none"> • Rural • Blue-collar • Lack of available buildings – 20,000 – 100,000 sf buildings • Lack of spec warehouse/industrial buildings in the county • The County is missing tools to compete (e.g., incentives, dedicated staff, etc.) • Lack of business services and retail • Perception is that the cities are further up north than they actually are

Stakeholder Interviews – Key Themes

Biggest Challenges

- **Infrastructure**
 - Transportation
 - Traffic issues – but new interchange coming
 - Moving east-west through the county is a challenge
 - Some highways are in need of upgrades
 - Lack of telecom (with the exception of Columbia Heights)
- **Inventory**
 - Lack of available buildings – 20,000 – 100,000 sf buildings
 - Lack of spec warehouse/industrial buildings in the county
 - There is land available; however, there is also a large amount of wetlands
- **Cohesiveness within the county**
 - Lack of vision and economic development planning around land development
 - No defined brand
 - The County is missing tools to compete (e.g., incentives, dedicated staff, etc.)
 - Changing the image of Anoka County being very rural and blue collar

Potential target industries

- Light manufacturing
 - Medical device manufacturing
 - Injection molding
 - Recreational activity manufacturing (e.g., kayak manufacturing)
 - High precision manufacturing for the aerospace industry
- Back Office
- Data Centers (certain parts of the county)
- Not distribution – Big distribution companies will likely want to be on the south and east of Minneapolis to be closer to larger markets

Overall Key Challenges from On-Site Visit



Key Challenges to Overcome

- 1. Countywide Professional Economic Development Representation** - Anoka County has no apparent platform for effectively supporting economic development. As a result, local communities are likely to produce inefficient and incomplete responses to investment inquiries, and ineffective brand and market the area. Consequently, within metro MSP, the county has gotten a smaller share of investment proportional to it's population. It appears each community addresses branding and marketing in their own way, which may include little or no effort. Each is apparently responsible for assembling community information, available real estate, demographics, utilities, zoning, planning, workforce, training and education, local employers, commuting patterns, and industry attraction targets.
- 2. Development Ready Industrial Sites / Available Industrial Buildings** - Despite the availability of large tracks of undeveloped land, Anoka County's inventory of development ready industrial sites appears quite small. This, in combination with a small inventory of available light industrial buildings, means Anoka County is being eliminated from the start of many location selection searches. Site selection professionals agree that more than 50% of all location searches start by looking for an available building. Site selectors also agree that development ready sites are essential in order to be competitive for new investment. Within the greater MSP area, but outside Anoka County, there are many site and building options for companies to consider. The sites and buildings investigated during this study, while a sample of the market, were largely unattractive, of modest quality, and possibly over priced.
- 3. Local Industry Engaged with Economic Development** - The best testimonial for a community's value as a place to do business is from a local business who is prospering. Community economic development programs that can illustrate high level engagement with existing industry are more likely to be successful in retaining business and recruiting investment from the outside. Anoka County and Local Community Branding and Marketing - Anoka County's 20 incorporated cities, many small in population and geography, along with large swaths of wetlands and small lakes, contribute to an imprecise image of the area. Locals seem to struggle with defining, "What is this place 'Anoka County'?" Absent a brand that resonates with people inside and outside the county, Anoka County will continue to struggle to gain attention.
- 4. Engagement with Regional and State Economic Development** - Anecdotal evidence indicates Anoka County has a poor track record in attracting new investment. Economic development opportunities come to a region in two ways: (1) Locally generated - retention and expansion of existing businesses, start-ups; and (2) Investment generated from outside the area. A good local economic development program, with strong branding and messaging, will garner attention from economic development partners. In the absence of such a program in Anoka County, there is a sense that Greater MSP and state ED agencies are only marginally supportive. Also, there appears to be little discussion of local business startups and capturing business expansion and retention.
- 5. Engagement with Elected Officials, Political Leaders, City Staff, Business Leaders, and other Stakeholders** - Elected officials and community staff throughout the county are reported to be either broadly disengaged or lack training when it comes to best practices relative to economic development programming and processes. This lack of engagement places Anoka County communities at a competitive disadvantages as Greater MSP and many jurisdictions within the region are better equipped on economic development matters.

SECTION 6: TARGET INDUSTRY ANALYSIS



SECTION 5: TARGET INDUSTRY ANALYSIS

Economic Base Analysis	57
Target Industry Identification Analysis	72

Economic Base Analysis



Economic Base Analysis

Methodology and Purpose

To identify the region's economic drivers, data on industry concentration and historic growth were gathered for several specific industry clusters; the data covered two regions. The region referred to as Anoka County is Anoka County. The region referred to as the Greater Region includes Anoka County's Laborshed: Anoka, Chisago, Dakota, Hennepin, Isanti, Ramsey, Sherburne, Washington and Wright Counties.

The clusters are defined by the North American Industry Classification System (NAICS) and the data for this analysis was licensed from Economic Modeling Systems Inc. (EMSI). Note that while EMSI provides information on industries and their impact on the local economy, it does not include identities of specific firms. Additional information about EMSI's data and how its used for economic development are provided below.

- EMSI Information on Data Descriptions and Sources: <http://www.economicmodeling.com/data/usadata/>
- EMSI for Economic Development: <http://www.economicmodeling.com/our-clients/emsi-for-economic-developers/>

Our methodology focuses on industry size (measured by number of employees), industry growth or contraction (measured by historic change in employment from 2012 to 2016), industry concentration, as well as wages by industry. We used the most recent five-year period for the historical analysis.

Industry concentration is measured using a location quotient methodology. A location quotient measures the presence of industry employment within a specific region compared to national averages. For example, if a region has a location quotient of 1.25 this means the industry's share of regional employment is 25% higher than would be expected based on the industry's share of national employment.

Economic Base Analysis

Results Presented on Graphs

The various bubble charts, shown on the following pages, graphically show this first-level industry analysis for both Anoka County and the greater region (five-county region). The same analytical and graphical approach is used throughout this target industry analysis to help visually show the various industries at increasingly granular levels of analysis (e.g., from a 2-digit level up to and including a 6-digit analysis).

In each graph, the X-axis is the historic growth or contraction by industry over time; the Y-axis identifies the industry location quotient, and the size of the industry cluster circle represents the number of employees in the region.

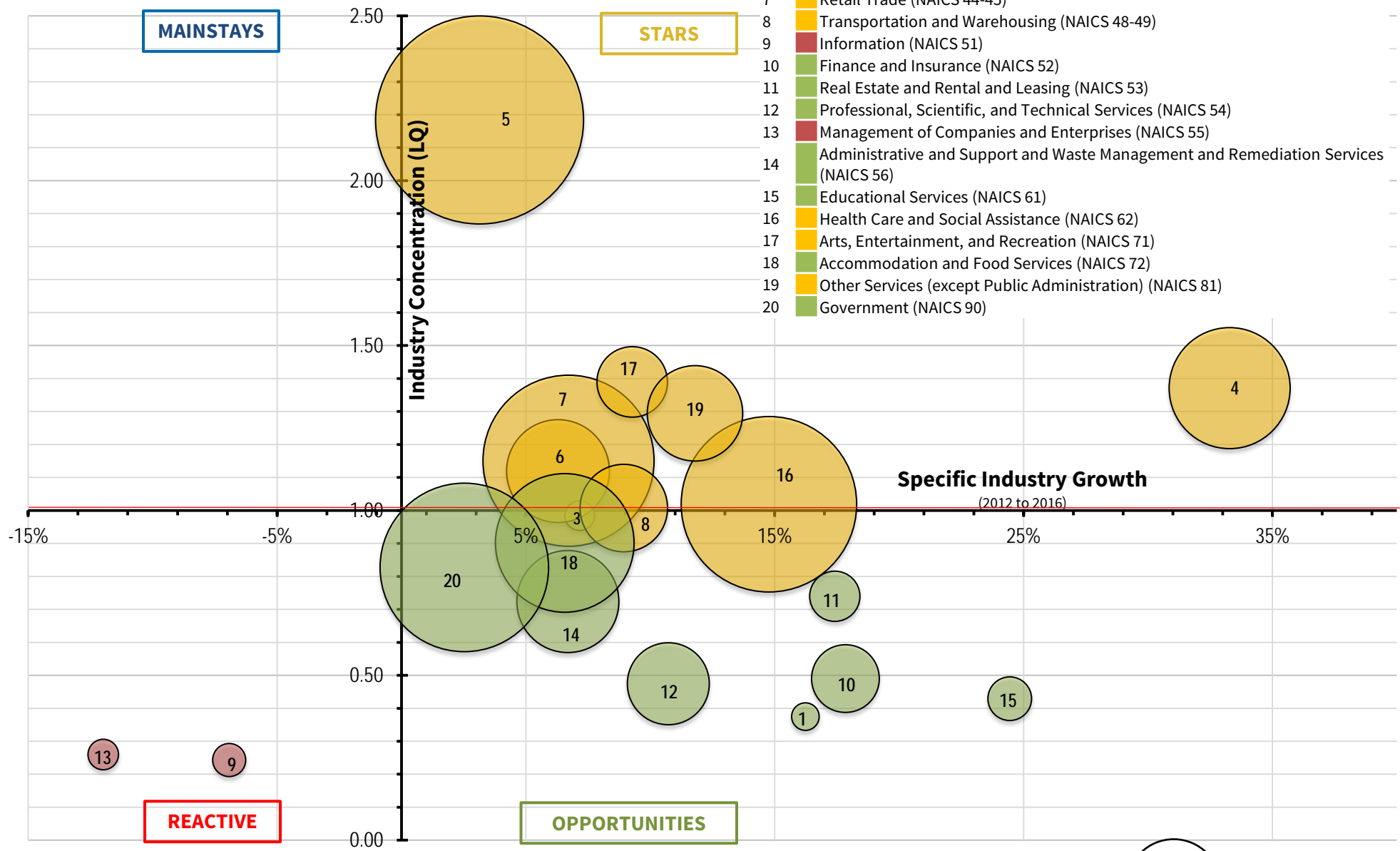
The graph breaks into four quadrants, split by industries above and below 0% growth, and those above and below average concentration (LQ = 1.0. The four quadrants reflect four general approaches to the industries, which we use as a starting point and then adjust based on the specific dynamics within a client's region as well as our experience in conducting similar analyses in many diverse regions.

The general approaches to each of the four quadrants are as follows:

- *Stars (Gold)*: Positive Growth / Above Average Concentration: Industries that currently drive the economy. They have been positive contributors to economic growth and there is a high-level of existing specialization and economic infrastructure; therefore, the region is likely competitive in those industries. These industries are often ideal targets for growing existing industry and attracting new industry.
- *Mainstays (Blue)*: Negative Growth / Above Average Concentration: These industries represent a very important part of the economy, but they have not been contributing to growth, and may in fact be contributing to job loss. It is important that these industries be aggressively supported through retention efforts to ensure they can continue to play a significant role in the economy.
- *Opportunities (Green)*: Positive Growth / Below Average Concentration: These industries have been growing, but are not currently well represented in the regional economy. If the regional economic infrastructure is able to support the operational requirements of these businesses, there is the opportunity to develop future stars. To foster such opportunities, economic development organizations need to develop needed infrastructure and be engaged in attraction.
- *Reactive (Red)*: Negative Growth / Below Average Concentration: These industries are not well represented in the region and have not been growing. As such, they should only be targeted in reaction to some need or opportunity, as such need or opportunity arises.

Economic Base Analysis: Regional

Graph 6.1: Anoka County Industry Analysis



Circle Size = Number of employees in the Core Region

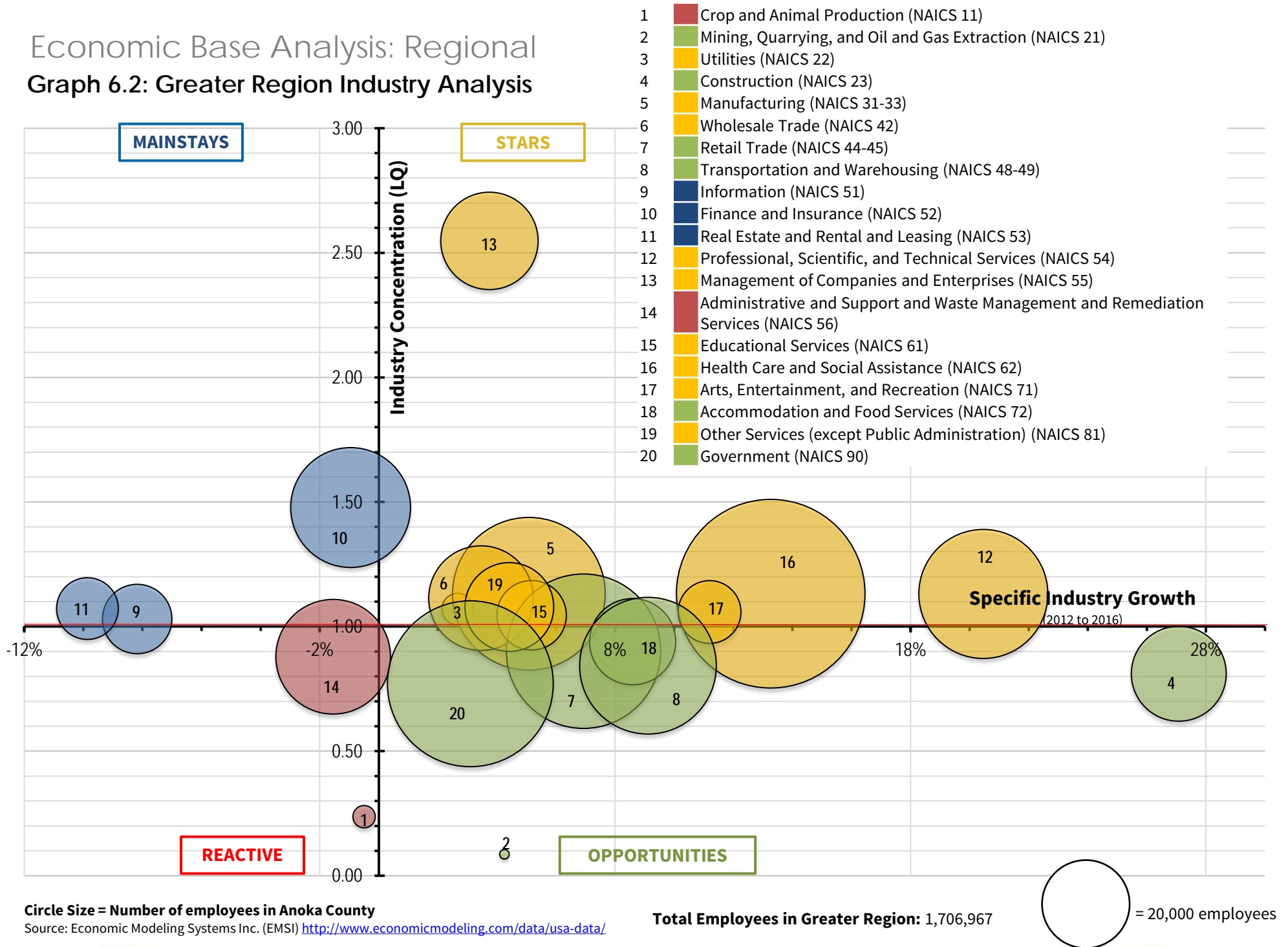
Source: Economic Modeling Systems Inc. (EMS) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 120,429

○ = 5,000 employees

Economic Base Analysis: Regional

Graph 6.2: Greater Region Industry Analysis



Economic Base Analysis: Comparisons

Table 6.2.A: Existing Industry Concentration Comparison	Anoka County Total Employment	Greater Region Total Employment	Anoka County Location Quotient	Greater Region Location Quotient
Total All Industries	120,429	1,706,967	-	-
Crop and Animal Production (NAICS 11)	401	3,594	0.37	0.24
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)*	0	662	0.00	0.09
Utilities (NAICS 22)	464	7,155	0.98	1.07
Construction (NAICS 23)	7,749	64,945	1.37	0.81
Manufacturing (NAICS 31-33)	22,882	168,035	2.18	1.13
Wholesale Trade (NAICS 42)	5,593	78,888	1.12	1.11
Retail Trade (NAICS 44-45)	15,484	171,844	1.15	0.90
Transportation and Warehousing (NAICS 48-49)	4,048	53,516	1.01	0.94
Information (NAICS 51)	578	34,699	0.24	1.03
Finance and Insurance (NAICS 52)	2,424	103,568	0.49	1.48
Real Estate and Rental and Leasing (NAICS 53)	1,335	27,433	0.74	1.07
Professional, Scientific, and Technical Services (NAICS 54)	3,552	120,007	0.47	1.13
Management of Companies and Enterprises (NAICS 55)	492	68,353	0.26	2.55
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	5,505	94,750	0.72	0.88
Educational Services (NAICS 61)	1,008	34,797	0.43	1.05
Health Care and Social Assistance (NAICS 62)	16,283	256,426	1.02	1.13
Arts, Entertainment, and Recreation (NAICS 71)	2,628	28,364	1.39	1.06
Accommodation and Food Services (NAICS 72)	10,167	134,750	0.90	0.84
Other Services (except Public Administration) (NAICS 81)	4,815	56,851	1.29	1.08
Government (NAICS 90)	15,023	198,330	0.83	0.77

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*This industry is not included in Anoka County bubble chart due to insufficient data.

Anoka County LQ > than Greater Region (by ≥ 0.5)

Anoka County LQ < than Greater Region (by ≥ 0.5)

Anoka County LQ and Greater Region LQ are not significantly different

Economic Base Analysis : Comparisons

Comparison of Industry Concentration

There are some marked differences in concentration between Anoka County and the greater region. It is instructive to examine these differences because it helps indicate how Anoka County may fit within the larger region. Note: clusters where Anoka County is more highly concentrated are highlighted in green.

Manufacturing (NAICS 31-33) has the highest location quotient (LQ) of all the industries in Anoka County (at a 2-digit NAICS code level) with an LQ of 2.18. Furthermore, the concentration in this industry is significantly greater than that of the greater region. The other industry in which Anoka County is significantly more concentrated than the greater region (> 0.5) is Construction (NAICS 23).

It should be noted that the greater nine county region has a significantly higher concentration (>0.5) than Anoka County in the following industries:

- Information (NAICS 51)
- Finance and Insurance (NAICS 52)
- Professional, Scientific, and Technical Services (NAICS 54)
- Management of Companies and Enterprises (NAICS 55)
- Educational Services (NAICS 61)

Economic Base Analysis: Comparisons

Table 6.2.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Total Industry (Average Wage)	\$50,971	\$60,612	\$54,466	\$53,812
Crop and Animal Production (NAICS 11)	\$29,483	\$33,302	\$36,713	\$33,237
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	-	\$101,023	\$77,028	\$103,184
Utilities (NAICS 22)	\$98,770	\$111,072	\$104,605	\$103,602
Construction (NAICS 23)	\$60,779	\$69,257	\$63,274	\$58,607
Manufacturing (NAICS 31-33)	\$81,936	\$73,620	\$64,119	\$65,340
Wholesale Trade (NAICS 42)	\$76,619	\$84,462	\$79,594	\$74,244
Retail Trade (NAICS 44-45)	\$27,705	\$31,165	\$28,815	\$30,439
Transportation and Warehousing (NAICS 48-49)	\$43,599	\$55,366	\$50,170	\$50,870
Information (NAICS 51)	\$44,776	\$79,456	\$71,923	\$98,808
Finance and Insurance (NAICS 52)	\$70,828	\$105,721	\$95,592	\$101,249
Real Estate and Rental and Leasing (NAICS 53)	\$35,884	\$57,519	\$52,162	\$55,019
Professional, Scientific, and Technical Services (NAICS 54)	\$66,049	\$96,253	\$90,653	\$91,072
Management of Companies and Enterprises (NAICS 55)	\$61,814	\$124,613	\$120,493	\$116,383
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	\$34,533	\$38,401	\$37,527	\$38,192
Educational Services (NAICS 61)	\$31,921	\$40,759	\$39,932	\$48,742
Health Care and Social Assistance (NAICS 62)	\$50,403	\$49,300	\$49,398	\$48,262
Arts, Entertainment, and Recreation (NAICS 71)	\$21,569	\$40,002	\$33,021	\$36,955
Accommodation and Food Services (NAICS 72)	\$16,352	\$19,974	\$18,081	\$20,002
Other Services (except Public Administration) (NAICS 81)	\$30,341	\$34,587	\$31,653	\$35,988
Government (NAICS 90)	\$51,816	\$59,430	\$52,403	\$54,189

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three region's wages only

Economic Base Analysis: Comparisons

Comparison of Industry Wages

For nearly all the industries, Anoka County's wages are lower when compared to the greater region, the Minnesota average and the national average (*highlighted in green*).

The only two industries in which Anoka County's wages are higher than the greater region, Minnesota and U.S. wages are Manufacturing (NAICS 31-33) and Health Care and Social Assistance (NAICS 62).

When we compare only Anoka County against the greater region, there is one additional one industry in which Anoka County has higher wages (*highlighted in yellow*): Wholesale Trade (NAICS 42)

There was one industry in which there was insufficient wage data in Anoka County to perform a comparison, Mining, Quarrying, and Oil and Gas Extraction (NAICS 21).

There may be opportunities in those industries in which Anoka County is on par or has lower wages in comparison. Lower wages can be used to attract new businesses, which in theory creates more demand for those workers resulting in increased wages over time.

Economic Base Analysis: Comparisons

Table 6.2.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Total All Industries	9%	4%	7%	3%	7%	6%
Crop and Animal Production (NAICS 11)	16%	2%	0%	0%	6%	3%
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	0%	0%	4%	9%	(20%)	6%
Utilities (NAICS 22)	7%	12%	3%	7%	1%	3%
Construction (NAICS 23)	33%	7%	27%	7%	19%	7%
Manufacturing (NAICS 31-33)	3%	(1%)	5%	(1%)	3%	1%
Wholesale Trade (NAICS 42)	6%	4%	3%	(0%)	4%	5%
Retail Trade (NAICS 44-45)	7%	1%	7%	1%	6%	4%
Transportation and Warehousing (NAICS 48-49)	9%	7%	9%	0%	13%	6%
Information (NAICS 51)	(7%)	(10%)	(8%)	(8%)	4%	2%
Finance and Insurance (NAICS 52)	18%	8%	(1%)	1%	4%	5%
Real Estate and Rental and Leasing (NAICS 53)	17%	6%	(10%)	(2%)	9%	5%
Professional, Scientific, and Technical Services (NAICS 54)	11%	9%	20%	7%	11%	9%
Management of Companies and Enterprises (NAICS 55)	(12%)	(4%)	4%	1%	11%	6%
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	7%	1%	(2%)	0%	12%	8%
Educational Services (NAICS 61)	24%	12%	5%	5%	6%	8%
Health Care and Social Assistance (NAICS 62)	15%	9%	13%	10%	12%	11%
Arts, Entertainment, and Recreation (NAICS 71)	9%	16%	11%	4%	12%	7%
Accommodation and Food Services (NAICS 72)	7%	1%	9%	2%	13%	7%
Other Services (except Public Administration) (NAICS 81)	12%	7%	4%	1%	(4%)	4%
Government (NAICS 90)	3%	0%	3%	1%	1%	2%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to five percent in the respective region and time frame.

Industry growth is less than or equal to negative five percent in the respective region and time frame.

Economic Base Analysis: Comparisons

Comparison of Industry Growth

Looking at growth by industry cluster provides some indication of potential strengths of an industry in the region, at the state level, as well as at the national level. Growth was examined by looking at both the previous five-year period (2012-2016), as well as the projected five-year growth (2016-2020). In order to see where the growth is happening, the cells of the table were highlighted green where growth was greater than or equal to five percent in the respective period and was highlighted red where growth was less than or equal to negative five percent.

It is immediately apparent that a great amount of positive growth has occurred and is projected to continue occurring across all the regions in the vast majority of the industries. Those industries that have experienced and will experience growth of over five percent in all regions include *(whole row highlighted green)*:

- Construction (NAICS 23)
- Professional, Scientific, and Technical Services (NAICS 54)
- Educational Services (NAICS 61)
- Health Care and Social Assistance (NAICS 62)

Management of Companies and Enterprises (NAICS 55) experienced the most significant decline within Anoka County over the past five-year period, declining by 12%. In addition, there is only one industry that has experienced a significant decline in Anoka County and the greater region over the past five-year period as well as is projected to continue to experience a significant decline over the next five-year period: Information (NAICS 51).

Economic Base Analysis: Comparisons

Table 6.2.D: Existing Industry Wage Comparison	Anoka County Competitive Effect (2012 - 2016)	Greater Region Competitive Effect (2012 - 2016)	Minnesota Competitive Effect (2012 - 2016)
Crop and Animal Production (NAICS 11)	37	(218)	117
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	0	155	428
Utilities (NAICS 22)	28	134	(252)
Construction (NAICS 23)	843	4,241	3,483
Manufacturing (NAICS 31-33)	(39)	2,830	2,387
Wholesale Trade (NAICS 42)	136	(175)	(1,169)
Retail Trade (NAICS 44-45)	65	1,074	(3,369)
Transportation and Warehousing (NAICS 48-49)	(169)	(2,412)	(1,284)
Information (NAICS 51)	(69)	(4,675)	(4,969)
Finance and Insurance (NAICS 52)	277	(5,540)	(3,949)
Real Estate and Rental and Leasing (NAICS 53)	96	(5,759)	(6,672)
Professional, Scientific, and Technical Services (NAICS 54)	(18)	9,131	10,072
Management of Companies and Enterprises (NAICS 55)	(128)	(4,740)	(4,907)
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	(264)	(12,842)	(11,571)
Educational Services (NAICS 61)	151	(179)	356
Health Care and Social Assistance (NAICS 62)	434	3,510	(9,056)
Arts, Entertainment, and Recreation (NAICS 71)	(74)	(291)	(1,517)
Accommodation and Food Services (NAICS 72)	(572)	(4,255)	(11,096)
Other Services (except Public Administration) (NAICS 81)	680	4,586	8,253
Government (NAICS 90)	182	3,496	3,944

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Competitive Effect is greater than or equal to 100 in the respective region and time frame.

Competitive Effect is less than or equal to 100 in the respective region and time frame.

Economic Base Analysis: Comparisons

Comparison of Industry Growth

Definition of shift-share analysis, per EMSI:

Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors. Shift share helps to answer the question “Why is employment growing or declining in this regional industry, cluster, or occupation?”

Shift share analysis looks at national and regional trends over a certain timeframe and asks, “If the region had just followed national trends (such as percent job growth) during this time, what would it have looked like at the end?” It then compares this picture of “expected” change to the region’s actual change during that time. The difference between the two is one measure of regional performance.

Shift share analysis is practical because it provides context for regional job growth. Just knowing that the health care industry is growing in your area does not tell you how your area stacks up to the national average in health care industry growth. Conversely, just knowing that a certain manufacturing industry has declining employment in your area would not tell you whether it is declining more quickly or slowly than national trends.

There are three industries in which all regions have a strong competitive effect (*entire row highlighted green*)

- Construction (NAICS 23)
- Other Services (except Public Administration) (NAICS 81)
- Government (NAICS 90)

Industries in which Anoka County has a strong competitive effect include the aforementioned three industries, as well as:

- Wholesale Trade (NAICS 42)
- Retail Trade (NAICS 44-45)
- Finance and Insurance (NAICS 52)
- Educational Services (NAICS 61)
- Health Care and Social Assistance (NAICS 62)

Economic Base Analysis: Comparisons

In order to narrow down the list of industries for further analysis at the two-digit level, we created a screening process. This process takes into account the growth and concentration (chart quadrant), the stakeholder input from the on-site visit. The industries highlighted in green will be explored further in the following section.

Industry	Anoka County Chart Quadrant	Greater Region Chart Quadrant	Stakeholder Input	Include in further analysis? Comments
Crop and Animal Production (NAICS 11)	Opportunity	Reactive	No	No. Although Anoka is known as a more rural county, the agriculture industry in the region is very small, employing only 400 people.
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)*	N/A	Opportunity	No	No. This industry currently does not exist in the region and is a very small industry for the state.
Utilities (NAICS 22)	Opportunity	Star	No	No. This is not an industry to focus on recruiting.
Construction (NAICS 23)	Star	Opportunity	Yes	No. This industry tends to lag the economy.
Manufacturing (NAICS 31-33)	Star	Star	Yes	Yes. There is an existing, diverse base of manufacturers in the region. This industry will be explored heavily in the following section.
Wholesale Trade (NAICS 42)	Star	Star	No	Yes. We will analyze this industry to look at potential types of manufacturing and distribution that might be a good fit for the region.
Retail Trade (NAICS 44-45)	Star	Opportunity	Yes	No. Not a focus of this research
Transportation and Warehousing (NAICS 48-49)	Star	Opportunity	Yes	This industry has experienced extremely high past growth in the region and it is expected to continue to grow.
Information (NAICS 51)	Reactive	Mainstay	No	No. The main drivers of this industry are Motion Picture Theaters and Wired Telecommunications Carriers, not necessarily industries to recruit.

Economic Base Analysis: Comparisons

Industry	Anoka County Chart Quadrant	Greater Region Chart Quadrant	Stakeholder Input	Include in further analysis? Comments
Finance and Insurance (NAICS 52)	Opportunity	Mainstay	Yes	Yes. Anoka County is well suited for shared service centers and back office functions associated with Finance and Insurance, supported by lower building and labor costs.
Real Estate and Rental and Leasing (NAICS 53)	Opportunity	Mainstay	No	No. This is not an industry to focus on recruiting.
Professional, Scientific, and Technical Services (NAICS 54)	Opportunity	Star	Yes	Yes. This has been growing in the region and the state. There may be opportunities to bring more white-collar jobs to the county.
Management of Companies and Enterprises (NAICS 55)	Reactive	Star	Yes	No. This industry is driven by Corporate, Subsidiary, and Regional Managing Offices. It is projected to decline in the county.
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	Opportunity	Reactive	No	No - Main drivers are Office Administrative Services and Temporary Help Services
Educational Services (NAICS 61)	Opportunity	Star	No	No. This is not an industry to focus on recruiting.
Health Care and Social Assistance (NAICS 62)	Star	Star	Yes	Maybe
Arts, Entertainment, and Recreation (NAICS 71)	Star	Star	No	No. This is not a focus of this research.
Accommodation and Food Services (NAICS 72)	Opportunity	Opportunity	Yes	No. This is not a focus of this research.
Other Services (except Public Administration) (NAICS 81)	Star	Star	No	No - Most subsectors in this industry revolve around consumer services, will follow the economy.
Government (NAICS 90)	Opportunity	Opportunity	No	No. This is not an industry to focus on recruiting.

Target Industry Identification Analysis



Manufacturing



Manufacturing

The manufacturing industry in Anoka county is extremely diverse at the 6-digit NAICS code level. For this reason, we have divided the industry into the following groups and have created a bubble chart with back up data for each:

- Wood and Paper Manufacturing and Printing (NAICS 321-323)
- Chemicals, Plastics, Rubber and Mineral Product Manufacturing (NAICS 324-327)
- Metal Manufacturing (Primary and Fabricated) (NAICS 331-332)
- Machinery Manufacturing (NAICS 333)
- Computer, Electronic Product and Electrical Equipment Manufacturing (NAICS 334-335)
- Transportation Equipment Manufacturing (NAICS 336)
- Other Manufacturing

Target Industry Analysis – Wood and Paper Products Manufacturing and Printing (NAICS 321-323)

SUMMARY OF WOOD AND PAPER PRODUCTS MANUFACTURING AND PRINTING

This industry employs close to 1,300 people in Anoka County, with Commercial Printing (except Screen and Books) (NAICS 323111) being the largest source of employment in the industry, constituting about half of the total. Anoka County has a significantly higher concentration than the greater region in the following subsectors:

- Wood Preservation (NAICS 321114)
- Prefabricated Wood Building Manufacturing (NAICS 321992)
- All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)
- Folding Paperboard Box Manufacturing (NAICS 322212)

Wages in Anoka County are generally competitive compared to the greater region, state and national average. In half the subsectors Anoka County has lower wages than all three, in and additional three subsectors the wages are lower than two out of three.

