East Central Minnesota: Social and Economic Trends and Implications, Forestry Analysis

March 2004

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See also http://www.d.umn.edu/sbe/departments/bber/projects/
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EXECUTIVE SUMMARY

Social and economic variables provide a framework within which landscape management can be developed. The following descriptions present an overview of some of the social conditions within the East Central Landscape. There are some considerations with regard to the variables that may help inform the planning process. One of the major considerations is that the East Central area is not homogeneous. There are important differences across the area with regard to population size, composition, income, housing, land use, etc. The variability in the demographics of the area may be related to a number of important considerations.

Summary of East Central Region’s Social Environment

Landscape management considerations:

- ways in which residents see the natural resources
- how and what residents value about natural resources
- how dependent residents are on specific resources for their livelihood and/or recreation
- residents willingness and capacity to participate in a policy development process
- residents “lifestyles and opportunity structures”
- amount and type of “social capital” in communities
- ability, willingness, and capacity to “adapt to changes” in the ecosystem.

In addition, there are limitations from the landscape ecosystem on levels of human activity, and there are attempts to restore some of the natural and physical features which have been changed. It is important therefore to consider the importance of similarities but also to consider the importance of heterogeneity across the East Central Landscape for developing policy that is based on those differences.

Natural Resource planning requires: data, natural, physical, and social/economic data. A set of overarching goals is also critical. The ways in which the natural, physical and social/economic data interact provides a more advanced level of information. Some of the high lights of the social data which pertain to the East Central Landscape are as follows:

County Population Differences

- Larger population counties are closer to the Metropolitan Area
- Counties with larger urban populations are closer to the Metropolitan Area
- Counties with larger rural populations are more distant from the Metropolitan Area
- Levels of change: Seven of the East Central Region counties have net migration rates 3 to 8 times higher than the Minnesota rate
- Rate of increase: Some counties doubled and one tripled in population over the past 40 years with increases between 10,000 to 20,000 in the past 10 years.
6) Age structure: Counties with smaller populations tend to have higher median age for the county.

7) Larger counties tend to have larger percentages of the population in the “labor force” range (18 – 65 years).

8) Income levels: Counties closer to the Metropolitan Area have higher median household incomes.

9) Four counties (Kanabec, Mille Lacs, Morrison, and Pine) have between 9 and 11 percent of the population below the poverty level.

10) Persons per household: Average household size, between 1970 and 2000 dropped for all counties of the East Central Region. The ranking of percentage change in these years shows that Benton and Morrison dropped household size the most—as much as one person per household—and Sherburne and Chisago dropped the least, around .5 persons per household.

Travel Time
Average travel times to work in the East Central Region range between just over 20 minutes to almost 35 minutes, compared to the State average of 21.7 minutes.

Housing
1) The number of housing units varies along the lines of population size but the number and percent of vacant housing units follows an inverse trend.

2) Counties with smaller populations tend to have higher percentages of vacant housing units.

3) The percent of vacant housing units which are seasonal, recreational, or occasional use are higher in the less densely populated counties.

4) Pine County has the highest percentage of vacant housing units and the highest percentage of vacant housing units which are seasonal, recreational, or occasional use.

Land Use
1) Counties vary in size. Pine county is almost three times larger in total acres than five of the other counties. Morrison is about 66% as large as Pine, and Wright and Mille Lacs are about one half the size.

2) Settlement and accompanying land use patterns vary across the counties. Urban and Industrial uses vary from almost 9,000 acres in Wright county to between 1300 and 2200 acres in Kanabec, Mille Lacs, and Pine counties – these three counties rank lowest in the number of acres for Farmsteads, Rural Residences and Rural Residential Development.

3) Land use patterns vary across counties not only in amount but in distribution - Chisago county has some “forest” but it tends to be concentrated along the eastern border. Wright county has some “forest” but it is highly fragmented.

4) Counties vary by the percent of land classified as “forest, grassland, water/wetland, cultivated land. Pine county has the largest total acreage of “forest”, with Kanabec, Mille Lacs, and Morrison following in decreasing amounts.
Summary of East Central Region’s Economic Base: Counties

This analysis looked at three measures for each of the nine counties in the East Central Region (production of goods in millions of dollars; employment; compensation in millions of dollars), and ranks them according to size to show the leading industries in the county. County industries are also analyzed according to relative importance to the county (as compared to the State), and also analyzed for growth trends. The profile discussion answers the questions: What are the largest industries in the county? What are the most concentrated industries in the county? What are the fastest growing industries in the county?

These profiles are generated from combined rankings for employment, output, and value added measures. Note that some IMPLAN industry sectors have been cut from the discussion of county economic base as they can be misleading when they appear in the rankings. For details on the county profiles see the County-by-County Profiles section to this report; for supporting data and complete tables see the appendix to this report.