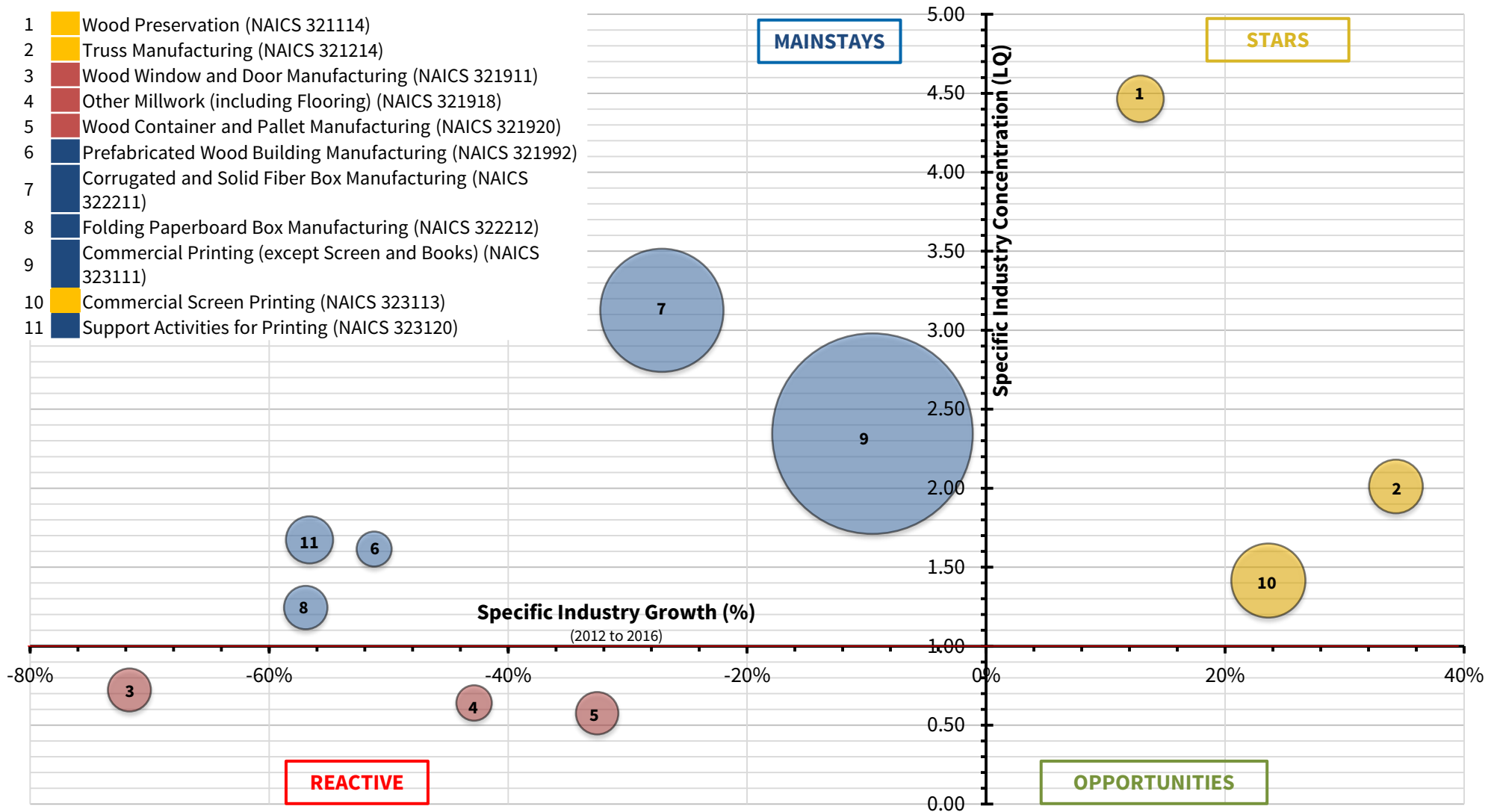
The majority of the subsectors within this industry have not experienced growth over the past five-year period, and have in fact experienced negative growth within Anoka County. All Other Miscellaneous Wood Product Manufacturing (NAICS 321999) is the only industry projected to experience significant growth across all regions and time periods, except Anoka County's past five-year period where there is insufficient data.

Five subsectors are projected to continue experiencing significant negative growth over the next five-year period:

- Other Millwork (including Flooring) (NAICS 321918)
- Prefabricated Wood Building Manufacturing (NAICS 321992)
- Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)
- Commercial Screen Printing (NAICS 323113)
- Support Activities for Printing (NAICS 323120)

Target Industry Analysis – Wood and Paper Products Manufacturing and Printing (NAICS 321-323)

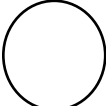
Graph 6.3: Wood and Paper Products Manufacturing and Printing



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMS) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 1,294

 = 100 employees

Target Industry Analysis – Wood and Paper Products Manufacturing and Printing (NAICS 321-323)

Table 6.3.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Wood Preservation (NAICS 321114)	4.47	1.07	0.94
Truss Manufacturing (NAICS 321214)	2.01	1.52	1.52
Wood Window and Door Manufacturing (NAICS 321911)	0.72	4.69	5.60
Other Millwork (including Flooring) (NAICS 321918)	0.64	0.65	0.98
Wood Container and Pallet Manufacturing (NAICS 321920)	0.58	0.71	1.01
Prefabricated Wood Building Manufacturing (NAICS 321992)	1.62	0.28	1.52
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	1.53	0.85	1.49
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	3.13	1.94	1.59
Folding Paperboard Box Manufacturing (NAICS 322212)	1.24	0.95	1.13
Stationery Product Manufacturing (NAICS 322230)	1.34	2.88	1.76
Commercial Printing (except Screen and Books) (NAICS 323111)	2.35	2.51	2.75
Commercial Screen Printing (NAICS 323113)	1.42	1.57	2.06
Support Activities for Printing (NAICS 323120)	1.67	5.33	3.32

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Wood and Paper Products Manufacturing and Printing (NAICS 321-323)

Table 6.3.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Wood Preservation (NAICS 321114)	\$56,002	\$64,001	\$61,875	\$47,535
Truss Manufacturing (NAICS 321214)	\$27,809	\$47,054	\$44,656	\$40,054
Wood Window and Door Manufacturing (NAICS 321911)	\$45,387	\$63,311	\$56,053	\$46,267
Other Millwork (including Flooring) (NAICS 321918)	\$30,732	\$43,952	\$43,227	\$40,533
Wood Container and Pallet Manufacturing (NAICS 321920)	\$56,958	\$42,236	\$37,469	\$35,960
Prefabricated Wood Building Manufacturing (NAICS 321992)	\$51,757	\$47,264	\$42,816	\$43,010
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	\$28,158	\$44,694	\$40,072	\$38,823
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	\$63,362	\$68,914	\$65,630	\$62,167
Folding Paperboard Box Manufacturing (NAICS 322212)	\$75,927	\$68,931	\$59,745	\$56,825
Stationery Product Manufacturing (NAICS 322230)	\$49,670	\$61,059	\$61,041	\$51,878
Commercial Printing (except Screen and Books) (NAICS 323111)	\$55,210	\$62,407	\$56,720	\$50,872
Commercial Screen Printing (NAICS 323113)	\$26,999	\$49,295	\$44,658	\$35,871
Support Activities for Printing (NAICS 323120)	\$51,748	\$78,583	\$78,594	\$51,987

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Wood and Paper Products Manufacturing and Printing (NAICS 321-323)

Table 6.3.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5-year Growth (2012-2016)	Minnesota 5-year Projected Growth (2016-2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Wood Preservation (NAICS 321114)	13%	26%	(15%)	12%	(21%)	3%	10%	8%
Truss Manufacturing (NAICS 321214)	34%	19%	20%	3%	18%	(1%)	50%	6%
Wood Window and Door Manufacturing (NAICS 321911)	(72%)	**	21%	(7%)	9%	(9%)	18%	(1%)
Other Millwork (including Flooring) (NAICS 321918)	(43%)	(30%)	(3%)	(15%)	1%	(3%)	11%	(1%)
Wood Container and Pallet Manufacturing (NAICS 321920)	(33%)	3%	29%	7%	12%	7%	12%	6%
Prefabricated Wood Building Manufacturing (NAICS 321992)	(51%)	(10%)	(37%)	(8%)	7%	3%	15%	3%
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	**	23%	25%	11%	18%	13%	18%	10%
Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	(27%)	(11%)	5%	(3%)	(0%)	(4%)	3%	(3%)
Folding Paperboard Box Manufacturing (NAICS 322212)	(57%)	**	(64%)	(54%)	(47%)	(22%)	7%	5%
Stationery Product Manufacturing (NAICS 322230)	**	24%	(19%)	(29%)	(23%)	(29%)	(19%)	(13%)
Commercial Printing (except Screen and Books) (NAICS 323111)	(10%)	2%	1%	(11%)	(4%)	(12%)	(4%)	(12%)
Commercial Screen Printing (NAICS 323113)	24%	(34%)	9%	(1%)	17%	7%	14%	9%
Support Activities for Printing (NAICS 323120)	(57%)	(50%)	(7%)	(12%)	(7%)	(12%)	(16%)	(16%)

Source: Economic Modeling Systems Inc. (EMS) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Wood and Paper Products Manufacturing and Printing (NAICS 321-323)

Rank	Table 6.3.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Commercial Printing (except Screen and Books) (NAICS 323111)	656 (1)	(10%) (4)	2.35 (3)
2	Corrugated and Solid Fiber Box Manufacturing (NAICS 322211)	247 (2)	(27%) (5)	3.13 (2)
3	Commercial Screen Printing (NAICS 323113)	89 (3)	24% (2)	1.42
4	Truss Manufacturing (NAICS 321214)	47 (4)	34% (1)	2.01 (4)
5	Support Activities for Printing (NAICS 323120)	36 (5)	(57%)	1.67 (5)
6	Wood Preservation (NAICS 321114)	35	13% (3)	4.47 (1)
7	All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	31	**	1.53
8	Folding Paperboard Box Manufacturing (NAICS 322212)	31	(57%)	1.24
9	Wood Window and Door Manufacturing (NAICS 321911)	30	(72%)	0.72
10	Wood Container and Pallet Manufacturing (NAICS 321920)	29	(33%)	0.58
11	Stationery Product Manufacturing (NAICS 322230)	21	**	1.34
12	Other Millwork (including Flooring) (NAICS 321918)	20	(43%)	0.64
13	Prefabricated Wood Building Manufacturing (NAICS 321992)	20	(51%)	1.62

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top five (5) in each (# Jobs, Growth, LQ)

Target Industry Analysis – Chemical and Plastics Manufacturing (NAICS 325-326)

SUMMARY OF CHEMICAL AND PLASTICS MANUFACTURING

This industry employs about 1,400 people in Anoka County, with All Other Plastics Product Manufacturing (NAICS 326199) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in the following subsectors:

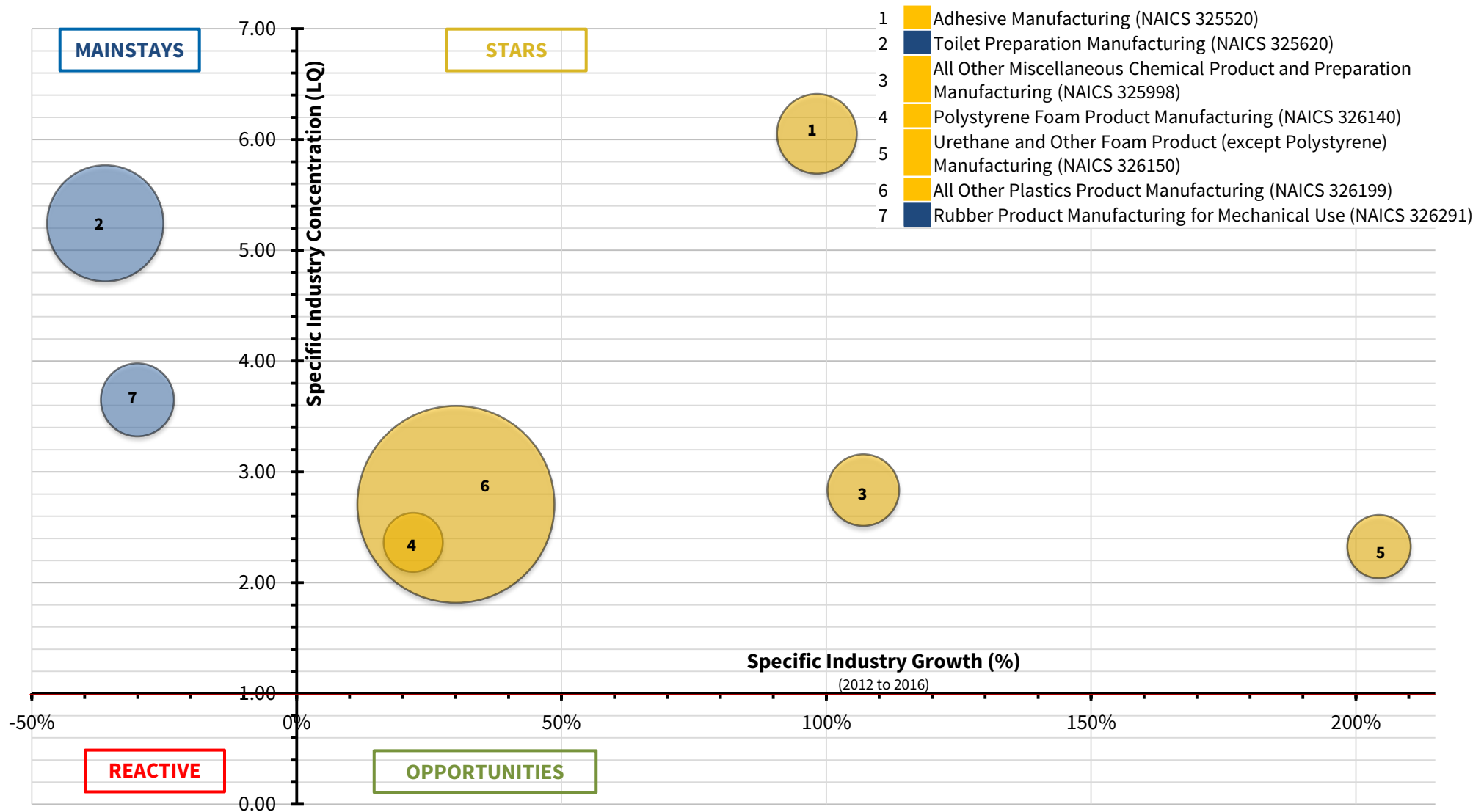
- Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)
- All Other Plastics Product Manufacturing (NAICS 326199)

Wages are generally competitive in the competitive region compared to the greater region, state average and the national average, with about half of the subsectors in Anoka County having lower wages than all three other regions, and an additional two having lower wages than two of the three other regions.

The majority of the subsectors within this industry have experienced significant growth over the past five-year period, and about half of the subsectors are projected to experience significant growth over the next five-year period. Polystyrene Foam Product Manufacturing (NAICS 326140) and Medicinal and Botanical Manufacturing (NAICS 325411) are projected to experience significant growth in Anoka County, greater region, and the state of Minnesota over the next five-year period.

Target Industry Analysis – Chemical and Plastics Manufacturing (NAICS 325-326)

Graph 6.4: Chemical and Plastics Manufacturing



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 1,392

○ = 100 employees

Target Industry Analysis – Chemical and Plastics Manufacturing (NAICS 325-326)

Table 6.4.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Medicinal and Botanical Manufacturing (NAICS 325411)	1.13	0.10	0.12
Adhesive Manufacturing (NAICS 325520)	6.05	2.44	1.80
Toilet Preparation Manufacturing (NAICS 325620)	5.24	1.37	1.31
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	2.84	2.39	1.70
Polystyrene Foam Product Manufacturing (NAICS 326140)	1.19	0.72	0.59
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	2.36	0.60	0.38
All Other Plastics Product Manufacturing (NAICS 326199)	2.33	0.43	0.42
Plastics Bag and Pouch Manufacturing (NAICS 326111)	2.71	1.68	1.66
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	3.65	1.41	1.07

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Chemical and Plastics Manufacturing (NAICS 325-326)

Table 6.4.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Medicinal and Botanical Manufacturing (NAICS 325411)	\$56,002	\$64,001	\$61,875	\$47,535
Adhesive Manufacturing (NAICS 325520)	\$27,809	\$47,054	\$44,656	\$40,054
Toilet Preparation Manufacturing (NAICS 325620)	\$45,387	\$63,311	\$56,053	\$46,267
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	\$30,732	\$43,952	\$43,227	\$40,533
Polystyrene Foam Product Manufacturing (NAICS 326140)	\$56,958	\$42,236	\$37,469	\$35,960
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	\$51,757	\$47,264	\$42,816	\$43,010
All Other Plastics Product Manufacturing (NAICS 326199)	\$28,158	\$44,694	\$40,072	\$38,823
Plastics Bag and Pouch Manufacturing (NAICS 326111)	\$63,362	\$68,914	\$65,630	\$62,167
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	\$75,927	\$68,931	\$59,745	\$56,825

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Chemical and Plastics Manufacturing (NAICS 325-326)

Table 6.4.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016-2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Medicinal and Botanical Manufacturing (NAICS 325411)	**	42%	(63%)	24%	(55%)	27%	38%	12%
Adhesive Manufacturing (NAICS 325520)	98%	22%	8%	5%	11%	5%	9%	3%
Toilet Preparation Manufacturing (NAICS 325620)	(36%)	(42%)	5%	(4%)	(1%)	(1%)	4%	1%
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	107%	(21%)	153%	3%	142%	2%	5%	3%
Polystyrene Foam Product Manufacturing (NAICS 326140)	**	28%	27%	20%	47%	22%	7%	4%
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	22%	15%	4%	(1%)	(6%)	(4%)	19%	6%
All Other Plastics Product Manufacturing (NAICS 326199)	204%	0%	(9%)	(20%)	4%	(5%)	13%	7%
Plastics Bag and Pouch Manufacturing (NAICS 326111)	30%	3%	12%	(5%)	11%	(3%)	10%	(3%)
Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	(30%)	(12%)	(3%)	2%	16%	5%	9%	(1%)

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Chemical and Plastics Manufacturing (NAICS 325-326)

Rank	Table 6.4.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	All Other Plastics Product Manufacturing (NAICS 326199)	675 (1)	30% (4)	2.71 (5)
2	Toilet Preparation Manufacturing (NAICS 325620)	235 (2)	(36%)	5.24 (2)
3	Adhesive Manufacturing (NAICS 325520)	111 (3)	98% (3)	6.05 (1)
4	Rubber Product Manufacturing for Mechanical Use (NAICS 326291)	93 (4)	(30%)	3.65 (3)
5	All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 326199)	89 (5)	107% (2)	2.84 (4)
6	Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	70	204% (1)	2.33
7	Polystyrene Foam Product Manufacturing (NAICS 326140)	61	22% (5)	2.36
8	Plastics Bag and Pouch Manufacturing (NAICS 326111)*	32	**	1.19
9	Medicinal and Botanical Manufacturing (NAICS 325411)*	26	**	1.13

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top five (5) in each (# Jobs, Growth, LQ)

Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

SUMMARY OF METAL MANUFACTURING

This industry employs over 8,600 people in Anoka County, with Machine Shops (NAICS 332710) being the largest source of employment in the industry, followed by Sheet Metal Work Manufacturing (NAICS 332322) and Small Arms Ammunition Manufacturing (NAICS 332922), both with sizable employment concentrations. Anoka County has a significantly higher concentration than the state in the following subsectors:

- Aluminum Sheet, Plate, and Foil Manufacturing (NAICS 331315)
- Steel Investment Foundries (NAICS 331512)
- Spring Manufacturing (NAICS 332613)

Wages are generally uncompetitive in Anoka County in the metal manufacturing industry, with the majority of subsectors having higher wages in Anoka County than the greater region, state average and national average. There are only three subsectors in which the wages are lower than all three, and only three additional more subsectors in which they are lower than two out of three.

Less than half the subsectors within this industry have experienced significant growth over the past five-year period in Anoka County. Two subsectors are projected to experience significant growth over the next five-year period in Anoka County, greater region and state of Minnesota:

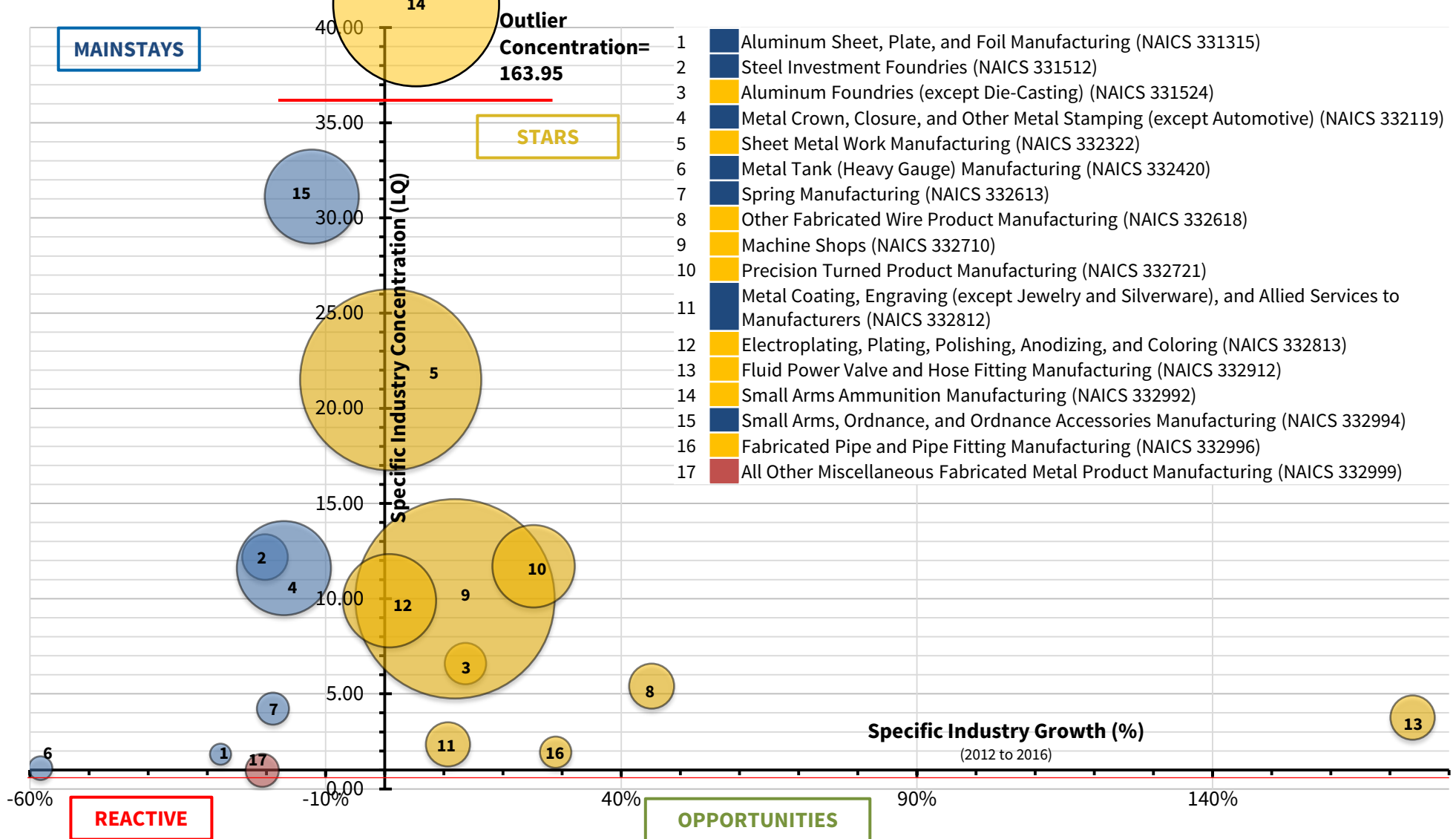
- Prefabricated Metal Building and Component Manufacturing (NAICS 332311)
- Other Metal Container Manufacturing (NAICS 332439)

Three industries have experienced significant negative growth over the past five-year period and will continue to experience significant negative growth over the next five-year period:

- Spring Manufacturing (NAICS 332613)
- Small Arms, Ordnance and Ordnance Accessories Manufacturing (NAICS 332994)
- All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)

Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

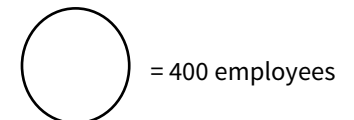
Graph 6.5: Metal Manufacturing



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMS) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 8,605



Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

Table 6.5.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Aluminum Sheet, Plate, and Foil Manufacturing (NAICS 331315)	1.83	0.21	0.13
Steel Investment Foundries (NAICS 331512)	12.19	0.86	0.53
Aluminum Foundries (except Die-Casting) (NAICS 331524)	6.59	4.32	3.21
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	11.61	3.05	3.06
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	0.88	0.30	0.37
Sheet Metal Work Manufacturing (NAICS 332322)	21.50	2.87	2.26
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	1.10	1.57	1.88
Other Metal Container Manufacturing (NAICS 332439)	3.63	1.94	1.21
Spring Manufacturing (NAICS 332613)	4.23	0.68	0.53
Other Fabricated Wire Product Manufacturing (NAICS 332618)	5.41	1.62	2.16
Machine Shops (NAICS 332710)	10.00	2.36	2.15
Precision Turned Product Manufacturing (NAICS 332721)	11.70	3.38	2.84
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	2.35	1.06	1.32
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	9.89	2.08	1.46
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	3.76	1.29	0.83
Small Arms Ammunition Manufacturing (NAICS 332992)	163.95	11.57	7.03
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	31.13	2.50	1.61
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	1.93	1.23	0.97
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	0.98	0.77	1.22

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

Table 6.5.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Aluminum Sheet, Plate, and Foil Manufacturing (NAICS 331315)	\$50,829	\$50,161	\$49,857	\$76,627
Steel Investment Foundries (NAICS 331512)	\$51,810	\$51,810	\$52,602	\$54,978
Aluminum Foundries (except Die-Casting) (NAICS 331524)	\$48,034	\$54,186	\$53,868	\$49,546
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	\$61,458	\$54,253	\$52,196	\$52,262
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	\$54,375	\$63,856	\$59,606	\$54,316
Sheet Metal Work Manufacturing (NAICS 332322)	\$65,348	\$60,864	\$58,069	\$50,915
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	\$79,838	\$73,747	\$64,080	\$57,638
Other Metal Container Manufacturing (NAICS 332439)	\$54,903	\$56,264	\$56,283	\$51,197
Spring Manufacturing (NAICS 332613)	\$52,948	\$52,473	\$52,486	\$54,863
Other Fabricated Wire Product Manufacturing (NAICS 332618)	\$55,703	\$58,036	\$53,090	\$49,291
Machine Shops (NAICS 332710)	\$59,780	\$61,541	\$56,700	\$52,261
Precision Turned Product Manufacturing (NAICS 332721)	\$74,502	\$61,868	\$58,968	\$51,965
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	\$42,864	\$47,533	\$42,783	\$47,027
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	\$51,011	\$46,778	\$45,280	\$45,725
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	\$77,625	\$75,716	\$75,567	\$67,906
Small Arms Ammunition Manufacturing (NAICS 332992)	\$74,588	\$74,588	\$74,588	\$57,061
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	\$123,869	\$117,228	\$113,630	\$60,209
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	\$46,919	\$61,673	\$59,575	\$60,622
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	\$57,818	\$54,507	\$49,314	\$53,315

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

Table 6.5.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016-2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Aluminum Sheet, Plate, and Foil Manufacturing (NAICS 331315)	(28%)	(8%)	(9%)	7%	(7%)	7%	11%	3%
Steel Investment Foundries (NAICS 331512)	(20%)	(5%)	(50%)	(5%)	(49%)	(3%)	(2%)	(4%)
Aluminum Foundries (except Die-Casting) (NAICS 331524)	14%	20%	13%	(2%)	9%	(1%)	6%	1%
Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	(17%)	(9%)	(4%)	(6%)	(3%)	(2%)	(2%)	(1%)
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	**	32%	27%	13%	32%	15%	6%	7%
Sheet Metal Work Manufacturing (NAICS 332322)	1%	(2%)	7%	1%	5%	0%	8%	4%
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	(58%)	(52%)	(1%)	15%	2%	11%	4%	11%
Other Metal Container Manufacturing (NAICS 332439)	**	38%	133%	25%	138%	23%	(4%)	4%
Spring Manufacturing (NAICS 332613)	(19%)	(32%)	(13%)	(13%)	2%	(9%)	16%	3%
Other Fabricated Wire Product Manufacturing (NAICS 332618)	45%	20%	(15%)	(10%)	(5%)	2%	(5%)	(8%)
Machine Shops (NAICS 332710)	12%	6%	10%	3%	3%	3%	(3%)	3%
Precision Turned Product Manufacturing (NAICS 332721)	25%	21%	12%	8%	8%	5%	2%	3%
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	11%	2%	18%	2%	9%	10%	5%	6%
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	1%	2%	(3%)	(1%)	(6%)	(2%)	(3%)	(3%)
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	174%	23%	(13%)	(8%)	(13%)	(10%)	(1%)	7%
Small Arms Ammunition Manufacturing (NAICS 332992)	6%	8%	6%	8%	6%	8%	4%	6%
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	(12%)	(46%)	(13%)	(38%)	(11%)	(37%)	20%	13%
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	29%	(2%)	81%	26%	51%	17%	4%	11%
All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	(21%)	(28%)	(10%)	(15%)	(1%)	(3%)	3%	3%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Metal Manufacturing (NAICS 331-332)

Rank	Table 6.5.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Machine Shops (NAICS 332710)	2,329 (1)	12% (6)	10.00 (7)
2	Sheet Metal Work Manufacturing (NAICS 332322)	1,924 (2)	1% (8/9)	21.50 (3)
3	Small Arms Ammunition Manufacturing (NAICS 332992)	1,526 (3)	6% (6)	163.95 (1)
4	Metal Crown, Closure, and Other Metal Stamping (except Automotive) (NAICS 332119)	520 (4)	(17%)	11.61 (6)
5	Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	518 (5)	(12%) (10)	31.13 (2)
6	Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	510 (6)	1% (8/9)	9.89 (8)
7	Precision Turned Product Manufacturing (NAICS 332721)	398 (7)	25% (4)	11.70 (5)
8	Steel Investment Foundries (NAICS 331512)	122 (8)	(20%)	12.19 (4)
9	Other Fabricated Wire Product Manufacturing (NAICS 332618)	119 (9)	45% (2)	5.41 (10)
10	Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	115 (10)	174% (1)	3.76
11	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	114	11% (7)	2.35
12	Aluminum Foundries (except Die-Casting) (NAICS 331524)	100	14% (5)	6.59 (9)
13	All Other Miscellaneous Fabricated Metal Product Manufacturing (NAICS 332999)	65	(21%)	0.98
14	Spring Manufacturing (NAICS 332613)	60	(19%)	4.23
15	Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	58	29% (3)	1.93
16	Other Metal Container Manufacturing (NAICS 332439)	47	**	3.63
17	Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	33	(58%)	1.10
18	Aluminum Sheet, Plate, and Foil Manufacturing (NAICS 331315)	26	(28%)	1.83
19	Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	22	**	0.88

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top ten (10) in each (# Jobs, Growth, LQ)

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

SUMMARY OF MACHINERY MANUFACTURING

This industry employs over 1,500 people in Anoka County, with Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in the following subsectors:

- Sawmill, Woodworking, and Paper Machinery Manufacturing (NAICS 333243)
- Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)
- Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)
- Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)
- Power-Driven Handtool Manufacturing (NAICS 333991)
- Welding and Soldering Equipment Manufacturing (NAICS 333992)

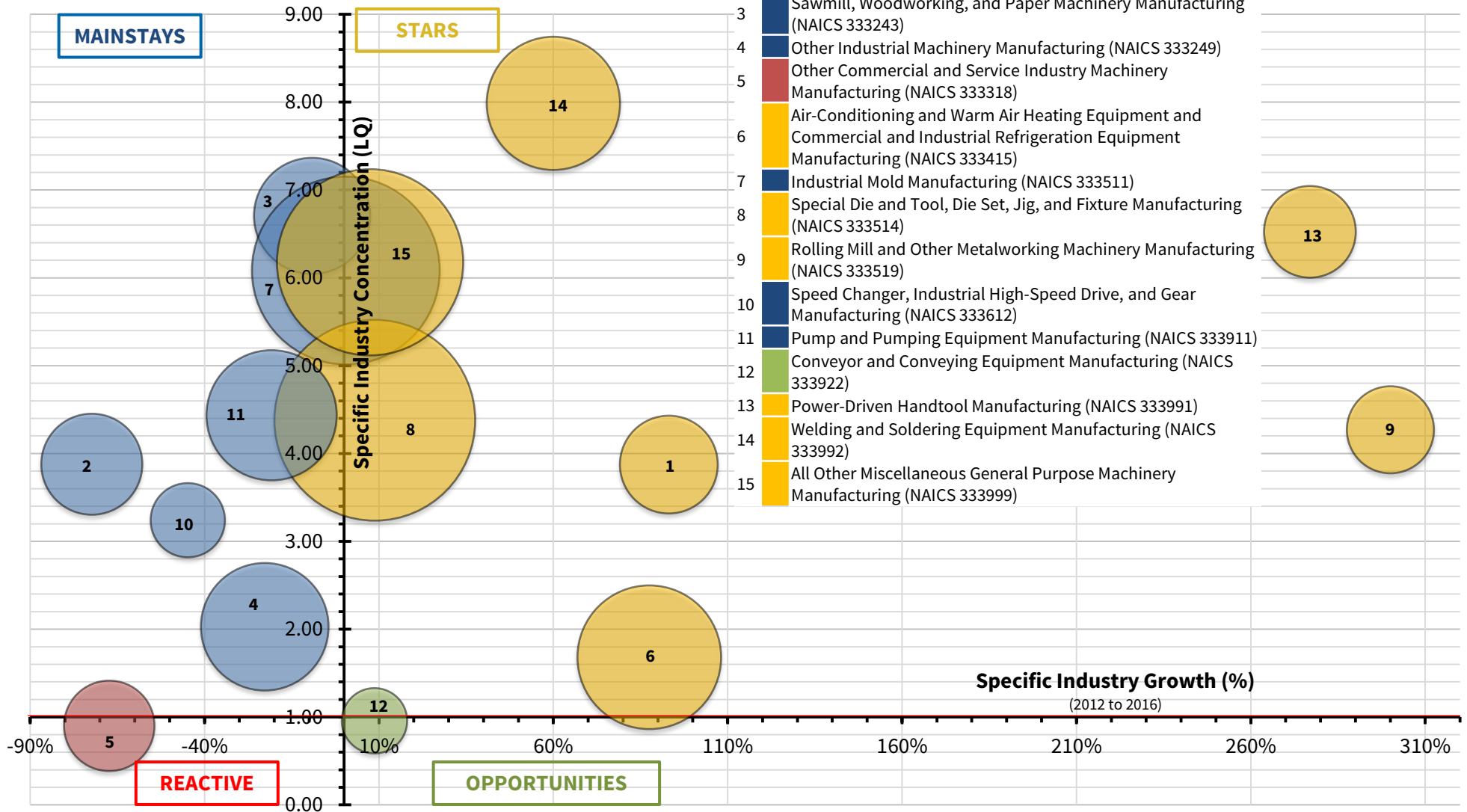
Wages are generally competitive in Anoka County, with wages in about half the subsectors lower than that of the greater region, state average and national average. Wages are lower than two of the three other regions in an additional two subsectors, and are higher than all other regions in less than a quarter of subsectors constituting the Machinery Manufacturing industry.

An equal number of subsectors have experienced significant negative growth over the past five-year period as have experienced significant positive growth within Anoka County. Three subsectors have experienced significant growth over the past five-year period and will continue experiencing significant positive growth over the next five-year period in Anoka County, greater region and state of Minnesota (*at least first six columns highlighted in green*):

- Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)
- Power-Driven Handtool Manufacturing (NAICS 333991)
- Welding and Soldering Equipment Manufacturing (NAICS 333992)

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

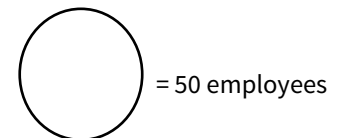
Graph 6.6: Machinery Manufacturing



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 1,505



Target Industry Analysis – Machinery Manufacturing (NAICS 333)

Table 6.6.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Farm Machinery and Equipment Manufacturing (NAICS 333111)	0.59	0.28	2.48
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing (NAICS 333112)	3.87	1.19	3.28
Food Product Machinery Manufacturing (NAICS 333241)	3.88	2.18	2.93
Sawmill, Woodworking, and Paper Machinery Manufacturing (NAICS 333243)	6.71	1.16	0.72
Other Industrial Machinery Manufacturing (NAICS 333249)	2.03	1.44	1.38
Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	0.90	3.09	2.11
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	1.68	0.75	1.11
Industrial Mold Manufacturing (NAICS 333511)	6.08	4.98	3.24
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	4.38	1.37	1.08
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	4.27	0.67	0.52
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	3.24	0.78	0.61
Other Engine Equipment Manufacturing (NAICS 333618)	0.56	0.06	0.04
Pump and Pumping Equipment Manufacturing (NAICS 333911)	4.44	4.96	3.18
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	0.96	1.19	2.27
Power-Driven Handtool Manufacturing (NAICS 333991)	6.52	0.78	0.86
Welding and Soldering Equipment Manufacturing (NAICS 333992)	7.99	0.75	0.53
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	6.18	2.76	2.32

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

Table 6.6.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Farm Machinery and Equipment Manufacturing (NAICS 333111)	\$59,887	\$62,203	\$51,846	\$58,992
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing (NAICS 333112)	\$68,059	\$93,716	\$55,787	\$42,401
Food Product Machinery Manufacturing (NAICS 333241)	\$67,230	\$83,008	\$79,330	\$65,948
Sawmill, Woodworking, and Paper Machinery Manufacturing (NAICS 333243)	\$67,347	\$62,852	\$62,686	\$64,835
Other Industrial Machinery Manufacturing (NAICS 333249)	\$66,769	\$82,572	\$76,880	\$66,867
Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	\$47,861	\$79,305	\$77,767	\$65,825
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	\$64,467	\$88,340	\$69,326	\$56,812
Industrial Mold Manufacturing (NAICS 333511)	\$69,887	\$69,118	\$68,191	\$55,940
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	\$53,316	\$62,717	\$60,378	\$58,901
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	\$46,548	\$59,731	\$59,817	\$66,969
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	\$27,764	\$48,402	\$48,443	\$60,473
Other Engine Equipment Manufacturing (NAICS 333618)	\$56,741	\$67,104	\$67,376	\$77,336
Pump and Pumping Equipment Manufacturing (NAICS 333911)	\$140,994	\$82,740	\$81,831	\$71,532
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	\$92,676	\$78,876	\$65,032	\$62,838
Power-Driven Handtool Manufacturing (NAICS 333991)	\$78,845	\$86,500	\$69,433	\$65,896
Welding and Soldering Equipment Manufacturing (NAICS 333992)	\$69,019	\$71,072	\$69,222	\$73,759
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	\$62,590	\$71,954	\$66,627	\$65,747

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

Table 6.6.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Farm Machinery and Equipment Manufacturing (NAICS 333111)	**	0%	(5%)	(4%)	(1%)	7%	(8%)	5%
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing (NAICS 333112)	93%	27%	(8%)	(13%)	11%	(0%)	(5%)	6%
Food Product Machinery Manufacturing (NAICS 333241)	(72%)	(55%)	(4%)	4%	15%	9%	7%	5%
Sawmill, Woodworking, and Paper Machinery Manufacturing (NAICS 333243)	(9%)	9%	14%	(5%)	16%	(5%)	4%	(3%)
Other Industrial Machinery Manufacturing (NAICS 333249)	(23%)	(46%)	3%	0%	3%	0%	10%	3%
Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	(67%)	(48%)	(1%)	(12%)	3%	(8%)	4%	(1%)
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	88%	(1%)	(4%)	(30%)	9%	(10%)	4%	(2%)
Industrial Mold Manufacturing (NAICS 333511)	0%	(12%)	37%	15%	36%	16%	10%	4%
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	9%	(18%)	(3%)	(12%)	3%	(6%)	(3%)	(4%)
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	300%	34%	230%	27%	97%	28%	(4%)	1%
Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	(45%)	3%	51%	(6%)	54%	0%	(17%)	(2%)
Other Engine Equipment Manufacturing (NAICS 333618)	**	9%	**	15%	**	21%	3%	4%
Pump and Pumping Equipment Manufacturing (NAICS 333911)	(21%)	(3%)	14%	(5%)	14%	(4%)	(7%)	(1%)
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	9%	0%	12%	5%	15%	9%	5%	5%
Power-Driven Handtool Manufacturing (NAICS 333991)	277%	35%	105%	20%	55%	24%	12%	7%
Welding and Soldering Equipment Manufacturing (NAICS 333992)	60%	22%	44%	11%	45%	13%	8%	5%
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	7%	3%	(12%)	(2%)	(4%)	2%	(2%)	2%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Machinery Manufacturing (NAICS 333)

Rank	Table 6.6.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	235 (1)	9% (6/7)	4.38 (7)
2	Industrial Mold Manufacturing (NAICS 333511)	206 (2)	0% (9)	6.08 (5)
3	All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	202 (3)	7% (8)	6.18 (4)
4	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	120 (4)	88% (4)	1.68
5	Welding and Soldering Equipment Manufacturing (NAICS 333992)	104 (5)	60% (5)	7.99 (1)
6	Pump and Pumping Equipment Manufacturing (NAICS 333911)	99 (6)	(21%)	4.44 (6)
7	Other Industrial Machinery Manufacturing (NAICS 333249)	95 (7)	(23%)	2.03
8	Sawmill, Woodworking, and Paper Machinery Manufacturing (NAICS 333243)	79 (8)	(9%) (10)	6.71 (2)
9	Food Product Machinery Manufacturing (NAICS 333241)	60 (9)	(72%)	3.88 (9)
10	Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing (NAICS 333112)	56 (10)	93% (3)	3.87 (10)
11	Power-Driven Handtool Manufacturing (NAICS 333991)	49	277% (2)	6.52 (3)
12	Other Commercial and Service Industry Machinery Manufacturing (NAICS 333318)	48	(67%)	0.90
13	Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	44	300% (1)	4.27 (8)
14	Speed Changer, Industrial High-Speed Drive, and Gear Manufacturing (NAICS 333612)	32	(45%)	3.24
15	Farm Machinery and Equipment Manufacturing (NAICS 333111)	30	**	0.59
16	Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	25	9% (6/7)	0.96
17	Other Engine Equipment Manufacturing (NAICS 333618)	22	**	0.56

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top ten (10) in each (# Jobs, Growth, LQ)

Target Industry Analysis – Computer and Electronics Manufacturing (NAICS 334-335)

SUMMARY OF COMPUTER AND ELECTRONICS MANUFACTURING

This industry employs close to 7,000 people in Anoka County, with Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and state in one subsector: Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515). It has a higher concentration the greater region alone in an additional subsector: Electronic Connector Manufacturing (NAICS 334417).

Wages are average in Anoka County compared to the other regions, having lower wages than all other regions in five of the subsectors, and lower than two out of three regions in an additional three subsectors. Wages are higher than all other regions in three of the subsectors, however in two out of those three they are significantly higher: Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510) and Analytical Laboratory Instrument Manufacturing (NAICS 334516).

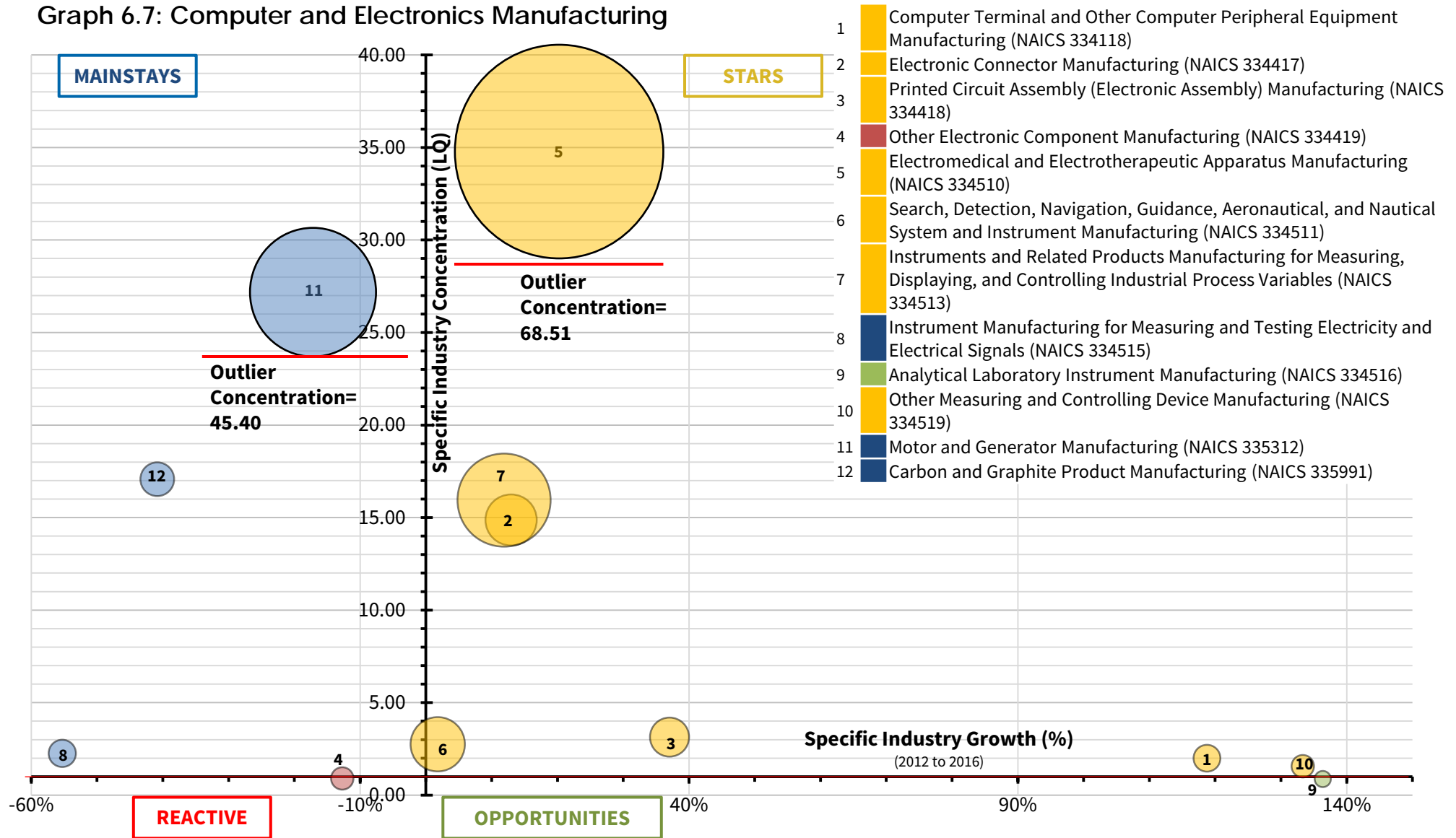
The majority of the subsectors within this industry have experienced significant growth over the past five-year period. In four of those subsectors that have experienced this significant growth, they are projected to continue experiencing significant growth over the next five-year period within Anoka County as well:

- Computer Terminal and Other Computer Peripheral Equipment Manufacturing (NAICS 334118)
- Electronic Connector Manufacturing (NAICS 334417)
- Analytical Laboratory Instrument Manufacturing (NAICS 334516)
- Other Measuring and Controlling Device Manufacturing (NAICS 334519)

The Analytical Laboratory Instrument Manufacturing (NAICS 334516) subsector has experienced significant past five-year growth and is projected to experience significant next five-year year growth in Anoka County, greater region and the state of Minnesota.

Target Industry Analysis – Computer and Electronics Manufacturing (NAICS 334-335)

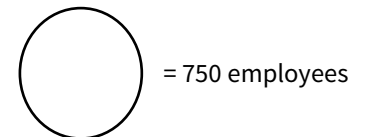
Graph 6.7: Computer and Electronics Manufacturing



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 6,989



Target Industry Analysis – Computer and Electronics Manufacturing (NAICS 334-335)

Table 6.7.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Computer Terminal and Other Computer Peripheral Equipment Manufacturing (NAICS 334118)	1.99	3.96	2.54
Electronic Connector Manufacturing (NAICS 334417)	14.87	1.13	1.42
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	3.14	1.71	2.06
Other Electronic Component Manufacturing (NAICS 334419)	0.91	0.91	1.40
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	68.51	17.62	11.23
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	2.75	1.93	1.25
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	15.94	2.88	3.86
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	2.26	0.72	0.62
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	0.87	0.78	0.58
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	1.56	3.52	2.24
Motor and Generator Manufacturing (NAICS 335312)	45.40	3.89	3.96
Relay and Industrial Control Manufacturing (NAICS 335314)	1.08	1.97	1.47
Carbon and Graphite Product Manufacturing (NAICS 335991)	17.08	1.21	0.74

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Computer and Electronics Manufacturing (NAICS 334-335)

Table 6.7.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Computer Terminal and Other Computer Peripheral Equipment Manufacturing (NAICS 334118)	\$60,595	\$84,708	\$96,512	\$113,191
Electronic Connector Manufacturing (NAICS 334417)	\$54,341	\$55,788	\$55,146	\$67,471
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	\$53,986	\$56,441	\$48,091	\$56,413
Other Electronic Component Manufacturing (NAICS 334419)	\$28,106	\$55,888	\$53,339	\$71,044
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	\$166,849	\$129,041	\$126,646	\$108,125
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	\$104,484	\$83,071	\$81,704	\$112,787
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	\$58,328	\$65,738	\$66,406	\$80,595
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	\$92,654	\$82,602	\$73,271	\$104,826
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	\$179,131	\$99,731	\$96,514	\$98,940
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	\$91,663	\$93,920	\$92,249	\$83,005
Motor and Generator Manufacturing (NAICS 335312)	\$85,645	\$84,098	\$72,265	\$61,304
Relay and Industrial Control Manufacturing (NAICS 335314)	\$43,653	\$70,113	\$68,926	\$77,126
Carbon and Graphite Product Manufacturing (NAICS 335991)	\$63,724	\$63,803	\$63,803	\$62,350

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Computer and Electronics Manufacturing (NAICS 334-335)

Table 6.7.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Computer Terminal and Other Computer Peripheral Equipment Manufacturing (NAICS 334118)	119%	14%	17%	(4%)	7%	(2%)	(12%)	(10%)
Electronic Connector Manufacturing (NAICS 334417)	13%	12%	22%	7%	9%	17%	7%	10%
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	37%	2%	12%	3%	3%	3%	5%	7%
Other Electronic Component Manufacturing (NAICS 334419)	(13%)	(48%)	(18%)	(2%)	(2%)	10%	(7%)	(1%)
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	20%	5%	5%	0%	5%	1%	8%	4%
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	2%	(37%)	(5%)	(6%)	(2%)	(5%)	(9%)	(9%)
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	12%	(6%)	3%	(4%)	9%	3%	3%	6%
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	(55%)	(47%)	(22%)	(15%)	(5%)	(5%)	(9%)	(7%)
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	136%	35%	43%	12%	75%	18%	8%	3%
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	133%	12%	17%	0%	14%	(0%)	6%	6%
Motor and Generator Manufacturing (NAICS 335312)	(17%)	0%	(17%)	(2%)	(17%)	(4%)	(9%)	(3%)
Relay and Industrial Control Manufacturing (NAICS 335314)	**	24%	7%	(3%)	9%	1%	(6%)	0%
Carbon and Graphite Product Manufacturing (NAICS 335991)	(41%)	(6%)	(41%)	(5%)	(41%)	(5%)	1%	5%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Computer and Electronics Manufacturing (NAICS 334-335)

Rank	Table 6.7.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	3,635 (1)	20% (5)	68.51 (1)
2	Motor and Generator Manufacturing (NAICS 335312)	1,416 (2)	(17%)	45.40 (2)
3	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	838 (3)	12%	15.94 (4)
4	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	284 (4)	2%	2.75
5	Electronic Connector Manufacturing (NAICS 334417)	253 (5)	13%	14.87 (5)
6	Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	148	37% (4)	3.14
7	Carbon and Graphite Product Manufacturing (NAICS 335991)	110	(41%)	17.08 (3)
8	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (NAICS 334515)	72	(55%)	2.26
9	Computer Terminal and Other Computer Peripheral Equipment Manufacturing (NAICS 334118)	70	119% (3)	1.99
10	Other Measuring and Controlling Device Manufacturing (NAICS 334519)	49	133% (2)	1.56
11	Other Electronic Component Manufacturing (NAICS 334419)	48	(13%)	0.91
12	Relay and Industrial Control Manufacturing (NAICS 335314)	41	**	1.08
13	Analytical Laboratory Instrument Manufacturing (NAICS 334516)	26	136% (1)	0.87

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top five (5) in each (# Jobs, Growth, LQ)

Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

SUMMARY OF TRANSPORTATION EQUIPMENT MANUFACTURING

This industry employs 300 people in Anoka County, with Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in the following subsectors:

- Motor Home Manufacturing (NAICS 336213)
- Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)

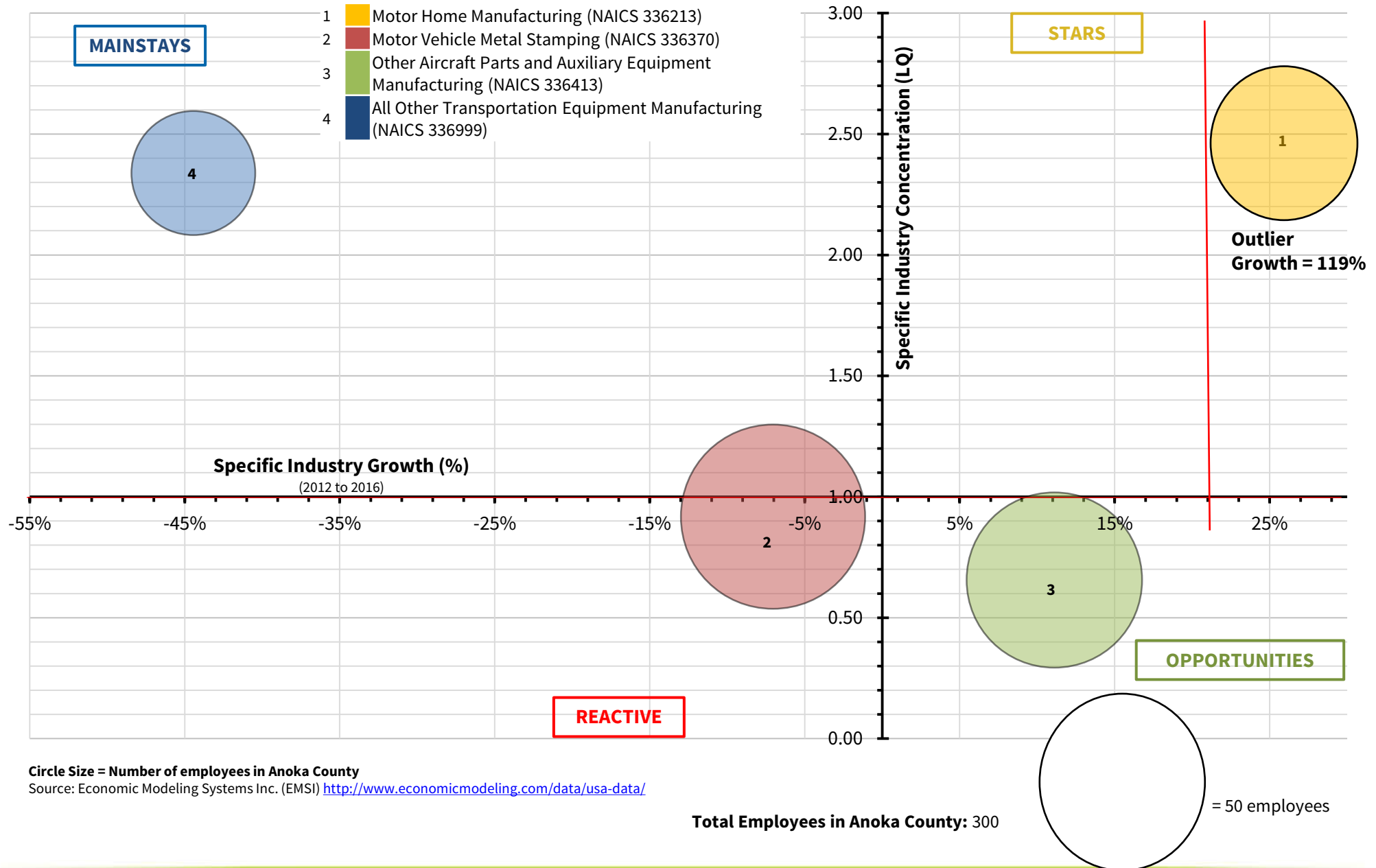
Wages in Anoka County are average compared to the greater region, state average and national average. The two subsectors in which they are lower than all other regions are: Motor Home Manufacturing (NAICS 336213) and All Other Transportation Equipment Manufacturing (NAICS 336999).

There is strong projected growth in this industry within Anoka County, with all subsectors projected to experience significant growth over the next five-year period except for one subsector: All Other Transportation Equipment Manufacturing (NAICS 336999). All the remaining subsectors but one are projected to experience this significant positive growth in Anoka County, greater region and the state of Minnesota:

- Motor Home Manufacturing (NAICS 336213)
- Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)
- Motor Vehicle Metal Stamping (NAICS 336370)

Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Graph 6.8: Transportation Equipment Manufacturing



Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Table 6.8.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Motor Home Manufacturing (NAICS 336213)	2.46	0.17	0.11
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	1.99	0.18	0.44
Motor Vehicle Metal Stamping (NAICS 336370)	0.92	0.13	0.15
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	0.66	0.17	0.14
All Other Transportation Equipment Manufacturing (NAICS 336999)	2.34	2.69	10.76

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Table 6.8.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Motor Home Manufacturing (NAICS 336213)	\$50,249	\$50,249	\$50,249	\$52,814
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	\$72,423	\$73,093	\$58,284	\$67,113
Motor Vehicle Metal Stamping (NAICS 336370)	\$50,525	\$53,527	\$46,833	\$60,837
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	\$52,443	\$50,280	\$50,413	\$71,275
All Other Transportation Equipment Manufacturing (NAICS 336999)	\$43,089	\$56,257	\$50,743	\$51,547

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Table 6.8.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016-2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Motor Home Manufacturing (NAICS 336213)	119%	17%	119%	17%	119%	17%	28%	5%
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	**	34%	**	28%	(19%)	2%	12%	3%
Motor Vehicle Metal Stamping (NAICS 336370)	(7%)	24%	21%	18%	22%	(5%)	22%	3%
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	11%	15%	(25%)	(2%)	(21%)	2%	2%	5%
All Other Transportation Equipment Manufacturing (NAICS 336999)	(44%)	(10%)	1%	7%	3%	(3%)	24%	6%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Transportation Equipment Manufacturing (NAICS 336)

Rank	Table 6.8.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	108 (1)	**	1.99 (3)
2	Motor Vehicle Metal Stamping (NAICS 336370)	66 (2)	(7%) (3)	0.92
3	Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	60 (3)	11% (2)	0.66
4	Motor Home Manufacturing (NAICS 336213)	35	119% (1)	2.46 (1)
5	All Other Transportation Equipment Manufacturing (NAICS 336999)	30	(44%)	2.34 (2)

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top three (3) in each (# Jobs, Growth, LQ)

Target Industry Analysis – Other Manufacturing (NAICS 311, 312, 314, 327, 337, 339)

SUMMARY OF OTHER MANUFACTURING

These other industries employ over 2,400 people in Anoka County, with Ophthalmic Goods Manufacturing (NAICS 339115) being the largest. Anoka County has a significantly higher concentration than the greater region and the state in one subsector: Mineral Wool Manufacturing (NAICS 327993). In an additional two subsectors Anoka County has a significantly higher concentration than only the greater region:

- Other Concrete Product Manufacturing (NAICS 327390)
- Abrasive Product Manufacturing (NAICS 327910)

Wages are generally competitive in Anoka County, having lower wages than the greater region, state average and national average in half of these subsectors. There is one additional subsector in which wages are lower than two of the three other regions: Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215).

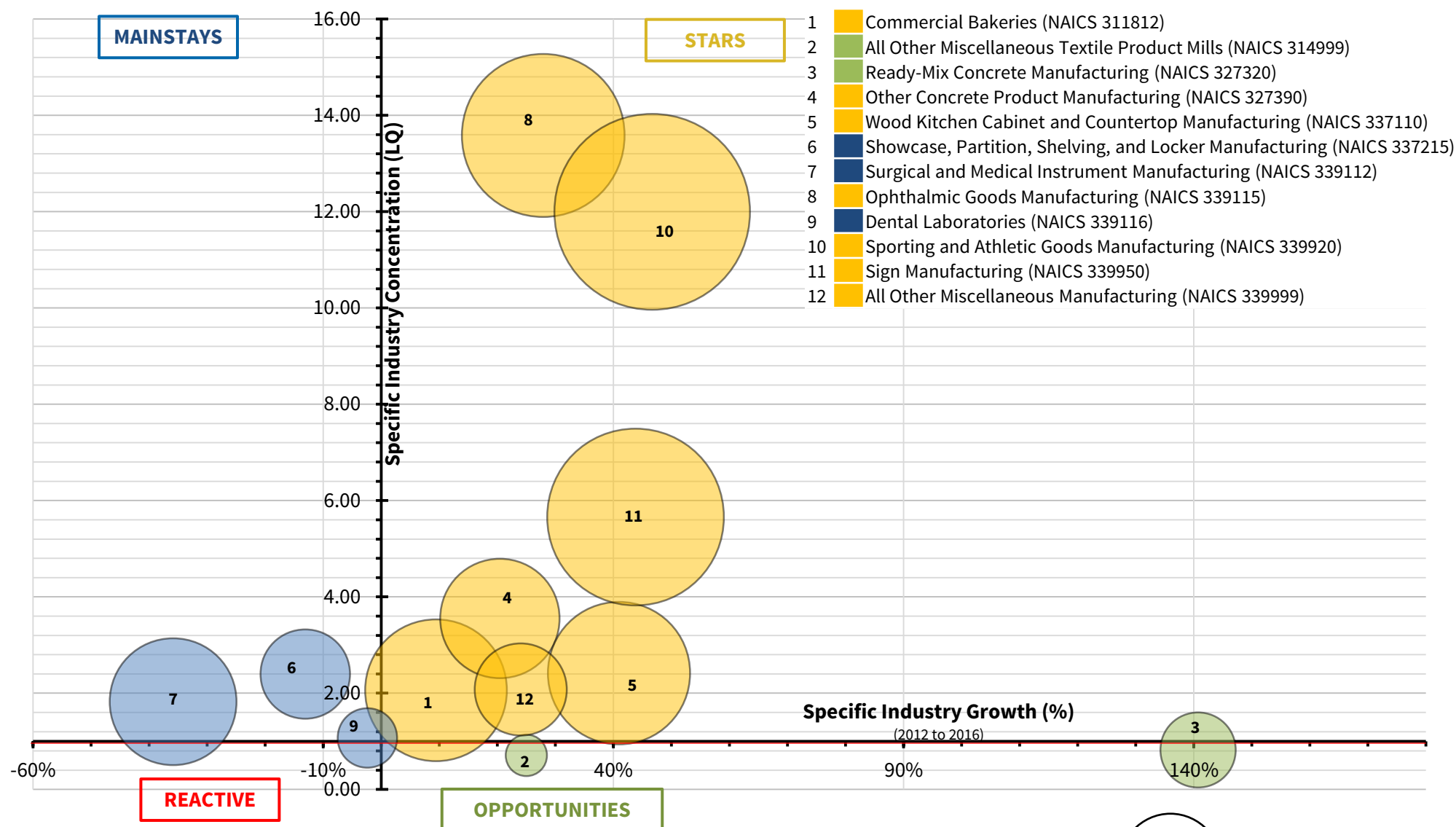
The majority of the subsectors within this industry have experienced significant growth over the past five-year period within Anoka County, and for most of the subsectors in which there was not there was insufficient data to create an estimation. Five subsectors are projected to experience significant positive growth over the next five-year period in Anoka County, greater region and the state of Minnesota:

- Retail Bakeries (NAICS 311911)
- Breweries (NAICS 312120)
- Wineries (NAICS 312130)
- Other Concrete Product Manufacturing (NAICS 327390)
- Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)

Of these five subsectors, two of them are projected to also experience this strong upcoming five-year growth at the national level as well: Breweries (NAICS 312120) and Wineries (NAICS 312130).

Target Industry Analysis – Other Manufacturing (NAICS 311, 312, 314, 327, 337, 339)

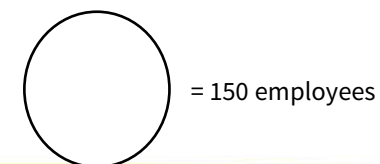
Graph 6.9: Other Manufacturing



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 2,423



Target Industry Analysis – Other Manufacturing (NAICS 311, 312, 314, 327, 337, 339)

Table 6.9.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Retail Bakeries (NAICS 311911)	0.78	0.91	0.96
Commercial Bakeries (NAICS 311812)	2.06	1.29	1.11
Breweries (NAICS 312120)	0.75	1.40	1.35
Wineries (NAICS 312130)	0.49	0.17	0.21
All Other Miscellaneous Textile Product Mills (NAICS 314999)	0.71	1.05	2.30
Ready-Mix Concrete Manufacturing (NAICS 327320)	0.82	0.76	0.95
Other Concrete Product Manufacturing (NAICS 327390)	3.55	0.59	1.27
Abrasive Product Manufacturing (NAICS 327910)	4.29	0.30	2.19
Mineral Wool Manufacturing (NAICS 327993)	1.77	0.13	0.42
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	2.41	1.52	2.27
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	2.40	1.27	1.34
Surgical and Medical Instrument Manufacturing (NAICS 339112)	1.82	6.49	4.40
Ophthalmic Goods Manufacturing (NAICS 339115)	13.58	2.25	3.33
Dental Laboratories (NAICS 339116)	1.07	1.25	1.05
Sporting and Athletic Goods Manufacturing (NAICS 339920)	12.00	2.06	2.35
Sign Manufacturing (NAICS 339950)	5.66	1.64	1.39
All Other Miscellaneous Manufacturing (NAICS 339999)	2.08	2.20	2.71

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Other Manufacturing (NAICS 311, 312, 314, 327, 337, 339)

Table 6.9.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Retail Bakeries (NAICS 311911)	\$16,955	\$18,933	\$17,360	\$21,752
Commercial Bakeries (NAICS 311812)	\$50,543	\$39,936	\$40,980	\$44,216
Breweries (NAICS 312120)	\$71,439	\$34,442	\$34,210	\$56,773
Wineries (NAICS 312130)	\$17,550	\$19,125	\$17,725	\$44,118
All Other Miscellaneous Textile Product Mills (NAICS 314999)	\$23,470	\$31,585	\$37,626	\$35,757
Ready-Mix Concrete Manufacturing (NAICS 327320)	\$68,786	\$68,999	\$62,808	\$57,049
Other Concrete Product Manufacturing (NAICS 327390)	\$77,128	\$62,404	\$57,543	\$50,142
Abrasive Product Manufacturing (NAICS 327910)	\$72,651	\$72,651	\$59,088	\$56,393
Mineral Wool Manufacturing (NAICS 327993)	\$51,903	\$52,980	\$63,210	\$64,703
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	\$39,927	\$42,146	\$43,410	\$40,375
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	\$50,357	\$53,772	\$51,002	\$47,161
Surgical and Medical Instrument Manufacturing (NAICS 339112)	\$81,888	\$88,553	\$85,586	\$83,703
Ophthalmic Goods Manufacturing (NAICS 339115)	\$73,967	\$62,143	\$48,015	\$59,604
Dental Laboratories (NAICS 339116)	\$35,055	\$42,927	\$41,563	\$42,053
Sporting and Athletic Goods Manufacturing (NAICS 339920)	\$59,693	\$60,184	\$53,195	\$53,404
Sign Manufacturing (NAICS 339950)	\$60,100	\$59,799	\$54,940	\$47,916
All Other Miscellaneous Manufacturing (NAICS 339999)	\$47,726	\$53,321	\$47,820	\$52,977

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Other Manufacturing (NAICS 311, 312, 314, 327, 337, 339)

Table 6.9.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Retail Bakeries (NAICS 311911)	**	42%	37%	4%	20%	4%	17%	8%
Commercial Bakeries (NAICS 311812)	9%	(3%)	1%	(2%)	(3%)	(1%)	2%	1%
Breweries (NAICS 312120)	**	36%	397%	32%	215%	27%	91%	20%
Wineries (NAICS 312130)	**	24%	67%	25%	6%	21%	31%	13%
All Other Miscellaneous Textile Product Mills (NAICS 314999)	25%	(40%)	60%	(6%)	25%	(1%)	2%	(3%)
Ready-Mix Concrete Manufacturing (NAICS 327320)	141%	(40%)	30%	(1%)	(3%)	(3%)	15%	0%
Other Concrete Product Manufacturing (NAICS 327390)	20%	(3%)	32%	4%	22%	13%	16%	3%
Abrasive Product Manufacturing (NAICS 327910)	**	29%	**	29%	45%	10%	2%	(2%)
Mineral Wool Manufacturing (NAICS 327993)	**	48%	**	42%	(60%)	17%	8%	2%
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	41%	(3%)	28%	1%	21%	2%	19%	3%
Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	(13%)	(25%)	(8%)	(18%)	(2%)	(13%)	5%	(2%)
Surgical and Medical Instrument Manufacturing (NAICS 339112)	(36%)	(36%)	11%	6%	10%	5%	(1%)	5%
Ophthalmic Goods Manufacturing (NAICS 339115)	28%	3%	11%	(7%)	20%	9%	(3%)	4%
Dental Laboratories (NAICS 339116)	(2%)	(49%)	12%	(12%)	(10%)	(12%)	1%	1%
Sporting and Athletic Goods Manufacturing (NAICS 339920)	47%	3%	43%	6%	16%	2%	5%	(4%)
Sign Manufacturing (NAICS 339950)	44%	15%	12%	(4%)	16%	4%	14%	(0%)
All Other Miscellaneous Manufacturing (NAICS 339999)	24%	(13%)	30%	6%	39%	12%	9%	1%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Other Manufacturing (NAICS 311, 312, 314, 327, 337, 339)

Rank	Table 6.9.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Sporting and Athletic Goods Manufacturing (NAICS 339920)	443 (1)	47% (2)	12.00 (2)
2	Sign Manufacturing (NAICS 339950)	361 (2)	44% (3)	5.66 (3)
3	Ophthalmic Goods Manufacturing (NAICS 339115)	307 (3)	28% (5)	13.58 (1)
4	Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	234 (4)	41% (4)	2.41 (6)
5	Commercial Bakeries (NAICS 311812)	232 (5)	9% (9)	2.06 (9)
6	Surgical and Medical Instrument Manufacturing (NAICS 339112)	186 (6)	(36%)	1.82 (10)
7	Other Concrete Product Manufacturing (NAICS 327390)	165 (7)	20% (8)	3.55 (5)
8	All Other Miscellaneous Manufacturing (NAICS 339999)	98 (8)	24% (7)	2.08 (8)
9	Showcase, Partition, Shelving, and Locker Manufacturing (NAICS 337215)	93 (9)	(13%)	2.40 (7)
10	Ready-Mix Concrete Manufacturing (NAICS 327320)	65 (10)	141% (1)	0.82
11	Retail Bakeries (NAICS 311811)	55	**	0.78
12	Dental Laboratories (NAICS 339116)	41	(2%) (10)	1.07
13	Abrasive Product Manufacturing (NAICS 327910)	38	**	4.29 (4)
14	Breweries (NAICS 312120)	36	**	0.75
15	Mineral Wool Manufacturing (NAICS 327993)	25	**	1.77
16	Wineries (NAICS 312130)	25	**	0.49
17	All Other Miscellaneous Textile Product Mills (NAICS 314999)	20	25% (6)	0.71

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top ten (10) in each (# Jobs, Growth, LQ)

Target Industry Identification Analysis: Wholesale



Target Industry Analysis – Wholesalers: Durable Goods (NAICS 423)

SUMMARY OF WHOLESALERS: DURABLE GOODS

This industry employs over 3,500 people in Anoka County, with Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (NAICS 423450) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in the following subsectors:

- Motor Vehicle Supplies and New Parts Merchant Wholesalers (NAICS 423120)
- Other Construction Material Merchant Wholesalers (NAICS 423390)
- Metal Service Centers and Other Metal Merchant Wholesalers (NAICS 423510)
- Industrial Supplies Merchant Wholesalers (NAICS 423840)
- Recyclable Material Merchant Wholesalers (NAICS 423930)
- Other Miscellaneous Durable Goods Merchant Wholesalers (NAICS 42399)

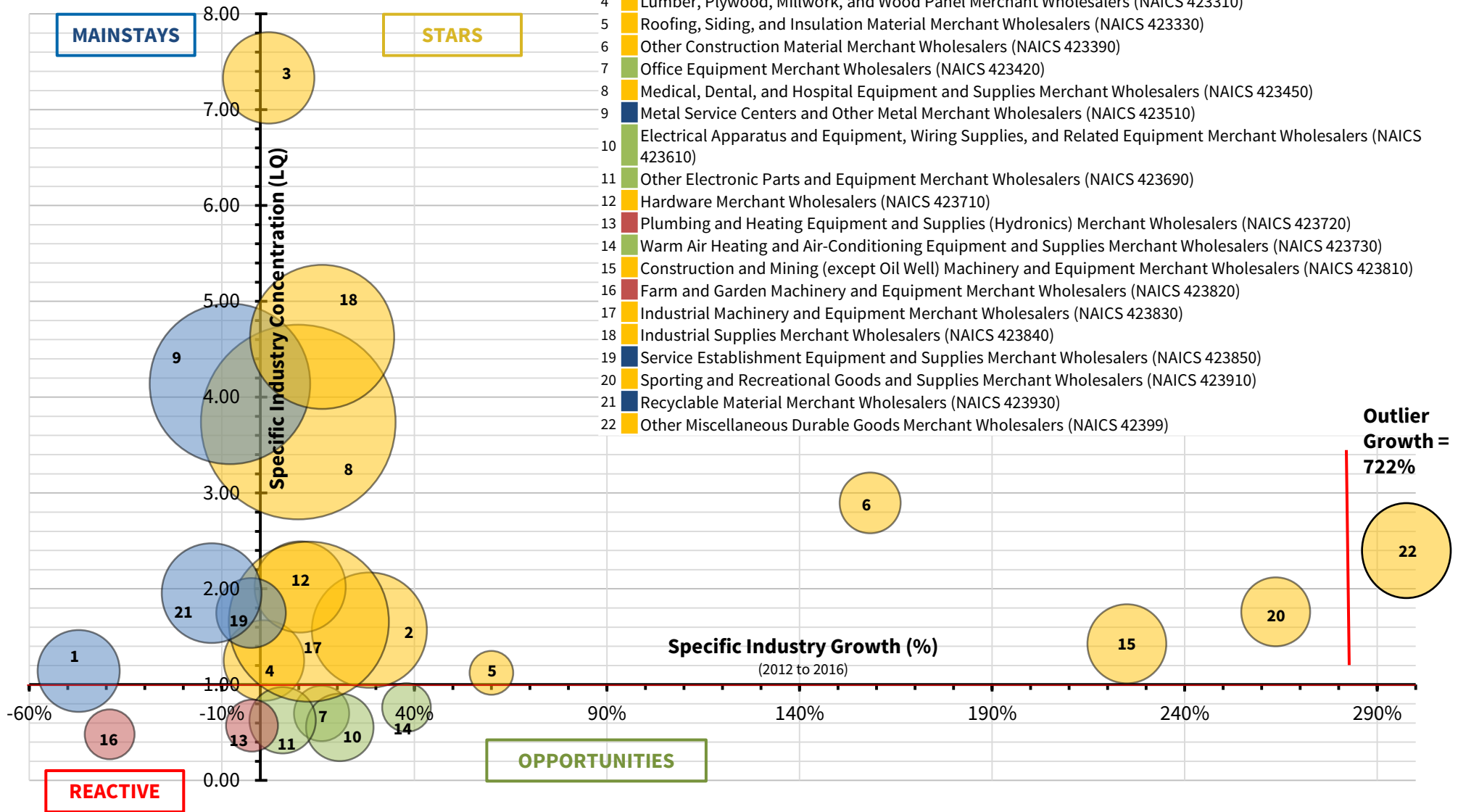
Wages are generally quite competitive in Anoka County compared to the greater region, state average and national average. They are outright lower than all other regions in twice as many subsectors in which they are not. Wages are significantly lower in Anoka County compared to the greater region in the Automobile and Other Motor Vehicle Merchant Wholesalers (NAICS 423110) subsector. Wages are higher than all other regions in only four of the subsectors.

The majority of the subsectors within this industry have experienced significant growth over the past five-year period. Three subsectors have experienced and will continue to experience significant growth in all regions and nearly all time periods:

- Other Construction Material Merchant Wholesalers (NAICS 423390)
- Sporting and Recreational Goods and Supplies Merchant Wholesalers (NAICS 423910)
- Other Miscellaneous Durable Goods Merchant Wholesalers (NAICS 42399)

Target Industry Analysis – Wholesalers: Durable Goods (NAICS 423)

Graph 6.10: Wholesalers: Durable Goods



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 3,584

○ = 100 employees

Target Industry Analysis – Wholesalers: Durable Goods (NAICS 423)

Table 6.10.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Automobile and Other Motor Vehicle Merchant Wholesalers (NAICS 423110)	1.14	1.13	1.36
Motor Vehicle Supplies and New Parts Merchant Wholesalers (NAICS 423120)	1.57	1.08	1.03
Motor Vehicle Parts (Used) Merchant Wholesalers (NAICS 423140)	7.33	1.45	1.29
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers (NAICS 423310)	1.25	1.50	1.58
Roofing, Siding, and Insulation Material Merchant Wholesalers (NAICS 423330)	1.12	1.52	1.21
Other Construction Material Merchant Wholesalers (NAICS 423390)	2.90	0.73	0.68
Office Equipment Merchant Wholesalers (NAICS 423420)	0.70	2.04	1.45
Other Commercial Equipment Merchant Wholesalers (NAICS 423440)	0.45	1.33	0.99
Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (NAICS 423450)	3.74	1.59	1.17
Metal Service Centers and Other Metal Merchant Wholesalers (NAICS 423510)	4.14	1.07	0.95
Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers (NAICS 423610)	0.55	1.00	0.88
Other Electronic Parts and Equipment Merchant Wholesalers (NAICS 423690)	0.63	1.23	2.04
Hardware Merchant Wholesalers (NAICS 423710)	2.02	1.38	1.12
Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers (NAICS 423720)	0.57	1.04	0.90
Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers (NAICS 423730)	0.76	0.96	0.62
Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers (NAICS 423810)	1.43	1.04	1.64
Farm and Garden Machinery and Equipment Merchant Wholesalers (NAICS 423820)	0.48	0.58	2.30
Industrial Machinery and Equipment Merchant Wholesalers (NAICS 423830)	1.66	1.40	1.11
Industrial Supplies Merchant Wholesalers (NAICS 423840)	4.63	1.17	0.97
Service Establishment Equipment and Supplies Merchant Wholesalers (NAICS 423850)	1.75	1.30	0.99
Sporting and Recreational Goods and Supplies Merchant Wholesalers (NAICS 423910)	1.76	2.39	1.96
Recyclable Material Merchant Wholesalers (NAICS 423930)	1.95	0.84	0.85
Other Miscellaneous Durable Goods Merchant Wholesalers (NAICS 42399)	2.42	1.12	1.09

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Wholesalers: Durable Goods (NAICS 423)

Table 6.10.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Automobile and Other Motor Vehicle Merchant Wholesalers (NAICS 423110)	\$54,393	\$100,741	\$79,749	\$63,390
Motor Vehicle Supplies and New Parts Merchant Wholesalers (NAICS 423120)	\$49,852	\$54,071	\$51,853	\$54,009
Motor Vehicle Parts (Used) Merchant Wholesalers (NAICS 423140)	\$35,750	\$40,946	\$38,779	\$40,199
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers (NAICS 423310)	\$59,607	\$82,797	\$70,293	\$60,480
Roofing, Siding, and Insulation Material Merchant Wholesalers (NAICS 423330)	\$53,736	\$69,888	\$70,626	\$65,834
Other Construction Material Merchant Wholesalers (NAICS 423390)	\$64,494	\$71,537	\$66,821	\$59,131
Office Equipment Merchant Wholesalers (NAICS 423420)	\$45,790	\$72,083	\$71,210	\$66,564
Other Commercial Equipment Merchant Wholesalers (NAICS 423440)	\$69,076	\$80,737	\$76,402	\$61,064
Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (NAICS 423450)	\$167,322	\$102,133	\$105,655	\$95,694
Metal Service Centers and Other Metal Merchant Wholesalers (NAICS 423510)	\$73,149	\$65,164	\$63,557	\$65,321
Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers (NAICS 423610)	\$69,797	\$78,114	\$75,515	\$77,347
Other Electronic Parts and Equipment Merchant Wholesalers (NAICS 423690)	\$64,741	\$86,796	\$67,029	\$96,312
Hardware Merchant Wholesalers (NAICS 423710)	\$70,568	\$62,444	\$61,738	\$59,598
Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers (NAICS 423720)	\$67,042	\$75,807	\$70,687	\$64,290
Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers (NAICS 423730)	\$65,635	\$80,787	\$79,856	\$75,167
Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers (NAICS 423810)	\$71,260	\$81,508	\$75,846	\$71,372
Farm and Garden Machinery and Equipment Merchant Wholesalers (NAICS 423820)	\$58,593	\$60,778	\$56,452	\$54,971
Industrial Machinery and Equipment Merchant Wholesalers (NAICS 423830)	\$67,180	\$80,248	\$79,422	\$72,962
Industrial Supplies Merchant Wholesalers (NAICS 423840)	\$62,854	\$64,544	\$64,055	\$69,128
Service Establishment Equipment and Supplies Merchant Wholesalers (NAICS 423850)	\$49,490	\$60,528	\$60,593	\$53,484
Sporting and Recreational Goods and Supplies Merchant Wholesalers (NAICS 423910)	\$130,746	\$68,731	\$67,132	\$58,487
Recyclable Material Merchant Wholesalers (NAICS 423930)	\$46,314	\$50,602	\$47,943	\$47,674
Other Miscellaneous Durable Goods Merchant Wholesalers (NAICS 42399)	\$61,672	\$64,314	\$74,909	\$58,824

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Wholesalers: Durable Goods (NAICS 423)

Table 6.10.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Automobile and Other Motor Vehicle Merchant Wholesalers (NAICS 423110)	(47%)	(20%)	(2%)	(2%)	(0%)	3%	5%	3%
Motor Vehicle Supplies and New Parts Merchant Wholesalers (NAICS 423120)	28%	23%	(2%)	(1%)	2%	2%	4%	4%
Motor Vehicle Parts (Used) Merchant Wholesalers (NAICS 423140)	2%	(21%)	21%	1%	(4%)	(2%)	(7%)	4%
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers (NAICS 423310)	1%	3%	13%	(8%)	21%	2%	16%	1%
Roofing, Siding, and Insulation Material Merchant Wholesalers (NAICS 423330)	60%	(44%)	(3%)	(10%)	(1%)	(3%)	16%	8%
Other Construction Material Merchant Wholesalers (NAICS 423390)	158%	34%	117%	24%	124%	26%	12%	8%
Office Equipment Merchant Wholesalers (NAICS 423420)	16%	14%	10%	(2%)	9%	(1%)	(9%)	(7%)
Other Commercial Equipment Merchant Wholesalers (NAICS 423440)	**	33%	21%	5%	14%	4%	10%	6%
Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (NAICS 423450)	10%	(3%)	28%	6%	27%	8%	5%	6%
Metal Service Centers and Other Metal Merchant Wholesalers (NAICS 423510)	(8%)	(11%)	(4%)	(3%)	0%	1%	3%	4%
Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers (NAICS 423610)	21%	0%	10%	1%	10%	3%	12%	5%
Other Electronic Parts and Equipment Merchant Wholesalers (NAICS 423690)	6%	(7%)	(9%)	(29%)	3%	(2%)	(6%)	(6%)
Hardware Merchant Wholesalers (NAICS 423710)	10%	5%	18%	0%	17%	2%	10%	3%
Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers (NAICS 423720)	(2%)	(2%)	8%	(3%)	(3%)	(5%)	13%	3%
Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers (NAICS 423730)	38%	0%	20%	2%	20%	3%	8%	3%
Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers (NAICS 423810)	225%	34%	9%	3%	13%	9%	8%	5%
Farm and Garden Machinery and Equipment Merchant Wholesalers (NAICS 423820)	(39%)	(14%)	(11%)	(5%)	(4%)	2%	3%	5%
Industrial Machinery and Equipment Merchant Wholesalers (NAICS 423830)	13%	(1%)	13%	2%	14%	4%	2%	1%
Industrial Supplies Merchant Wholesalers (NAICS 423840)	16%	20%	(0%)	4%	3%	6%	9%	9%
Service Establishment Equipment and Supplies Merchant Wholesalers (NAICS 423850)	(2%)	5%	4%	(2%)	3%	(0%)	2%	(2%)
Sporting and Recreational Goods and Supplies Merchant Wholesalers (NAICS 423910)	264%	26%	30%	21%	32%	21%	11%	14%
Recyclable Material Merchant Wholesalers (NAICS 423930)	(13%)	4%	(15%)	4%	(14%)	8%	(18%)	2%
Other Miscellaneous Durable Goods Merchant Wholesalers (NAICS 42399)	722%	63%	47%	27%	27%	27%	5%	14%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Wholesalers: Durable Goods (NAICS 423)

Rank	Table 6.10.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (NAICS 423450)	634 (1)	10%	3.74 (4)
2	Metal Service Centers and Other Metal Merchant Wholesalers (NAICS 423510)	431 (2)	(8%)	4.14 (3)
3	Industrial Machinery and Equipment Merchant Wholesalers (NAICS 423830)	429 (3)	13%	1.66
4	Industrial Supplies Merchant Wholesalers (NAICS 423840)	347 (4)	16% (9/10)	4.63 (2)
5	Motor Vehicle Supplies and New Parts Merchant Wholesalers (NAICS 423120)	222 (5)	28% (7)	1.57
6	Recyclable Material Merchant Wholesalers (NAICS 423930)	166 (6)	(13%)	1.95 (8)
7	Other Miscellaneous Durable Goods Merchant Wholesalers (NAICS 423990)	148 (7)	722% (1)	2.42 (6)
8	Motor Vehicle Parts (Used) Merchant Wholesalers (NAICS 423140)	140 (8)	2%	7.33 (1)
9	Hardware Merchant Wholesalers (NAICS 423710)	139 (9)	10%	2.02 (7)
10	Automobile and Other Motor Vehicle Merchant Wholesalers (NAICS 423110)	112 (10)	(47%)	1.14
11	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers (NAICS 423310)	108	1%	1.25
12	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers (NAICS 423810)	104	225% (3)	1.43
13	Service Establishment Equipment and Supplies Merchant Wholesalers (NAICS 423850)	81	(2%)	1.75 (10)
14	Sporting and Recreational Goods and Supplies Merchant Wholesalers (NAICS 423910)	80	264% (2)	1.76 (9)
15	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers (NAICS 423610)	76	21% (8)	0.55
16	Other Electronic Parts and Equipment Merchant Wholesalers (NAICS 423690)	73	6%	0.63
17	Other Construction Material Merchant Wholesalers (NAICS 423390)	62	158% (4)	2.90 (5)
18	Office Equipment Merchant Wholesalers (NAICS 423420)	51	16% (9/10)	0.70
19	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers (NAICS 423720)	45	(2%)	0.57
20	Farm and Garden Machinery and Equipment Merchant Wholesalers (NAICS 423820)	42	(39%)	0.48
21	Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers (NAICS 423730)	40	38% (6)	0.76
22	Roofing, Siding, and Insulation Material Merchant Wholesalers (NAICS 423330)	32	60% (5)	1.12
23	Other Commercial Equipment Merchant Wholesalers (NAICS 423440)	21	**	0.45

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top ten (10) in each (# Jobs, Growth, LQ)

Target Industry Analysis – Wholesalers: Non-Durable Goods (NAICS 424-425)

SUMMARY OF WHOLESALERS: NON-DURABLE GOODS

This industry employs over 1,900 people in Anoka County, with Wholesale Trade Agents and Brokers (NAICS 425120) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in the following subsectors:

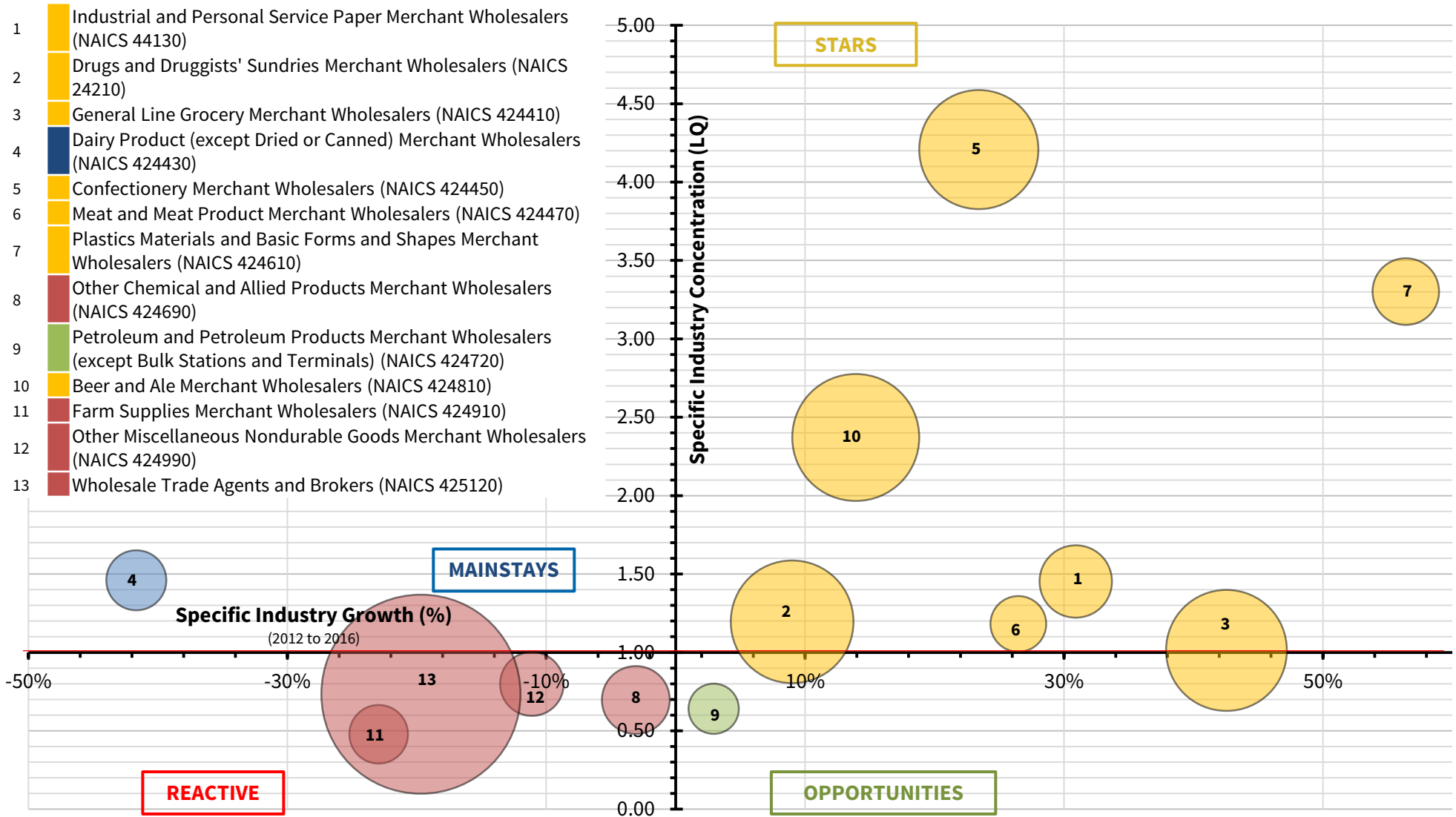
- Industrial and Personal Service Paper Merchant Wholesalers (NAICS 44130)
- Drugs and Druggists' Sundries Merchant Wholesalers (NAICS 24210)
- Confectionery Merchant Wholesalers (NAICS 424450)
- Beer and Ale Merchant Wholesalers (NAICS 424810)
- Tobacco and Tobacco Product Merchant Wholesalers (NAICS 424940)

Wages are generally competitive in Anoka County, with about half subsectors having lower wages than that of the greater region, state average and national average. There are three subsectors in which Anoka County has higher wages than that of all other regions.

There has been strong growth in less than half of the subsectors within this industry over the past five-year period, with significant negative growth or insufficient data in an equal amount of subsectors to those that have experienced significant growth. Only one subsector has experienced significant growth and is projected to continue doing so in Anoka County, greater region and the state of Minnesota: Plastics Materials and Basic Forms and Shapes Merchant Wholesalers (NAICS 424610). Two additional subsectors meet this criteria for Anoka County and greater region alone: Confectionery Merchant Wholesalers (NAICS 424450) and Tobacco and Tobacco Product Merchant Wholesalers (NAICS 424940).

Target Industry Analysis – Wholesalers: Non-Durable Goods (NAICS 424-425)

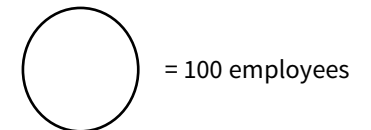
Graph 6.11: Wholesalers: Non-Durable Goods



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 1,902



Target Industry Analysis – Wholesalers: Non-Durable Goods (NAICS 424-425)

Table 6.11.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Stationery and Office Supplies Merchant Wholesalers (NAICS 424120)	0.60	1.12	1.22
Industrial and Personal Service Paper Merchant Wholesalers (NAICS 44130)	1.45	0.65	0.53
Drugs and Druggists' Sundries Merchant Wholesalers (NAICS 24210)	1.20	0.49	0.57
Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers (NAICS 424330)	0.55	0.25	0.29
General Line Grocery Merchant Wholesalers (NAICS 424410)	1.01	0.78	0.66
Dairy Product (except Dried or Canned) Merchant Wholesalers (NAICS 424430)	1.46	0.74	1.24
Confectionery Merchant Wholesalers (NAICS 424450)	4.21	0.90	1.03
Meat and Meat Product Merchant Wholesalers (NAICS 424470)	1.18	1.41	1.18
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers (NAICS 424610)	3.30	1.24	0.81
Other Chemical and Allied Products Merchant Wholesalers (NAICS 424690)	0.70	0.71	0.73
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals) (NAICS 424720)	0.64	0.83	1.13
Beer and Ale Merchant Wholesalers (NAICS 424810)	2.37	0.64	0.76
Farm Supplies Merchant Wholesalers (NAICS 424910)	0.48	1.14	2.39
Tobacco and Tobacco Product Merchant Wholesalers (NAICS 424940)	2.44	1.14	0.91
Other Miscellaneous Nondurable Goods Merchant Wholesalers (NAICS 424990)	0.80	0.83	0.89
Wholesale Trade Agents and Brokers (NAICS 425120)	0.73	1.20	1.28

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Wholesalers: Non-Durable Goods (NAICS 424-425)

Table 6.11.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Stationery and Office Supplies Merchant Wholesalers (NAICS 424120)	\$40,553	\$58,151	\$47,847	\$50,068
Industrial and Personal Service Paper Merchant Wholesalers (NAICS 44130)	\$77,057	\$75,888	\$70,355	\$72,899
Drugs and Druggists' Sundries Merchant Wholesalers (NAICS 24210)	\$107,711	\$115,352	\$126,563	\$110,660
Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers (NAICS 424330)	\$43,653	\$53,244	\$48,329	\$69,669
General Line Grocery Merchant Wholesalers (NAICS 424410)	\$72,157	\$75,704	\$68,550	\$59,421
Dairy Product (except Dried or Canned) Merchant Wholesalers (NAICS 424430)	\$71,883	\$98,004	\$70,032	\$53,575
Confectionery Merchant Wholesalers (NAICS 424450)	\$34,891	\$52,029	\$60,865	\$58,406
Meat and Meat Product Merchant Wholesalers (NAICS 424470)	\$90,883	\$67,634	\$86,284	\$55,546
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers (NAICS 424610)	\$82,923	\$69,015	\$71,404	\$76,182
Other Chemical and Allied Products Merchant Wholesalers (NAICS 424690)	\$69,723	\$97,212	\$91,897	\$83,940
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals) (NAICS 424720)	\$28,244	\$57,420	\$51,596	\$77,887
Beer and Ale Merchant Wholesalers (NAICS 424810)	\$56,467	\$58,742	\$54,733	\$55,738
Farm Supplies Merchant Wholesalers (NAICS 424910)	\$95,707	\$106,860	\$72,674	\$58,731
Tobacco and Tobacco Product Merchant Wholesalers (NAICS 424940)	\$23,589	\$43,185	\$42,969	\$52,239
Other Miscellaneous Nondurable Goods Merchant Wholesalers (NAICS 424990)	\$60,517	\$65,332	\$63,908	\$52,860
Wholesale Trade Agents and Brokers (NAICS 425120)	\$70,508	\$97,440	\$104,770	\$98,153

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Wholesalers: Non-Durable Goods (NAICS 424-425)

Table 6.11.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5-year Growth (2012-2016)	Minnesota 5-year Projected Growth (2016-2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Stationery and Office Supplies Merchant Wholesalers (NAICS 424120)	**	15%	(3%)	(16%)	(18%)	(20%)	(0%)	(5%)
Industrial and Personal Service Paper Merchant Wholesalers (NAICS 44130)	31%	6%	(20%)	(18%)	(14%)	(14%)	1%	(3%)
Drugs and Druggists' Sundries Merchant Wholesalers (NAICS 24210)	9%	(17%)	4%	(14%)	0%	(11%)	8%	0%
Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers (NAICS 424330)	**	40%	8%	(6%)	44%	12%	12%	9%
General Line Grocery Merchant Wholesalers (NAICS 424410)	43%	(12%)	(1%)	(10%)	(5%)	(6%)	2%	3%
Dairy Product (except Dried or Canned) Merchant Wholesalers (NAICS 424430)	(42%)	(10%)	(39%)	(27%)	(21%)	(6%)	(4%)	4%
Confectionery Merchant Wholesalers (NAICS 424450)	23%	19%	23%	10%	(5%)	7%	6%	8%
Meat and Meat Product Merchant Wholesalers (NAICS 424470)	26%	21%	3%	(3%)	6%	3%	15%	10%
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers (NAICS 424610)	56%	30%	46%	14%	44%	13%	7%	5%
Other Chemical and Allied Products Merchant Wholesalers (NAICS 424690)	(3%)	8%	(14%)	(9%)	(1%)	1%	2%	5%
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals) (NAICS 424720)	3%	(20%)	18%	11%	6%	3%	1%	2%
Beer and Ale Merchant Wholesalers (NAICS 424810)	14%	14%	5%	12%	5%	7%	10%	8%
Farm Supplies Merchant Wholesalers (NAICS 424910)	(23%)	(28%)	10%	1%	5%	(1%)	5%	2%
Tobacco and Tobacco Product Merchant Wholesalers (NAICS 424940)	**	44%	44%	13%	17%	5%	(2%)	1%
Other Miscellaneous Nondurable Goods Merchant Wholesalers (NAICS 424990)	(11%)	(5%)	10%	(6%)	(3%)	(3%)	(1%)	1%
Wholesale Trade Agents and Brokers (NAICS 425120)	(20%)	1%	(3%)	2%	(4%)	2%	4%	12%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Wholesalers: Non-Durable Goods (NAICS 424-425)

Rank	Table 6.11.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Wholesale Trade Agents and Brokers (NAICS 425120)	543 (1)	(20%)	0.73
2	Beer and Ale Merchant Wholesalers (NAICS 424810)	221 (2)	14% (6)	2.37 (4)
3	Drugs and Druggists' Sundries Merchant Wholesalers (NAICS 424210)	206 (3)	9% (7)	1.20 (7)
4	General Line Grocery Merchant Wholesalers (NAICS 424410)	201 (4)	43% (2)	1.01 (9)
5	Confectionery Merchant Wholesalers (NAICS 424450)	195 (5)	23% (5)	4.21 (1)
6	Industrial and Personal Service Paper Merchant Wholesalers (NAICS 424130)	72 (6)	31% (3)	1.45 (6)
7	Other Chemical and Allied Products Merchant Wholesalers (NAICS 424690)	63 (7)	(3%) (9)	0.70
8	Plastics Materials and Basic Forms and Shapes Merchant Wholesalers (NAICS 424610)	61 (8)	56% (1)	3.30 (2)
9	Other Miscellaneous Nondurable Goods Merchant Wholesalers (NAICS 424990)	56 (9)	(11%) (10)	0.80 (10)
10	Tobacco and Tobacco Product Merchant Wholesalers (NAICS 424940)	50 (10)	**	2.44 (3)
11	Dairy Product (except Dried or Canned) Merchant Wholesalers (NAICS 424430)	49	(42%)	1.46 (5)
12	Farm Supplies Merchant Wholesalers (NAICS 424910)	47	(23%)	0.48
13	Meat and Meat Product Merchant Wholesalers (NAICS 424470)	43	26% (4)	1.18 (8)
14	Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers (NAICS 424330)	35	**	0.55
15	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals) (NAICS 424720)	35	3% (8)	0.64
16	Stationery and Office Supplies Merchant Wholesalers (NAICS 424120)	27	**	0.60

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top ten (10) in each (# Jobs, Growth, LQ)

Target Industry Identification Analysis: Transportation



Target Industry Analysis – Transportation (NAICS 481-493)

SUMMARY OF TRANSPORTATION

This industry employs close to 4,000 people in Anoka County, with General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in the following subsectors:

- Other Nonscheduled Air Transportation (NAICS 481219)
- General Freight Trucking, Local (NAICS 484110)
- General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)
- Special Needs Transportation (NAICS 485991)
- All Other Transit and Ground Passenger Transportation (NAICS 485999)

Wages are generally competitive in this industry in Anoka County, with just under half the subsectors having lower wages than that of the greater region, state average and national average. An additional four subsectors have lower wages in Anoka County than two out of three of the other regions.

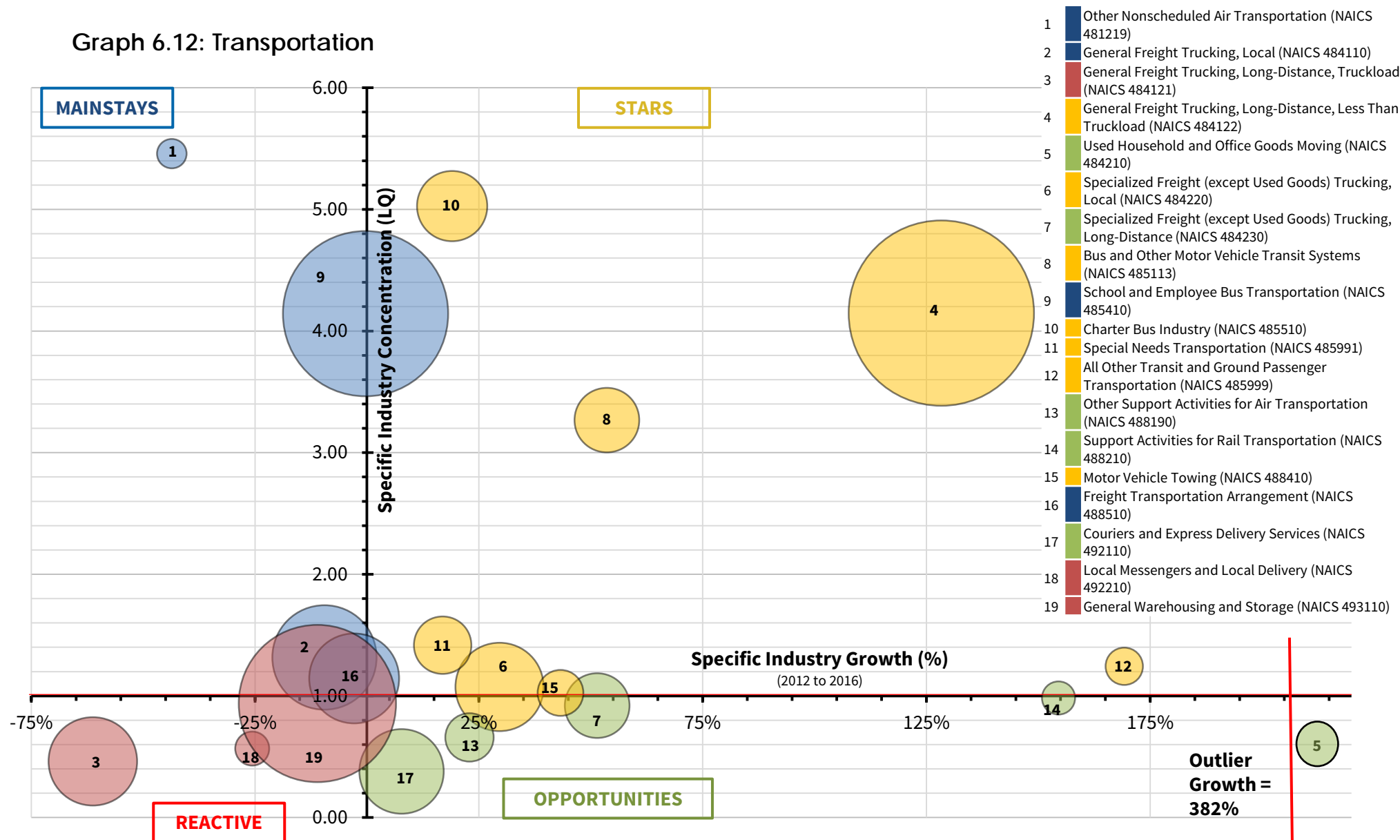
The majority of the subsectors within this industry have experienced significant growth over the past five-year period, and growth is projected to be strong in nearly all of the subsectors within Anoka County over the next five-year period. Subsectors in which growth has been significant in all regions and nearly all time periods include:

- Rail transportation (NAICS 482110)
- Bus and Other Motor Vehicle Transit Systems (NAICS 485113)
- All Other Transit and Ground Passenger Transportation (NAICS 485999)
- Motor Vehicle Towing (NAICS 488410)

Other Nonscheduled Air Transportation (NAICS 481219) is the only subsector that has experienced significant negative growth over the past five-year period and is projected to continue experiencing significant negative growth over the next five-year period in Anoka County, greater region and the state of Minnesota.

Target Industry Analysis – Transportation (NAICS 48-49)

Graph 6.12: Transportation



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 3,985

○ = 150 employees

Target Industry Analysis – Transportation (NAICS 48-49)

Table 6.12.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Other Nonscheduled Air Transportation (NAICS 481219)	5.46	0.43	0.55
Rail transportation (NAICS 482110)	71.63	5.16	4.12
General Freight Trucking, Local (NAICS 484110)	1.32	0.59	1.01
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	0.46	0.94	1.11
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	4.15	0.89	0.66
Used Household and Office Goods Moving (NAICS 484210)	0.63	0.95	0.68
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	1.07	0.40	0.86
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	0.92	0.46	0.76
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	3.27	2.29	1.93
School and Employee Bus Transportation (NAICS 485410)	4.14	1.97	2.29
Charter Bus Industry (NAICS 485510)	5.03	1.09	1.52
Special Needs Transportation (NAICS 485991)	1.42	1.19	1.12
All Other Transit and Ground Passenger Transportation (NAICS 485999)	1.24	0.41	1.10
Other Support Activities for Air Transportation (NAICS 488190)	0.66	0.57	0.46
Support Activities for Rail Transportation (NAICS 488210)	0.98	2.56	1.70
Motor Vehicle Towing (NAICS 488410)	1.02	0.87	0.78
Freight Transportation Arrangement (NAICS 488510)	1.14	0.90	0.68
Couriers and Express Delivery Services (NAICS 492110)	0.38	1.06	0.89
Local Messengers and Local Delivery (NAICS 492210)	0.57	1.14	0.94
General Warehousing and Storage (NAICS 493110)	0.94	0.47	0.43

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Transportation (NAICS 48-49)

Table 6.12.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Other Nonscheduled Air Transportation (NAICS 481219)	\$71,098	\$74,995	\$79,732	\$86,620
Rail transportation (NAICS 482110)	\$40,966	\$41,365	\$37,817	\$51,172
General Freight Trucking, Local (NAICS 484110)	\$47,521	\$45,690	\$41,646	\$46,486
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	\$46,111	\$54,025	\$51,276	\$47,479
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	\$55,556	\$55,596	\$55,368	\$56,104
Used Household and Office Goods Moving (NAICS 484210)	\$25,584	\$41,377	\$39,335	\$37,977
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	\$50,957	\$50,731	\$44,955	\$48,890
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	\$54,726	\$58,740	\$52,073	\$54,384
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	\$34,455	\$35,442	\$35,668	\$46,980
School and Employee Bus Transportation (NAICS 485410)	\$25,763	\$23,908	\$21,561	\$24,129
Charter Bus Industry (NAICS 485510)	\$27,866	\$25,598	\$22,679	\$33,667
Special Needs Transportation (NAICS 485991)	\$15,598	\$29,680	\$26,984	\$28,978
All Other Transit and Ground Passenger Transportation (NAICS 485999)	\$26,283	\$21,764	\$18,962	\$28,501
Other Support Activities for Air Transportation (NAICS 488190)	\$48,864	\$51,942	\$48,922	\$60,097
Support Activities for Rail Transportation (NAICS 488210)	\$54,414	\$75,789	\$73,666	\$51,137
Motor Vehicle Towing (NAICS 488410)	\$27,330	\$37,982	\$35,327	\$36,788
Freight Transportation Arrangement (NAICS 488510)	\$53,424	\$64,696	\$63,824	\$62,131
Couriers and Express Delivery Services (NAICS 492110)	\$29,360	\$42,484	\$43,112	\$47,363
Local Messengers and Local Delivery (NAICS 492210)	\$47,328	\$46,306	\$41,464	\$33,985
General Warehousing and Storage (NAICS 493110)	\$50,894	\$57,507	\$52,590	\$42,158

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Transportation (NAICS 48-49)

Table 6.12.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Other Nonscheduled Air Transportation (NAICS 481219)	(44%)	(23%)	(45%)	(25%)	(16%)	10%	54%	31%
Rail transportation (NAICS 482110)	**	34%	91%	33%	83%	27%	(1%)	14%
General Freight Trucking, Local (NAICS 484110)	(10%)	(17%)	7%	(8%)	19%	3%	13%	6%
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	(61%)	(49%)	9%	6%	6%	3%	3%	1%
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	128%	33%	8%	7%	16%	10%	15%	9%
Used Household and Office Goods Moving (NAICS 484210)	382%	21%	21%	4%	17%	4%	11%	3%
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	30%	10%	32%	1%	9%	3%	2%	4%
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	51%	18%	(14%)	4%	(2%)	5%	14%	10%
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	54%	25%	56%	24%	37%	21%	12%	9%
School and Employee Bus Transportation (NAICS 485410)	(0%)	5%	6%	1%	6%	2%	7%	5%
Charter Bus Industry (NAICS 485510)	19%	6%	3%	7%	9%	5%	(1%)	4%
Special Needs Transportation (NAICS 485991)	17%	14%	3%	5%	4%	7%	14%	17%
All Other Transit and Ground Passenger Transportation (NAICS 485999)	169%	46%	68%	18%	161%	39%	19%	21%
Other Support Activities for Air Transportation (NAICS 488190)	23%	14%	51%	2%	32%	2%	10%	8%
Support Activities for Rail Transportation (NAICS 488210)	155%	14%	(2%)	4%	1%	4%	27%	12%
Motor Vehicle Towing (NAICS 488410)	43%	8%	40%	10%	23%	10%	17%	10%
Freight Transportation Arrangement (NAICS 488510)	(3%)	16%	(3%)	(1%)	1%	3%	14%	8%
Couriers and Express Delivery Services (NAICS 492110)	8%	10%	9%	(3%)	14%	(0%)	17%	3%
Local Messengers and Local Delivery (NAICS 492210)	(26%)	(7%)	8%	(6%)	23%	(1%)	25%	8%
General Warehousing and Storage (NAICS 493110)	(11%)	(12%)	4%	(6%)	19%	0%	37%	11%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Transportation (NAICS 48-49)

Rank	Table 6.12.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	870 (1)	128% (4)	4.15 (4)
2	School and Employee Bus Transportation (NAICS 485410)	692 (2)	(0%)	4.14 (5)
3	General Warehousing and Storage (NAICS 493110)	626 (3)	(11%)	0.94
4	General Freight Trucking, Local (NAICS 484110)	276 (4)	(10%)	1.32 (8)
5	Freight Transportation Arrangement (NAICS 488510)	204 (5)	(3%)	1.14 (10)
6	General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	198 (6)	(61%)	0.46
7	Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	197 (7)	30% (8)	1.07
8	Couriers and Express Delivery Services (NAICS 492110)	181 (8)	8%	0.38
9	Charter Bus Industry (NAICS 485510)	125 (9)	19% (10)	5.03 (3)
10	Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	106 (10)	51% (6)	0.92
11	Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	106	54% (5)	3.27 (6)
12	Special Needs Transportation (NAICS 485991)	83	17%	1.42 (7)
13	Other Support Activities for Air Transportation (NAICS 488190)	59	23% (9)	0.66
14	Motor Vehicle Towing (NAICS 488410)	53	43% (7)	1.02
15	Used Household and Office Goods Moving (NAICS 484210)	53	382% (1)	0.63
16	Rail transportation (NAICS 482110)	41	**	71.63 (1)
17	All Other Transit and Ground Passenger Transportation (NAICS 485999)	35	169% (2)	1.24 (9)
18	Local Messengers and Local Delivery (NAICS 492210)	29	(26%)	0.57
19	Support Activities for Rail Transportation (NAICS 488210)	28	155% (3)	0.98
20	Other Nonscheduled Air Transportation (NAICS 481219)	22	(44%)	5.46 (2)

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top five (10) in each (# Jobs, Growth, LQ)

Target Industry Identification Analysis: Finance and Insurance



Target Industry Analysis – Finance and Insurance (NAICS 52)

SUMMARY OF FINANCE AND INSURANCE

This industry employs over 2,000 people in Anoka County, with the largest subsector being Commercial Banking (NAICS 522110).

While a majority of the industries have experienced positive growth over the past five years, a majority of these subsectors have a lower concentration in Anoka County than the U.S. average. Those industries that have experienced growth over 20 percent in the last five years include:

- Securities Brokerage (NAICS 523120)
- Trust, Fiduciary, and Custody Activities (NAICS 523991)
- Miscellaneous Financial Investment Activities (NAICS 523999)
- Direct Property and Casualty Insurance Carriers (NAICS 524126)

Three of these four subsectors also have a significant concentration that already exists in the county.

Wages in this industry tend to be lower than the greater region, the state and the U.S.; however, the following two industries have wages that are pretty significantly higher in the county than the greater region, state and the U.S.:

- Third Party Administration of Insurance and Pension Funds (NAICS 524292)
- All Other Insurance Related Activities (NAICS 524298)

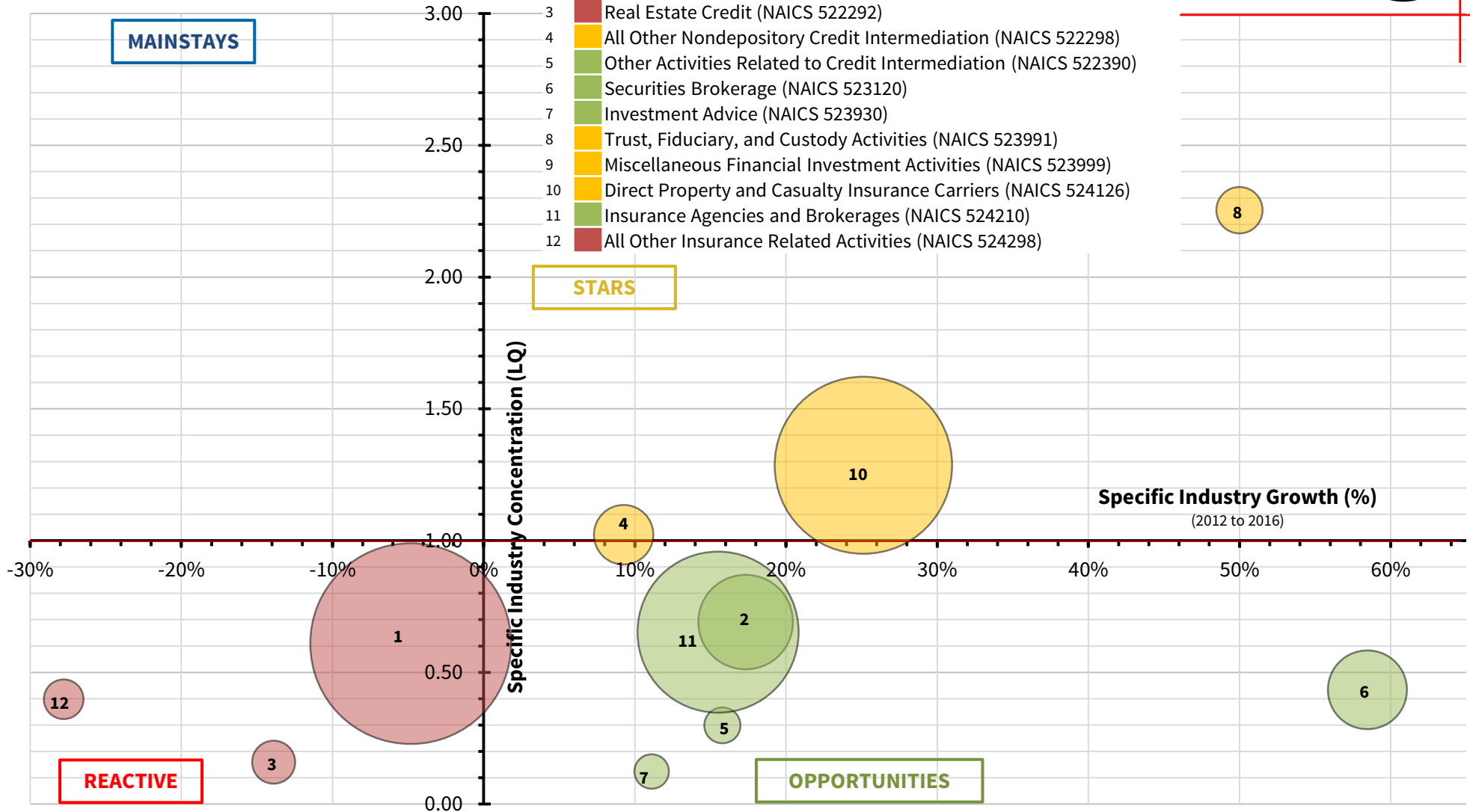
It should be noted that many of these industries are consumer/customer-driven and may not be ideal target industries for the region. When the demand is there, they will come to Anoka County.

Target Industry Analysis – Finance and Insurance (NAICS 52)

Outlier
LQ = 9.41
Growth = 225%

Graph 6.14: Finance and Insurance

- 1 Commercial Banking (NAICS 522110)
- 2 Credit Unions (NAICS 522130)
- 3 Real Estate Credit (NAICS 522292)
- 4 All Other Nondepository Credit Intermediation (NAICS 522298)
- 5 Other Activities Related to Credit Intermediation (NAICS 522390)
- 6 Securities Brokerage (NAICS 523120)
- 7 Investment Advice (NAICS 523930)
- 8 Trust, Fiduciary, and Custody Activities (NAICS 523991)
- 9 Miscellaneous Financial Investment Activities (NAICS 523999)
- 10 Direct Property and Casualty Insurance Carriers (NAICS 524126)
- 11 Insurance Agencies and Brokerages (NAICS 524210)
- 12 All Other Insurance Related Activities (NAICS 524298)



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 2,332

○ = 100 employees

Target Industry Analysis – Finance and Insurance (NAICS 52)

Table 6.13.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Commercial Banking (NAICS 522110)	0.61	1.84	1.62
Credit Unions (NAICS 522130)	0.69	0.75	0.85
Real Estate Credit (NAICS 522292)	0.16	1.16	0.76
All Other Nondepository Credit Intermediation (NAICS 522298)	1.02	1.29	1.24
Other Activities Related to Credit Intermediation (NAICS 522390)	0.30	0.78	0.64
Securities Brokerage (NAICS 523120)	0.43	1.47	1.09
Investment Advice (NAICS 523930)	0.12	1.26	0.88
Trust, Fiduciary, and Custody Activities (NAICS 523991)	2.25	0.83	0.71
Miscellaneous Financial Investment Activities (NAICS 523999)	9.41	2.11	1.62
Direct Property and Casualty Insurance Carriers (NAICS 524126)	1.29	1.08	0.93
Insurance Agencies and Brokerages (NAICS 524210)	0.65	1.08	1.00
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	0.15	1.37	1.11
All Other Insurance Related Activities (NAICS 524298)	0.40	1.14	0.90

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Finance and Insurance (NAICS 52)

Table 6.13.B: Existing Industry Wage Comparison ¹	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Commercial Banking (NAICS 522110)	\$57,464	\$91,495	\$80,080	\$76,518
Credit Unions (NAICS 522130)	\$43,888	\$55,944	\$51,484	\$50,205
Real Estate Credit (NAICS 522292)	\$90,718	\$93,967	\$93,988	\$97,606
All Other Nondepository Credit Intermediation (NAICS 522298)	\$31,932	\$93,051	\$81,094	\$65,008
Other Activities Related to Credit Intermediation (NAICS 522390)	\$32,483	\$73,285	\$74,359	\$71,350
Securities Brokerage (NAICS 523120)	\$58,744	\$127,055	\$125,711	\$201,241
Investment Advice (NAICS 523930)	\$55,704	\$131,596	\$124,822	\$164,354
Trust, Fiduciary, and Custody Activities (NAICS 523991)	\$95,418	\$78,820	\$84,819	\$112,061
Miscellaneous Financial Investment Activities (NAICS 523999)	\$119,108	\$177,567	\$166,101	\$138,723
Direct Property and Casualty Insurance Carriers (NAICS 524126)	\$94,291	\$100,313	\$96,591	\$87,849
Insurance Agencies and Brokerages (NAICS 524210)	\$45,932	\$89,284	\$77,363	\$74,334
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	\$101,092	\$68,093	\$66,883	\$70,083
All Other Insurance Related Activities (NAICS 524298)	\$90,851	\$88,859	\$87,817	\$84,213

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Finance and Insurance (NAICS 52)

Table 6.13.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Commercial Banking (NAICS 522110)	(5%)	(6%)	26%	10%	16%	7%	(2%)	0%
Credit Unions (NAICS 522130)	17%	4%	2%	0%	8%	4%	10%	8%
Real Estate Credit (NAICS 522292)	(14%)	(52%)	(11%)	(21%)	(8%)	(19%)	9%	(0%)
All Other Nondepository Credit Intermediation (NAICS 522298)	9%	7%	(10%)	(25%)	(11%)	(8%)	6%	12%
Other Activities Related to Credit Intermediation (NAICS 522390)	16%	(5%)	0%	7%	25%	14%	(4%)	4%
Securities Brokerage (NAICS 523120)	58%	35%	(7%)	(8%)	(3%)	(4%)	2%	3%
Investment Advice (NAICS 523930)	11%	15%	28%	21%	30%	21%	26%	20%
Trust, Fiduciary, and Custody Activities (NAICS 523991)	50%	31%	22%	(22%)	39%	(9%)	(1%)	8%
Miscellaneous Financial Investment Activities (NAICS 523999)	225%	46%	61%	31%	61%	31%	26%	20%
Direct Property and Casualty Insurance Carriers (NAICS 524126)	25%	14%	(11%)	(14%)	(10%)	(12%)	5%	(1%)
Insurance Agencies and Brokerages (NAICS 524210)	16%	2%	20%	3%	19%	4%	20%	7%
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	Insf. Data	30%	1%	2%	6%	5%	33%	15%
All Other Insurance Related Activities (NAICS 524298)	(28%)	15%	40%	12%	37%	14%	25%	16%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Finance and Insurance (NAICS 52)

Rank	Table 6.13.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Commercial Banking	671 (1)	(5%)	0.61
2	Direct Property and Casualty Insurance Carriers	523 (2)	25% (4)	1.29 (3)
3	Insurance Agencies and Brokerages	432 (3)	16%	0.65
4	Miscellaneous Financial Investment Activities	237 (4)	225% (1)	9.41 (1)
5	Credit Unions	149 (5)	17% (5)	0.69 (5)
6	Securities Brokerage	103	58% (2)	0.43
7	All Other Nondepository Credit Intermediation	59	9%	1.02 (4)
8	Trust, Fiduciary, and Custody Activities	36	50% (3)	2.25 (2)
9	Real Estate Credit	31	(14%)	0.16
10	All Other Insurance Related Activities	26	(28%)	0.40
11	Third Party Administration of Insurance and Pension Funds	23	Insf. Data	0.15
12	Other Activities Related to Credit Intermediation	22	16%	0.30
13	Investment Advice	20	11%	0.12

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top five (5) in each (# Jobs, Growth, LQ)

Target Industry Identification Analysis: Professional Services



Target Industry Analysis – Professional Services (NAICS 54)

SUMMARY OF PROFESSIONAL SERVICES

This industry employs over 3,300 people in Anoka County, with Custom Computer Programming Services (NAICS 541511) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in only one subsector: Photography Studios, Portrait (NAICS 541921)

Wages are extremely competitive in this industry, with Anoka County featuring lower wages in every single Professional Services subsector than that of the greater region, the state average and the national average.

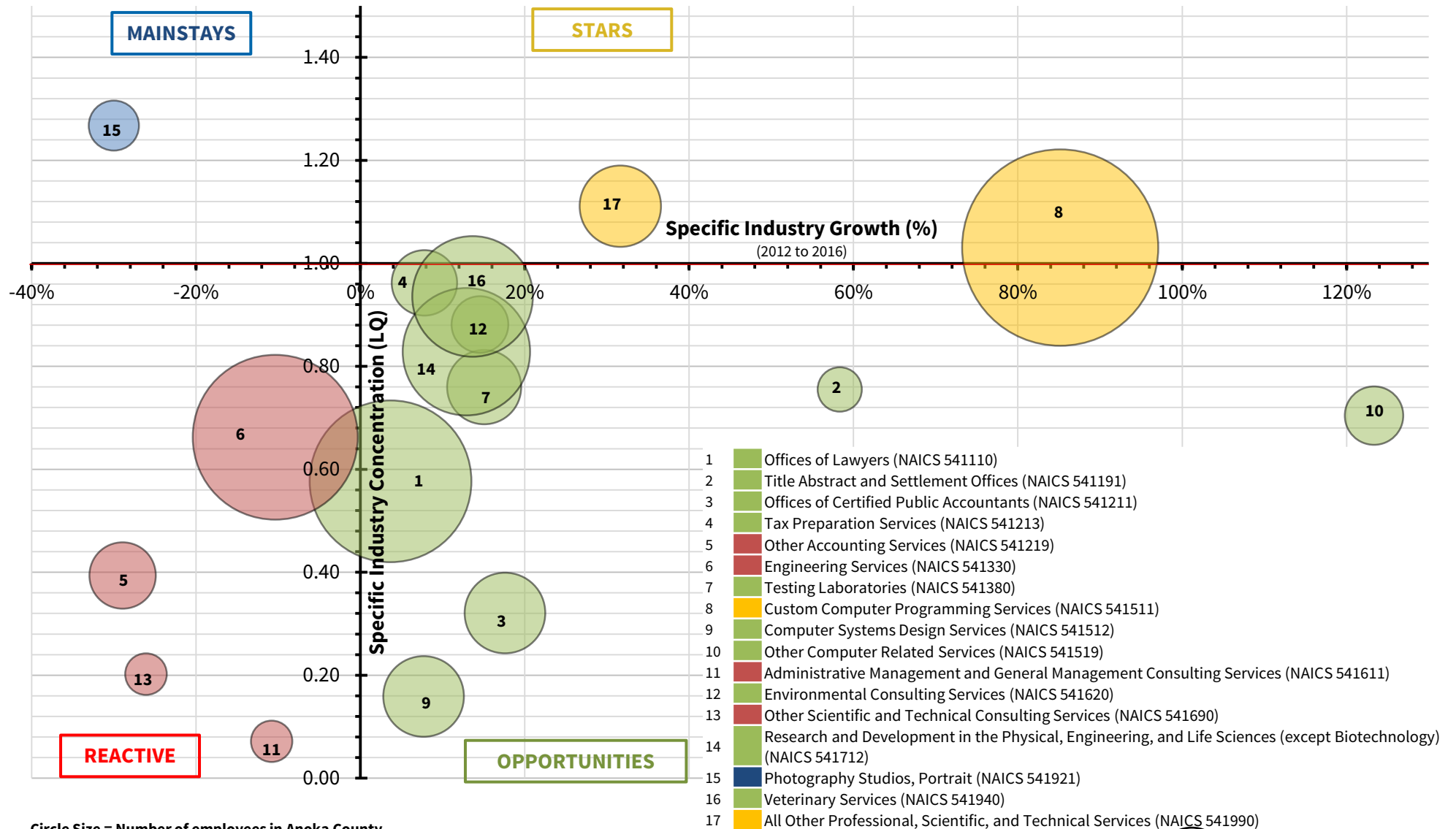
The majority of the subsectors within this industry have experienced significant growth over the past five-year period, however only a handful of subsectors are projected to experience significant growth over the next five-year period within Anoka County. Subsectors in which growth has been significant in all regions and nearly all time periods include:

- Custom Computer Programming Services (NAICS 541511)
- All Other Professional, Scientific, and Technical Services (NAICS 541990)

Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology) (NAICS 541712) meets this criteria as well but only in Anoka County, greater region and state of Minnesota, not the U.S. Photography Studios, Portrait (NAICS 541921) has experienced significant negative growth in all regions across all time periods.

Target Industry Analysis – Professional Services (NAICS 54)

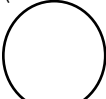
Graph 6.13: Professional Services



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 3,325

 = 100 employees

Target Industry Analysis – Professional Services (NAICS 54)

Table 6.13.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Offices of Lawyers (NAICS 541110)	0.58	1.08	0.79
Title Abstract and Settlement Offices (NAICS 541191)	0.76	1.35	1.17
Offices of Certified Public Accountants (NAICS 541211)	0.32	1.18	1.01
Tax Preparation Services (NAICS 541213)	0.96	0.68	0.68
Other Accounting Services (NAICS 541219)	0.39	1.10	0.97
Engineering Services (NAICS 541330)	0.66	0.94	0.74
Testing Laboratories (NAICS 541380)	0.76	1.17	0.91
Custom Computer Programming Services (NAICS 541511)	1.03	1.17	0.92
Computer Systems Design Services (NAICS 541512)	0.16	1.26	0.88
Other Computer Related Services (NAICS 541519)	0.70	2.44	2.04
Administrative Management and General Management Consulting Services (NAICS 541611)	0.07	1.76	1.16
Environmental Consulting Services (NAICS 541620)	0.88	0.84	0.63
Other Scientific and Technical Consulting Services (NAICS 541690)	0.20	0.80	0.76
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology) (NAICS 541712)	0.83	0.90	0.76
Photography Studios, Portrait (NAICS 541921)	1.27	1.11	0.89
Veterinary Services (NAICS 541940)	0.94	0.84	0.88
All Other Professional, Scientific, and Technical Services (NAICS 541990)	1.11	2.23	2.32

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Professional Services (NAICS 54)

Table 6.13.B: Existing Industry Wage Comparison ¹	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Offices of Lawyers (NAICS 541110)	\$45,853	\$107,138	\$97,994	\$95,936
Title Abstract and Settlement Offices (NAICS 541191)	\$49,401	\$61,481	\$55,295	\$57,840
Offices of Certified Public Accountants (NAICS 541211)	\$44,937	\$85,273	\$78,458	\$85,963
Tax Preparation Services (NAICS 541213)	\$22,264	\$31,383	\$28,054	\$30,220
Other Accounting Services (NAICS 541219)	\$41,489	\$87,274	\$75,913	\$57,241
Engineering Services (NAICS 541330)	\$79,174	\$94,435	\$91,535	\$93,991
Testing Laboratories (NAICS 541380)	\$59,315	\$67,469	\$62,300	\$73,935
Custom Computer Programming Services (NAICS 541511)	\$90,888	\$101,304	\$101,236	\$112,099
Computer Systems Design Services (NAICS 541512)	\$81,170	\$108,343	\$106,889	\$107,294
Other Computer Related Services (NAICS 541519)	\$51,364	\$104,884	\$109,570	\$109,160
Administrative Management and General Management Consulting Services (NAICS 541611)	\$56,424	\$114,413	\$114,318	\$107,118
Environmental Consulting Services (NAICS 541620)	\$72,315	\$80,943	\$76,869	\$74,671
Other Scientific and Technical Consulting Services (NAICS 541690)	\$50,645	\$85,514	\$82,159	\$86,852
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology) (NAICS 541712)	\$100,376	\$146,243	\$133,701	\$120,802
Photography Studios, Portrait (NAICS 541921)	\$22,503	\$41,695	\$36,379	\$25,450
Veterinary Services (NAICS 541940)	\$35,239	\$38,007	\$36,343	\$37,529
All Other Professional, Scientific, and Technical Services (NAICS 541990)	\$30,289	\$102,892	\$88,155	\$75,295

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Professional Services (NAICS 54)

Table 6.13.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Offices of Lawyers (NAICS 541110)	4%	13%	(4%)	(3%)	(4%)	(3%)	(1%)	1%
Title Abstract and Settlement Offices (NAICS 541191)	58%	(21%)	14%	4%	12%	1%	12%	6%
Offices of Certified Public Accountants (NAICS 541211)	18%	2%	14%	3%	14%	3%	13%	6%
Tax Preparation Services (NAICS 541213)	8%	0%	8%	0%	7%	4%	1%	2%
Other Accounting Services (NAICS 541219)	(29%)	(23%)	32%	8%	29%	8%	7%	4%
Engineering Services (NAICS 541330)	(10%)	(8%)	19%	9%	17%	10%	5%	6%
Testing Laboratories (NAICS 541380)	15%	(2%)	22%	9%	23%	11%	4%	5%
Custom Computer Programming Services (NAICS 541511)	85%	35%	17%	11%	16%	11%	22%	14%
Computer Systems Design Services (NAICS 541512)	8%	9%	52%	15%	48%	15%	22%	16%
Other Computer Related Services (NAICS 541519)	123%	27%	(26%)	(23%)	(16%)	(11%)	3%	6%
Administrative Management and General Management Consulting Services (NAICS 541611)	(11%)	(9%)	236%	26%	197%	25%	31%	17%
Environmental Consulting Services (NAICS 541620)	15%	3%	13%	8%	11%	9%	4%	8%
Other Scientific and Technical Consulting Services (NAICS 541690)	(26%)	(6%)	42%	22%	31%	22%	2%	15%
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology) (NAICS 541712)	13%	7%	20%	11%	16%	10%	3%	5%
Photography Studios, Portrait (NAICS 541921)	(30%)	(18%)	(21%)	(30%)	(29%)	(29%)	(20%)	(11%)
Veterinary Services (NAICS 541940)	14%	(0%)	15%	6%	13%	5%	16%	8%
All Other Professional, Scientific, and Technical Services (NAICS 541990)	32%	29%	8%	18%	21%	24%	31%	22%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Professional Services (NAICS 54)

Rank	Table 6.13.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Custom Computer Programming Services (NAICS 541511)	748 (1)	85% (2)	1.03 (3)
2	Engineering Services (NAICS 541330)	528 (2)	(10%)	0.66
3	Offices of Lawyers (NAICS 541110)	509 (3)	4%	0.58
4	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology) (NAICS 541712)	315 (4)	13% (9)	0.83 (7)
5	Veterinary Services (NAICS 541940)	283 (5)	14% (8)	0.94 (5)
6	All Other Professional, Scientific, and Technical Services (NAICS 541990)	129 (6)	32% (4)	1.11 (2)
7	Offices of Certified Public Accountants (NAICS 541211)	127 (7)	18% (5)	0.32
8	Computer Systems Design Services (NAICS 541512)	126 (8)	8% (10/11)	0.16
9	Testing Laboratories (NAICS 541380)	107 (9)	15% (6/7)	0.76 (8/9)
10	Other Accounting Services (NAICS 541219)	86 (10)	(29%)	0.39
11	Tax Preparation Services (NAICS 541213)	83	8% (10/11)	0.96 (4)
12	Other Computer Related Services (NAICS 541519)	67	123% (1)	0.70 (10)
13	Environmental Consulting Services (NAICS 541620)	63	15% (6/7)	0.88 (6)
14	Photography Studios, Portrait (NAICS 541921)	49	(30%)	1.27 (1)
15	Title Abstract and Settlement Offices (NAICS 541191)	38	58% (3)	0.76 (8/9)
16	Other Scientific and Technical Consulting Services (NAICS 541690)	34	(26%)	0.20
17	Administrative Management and General Management Consulting Services (NAICS 541611)	33	(11%)	0.07

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top ten (10) in each (# Jobs, Growth, LQ)

Target Industry Identification Analysis: Healthcare



Target Industry Analysis – Healthcare (NAICS 621-624)

SUMMARY OF HEALTHCARE

This industry employs over 16,000 people in Anoka County, with General Medical and Surgical Hospitals (NAICS 622110) being the largest source of employment in the industry. Anoka County has a significantly higher concentration than the greater region and the state in the following subsectors:

- Offices of Dentists (NAICS 621210)
- Offices of Optometrists (NAICS 621320)
- Offices of All Other Miscellaneous Health Practitioners (NAICS 621399)
- Kidney Dialysis Centers (NAICS 621492)
- Child Day Care Services (NAICS 624410)

Wages are generally competitive in this industry in Anoka County, with about half the subsectors having lower wages than that of the greater region, state average and national average. An additional two subsectors have lower wages in Anoka County than two out of three of the other regions.

Nearly all of the subsectors within this industry have experienced significant growth over the past five-year period, and growth is projected to be strong in nearly all of the subsectors across all regions over the next five-year period. Subsectors in which growth has been significant in all regions and nearly all time periods include:

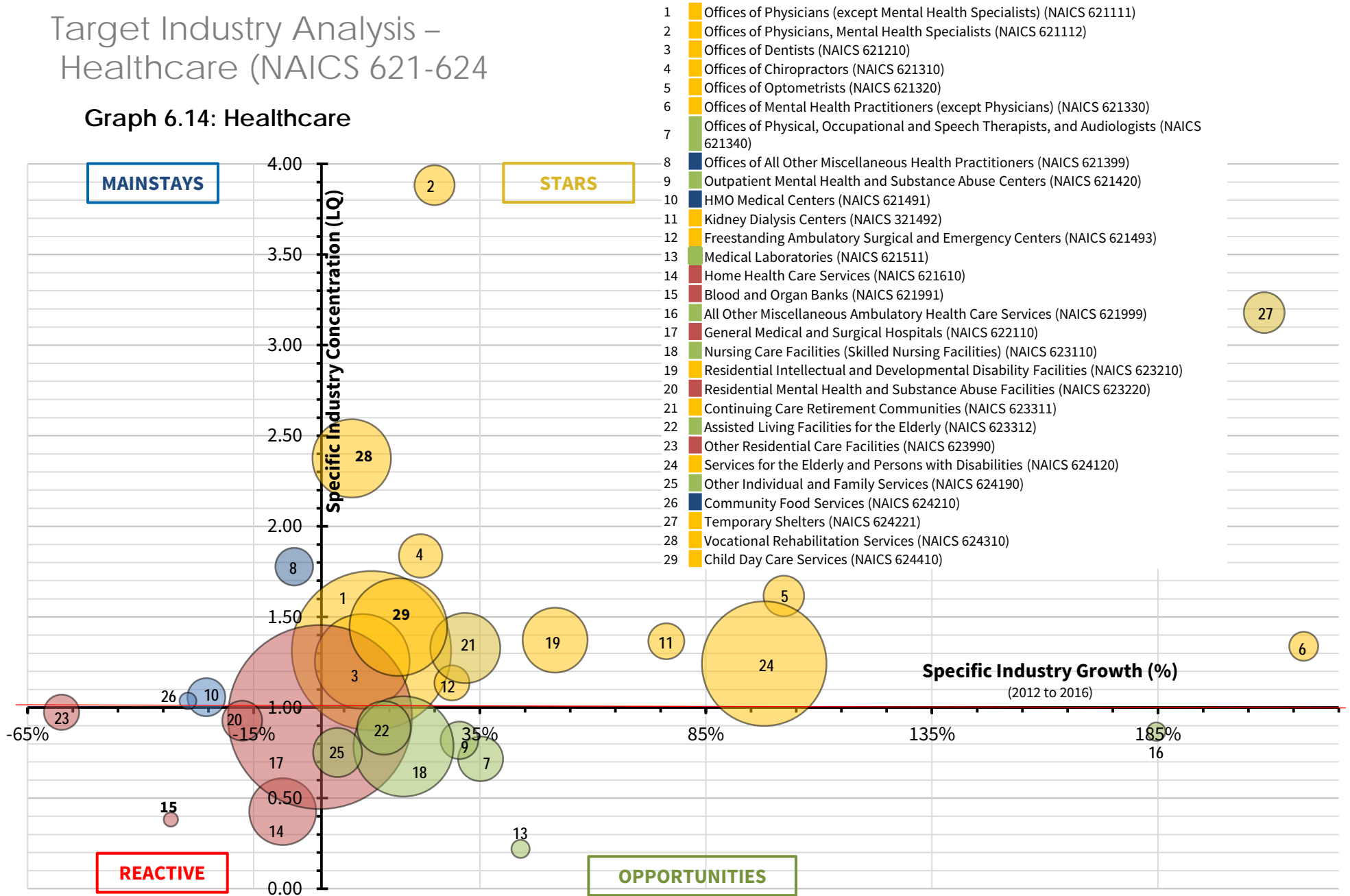
- Offices of Physicians, Mental Health Specialists (NAICS 621112)
- Offices of Optometrists (NAICS 621320)
- Offices of Mental Health Practitioners (except Physicians) (NAICS 621330)
- Outpatient Mental Health and Substance Abuse Centers (NAICS 621420)
- Kidney Dialysis Centers (NAICS 321492)
- Freestanding Ambulatory Surgical and Emergency Centers (NAICS 621493)
- Medical Laboratories (NAICS 621511)
- Continuing Care Retirement Communities (NAICS 623311)
- Assisted Living Facilities for the Elderly (NAICS 623312)
- Services for the Elderly and Persons with Disabilities (NAICS 624120)

Two healthcare industries have experienced significant negative growth over the past five-year period in Anoka County and are the only subsectors projected to experience significant negative growth over the next five-year period within Anoka County:

- Other Residential Care Facilities (NAICS 623990)
- Community Food Services (NAICS 624210)

Target Industry Analysis – Healthcare (NAICS 621-624)

Graph 6.14: Healthcare



Circle Size = Number of employees in Anoka County

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Total Employees in Anoka County: 16,235

○ = 500 employees

Target Industry Analysis – Healthcare (NAICS 621-624)

Table 6.14.A: Existing Industry Concentration Comparison	Anoka County Location Quotient	Greater Region Location Quotient	Minnesota Location Quotient
Offices of Physicians (except Mental Health Specialists) (NAICS 621111)	1.31	1.02	1.37
Offices of Physicians, Mental Health Specialists (NAICS 621112)	3.88	1.61	1.11
Offices of Dentists (NAICS 621210)	1.25	0.89	0.89
Offices of Chiropractors (NAICS 621310)	1.84	1.58	1.59
Offices of Optometrists (NAICS 621320)	1.62	0.79	0.89
Offices of Mental Health Practitioners (except Physicians) (NAICS 621330)	1.34	2.67	2.26
Offices of Physical, Occupational and Speech Therapists, and Audiologists (NAICS 621340)	0.72	0.51	0.52
Offices of All Other Miscellaneous Health Practitioners (NAICS 621399)	1.78	0.91	0.74
Outpatient Mental Health and Substance Abuse Centers (NAICS 621420)	0.82	0.64	0.92
HMO Medical Centers (NAICS 621491)	1.06	1.62	1.01
Kidney Dialysis Centers (NAICS 321492)	1.37	0.57	0.48
Freestanding Ambulatory Surgical and Emergency Centers (NAICS 621493)	1.14	0.79	0.57
Medical Laboratories (NAICS 621511)	0.22	0.56	0.81
Home Health Care Services (NAICS 621610)	0.43	1.08	0.89
Blood and Organ Banks (NAICS 621991)	0.38	2.53	1.93
All Other Miscellaneous Ambulatory Health Care Services (NAICS 621999)	0.87	3.11	2.35
General Medical and Surgical Hospitals (NAICS 622110)	0.95	1.01	1.15
Nursing Care Facilities (Skilled Nursing Facilities) (NAICS 623110)	0.79	1.00	1.33
Residential Intellectual and Developmental Disability Facilities (NAICS 623210)	1.37	2.27	2.69
Residential Mental Health and Substance Abuse Facilities (NAICS 623220)	0.93	2.09	2.11
Continuing Care Retirement Communities (NAICS 623311)	1.33	1.17	1.36
Assisted Living Facilities for the Elderly (NAICS 623312)	0.89	1.03	1.13
Other Residential Care Facilities (NAICS 623990)	0.97	2.60	3.40
Services for the Elderly and Persons with Disabilities (NAICS 624120)	1.24	1.50	1.27
Other Individual and Family Services (NAICS 624190)	0.75	2.06	1.84
Community Food Services (NAICS 624210)	1.04	1.14	1.05
Temporary Shelters (NAICS 624221)	3.18	1.25	0.98
Vocational Rehabilitation Services (NAICS 624310)	2.38	1.85	2.06
Child Day Care Services (NAICS 624410)	1.44	1.03	0.88

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Concentration in the respective region is significantly higher than U.S. average (>1.2)

Target Industry Analysis – Healthcare (NAICS 621-624)

Table 6.14.B: Existing Industry Wage Comparison	Anoka County Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Minnesota Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Offices of Physicians (except Mental Health Specialists) (NAICS 621111)	\$91,076	\$97,491	\$98,350	\$87,843
Offices of Physicians, Mental Health Specialists (NAICS 621112)	\$54,959	\$63,850	\$64,546	\$59,051
Offices of Dentists (NAICS 621210)	\$59,269	\$59,005	\$55,257	\$50,250
Offices of Chiropractors (NAICS 621310)	\$26,862	\$30,549	\$28,670	\$32,740
Offices of Optometrists (NAICS 621320)	\$48,863	\$48,116	\$42,175	\$40,695
Offices of Mental Health Practitioners (except Physicians) (NAICS 621330)	\$38,530	\$45,213	\$43,735	\$39,406
Offices of Physical, Occupational and Speech Therapists, and Audiologists (NAICS 621340)	\$44,543	\$47,680	\$45,495	\$44,305
Offices of All Other Miscellaneous Health Practitioners (NAICS 621399)	\$81,147	\$45,898	\$45,579	\$42,976
Outpatient Mental Health and Substance Abuse Centers (NAICS 621420)	\$52,977	\$48,694	\$43,988	\$40,126
HMO Medical Centers (NAICS 621491)	\$119,191	\$111,179	\$110,699	\$101,036
Kidney Dialysis Centers (NAICS 321492)	\$47,630	\$58,860	\$57,029	\$56,111
Freestanding Ambulatory Surgical and Emergency Centers (NAICS 621493)	\$21,893	\$67,533	\$65,209	\$60,462
Medical Laboratories (NAICS 621511)	\$70,143	\$54,959	\$65,187	\$60,615
Home Health Care Services (NAICS 621610)	\$23,996	\$30,189	\$28,690	\$29,948
Blood and Organ Banks (NAICS 621991)	\$32,700	\$61,839	\$56,503	\$49,213
All Other Miscellaneous Ambulatory Health Care Services (NAICS 621999)	\$21,188	\$65,647	\$63,015	\$59,522
General Medical and Surgical Hospitals (NAICS 622110)	\$66,039	\$67,701	\$63,695	\$61,951
Nursing Care Facilities (Skilled Nursing Facilities) (NAICS 623110)	\$32,703	\$33,083	\$30,647	\$32,666
Residential Intellectual and Developmental Disability Facilities (NAICS 623210)	\$23,010	\$25,475	\$23,510	\$26,319
Residential Mental Health and Substance Abuse Facilities (NAICS 623220)	\$27,563	\$37,689	\$34,669	\$34,188
Continuing Care Retirement Communities (NAICS 623311)	\$23,526	\$26,843	\$25,222	\$28,714
Assisted Living Facilities for the Elderly (NAICS 623312)	\$25,916	\$25,987	\$23,962	\$24,624
Other Residential Care Facilities (NAICS 623990)	\$28,950	\$25,745	\$24,391	\$30,848
Services for the Elderly and Persons with Disabilities (NAICS 624120)	\$18,186	\$20,480	\$19,640	\$17,213
Other Individual and Family Services (NAICS 624190)	\$38,779	\$31,125	\$30,769	\$34,632
Community Food Services (NAICS 624210)	\$21,064	\$39,460	\$34,978	\$32,329
Temporary Shelters (NAICS 624221)	\$29,670	\$33,372	\$32,030	\$30,945
Vocational Rehabilitation Services (NAICS 624310)	\$25,927	\$27,489	\$24,980	\$26,234
Child Day Care Services (NAICS 624410)	\$20,422	\$23,062	\$22,005	\$21,716

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Anoka County wages < Greater Region, Minnesota and U.S. wages

Anoka County wages > Greater Region, Minnesota and U.S. wages

Anoka County wages < Two of three other Region wages

Target Industry Analysis – Healthcare (NAICS 621-624)

Table 6.14.C: Existing Industry Growth Comparison	Anoka County 5-year Growth (2012 - 2016)	Anoka County 5-year Projected Growth (2016 - 2020)	Greater Region 5-year Growth (2012 - 2016)	Greater Region 5-year Projected Growth (2016 - 2020)	Minnesota 5- year Growth (2012-2016)	Minnesota 5- year Projected Growth (2016- 2020)	U.S. 5-year Growth (2012 - 2016)	U.S. 5-year Projected Growth (2016 - 2020)
Offices of Physicians (except Mental Health Specialists) (NAICS 621111)	11%	11%	11%	9%	9%	8%	6%	10%
Offices of Physicians, Mental Health Specialists (NAICS 621112)	25%	34%	117%	38%	60%	34%	9%	14%
Offices of Dentists (NAICS 621210)	9%	8%	4%	4%	5%	4%	8%	9%
Offices of Chiropractors (NAICS 621310)	22%	15%	6%	8%	6%	7%	6%	9%
Offices of Optometrists (NAICS 621320)	102%	32%	27%	15%	20%	15%	13%	15%
Offices of Mental Health Practitioners (except Physicians) (NAICS 621330)	217%	34%	51%	26%	45%	24%	22%	18%
Offices of Physical, Occupational and Speech Therapists, and Audiologists (NAICS 621340)	35%	32%	6%	24%	5%	22%	18%	24%
Offices of All Other Miscellaneous Health Practitioners (NAICS 621399)	(6%)	12%	6%	23%	14%	26%	30%	31%
Outpatient Mental Health and Substance Abuse Centers (NAICS 621420)	31%	31%	50%	27%	43%	25%	16%	16%
HMO Medical Centers (NAICS 621491)	(25%)	(4%)	(8%)	(5%)	(11%)	(4%)	45%	27%
Kidney Dialysis Centers (NAICS 321492)	76%	30%	22%	13%	39%	20%	22%	20%
Freestanding Ambulatory Surgical and Emergency Centers (NAICS 621493)	29%	31%	41%	30%	31%	29%	33%	25%
Medical Laboratories (NAICS 621511)	44%	28%	12%	13%	48%	25%	15%	17%
Home Health Care Services (NAICS 621610)	(9%)	16%	29%	31%	22%	28%	14%	24%
Blood and Organ Banks (NAICS 621991)	(33%)	14%	9%	11%	9%	16%	(2%)	9%
All Other Miscellaneous Ambulatory Health Care Services (NAICS 621999)	185%	32%	(15%)	6%	(16%)	8%	41%	29%
General Medical and Surgical Hospitals (NAICS 622110)	(0%)	(3%)	5%	4%	5%	5%	4%	5%
Nursing Care Facilities (Skilled Nursing Facilities) (NAICS 623110)	18%	10%	(3%)	(2%)	(4%)	(0%)	(1%)	4%
Residential Intellectual and Developmental Disability Facilities (NAICS 623210)	52%	19%	(8%)	1%	(16%)	(3%)	4%	10%
Residential Mental Health and Substance Abuse Facilities (NAICS 623220)	(18%)	10%	13%	19%	11%	19%	11%	18%
Continuing Care Retirement Communities (NAICS 623311)	32%	36%	15%	23%	13%	25%	12%	21%
Assisted Living Facilities for the Elderly (NAICS 623312)	14%	23%	28%	29%	16%	23%	13%	19%
Other Residential Care Facilities (NAICS 623990)	(58%)	(35%)	88%	30%	112%	31%	3%	4%
Services for the Elderly and Persons with Disabilities (NAICS 624120)	98%	11%	46%	11%	32%	9%	107%	22%
Other Individual and Family Services (NAICS 624190)	4%	(4%)	8%	3%	6%	4%	11%	6%
Community Food Services (NAICS 624210)	(30%)	(16%)	3%	3%	8%	6%	16%	10%
Temporary Shelters (NAICS 624221)	208%	29%	14%	11%	7%	8%	14%	8%
Vocational Rehabilitation Services (NAICS 624310)	7%	3%	5%	1%	4%	1%	2%	1%
Child Day Care Services (NAICS 624410)	17%	9%	30%	13%	23%	11%	7%	5%

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

Industry growth greater than or equal to 10 percent in the respective region and time frame.

Industry growth is less than or equal to negative 10 percent in the respective region and time frame.

Target Industry Analysis – Healthcare (NAICS 621-624)

Rank	Table 6.14.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2016)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	General Medical and Surgical Hospitals (NAICS 622110)	3,696 (1)	(0%)	0.95
2	Offices of Physicians (except Mental Health Specialists) (NAICS 621111)	2,768 (2)	11%	1.31 (12)
3	Services for the Elderly and Persons with Disabilities (NAICS 624120)	1,696 (3)	98% (5)	1.24 (14)
4	Nursing Care Facilities (Skilled Nursing Facilities) (NAICS 623110)	1,095 (4)	18% (15)	0.79
5	Child Day Care Services (NAICS 624410)	1,039 (5)	17%	1.44 (7)
6	Offices of Dentists (NAICS 621210)	979 (6)	9%	1.25 (13)
7	Vocational Rehabilitation Services (NAICS 624310)	671 (7)	7%	2.38 (3)
8	Continuing Care Retirement Communities (NAICS 623311)	535 (8)	32% (10)	1.33 (11)
9	Home Health Care Services (NAICS 621610)	490 (9)	(9%)	0.43
10	Residential Intellectual and Developmental Disability Facilities (NAICS 623210)	461 (10)	52% (7)	1.37 (8/9)
11	Assisted Living Facilities for the Elderly (NAICS 623312)	313 (11)	14%	0.89
12	Other Individual and Family Services (NAICS 624190)	262 (12)	4%	0.75
13	Offices of Physical, Occupational and Speech Therapists, and Audiologists (NAICS 621340)	219 (13)	35% (9)	0.72
14	Offices of Chiropractors (NAICS 621310)	206 (14)	22% (14)	1.84 (4)
15	Temporary Shelters (NAICS 624221)	182 (15)	208% (2)	3.18 (2)
16	Offices of Optometrists (NAICS 621320)	180	102% (4)	1.62 (6)
17	Offices of Physicians, Mental Health Specialists (NAICS 621112)	175	25% (13)	3.88 (1)
18	Residential Mental Health and Substance Abuse Facilities (NAICS 623220)	174	(18%)	0.93
19	HMO Medical Centers (NAICS 621491)	158	(25%)	1.06
20	Offices of All Other Miscellaneous Health Practitioners (NAICS 621399)	156	(6%)	1.78 (5)
21	Outpatient Mental Health and Substance Abuse Centers (NAICS 621420)	154	31% (11)	0.82
22	Kidney Dialysis Centers (NAICS 621492)	141	76% (6)	1.37 (8/9)
23	Other Residential Care Facilities (NAICS 623990)	136	(58%)	0.97
24	Freestanding Ambulatory Surgical and Emergency Centers (NAICS 621493)	134	29% (12)	1.14 (15)
25	Offices of Mental Health Practitioners (except Physicians) (NAICS 621330)	92	217% (1)	1.34 (10)
26	All Other Miscellaneous Ambulatory Health Care Services (NAICS 621999)	37	185% (3)	0.87
27	Medical Laboratories (NAICS 621511)	36	44% (8)	0.22
28	Community Food Services (NAICS 624210)	31	(30%)	1.04
29	Blood and Organ Banks (NAICS 621991)	22	(33%)	0.38

Source: Economic Modeling Systems Inc. (EMSI) <http://www.economicmodeling.com/data/usa-data/>

*These industries are not included in the previous Bubble Plot due to insufficient data.

**Insufficient data

Top fifteen (15) in each (# Jobs, Growth, LQ)

Target Industry Screening



Target Industry Screening

The following section narrows down the target industries by looking at current concentration, past five year growth in the region, and projected U.S. growth, as well as stakeholder input. Industries from the previous section are included in this screening if they are a “star” or “opportunity” on the regional bubble chart and/or are projected to grow on a national level.

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Wood and Paper Products Manufacturing and Printing				
Wood Preservation (NAICS 321114)	Star	8%	No	No. Various paper-associated industries have been declining over the past decade. The subsectors within this category are not typically value-added-type manufacturing operations.
Truss Manufacturing (NAICS 321214)	Star	6%		
Wood Container and Pallet Manufacturing (NAICS 321920)	Reactive	6%		
Prefabricated Wood Building Manufacturing (NAICS 321992)	Mainstay	3%		
All Other Miscellaneous Wood Product Manufacturing (NAICS 321999)	NA	10%		
Folding Paperboard Box Manufacturing (NAICS 322212)	Mainstay	5%		
Commercial Screen Printing (NAICS 323113)	Star	9%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Chemical and Plastics Manufacturing				
Medicinal and Botanical Manufacturing (NAICS 325411)	NA	12%	No	Yes. The Minneapolis region has a strong health care industry and this industry has potential to locate in Anoka County and support that industry.
Adhesive Manufacturing (NAICS 325520)	Star	3%		Yes. The Minneapolis region has a long history of adhesives, with the 3M headquarters not too far away from Anoka County.
Polystyrene Foam Product Manufacturing (NAICS 326140)	Star	4%		Maybe. There may be opportunities for this industry to support some of the other target industries, such as medical device manufacturing, etc.
Urethane and Other Foam Product (except Polystyrene) Manufacturing (NAICS 326150)	Star	6%		
All Other Plastics Product Manufacturing (NAICS 326199)	Star	7%		
Toilet Preparation Manufacturing (NAICS 325620)	Mainstay	1%		No. These subsectors tend to be commodity-driven.
All Other Miscellaneous Chemical Product and Preparation Manufacturing (NAICS 325998)	Star	3%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Metal Manufacturing				
Machine Shops (NAICS 332710)	Star	3%	Yes	Yes. This region has an existing cluster of specialized metalworking and related industries in the region. Focus should be on ensuring these companies have the labor that they need to continue to grow, and welcoming other businesses within this industry.
Precision Turned Product Manufacturing (NAICS 332721)	Star	3%		
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers (NAICS 332812)	Mainstay	6%		
Electroplating, Plating, Polishing, Anodizing, and Coloring (NAICS 332813)	Star	(3%)		
Aluminum Sheet, Plate, and Foil Manufacturing (NAICS 331315)	Mainstay	3%	No	No. Support existing businesses in the region; however, this should not be a focus of recruitment. These industries tend to be lower value manufacturing and more commodity-based.
Aluminum Foundries (except Die-Casting) (NAICS 331524)	Star	1%		
Prefabricated Metal Building and Component Manufacturing (NAICS 332311)	N/A	7%		
Sheet Metal Work Manufacturing (NAICS 332322)	Star	4%		
Metal Tank (Heavy Gauge) Manufacturing (NAICS 332420)	Mainstay	11%		
Other Metal Container Manufacturing (NAICS 332439)	N/A	4%		
Spring Manufacturing (NAICS 332613)	Mainstay	3%		
Other Fabricated Wire Product Manufacturing (NAICS 332618)	Star	(8%)		
Fluid Power Valve and Hose Fitting Manufacturing (NAICS 332912)	Star	7%	No	
Small Arms Ammunition Manufacturing (NAICS 332992)	Star	6%		
Small Arms, Ordnance, and Ordnance Accessories Manufacturing (NAICS 332994)	Mainstay	13%		
Fabricated Pipe and Pipe Fitting Manufacturing (NAICS 332996)	Star	11%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Machinery Manufacturing				
Farm Machinery and Equipment Manufacturing (NAICS 333111)	N/A	5%	No	Yes. There is a good supply chain base for these types of manufacturing companies, and a technical workforce to support it.
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing (NAICS 333112)	Star	6%		
Food Product Machinery Manufacturing (NAICS 333241)	Mainstay	5%		
Other Industrial Machinery Manufacturing (NAICS 333249)	Mainstay	3%		
Industrial Mold Manufacturing (NAICS 333511)	Mainstay	4%		Yes. These subsectors tie back to the existing metal cluster in the region.
Special Die and Tool, Die Set, Jig, and Fixture Manufacturing (NAICS 333514)	Star	(4%)		
Conveyor and Conveying Equipment Manufacturing (NAICS 333922)	Opportunity	5%		Yes. This subsector can support some of the machinery manufacturing above, such as food machinery, farm machinery, etc.
Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing (NAICS 333415)	Star	(2%)		No. These tend to be commodity-based manufacturing subsectors.
Rolling Mill and Other Metalworking Machinery Manufacturing (NAICS 333519)	Star	1%		
Other Engine Equipment Manufacturing (NAICS 333618)	N/A	4%		
Power-Driven Handtool Manufacturing (NAICS 333991)	Star	7%		
Welding and Soldering Equipment Manufacturing (NAICS 333992)	Star	5%		
All Other Miscellaneous General Purpose Machinery Manufacturing (NAICS 333999)	Star	2%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Computer and Electronics Manufacturing				
Electromedical and Electrotherapeutic Apparatus Manufacturing (NAICS 334510)	Star	4%	No	Yes. This subsector can be tied to the medical device industry.
Analytical Laboratory Instrument Manufacturing (NAICS 334516)	Opportunity	3%		Yes. These subsectors can be tied to several target industries, such as medical device manufacturing or food manufacturing machinery.
Other Measuring and Controlling Device Manufacturing (NAICS 334519)	Star	6%		Yes. This subsector can be tied to the existing machining cluster.
Carbon and Graphite Product Manufacturing (NAICS 335991)	Mainstay	5%		No. The industries that these companies would supply to are not located in the region. The low national growth in a number of these industries may be due to offshoring this type of manufacturing, as it tends to be more commodity-based.
Computer Terminal and Other Computer Peripheral Equipment Manufacturing (NAICS 334118)	Star	(10%)		
Electronic Connector Manufacturing (NAICS 334417)	Star	10%		
Printed Circuit Assembly (Electronic Assembly) Manufacturing (NAICS 334418)	Star	7%		
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing (NAICS 334511)	Star	(9%)		
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables (NAICS 334513)	Star	6%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Transportation Equipment Manufacturing				
Other Aircraft Parts and Auxiliary Equipment Manufacturing (NAICS 336413)	Opportunity	5%	No	Maybe. There might be opportunities within the metals ad machining industry to support these types of companies.
All Other Transportation Equipment Manufacturing (NAICS 336999)	Mainstay	6%		
Motor Home Manufacturing (NAICS 336213)	Star	5%		
Motor Vehicle Gasoline Engine and Engine Parts Manufacturing (NAICS 336310)	NA	3%		
Motor Vehicle Metal Stamping (NAICS 336370)	Reactive	3%		
Other Manufacturing				
Surgical and Medical Instrument Manufacturing (NAICS 339112)	Mainstay	5%	Yes	Yes. These industries are related to the medical device manufacturing industry.
Ophthalmic Goods Manufacturing (NAICS 339115)	Star	4%		
Retail Bakeries (NAICS 311911)	NA	8%	Maybe	Maybe. There is not a strong presence already in the industry; however, Anoka County should welcome companies within these industries.
Commercial Bakeries (NAICS 311812)	Star	1%		
Breweries (NAICS 312120)	NA	20%	No	No. Not likely a company to recruit. Local businesses in this industry may continue to pop up.
Wineries (NAICS 312130)	NA	13%		
All Other Miscellaneous Textile Product Mills (NAICS 314999)	Opportunity	(3%)	No	No. These subsectors tend to be more-commodity driven.
Ready-Mix Concrete Manufacturing (NAICS 327320)	Opportunity	0%		
Other Concrete Product Manufacturing (NAICS 327390)	Star	3%		
Abrasive Product Manufacturing (NAICS 327910)	NA	(2%)		
Mineral Wool Manufacturing (NAICS 327993)	NA	2%		
Wood Kitchen Cabinet and Countertop Manufacturing (NAICS 337110)	Star	3%		
Dental Laboratories (NAICS 339116)	Mainstay	1%		
Sporting and Athletic Goods Manufacturing (NAICS 339920)	Star	(4%)		
Sign Manufacturing (NAICS 339950)	Star	(0%)		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Wholesale				
Automobile and Other Motor Vehicle Merchant Wholesalers (NAICS 423110)	Mainstay	3%	No	<p>Maybe. This industry was examined to determine potential manufacturing and/or distribution opportunities within the industry. The big box-type fulfillment centers are more likely to locate south of the city for better access to market; however, Anoka County has seen some small specialty distribution going on in the region.</p>
Motor Vehicle Supplies and New Parts Merchant Wholesalers (NAICS 423120)	Star	4%		
Motor Vehicle Parts (Used) Merchant Wholesalers (NAICS 423140)	Star	4%		
Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers (NAICS 423310)	Star	1%		
Roofing, Siding, and Insulation Material Merchant Wholesalers (NAICS 423330)	Star	8%		
Other Construction Material Merchant Wholesalers (NAICS 423390)	Star	8%		
Office Equipment Merchant Wholesalers (NAICS 423420)	Opportunity	(7%)		
Other Commercial Equipment Merchant Wholesalers (NAICS 423440)	N/A	6%		
Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers (NAICS 423450)	Star	6%		
Metal Service Centers and Other Metal Merchant Wholesalers (NAICS 423510)	Mainstay	4%		
Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers (NAICS 423610)	Opportunity	5%		
Other Electronic Parts and Equipment Merchant Wholesalers (NAICS 423690)	Opportunity	(6%)		
Hardware Merchant Wholesalers (NAICS 423710)	Star	3%		
Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers (NAICS 423720)	Reactive	3%		
Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers (NAICS 423730)	Opportunity	3%		
Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers (NAICS 423810)	Star	5%		
Farm and Garden Machinery and Equipment Merchant Wholesalers (NAICS 423820)	Reactive	5%		
Industrial Machinery and Equipment Merchant Wholesalers (NAICS 423830)	Star	1%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Wholesale (cont.)				
Industrial Supplies Merchant Wholesalers (NAICS 423840)	Star	9%	No	Maybe. This industry was examined to determine potential manufacturing and/or distribution opportunities within the industry. The big box-type fulfillment centers are more likely to locate south of the city for better access to market; however, Anoka County has seen some small specialty distribution going on in the region.
Sporting and Recreational Goods and Supplies Merchant Wholesalers (NAICS 423910)	Star	14%		
Recyclable Material Merchant Wholesalers (NAICS 423930)	Mainstay	2%		
Other Miscellaneous Durable Goods Merchant Wholesalers (NAICS 42399)	Star	14%		
Industrial and Personal Service Paper Merchant Wholesalers (NAICS 44130)	Star	(3%)		
Drugs and Druggists' Sundries Merchant Wholesalers (NAICS 24210)	Star	0%		
Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers (NAICS 424330)		9%		
General Line Grocery Merchant Wholesalers (NAICS 424410)	Star	3%		
Dairy Product (except Dried or Canned) Merchant Wholesalers (NAICS 424430)	Mainstay	4%		
Confectionery Merchant Wholesalers (NAICS 424450)	Star	8%		
Meat and Meat Product Merchant Wholesalers (NAICS 424470)	Star	10%		
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers (NAICS 424610)	Star	5%		
Other Chemical and Allied Products Merchant Wholesalers (NAICS 424690)	Reactive	5%		
Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals) (NAICS 424720)	Opportunity	2%		
Beer and Ale Merchant Wholesalers (NAICS 424810)	Star	8%		
Farm Supplies Merchant Wholesalers (NAICS 424910)	Reactive	2%		
Tobacco and Tobacco Product Merchant Wholesalers (NAICS 424940)	N/A	1%		
Other Miscellaneous Nondurable Goods Merchant Wholesalers (NAICS 424990)	Reactive	1%		
Wholesale Trade Agents and Brokers (NAICS 425120)	Reactive	12%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Transportation				
General Freight Trucking, Local (NAICS 484110)	Mainstay	6%	Yes	Yes. Truck terminal operations may be opportunities for some of the available land in Anoka County. There are already several of these operations in the county.
General Freight Trucking, Long-Distance, Truckload (NAICS 484121)	Reactive	1%		
General Freight Trucking, Long-Distance, Less Than Truckload (NAICS 484122)	Star	9%		Maybe. Focus should be on specialized warehousing. (See note under wholesaling)
General Warehousing and Storage (NAICS 493110)	Reactive	11%		
Other Nonscheduled Air Transportation (NAICS 481219)	Mainstay	31%	No	No. Many of these industries are market-driven and population-driven. Not necessarily industries to recruit.
Rail transportation (NAICS 482110)	N/A	14%		
Used Household and Office Goods Moving (NAICS 484210)	Opportunity	3%		
Specialized Freight (except Used Goods) Trucking, Local (NAICS 484220)	Star	4%		
Specialized Freight (except Used Goods) Trucking, Long-Distance (NAICS 484230)	Opportunity	10%		
Bus and Other Motor Vehicle Transit Systems (NAICS 485113)	Star	9%		
School and Employee Bus Transportation (NAICS 485410)	Mainstay	5%		
Charter Bus Industry (NAICS 485510)	Star	4%		
Special Needs Transportation (NAICS 485991)	Star	17%		
All Other Transit and Ground Passenger Transportation (NAICS 485999)	Star	21%		
Other Support Activities for Air Transportation (NAICS 488190)	Opportunity	8%		
Support Activities for Rail Transportation (NAICS 488210)	Opportunity	12%		
Motor Vehicle Towing (NAICS 488410)	Star	10%		
Freight Transportation Arrangement (NAICS 488510)	Mainstay	8%		
Couriers and Express Delivery Services (NAICS 492110)	Opportunity	3%		
Local Messengers and Local Delivery (NAICS 492210)	Reactive	8%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Finance and Insurance				
Credit Unions (NAICS 522130)	Opportunity	8%	No	No. Many of these industries are customer/consumer-driven. They will come to Anoka County if there is demand. Anoka County will fare better if it has quality office space and office parks available for when this does happen.
All Other Nondepository Credit Intermediation (NAICS 522298)	Star	12%		
Other Activities Related to Credit Intermediation (NAICS 522390)	Opportunity	4%		
Securities Brokerage (NAICS 523120)	Opportunity	3%		
Investment Advice (NAICS 523930)	Opportunity	20%		
Trust, Fiduciary, and Custody Activities (NAICS 523991)	Star	8%		
Miscellaneous Financial Investment Activities (NAICS 523999)	Star	20%		
Direct Property and Casualty Insurance Carriers (NAICS 524126)	Star	(1%)		
Insurance Agencies and Brokerages (NAICS 524210)	Opportunity	7%		
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	NA	15%		
All Other Insurance Related Activities (NAICS 524298)	Reactive	16%		

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Professional, Scientific and Technical Services				
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology) (NAICS 541712)	Opportunity	5%	No	Yes, as it relates to medical device manufacturing and supporting industries.
Offices of Lawyers (NAICS 541110)	Opportunity	1%		
Title Abstract and Settlement Offices (NAICS 541191)	Opportunity	6%		
Offices of Certified Public Accountants (NAICS 541211)	Opportunity	6%		
Tax Preparation Services (NAICS 541213)	Opportunity	2%		
Other Accounting Services (NAICS 541219)	Reactive	4%		
Engineering Services (NAICS 541330)	Reactive	6%		
Testing Laboratories (NAICS 541380)	Opportunity	5%		
Custom Computer Programming Services (NAICS 541511)	Star	14%		
Computer Systems Design Services (NAICS 541512)	Opportunity	16%		
Other Computer Related Services (NAICS 541519)	Opportunity	6%		
Administrative Management and General Management Consulting Services (NAICS 541611)	Reactive	17%		
Environmental Consulting Services (NAICS 541620)	Opportunity	8%		
Other Scientific and Technical Consulting Services (NAICS 541690)	Reactive	15%		
Veterinary Services (NAICS 541940)	Opportunity	8%		
All Other Professional, Scientific, and Technical Services (NAICS 541990)	Star	22%		Maybe. Several of these industries are consumer/customer-driven. Back office-type operations may be a good aspirational target industry for Anoka County; however, it currently lacks good, available office parks and office space.

Target Industry Screening

Industry	Chart Quadrant	Projected U.S. Growth	Stakeholder Input	Include as a target industry? Comments
Health Care and Social Services				
Offices of Physicians (except Mental Health Specialists) (NAICS 621111)	Star	10%	No	No. This industry was examined to see if there were any opportunities related to the medical device industry or supporting industries; however, these are all market-driven and should not be a focus of recruitment.
Offices of Physicians, Mental Health Specialists (NAICS 621112)	Star	14%		
Offices of Dentists (NAICS 621210)	Star	9%		
Offices of Chiropractors (NAICS 621310)	Star	9%		
Offices of Optometrists (NAICS 621320)	Star	15%		
Offices of Mental Health Practitioners (except Physicians) (NAICS 621330)	Star	18%		
Offices of Physical, Occupational and Speech Therapists, and Audiologists (NAICS 621340)	Opportunity	24%		
Offices of All Other Miscellaneous Health Practitioners (NAICS 621399)	Mainstay	31%		
Outpatient Mental Health and Substance Abuse Centers (NAICS 621420)	Opportunity	16%		
HMO Medical Centers (NAICS 621491)	Mainstay	27%		
Kidney Dialysis Centers (NAICS 321492)	Star	20%		
Freestanding Ambulatory Surgical and Emergency Centers (NAICS 621493)	Star	25%		
Medical Laboratories (NAICS 621511)	Opportunity	17%		
Home Health Care Services (NAICS 621610)	Reactive	24%		
Blood and Organ Banks (NAICS 621991)	Reactive	9%		
All Other Miscellaneous Ambulatory Health Care Services (NAICS 621999)	Opportunity	29%		
General Medical and Surgical Hospitals (NAICS 622110)	Reactive	5%		
Nursing Care Facilities (Skilled Nursing Facilities) (NAICS 623110)	Opportunity	4%		
Residential Intellectual and Developmental Disability Facilities (NAICS 623210)	Star	10%		
Residential Mental Health and Substance Abuse Facilities (NAICS 623220)	Reactive	18%		
Continuing Care Retirement Communities (NAICS 623311)	Star	21%		
Assisted Living Facilities for the Elderly (NAICS 623312)	Opportunity	19%		
Other Residential Care Facilities (NAICS 623990)	Reactive	4%		
Services for the Elderly and Persons with Disabilities (NAICS 624120)	Star	22%		
Other Individual and Family Services (NAICS 624190)	Opportunity	6%		
Community Food Services (NAICS 624210)	Mainstay	10%		
Temporary Shelters (NAICS 624221)	Star	8%		
Vocational Rehabilitation Services (NAICS 624310)	Star	1%		
Child Day Care Services (NAICS 624410)	Star	5%		

Recommended Target Industries

Based on the analysis in this section, we recommend the following industries as targets for the Anoka County. Each target industry will have a specific strategy, as well as a set of key competitive advantages of the region. Positioning for each target industry will be added to the following section of this report.

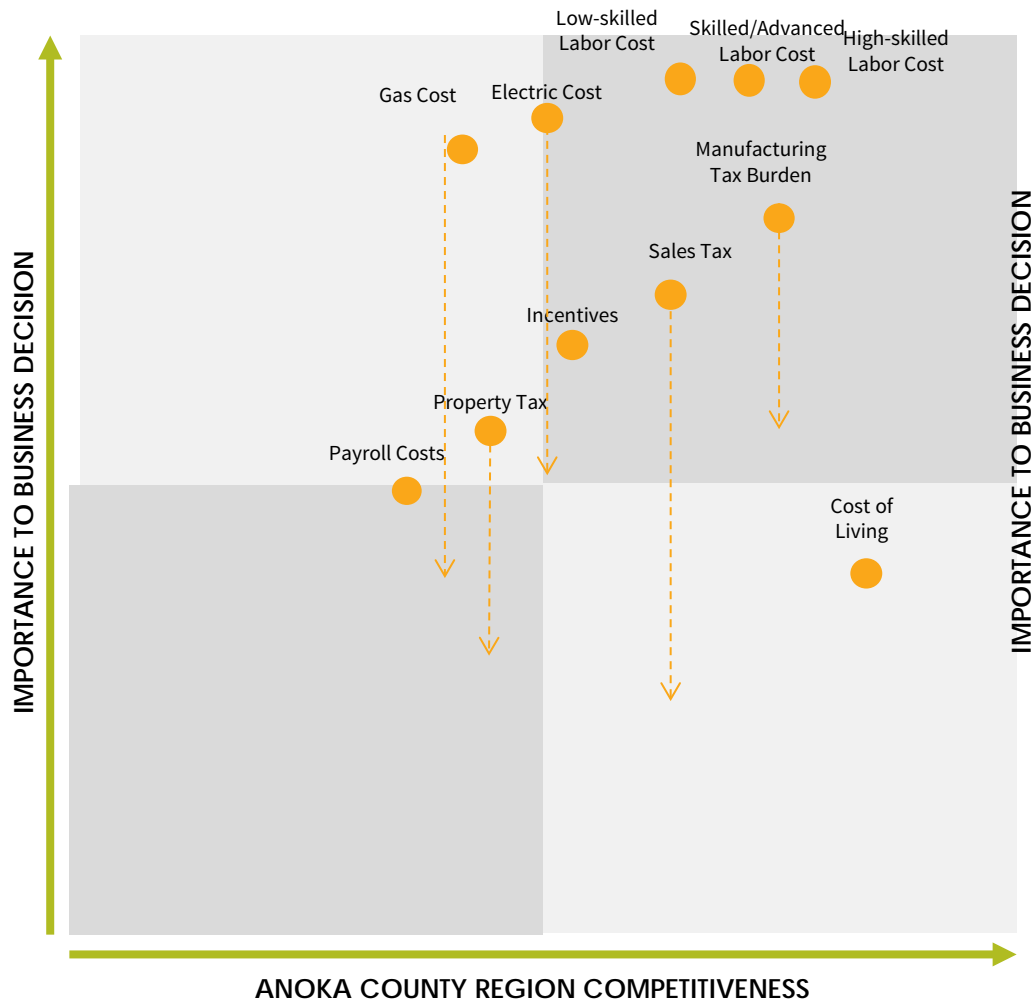
Target Industry	Subsectors of Focus	Comments
Light Manufacturing	Medical Device Manufacturing and Related Industries	<ul style="list-style-type: none"> The medical device supply chain is well developed in the region. Technologic advances in medical devices are creating opportunities for metal and advanced materials fabrication and precision instrument manufacturing.
	Plastic Product Manufacturing	<ul style="list-style-type: none"> Plastics manufacturing technologies are well established in the region Producers are aligned with both advanced devices (e.g. medical devices) and commodity parts (e.g. food machinery, farm equipment, transportation equipment)
	Instrument Manufacturing	<ul style="list-style-type: none"> Instrumentation and measuring devices are critical to manufacturing precision products including medical devices. There is growing demand for precision instruments.
	Metal Working, Machining and Specialized Materials	<ul style="list-style-type: none"> The region has a strong tradition for precision machining and the fabrication of metal and other specialized materials. Advanced materials, such as carbon fiber, are growing in importance within the global economy.
	Chemical Manufacturing	<ul style="list-style-type: none"> Minneapolis/St. Paul region has a long history around innovation and manufacturing of adhesives and other industrial supply chain specialty chemicals. Advances in medical devices, pharmaceuticals, coating technologies are present in the region and align with Anoka County skill sets.
Heavy Manufacturing	Machinery Manufacturing	<ul style="list-style-type: none"> This includes machinery related to existing industries in the region including food processing and material handling equipment, and farm machinery.
Distribution and Trucking	Specialized Distribution and Warehousing	<ul style="list-style-type: none"> The big box-type fulfillment centers are more likely to locate south of the city for better access to market; however, Anoka County has seen some small specialty distribution going on in the region and smaller trucking operations.
Data Centers	Smaller data centers	<ul style="list-style-type: none"> Data centers are big users of electricity and Anoka County has the infrastructure to support this. However, this industry also requires fiber access, which is only available in some parts of the county. Recruitment should be limited to only those areas.
Back Office	Medical services Call centers	<ul style="list-style-type: none"> Some available buildings for this; however, there will need to be a better inventory of these buildings in the future in order for Anoka County to realistically recruit this industry.

SECTION 7: ANOKA COUNTY REGIONAL POSITIONING

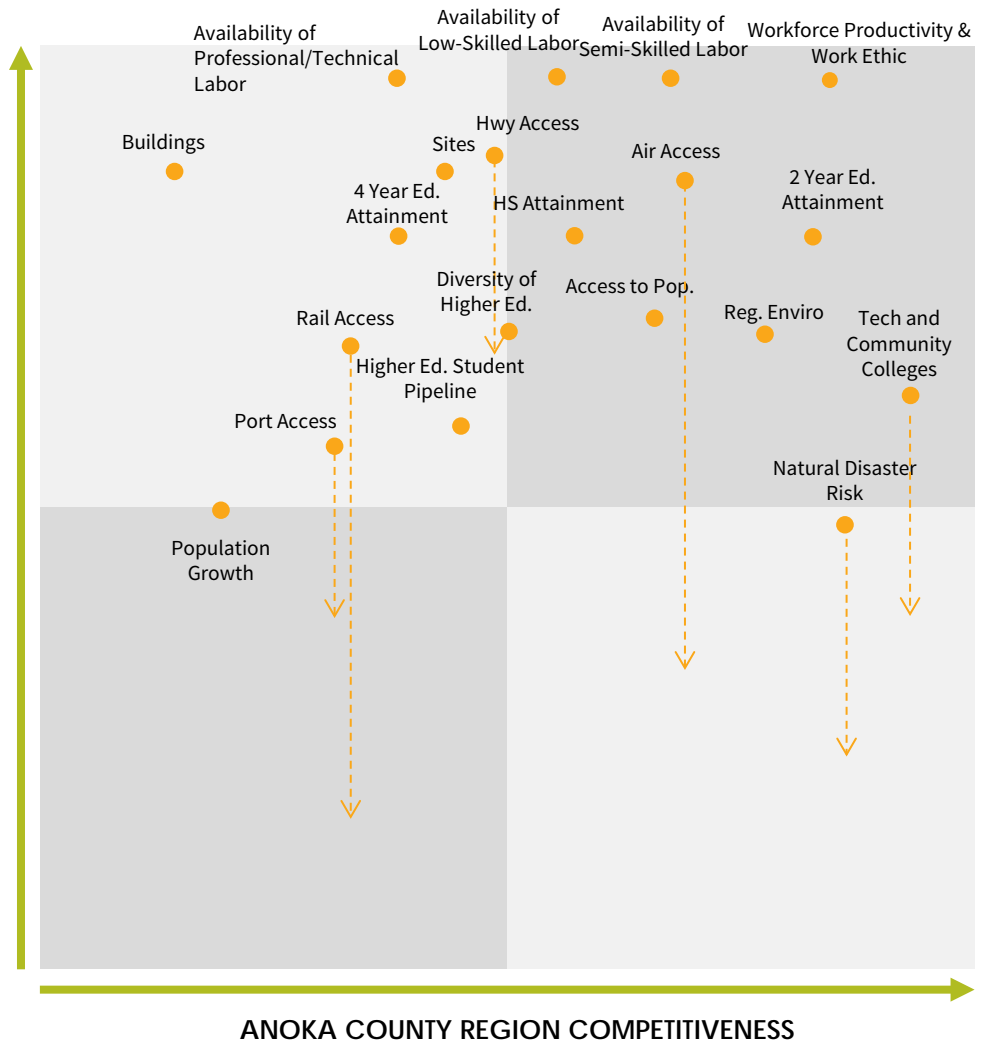


Anoka County Regional Positioning

GENERAL BUSINESS COSTS ASSET MAP



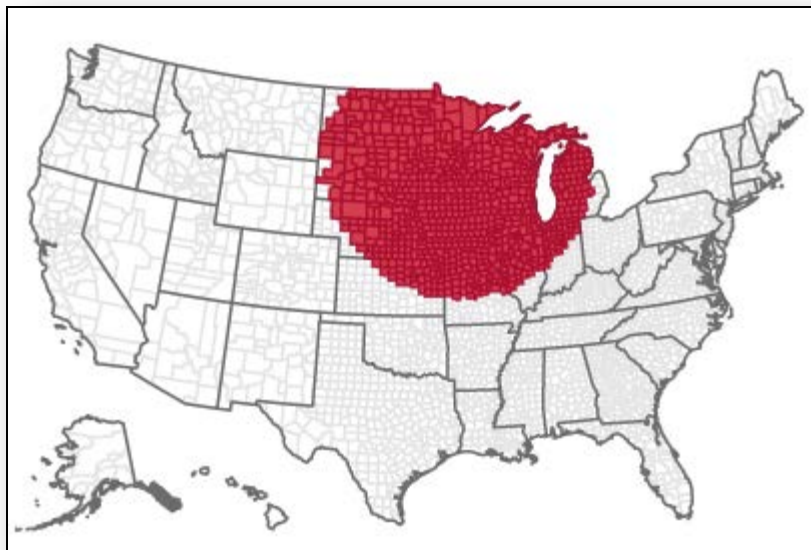
GENERAL CONDITIONS ASSET MAP



Anoka County Regional Positioning

Anoka County provides the following competitive advantages. Note: These specific assets apply to all industries. The following pages show the specific assets that are important to each target industry.

- **Access to regional markets in Minnesota, Wisconsin, Illinois, North and South Dakota, Nebraska and Iowa**



Major Cities Within 10 Hour Drive of Minneapolis

City	Distance (miles)
Sioux Falls, SD	230
Des Moines, IA	237
Fargo, ND	341
Milwaukee, WI	341
Thunder Bay, Ontario	351
Chicago, IL	413
Lincoln, NE	429
Winnipeg, Manitoba	463
Topeka, KS	494
St. Louis, MO	555
Kalamazoo, MI	558

- **Transportation Infrastructure**

- **Air:** Anoka County has a small public use airport options available, Anoka County-Blaine Airport located in the city of Blaine. It has two runways, one 5000 feet and the other 4855 feet. Located less than an hour south is the Minneapolis-St. Paul International Airport (MSP), the largest and busiest airport in the Upper Midwest region.
- **Highway:** Although there are some notable challenges with highway access in Anoka County, some of them are being worked on.
 - I-35 (to Duluth) and I-94 (to Fargo) connect the county to Minneapolis.
 - North-south highway 65 that runs through the whole county.

Anoka County Regional Positioning

Anoka County provides the following competitive advantages:

- **Access to skilled workforce**

- Access to talent from 34 colleges and universities in the Greater MSP region.
- **Anoka Technical College** – Offers more than 35 programs across the levels of Associate of Applied Science (AAS) degrees, diplomas and certificates. Its largest programs include Practical Nursing, Information Technology, Welding and Medical Assistant.
- **Anoka-Ramsey Community College** – Offers over 100 transferrable courses and programs and has an annual enrollment of over 12,000 each year. Its most popular programs include Associate’s degrees in Liberal Arts and Sciences, Registered Nursing and Business.
- **High educational attainment levels for high school diplomas and 2-year degrees.**

Educational Attainment	Anoka County	Minneapolis MSA	MN	WI	ND	SD	US
High School	93.4%	93.1%	92.3%	90.7%	91.3%	90.7%	86.3%
2-Year Degree	12.1%	9.9%	10.5%	9.9%	13.0%	10.5%	7.9%

Manufacturing (Heavy and Light)



Anoka County Regional Positioning –Manufacturing: Heavy and Light

Anoka County provides the following industry-specific competitive advantages for light and heavy manufacturing:

- **Manufacturing-related degree programs in the county:**

Program	Number of Annual Awards
Welding	44
Computer Technology/Computer Systems Technology	28
Electrical, Electronic and Communications Engineering Technology/Technician	20
CNC Machinist	13
Mechanical Drafting and Mechanical Drafting CAD/CADD	10

- **Extremely high concentration of the following manufacturing occupations (location quotient > 2.5)**

- Electromechanical Equipment Assemblers
- Etchers and Engravers
- Plating and Coating Machine Setters, Operators, and Tenders, Metal and Plastic
- Electrical and Electronic Equipment Assemblers
- Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic
- Computer Numerically Controlled Machine Tool Programmers, Metal and Plastic
- Computer-Controlled Machine Tool Operators, Metal and Plastic
- Machinists
- Industrial Engineering Technicians
- Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic
- Coating, Painting, and Spraying Machine Setters, Operators, and Tenders
- Medical Appliance Technicians
- Industrial Engineers
- Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic
- Industrial Production Managers
- Mechanical Engineering Technicians
- Tool and Die Makers

Distribution



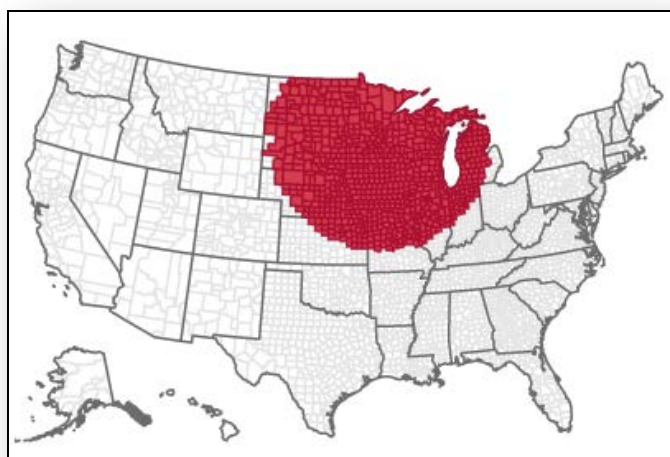
Anoka County Regional Positioning – Distribution/Trucking

Anoka County provides the following industry-specific competitive advantages for distribution/trucking:

- Competitive Wages for Transportation-related occupations**

Occupation	Anoka County Median Wage	Minneapolis MSA	Minnesota
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	\$22.00	\$23.46	\$23.84
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	\$27.33	\$28.75	\$28.01
Heavy and Tractor-Trailer Truck Drivers	\$21.57	\$22.10	\$20.72
Light Truck or Delivery Services Drivers	\$15.68	\$17.52	\$16.39
Industrial Truck and Tractor Operators	\$17.14	\$18.08	\$17.83
Laborers and Freight, Stock, and Material Movers, Hand	\$13.67	\$14.67	\$14.49
Packers and Packagers, Hand	\$11.53	\$12.17	\$11.55

- Access to regional markets in Minnesota, Wisconsin, Illinois, North and South Dakota, Nebraska and Iowa**



Major Cities Within 10 Hour Drive of Minneapolis

City	Distance (miles)
Sioux Falls, SD	230
Des Moines, IA	237
Fargo, ND	341
Milwaukee, WI	341
Thunder Bay, Ontario	351
Chicago, IL	413
Lincoln, NE	429
Winnipeg, Manitoba	463
Topeka, KS	494
St. Louis, MO	555
Kalamazoo, MI	558

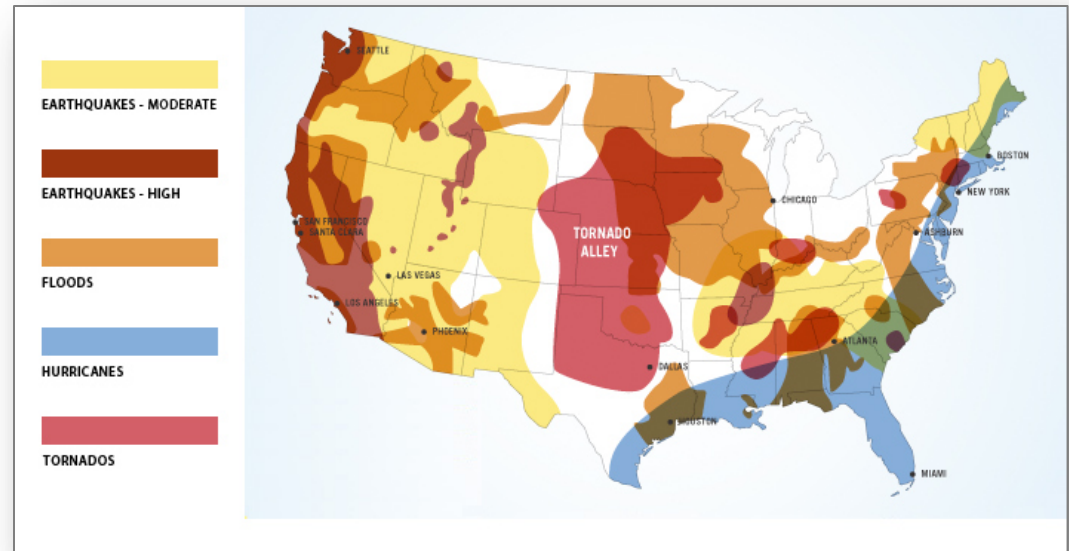
Data Centers



Anoka County Regional Positioning – Data Centers

Anoka County provides the following industry-specific competitive advantages for data centers:

- **Minnesota Data Center Sales Tax Incentives** - Companies that build data or network operation centers of at least 25,000 square feet and invest \$30 million in the first four years qualify for valuable tax breaks.
 - In addition, Minnesota does not tax:
 - Personal property
 - Inventories
 - Utilities
 - Internet access
 - Information services
 - Custom-created software
- **Fiber (in some areas)**
 - 97.1% of Anoka County has broadband over 100+ mbps, and about 8% of the county has access to over 1 Gbit broadband. Andover has the highest broadband coverage of all cities in Minnesota. (<https://broadbandnow.com/Minnesota>)
- **Climate**
 - Minnesota's moderate climate allows for more than 300 days of free cooling annually.
- **Low natural disaster risk**
 - According to historical data, less than four percent of the tornadoes in the country take place in the state.* This low occurrence makes Minnesota a safe place for data centers (National Oceanic and Atmospheric Administration)



Anoka County Regional Positioning – Data Centers

Anoka County provides the following industry-specific competitive advantages for data centers:

- **Competitive wages for data-center related occupations:**

Occupation	Anoka County Median Wage	Minneapolis MSA	Minnesota
Computer Systems Analysts	\$40.64	\$44.70	\$43.14
Information Security Analysts	\$38.58	\$43.17	\$42.06
Computer Programmers	\$34.93	\$38.37	\$38.33
Software Developers, Applications	\$41.37	\$44.00	\$43.57
Software Developers, Systems Software	\$56.20	\$52.97	\$49.44
Web Developers	\$28.89	\$32.45	\$31.06
Database Administrators	\$40.04	\$44.77	\$43.40
Network and Computer Systems Administrators	\$38.10	\$41.46	\$39.56
Computer Network Architects	\$44.78	\$48.82	\$48.68
Computer User Support Specialists	\$24.25	\$25.78	\$24.84
Computer Network Support Specialists	\$27.18	\$28.52	\$28.35
Computer Occupations, All Other	\$34.77	\$37.15	\$36.25
Operations Research Analysts	\$35.17	\$39.81	\$38.49

- **Relevant degree programs in the county:**

Program	Number of Annual Awards
Computer Systems Technology	28
Computer Systems Networking and Telecommunications	25
Computer Science	17
Network and System Administration/Administrator	15

Back Office



Anoka County Regional Positioning – Back Office

Anoka County provides the following industry-specific competitive advantages for back office operations:

- **Available buildings**
 - Northeast Business Center building – This vacant building is right on Highway 65 and has over 94,000 square feet available.
- **Available labor**
 - Many of these jobs require high school degrees, such as customer service representatives. For those occupations that require higher skills, Anoka County has access to Anoka Technical College and Anoka-Ramsey Community College, as well as 34 colleges and universities in the Greater MSP region.
- **Competitive wages**



Occupation	Anoka County Median Wage	Minneapolis MSA	Minnesota
First-Line Supervisors of Office and Administrative Support Workers	\$25.27	\$28.26	\$27.35
Billing and Posting Clerks	\$17.24	\$19.41	\$18.53
Bookkeeping, Accounting, and Auditing Clerks	\$18.30	\$20.40	\$19.26
Payroll and Timekeeping Clerks	\$20.71	\$22.73	\$21.55
Customer Service Representatives	\$16.54	\$18.60	\$17.67
Human Resources Assistants, Except Payroll and Timekeeping	\$18.28	\$19.80	\$19.20
Receptionists and Information Clerks	\$13.20	\$14.41	\$14.06
Executive Secretaries and Executive Administrative Assistants	\$23.57	\$26.47	\$24.96
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	\$17.82	\$19.87	\$18.56
Office Clerks, General	\$15.46	\$17.12	\$16.50
Office and Administrative Support Workers, All Other	\$14.63	\$16.11	\$15.38

SECTION 8: GOALS FOR THE FUTURE



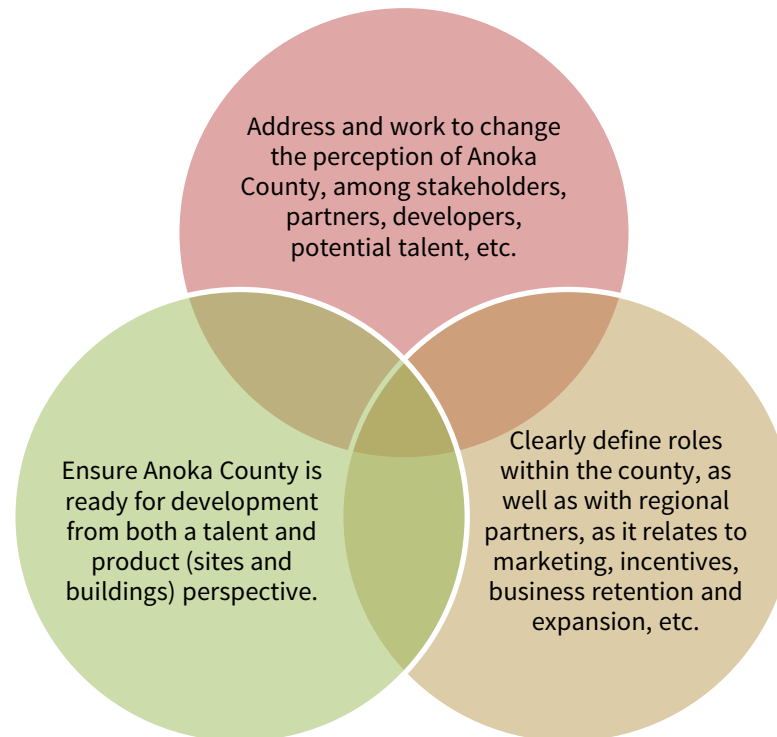
Goals for the Future

Introduction

The goals for the future were determined and thoroughly discussed during a Goals and Visioning work session on Wednesday, October 11. To ensure that stakeholder input was significantly considered in this process, Connexus Energy invited a number of key stakeholders.

During the work session, we discussed certain gaps identified in the three main categories of alignment/regionalism, readiness, and marketing/differentiation. Those gaps then drove the discussion on what the goals are that Anoka County would like to achieve in the near future. These goals will be discussed further in the following pages and will serve as the basis for the Economic Development Business Recruitment Roadmap in Section 9.

The goals are in no particular order. All are considered equally high in importance.



SECTION 9: BEST PRACTICES



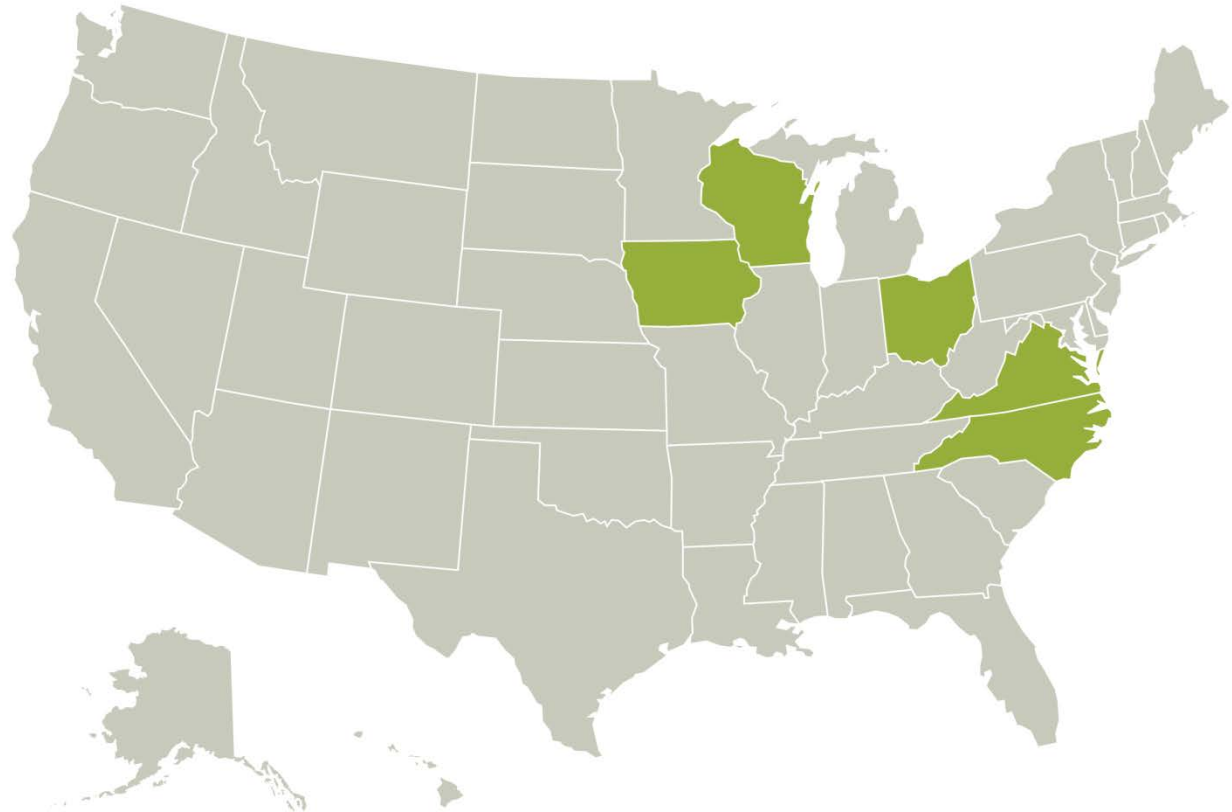
Best Practices

Introduction

Based on the challenges and goals identified for Anoka County throughout this report, Ady Advantage developed five best practice case studies from communities that have faced similar challenges and have found success through various strategies. The best practices can be used to see the potential success Anoka County may continue to have through implementation of this plan.

The five case studies are as follows:

- Hudson, Wisconsin
- Hendersonville, North Carolina
- Pickaway County, Ohio
- Washington County, Virginia
- CONFIDENTIAL - Regional Group in Iowa



Best Practices

BACKGROUND INFORMATION	
City/County	Hudson, Wisconsin
Metropolitan Area	Minneapolis-St. Paul-Bloomington
County-Wide Population	88,029
County-Wide Growth Since 2010 Census	4.4%
Economic Development Website	http://stcroixedc.com/

Situation

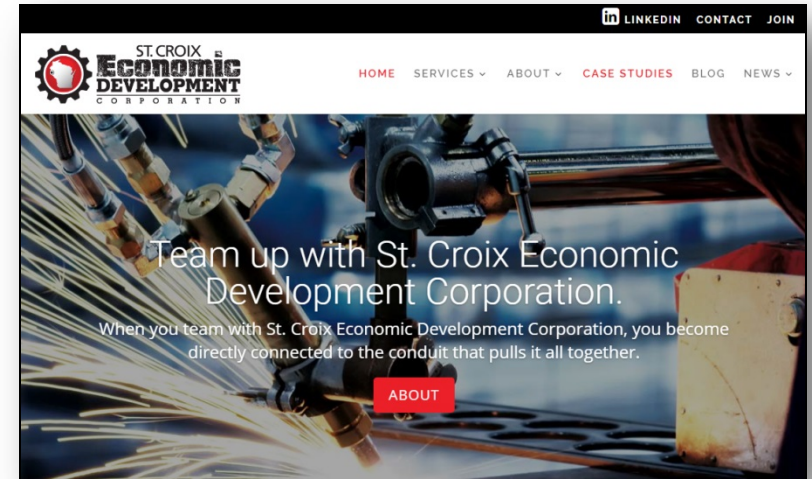
A decline in traditional manufacturing weakened the economy. At the same time, nearby suburbanization from Minneapolis/St. Paul pulled retail from the downtown, leading to further decline.

Action Steps

- Strong support for the regional development organization (Momentum West).
- Community developed plans around improving the urban landscape as a way of becoming more attractive as a place to live.
- Investment in a river front park.
- Downtown streetscape and store front improvements.

How did the Community Change?

Hudson is now both a daytrip tourist destination, and a favored bedroom community for the creative class. The population has more than doubled in the last 25 years, and it has an attractive and prosperous downtown.



Hudson, Wisconsin Waterfront

Best Practices

BACKGROUND INFORMATION	
City/County	Hendersonville, North Carolina
Metropolitan Area	Asheville MSA
County-Wide Population	114,209
County-Wide Growth Since 2010 Census	7.0%
Economic Development Website	https://gohendersoncountync.org/

Situation

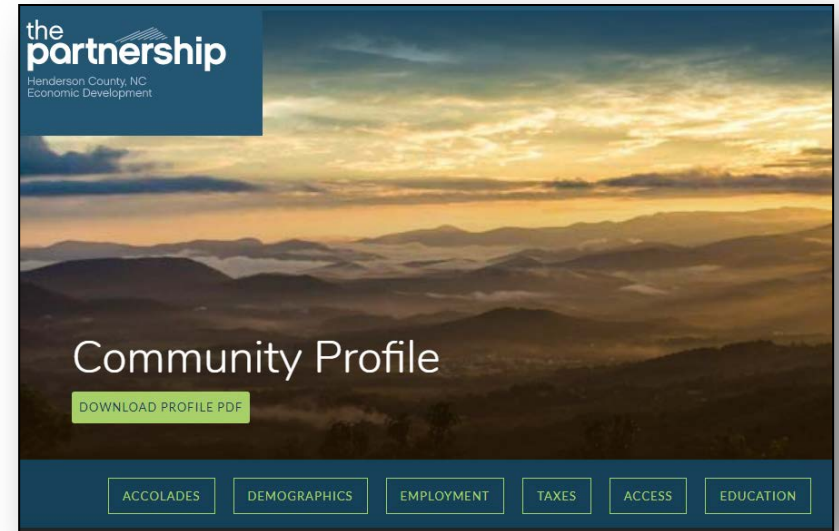
Weak economy brought on by decline in traditional manufacturing (textiles, wood products) in the 1990s spurred community leaders to pursue new approaches to economic development.

Action Steps

- Strong support for county wide economic development organization, giving the organization responsibility for investment attraction, city leaders then focused on making the city better
- Downtown streetscape and store front improvements
- Local emphasis on tourism and retirement, playing on Blue Ridge Mountains
- Development of shovel-ready industrial property

How did the Community Change?

Hendersonville has grown significantly over the last 20 years. The downtown district is now fully occupied and prosperous. The area now has a healthy mix of industrial and commercial/retail employers.



Downtown Hendersonville

Best Practices

BACKGROUND INFORMATION	
City/County	Pickaway County, Ohio
Metropolitan Area	Columbus MSA
County-Wide Population	57,565
County-Wide Growth Since 2010 Census	3.40%
Economic Development Website	https://www.pickawayprogress.com/

Situation

A rebounding, dynamic economy after decades of manufacturing decline and businesses lost to closure and relocation. The primary challenge now is growth management and effectively communicating the value of that growth to the community.

Action Steps

- Strong support for both the county wide economic development organization (P3) and the regional economic development organization (Columbus 2020)
- Strong cooperation between the county and region on economic development efforts, while differentiating their community's own unique identity and priorities
- A recognition of the tremendous growth after past decades of economic challenges and a reprioritizing to be more selective in business attraction efforts
- Community outreach efforts to ensure public opinion continues to stay in favor of economic development activities while still staying true to the community's traditional values

How did the Community Change?

Pickaway County has combined strong local level efforts with strong regional efforts to achieve tremendous growth after decades of economic struggle.



New Sofidel Plant In Pickaway County

Best Practices

BACKGROUND INFORMATION	
City/County	Washington County, Virginia
Metropolitan Area	Kingsport-Bristol-Bristol, TN-VA MSA
County-Wide Population	54,591
County-Wide Growth Since 2010 Census	0.50%
Economic Development Website	http://www.washingtoncountyva.com/

Situation

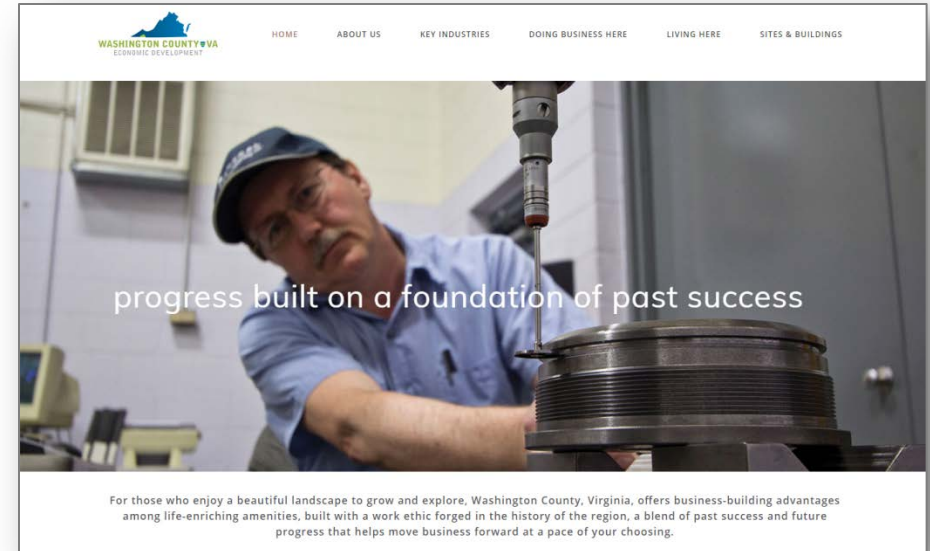
A county without an economic development brand, it lacked a means of differentiating itself from others in the region.

Action Steps

- Conducted a thorough assessment of the county, each community and their strengths and weaknesses
- Mapped its assets and created competitive positioning statements
- Developed a brand unique to the community, founded in those positioning statements
- Created a website that leveraged this distinct brand to its target audiences
- Developed additional marketing materials
- Lead generation activities are underway

How did the Community Change?

Washington County has a fully developed, unique brand that it leverages to consistently message and market itself to its target audiences. It has also strengthened its relationships with its own and neighboring communities for stronger impact.



Downtown Abingdon, County Seat of Washington County, VA

Best Practices

BACKGROUND INFORMATION	
City/County	Regional Group in Iowa
Average County Population within the Region	15,000
Average County Growth Since 2010 Census	-2.93%

Situation

This multiple county region in Iowa has a very diverse set of assets, as well as economic development capacities within the region.

Action Steps

- Conducted an on-site community assessment in each of the counties, including focused content development related to the specific issues of each county
- Recommendations of improvement for the region as a whole, as well as for each individual county

How did the Community Change?

This process has enhanced board and stakeholder engagement and alignment in economic development. It has also helped differentiate the communities within the context of the larger region. The on-site assessment, specifically, helped the counties evaluate their current property readiness.



SECTION 10: ECONOMIC DEVELOPMENT BUSINESS RECRUITMENT ROADMAP



SECTION 10: ECONOMIC DEVELOPMENT BUSINESS RECRUITMENT ROADMAP

Economic Development Strategies	196
Economic Development Business Recruitment Roadmap	202

Economic Development Strategies

Introduction

Within this section are the main strategies for Anoka County. Strategies are defined as items necessary to fulfill one or several of the three goals (determined in Section 8). They are more detailed than goals but not as detailed as specific tasks.

As you will see on the following pages, each of the strategies has a specific effect on one or multiple goals; however the effect the strategy has on the particular goal varies from primary effect to direct effect to indirect effect.

These strategies will be broken down further into specific tactics within each strategy in the following section.

Also of note, the marketing strategies are broken down by various audiences. Those audiences and details about each are listed below:

- All audiences: There will be a number of marketing tactics that will be applicable for all audiences.
- Internal Stakeholders: This includes local EDOs within Anoka County.
- Partners: Key partners of Anoka County include Connexus Energy, Greater MSP, DEED, local educational institutions, etc.
- Existing businesses: This group includes all existing companies in Anoka County from retail to industry to agriculture.
- Developers/Real Estate Brokers: This group will include both local and regional developers and real estate brokers.
- Site Selectors: This is a group of professionals who help companies make site location decisions.
- Target industries:
 - Manufacturing companies, specifically, medical devices, plastics, chemicals and heavy equipment.
 - Distribution companies
 - Data centers
 - Back office operations

Economic Development Strategies

Key Performance Indicators

Key performance indicators are specific criteria identified that are designed to measure the success or progress of the economic development growth plan. Therefore these indicators are measurable, based off of the goals determined by Anoka County, and can be realistically improved upon over time based on specific actions outlined within the strategic plan. These are divided into those over which the county has direct control, and those outcomes in the county that its efforts are intended to ameliorate.

Anoka County's key performance indicators include:

- Number of BRE interviews conducted annually
- Number of sites available for investment and competitive/ready for desired uses
- Time required and business-friendliness to get through public approvals for incentives provided to companies investing in Anoka County
- Number of existing companies, jobs, and/or investment that was retained or grown in Anoka County
- Number of projects for which Anoka County or local EDOs provided project support or oversight (BRE or attraction)
- Number of RFI/RFPs received, number responded to, percent that result in a site visit, number of project wins

Success indicators in the Anoka County economy:

- Awareness and positive perception of Anoka County among stakeholders, residents, visitors and existing businesses
- Awareness and positive perception of Anoka County among decision makers and influencers
- Alignment among local EDOs involved in the county's economic development – degree of coordination, information sharing, clarity of roles, etc.
- Level and percent increase in average wages
- Diversity and growth of employer base
- Employment retention/growth relative to index (i.e., whether Anoka County is maintaining or growing market share in a specific target industry at a level equal or above the national average)

Economic Development Strategies

Alignment/Regionalism			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
Articulate roles and responsibilities of Anoka County, Connexus Energy, and each local/regional economic development partner to help avoid duplication of efforts, identify gaps, and reach consensus on project coordination protocols.		X	XXX
Communicate regularly with economic development partners and other stakeholders about economic development initiatives, business news, county-wide successes, and quality of life improvements.	X		XX

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategies

Readiness			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
Product Readiness			
Ensure sites and buildings are listed in LOIS or another sites and buildings database and information is accurate and up-to-date.	X	XXX	X
Determine the next sites/buildings for short-term, medium-term and long-term development that meet the needs of the target industries (as identified in this report)		XXX	X
Develop and maintain relationships with local developers and real estate brokers.	XX	XX	
Re-evaluate the city and county incentive policies to ensure they align with future goals.		XXX	X
Talent Readiness			
Continue to explore what Greater MSP is doing with regard to talent, and participate selectively.		XXX	X
Identify any gaps related to the Anoka County talent strategies and develop approaches to address.	X	XXX	

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategies

Marketing/Differentiation			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
All Audiences			
Using this economic development plan as a base of information, outline the key assets of the region from both a talent and business retention/development perspective.	XXX	X	
Communicate a consistent county-wide economic development brand.	XXX	XX	
Internal Stakeholders			
Market the key assets of Anoka County to internal stakeholders to ensure that everyone is communicating a consistent message about the county and region.	XXX		X
Partners			
Market the key assets of Anoka County to partners so that they are aware of the unique assets of the county, as well as the types of projects Anoka County is best suited for.	XXX		

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Strategies

Marketing/Differentiation			
	Goal #1: Address and work to change the perception of Anoka County, among stakeholders, partners, developers, potential talent, etc.	Goal #2: Ensure Anoka County is ready for development from both a talent and product (sites and buildings) perspective.	Goal #3: Clearly define roles within the county, as well as with regional partners, as it relates to marketing, incentives, business retention and expansion, etc.
Existing Businesses			
Help existing businesses continue to grow in Anoka County.	XXX	XX	
Ensure existing businesses are aware of local, regional and state programs/initiatives that would benefit their business.	XXX		X
Developers/Real Estate Brokers			
Market the key assets of Anoka County to local/regional developers and real estate brokers so they are aware of the S&B product in the county, as well as the target industries that are best suited for Anoka County.	XXX		
Site Selectors			
Market the key assets of Anoka County to site selectors who work in the target industries identified in this report.	XXX		
Target Industries			
Communicate the benefits of doing business in Anoka County to companies within the specific target industries identified in this report.	XXX		
Identify companies in the recommended target industries to attract to Anoka County	XXX	XX	

XXX: Primary effect on goal

XX: Direct effect on goal

X: Indirect effect on goal

Economic Development Business Recruitment Roadmap

Introduction

The implementation plan builds off of the same strategies found on the previous pages by including additional tasks identified to accomplish each strategy. Again, these strategies are key to achieving Anoka County's goals. The strategies from the previous section are highlighted in gray in each of the tables, and then broken down further into actionable tactics.

Through various discussions and experience, we have determined the following for each task:

- Responsible party
- Priority
- Timeline
- Budget Estimate

These criteria will help determine which of these tasks should be accomplished first and who should be responsible for the completion of each.

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

ALIGNMENT/REGIONALISM				
Alignment/Regionalism	Responsible Party	Priority	Timeline	Budget Estimate
Articulate roles and responsibilities of Anoka County, Connexus Energy, and each local/regional economic development partner to help avoid duplication of efforts, identify gaps, and reach consensus on project coordination protocols.				
Host a capacity building training that includes all local economic developers within the county and trains them on key topics related to economic development and capacity building.	Connexus Energy	High	Q1 2018	Included in marketing proposal to Connexus
Facilitate a work session to bring together all economic development partners to review and clarify the roles and responsibilities of each organization. Topics should include incentives, marketing activities, lead coordination, talent strategies, positioning of the city within the region, BRE coordination, etc.	Anoka County or Connexus Energy with a facilitator	High	Q1 2018	Staff time
Explore options to create a separate economic development role at the county level or to hire another staff person to work with the current Community and Governmental Relations person.	Anoka County	High	Q2 2018	Staff time
Assemble local information for regional benefit , such as permitting/approval processes, talent programs, BRE data, sites and buildings information, etc.	Anoka County and Local EDOs	High	Ongoing	Staff time
Communicate regularly with economic development partners and other stakeholders about economic development initiatives, business news, county-wide successes, and quality of life improvements.				
Create a list of stakeholders and a distribution system to regularly push out economic development news.	Anoka County and Local EDOs	High	Q1 2018	Staff time
See Marketing - Partners				

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

READINESS				
Product Readiness	Responsible Party	Priority	Timeline	Budget Estimate
Ensure sites and buildings are listed in LOIS and information is accurate and up-to-date.				
Continually update sites and buildings data on LOIS and Greater MSP's S&B database.	Anoka County and Local EDOs	High	Ongoing	Staff time
Evaluate whether or not existing sites and buildings tool is sufficient to meet the goals of Anoka County.	Anoka County and Local EDOs	High	Q1-Q2 2018	Staff time
Include the sites and buildings interface on the Anoka County website instead of redirecting people to regional website (see marketing recommendations).	Anoka County	Medium	Q2-Q3 2018	See marketing recommendations
Feed S&B data into relevant real estate databases.	Anoka County and Local EDOs	Medium	Ongoing	Staff time
Determine the next sites/buildings for short-term, medium-term and long-term development that meet the needs of the target industries (as identified in this report).				
Identify all potential sites , regardless of state of readiness.	Anoka County and Local EDOs	High	Q1 2018	Staff time
Prioritize the identified sites based on state of readiness, attractiveness, location, etc.	Anoka County and Local EDOs	High	Q1 2018	Staff time
Ensure there is a plan in place to gain control and prepare sites that are not currently ready for sale. If infrastructure needs exist, proactively engage necessary stakeholders.	Anoka County and Local EDOs	High	Q1-Q2 2018	Staff time
Consider creating speculative industrial buildings aligned with market needs for the target industries identified in this report.	Anoka County and Local EDOs	Medium	Q3-Q4 2018 or later	High

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

READINESS				
Product Readiness (continued)	Responsible Party	Priority	Timeline	Budget Estimate
Develop and maintain relationships with local developers and real estate brokers.				
See Marketing - Developers and Real Estate Brokers				
Re-evaluate the city and county incentive policies to ensure they align with future goals.				
Hold an incentives workshop to determine what types of projects the county and the local EDOs would incent and how.	Anoka County and Local EDOs	High	Q2 2018	\$8,000-\$10,000 (facilitated)
Depending on the outcomes of the incentives workshop, re-evaluate the local and county-wide incentives policies to ensure alignment. Consider creating incentives policies around the county's target industries.	Anoka County and Local EDOs	High	Q2-Q3 2018	Staff time
Talent Readiness	Responsible Party	Priority	Timeline	Budget Estimate
Continue to explore what Greater MSP is doing with regard to talent, and participate selectively.				
Have Greater MSP provide a list of current talent programs at a regional level and continue to meet with them quarterly for an update on these initiatives.	Anoka County	Medium	Q2-Q3 2018	N/A
As a group, review and evaluate the effectiveness of these programs with regards to Anoka County's economic development goals and participate selectively.	Anoka County and Local EDOs	Medium	Q3 2018	Staff time
Identify any gaps related to the Anoka County talent strategies and develop approaches to address.				
Mine existing BRE data to determine specific talent issues in the region. Supplement this with additional employer interviews as needed.	Anoka County and Local EDOs	High	Q2 2018	Staff time
Hold a talent strategy workshop to work through potential solutions to the issues identified. This workshop should include employers, workforce development representatives, educational institutions and economic development representatives.	Anoka County and Local EDOs	Medium	Q3 2018	\$10,000-\$14,000 (facilitated)

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

MARKETING/DIFFERENTIATION				
All Audiences	Responsible Party	Priority	Timeline	Budget Estimate
Using this economic development plan as a base of information, outline the key assets of the region from both a talent and business retention/development perspective.				
Create a regional profile that summarizes Anoka County's competitive positioning and highlights the benefits of doing business in Anoka County. This will be the baseline marketing piece to be used with any audience, internal or external.	Anoka County	High	Q1 2018	Included in marketing proposal to Connexus
Update the economic development portion of the current Anoka County website to include the target industries, key assets and positioning as outlined in this report. This should include new website navigation and content.	Anoka County	High	Q1 2018	Included in marketing proposal to Connexus
Communicate a consistent county-wide economic development brand.				
Conduct a survey of perceptions of Anoka County. This should include residents, stakeholders, brokers, employers, and those outside of Anoka County. The goal of this survey is to get at the root of the negative perceptions, but also to help build a brand from the positive perceptions.	Anoka County	High	Q2 2018	\$3,500 - \$6,000
Track perceptions over time using the same survey to see how effective these initiatives are in changing the perceptions of the region.	Anoka County	High	Q2 2018	TBD
Create a county-wide economic development brand , so that all internal stakeholders are communicating the same message and brand about Anoka County.	Anoka County	Medium	Q3 2018	\$15,000 - \$25,000

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

MARKETING/DIFFERENTIATION				
Internal Stakeholders	Responsible Party	Priority	Timeline	Budget Estimate
Market the key assets of Anoka County to internal stakeholders to ensure that everyone is communicating a consistent message about the county and region.				
Arm all internal stakeholders with marketing materials , including the regional profile and website link. Encourage them to add the website link to their own website.	Anoka County and Local EDOs	High	Q2 2018	Staff time
Create a brand ambassadors program in which Anoka County would push out positive economic development news via social media channels, and local EDOs would push out that same content. This program, if successful, could be extended to local businesses and other key stakeholders.	Anoka County and Local EDOs	Medium	Q3-Q4 2018 and Ongoing	Staff time
Partners	Responsible Party	Priority	Timeline	Budget Estimate
Market the key assets of Anoka County to partners so that they are aware of the unique assets of the county, as well as the types of projects Anoka County is best suited for.				
Arm partners with marketing materials , including the regional profile and website link. Encourage them to add the website link to their own website.	Anoka County and Local EDOs	High	Q2 2018	Staff time
Meet with economic development partners, such as Greater MSP and DEED on a regular basis to inform them of current county-wide economic development initiatives.	Anoka County	High	Quarterly	Staff time
Obtain a list of tradeshow, conferences and trade missions that regional/state groups will be attending in 2018 and 2019. Determine which are relevant to Anoka County's target industries and send Anoka County representative or marketing materials as needed.	Anoka County and Local EDOs	Medium	Q2-Q3 2018	Staff time

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

MARKETING/DIFFERENTIATION				
Existing Businesses	Responsible Party	Priority	Timeline	Budget Estimate
Help existing businesses continue to grow in Anoka County.				
Implement a consistent BRE program at a county-wide level. First, look at what tools are currently being used at the local level to conduct BRE interviews and collect data. Review and evaluate these tools and then implement a single BRE program.	Anoka County and Local EDOs	High	Q2 2018	TBD
Use the findings from the BRE visits to communicate local business needs involving workforce, costs, and other regional issues to respective stakeholders that can implement solutions.	Anoka County and Local EDOs	High	Ongoing	Staff time
Ensure existing businesses are aware of local, regional and state programs/initiatives that would benefit their business.				
Conduct an annual business summit to engage business leaders in economic development initiatives. This meeting should include an educational piece to update employers on economic development initiatives and programs, but also to gain their input into key challenges they might be facing.	Anoka County or Connexus Energy	Medium	Q3 2018	TBD
Create a resource list of programs, incentives, etc. that are available to companies within Anoka County. This should include state, regional and local programs. Distribute during BRE visits and/or during the annual business summit.	Anoka County and Local EDOs	High	Q1 2018	Staff time

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

MARKETING/DIFFERENTIATION				
Developers/Real Estate Brokers	Responsible Party	Priority	Timeline	Budget Estimate
Market the key assets of Anoka County to local/regional developers and real estate brokers so they are aware of the S&B product in the county, as well as the target industries that are best suited for Anoka County.				
Continue hosting a broker event on an annual or semi-annual basis.	Anoka County or Connexus Energy	Medium	Annual or Semi-Annual	TBD
Create a process to push out information to brokers when a site/building is ready for development.	Anoka County and Local EDOs	Medium	Q3-Q4 2018	Staff time
Consider advertising Anoka County on real estate databases such as LoopNet.	Anoka County	Low	2019	TBD
Site Selectors	Responsible Party	Priority	Timeline	Budget Estimate
Market the key assets of Anoka County to site selectors who work in the target industries identified in this report.				
Create an RFI template , so that local EDOs are using a consistent format to submit RFI responses when inquiries come in.	Anoka County and Local EDOs	High	Q2 2018	TBD
Hold a familiarization tour for site selectors that work in Anoka County's target industries. This fam tour should include both a tour of the community, an educational component and a fun event.	Anoka County and Local EDOs	Low	2019	TBD
Create a video fam tour to show the unique assets of the county, to be distributed to a larger audience than an on-the-ground fam tour.	Anoka County and Local EDOs	Low	2019	TBD
Consider sending an Anoka County representative to site selector events that Greater MSP or DEED may be attending.	Anoka County	Medium	2018	TBD

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

MARKETING/DIFFERENTIATION				
Target Industry - Manufacturing	Responsible Party	Priority	Timeline	Budget Estimate
Communicate the benefits of doing business in Anoka County to companies in the manufacturing industry.				
Create a target industry profile for the manufacturing industry that can be used with prospective companies, as well as economic development partners. This should outline the key positioning points for the target industry.	Anoka County	High	Q2 2018	Included in marketing proposal to Connexus
Create success stories/case studies of successful companies that have recently relocated or expanded in Anoka County.	Anoka County	Medium	Q3-Q4 2018	\$2,000/success story
Identify companies in the manufacturing industry to attract to Anoka County.				
Use lead generation to identify companies within Anoka County's specific manufacturing-related industries, such as medical devices, plastics, and chemicals, that are growing and may be interested in locating in Anoka County.	Anoka County	Low	2019	\$15,000
Target Industry - Distribution/Trucking	Responsible Party	Priority	Timeline	Budget Estimate
Communicate the benefits of doing business in Anoka County to companies in the distribution industry.				
Create a target industry profile for the distribution industry that can be used with prospective companies, as well as economic development partners. This should outline the key positioning points for the target industry.	Anoka County	High	Q2 2018	Included in marketing proposal to Connexus
Identify companies in the distribution industry to attract to Anoka County.				
Use BRE visits to manufacturers to identify potential opportunities for manufacturers to locate their distribution operations in the county.	Anoka County and Local EDOs	Medium	Ongoing	Staff time

Economic Development Business Recruitment Roadmap

Areas of Focus
Strategies
Tactics

MARKETING/DIFFERENTIATION				
Target Industry – Data Centers/Back Office	Responsible Party	Priority	Timeline	Budget Estimate
Communicate the benefits of doing business in Anoka County to companies in the data center/back office industry.				
Create a separate target industry profile for the data center industry and the back office industry which can be used with prospective companies, as well as economic development partners. This should outline the key positioning points for the target industries, as they are similar but different for these two subsectors.	Anoka County	High	Q2 2018	Included in marketing proposal to Connexus
Identify regional companies in the data center/back office industry to attract to Anoka County.				
Research companies in the greater region that may be growing/expanding and may need back office or data center operations in lower cost areas.	Anoka County and Local EDOs	Low	2019	TBD

About Ady Advantage

Published by Ady Advantage, a comprehensive and integrated economic development market research, site selection, and marketing consulting firm. Our experience on both sides of the economic development equation is unique. It gives us important insight into the perspectives, challenges, and sensitivities of both manufacturers and economic development organizations, bringing added value to both. And we're the only such firm that not only makes marketing recommendations, but also helps you build your website, market to prospective businesses, and use social media as a competitive advantage. Our corporate services focus on helping manufacturers, utilities and other sectors grow their businesses through an integrated solution set that includes research, competitive positioning, marketing strategy, integrated communications, and facility expansion.

Contact us today for more information or if you have any questions on this report.

Janet Ady
President and CEO
608.663.9218
jady@adyadvantage.com