Source: 2000 IMPLAN data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Benton</th>
<th>Chisago</th>
</tr>
</thead>
<tbody>
<tr>
<td>County</td>
<td>profile:</td>
<td>Largest industries</td>
</tr>
<tr>
<td></td>
<td>1. Population</td>
<td>Commercial Printing</td>
</tr>
<tr>
<td></td>
<td>2. Area (Sq.Miles)</td>
<td>Wholesale Trade</td>
</tr>
<tr>
<td></td>
<td>Employment</td>
<td>3. Employment</td>
</tr>
<tr>
<td></td>
<td>Number of Industries</td>
<td>4. Number of Industries</td>
</tr>
<tr>
<td></td>
<td>Households</td>
<td>5. Households</td>
</tr>
<tr>
<td></td>
<td>Income per Household</td>
<td>6. Income per Household</td>
</tr>
<tr>
<td></td>
<td>Total Person Income</td>
<td>7. Total Person Income</td>
</tr>
</tbody>
</table>

Chisago

| Population | 41,101 | State & Local Government – Education, and Residential Care are major employer industries for the County |
| Area (Sq.Miles) | 418 | Boat Building and Repairing |
| Employment | 18,133 | Ready-mixed Concrete |
| Number of Industries | 155 | Forest Products |
| Households | 14,517 | State & Local Government – Residential Care are the fastest growing major employer industries for the County |
| Income per Household | $80,851 | Miscellaneous Plastics Products |
| Total Person Income | $1,173,712,000 | Banking are the fastest growing major producers of goods, and sources of compensation for Chisago County. |
| Isanti          | Population  | 31,287 | State & Local Government- Education, and Hospital's production and employment | Forest Products are densely represented in the County compared to the State, but Industrial Machines are very important to the County. |
|                | Area (Sq.Miles) | 439 | Banking's production and distribution of goods and compensation are very important to the County. | Fabricated Plate Work (Boiler Shops) is densely represented and also ranks as a fast growth industry. |
|                | Employment    | 16,454 | 145 | Nursing and Protective Care is an important employer in the County. |
|                | Number of Industries | 145 |  |  |
|                | Households    | 11,266 |  |  |
|                | Income per household | $69,611 |  |  |
|                | Total Person Income | $784,240,000 |  |  |
| Kanabec        | Population  | 14,996 | Miscellaneous Retail | Photofinishing is a County specialization, the industry appears on the top ten goods producing list, and is also ranked high in the fastest growing industries in the County. |
|                | Area (Sq.Miles) | 525 | Miscellaneous Plastics Products | Commercial Photography is a County specialization, the industry appears on the top ten goods producing list, and is also ranked high in the fastest growing industries in the County. |
|                | Employment    | 6,738 | Hay and Pasture |  |
|                | Number of Industries | 107 | State & Local Government – Non-Education |  |
|                | Households    | 5,754 | Education |  |
|                | Income per household | $51,423 | and State & Local Government - Non-Education are major employers |  |
|                | Total Person Income | $295,889,984 | Non-Education are major employers |  |

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### Mille Lacs

<table>
<thead>
<tr>
<th></th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>22,330</td>
<td>The County's largest goods producers and employers are also where most of the growth and the industry concentration is located: Apparel From Purchased Materials, Electromedical Apparatus, Amusement and Recreation Services, N.E.C., Millwork and Hardwood Dimension and Flooring. Growth industries in the County are, in order of employment growth ranking: Amusement and Recreation Services, N.E.C., State &amp; Local Government – Education, Hospitals, and Electromedical Apparatus.</td>
</tr>
<tr>
<td>Area (Sq.Miles)</td>
<td>575</td>
<td></td>
</tr>
<tr>
<td>Employment</td>
<td>13,197</td>
<td></td>
</tr>
<tr>
<td>Number of Industries</td>
<td>126</td>
<td></td>
</tr>
<tr>
<td>Households</td>
<td>8,648</td>
<td></td>
</tr>
<tr>
<td>Income per household</td>
<td>$55,031</td>
<td>State &amp; Local Government – Education Hospitals; and Electromedical Apparatus</td>
</tr>
<tr>
<td>Total Person Income</td>
<td>$475,910,016</td>
<td></td>
</tr>
</tbody>
</table>

### Morrison

<table>
<thead>
<tr>
<th></th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>31,712</td>
<td>Most concentrated industries include Apparel From Purchased Materials, Electromedical Apparatus, Amusement and Recreation Services, N.E.C., Millwork and Hardwood Dimension and Flooring. Growth industries in the County are, in order of employment growth ranking: Amusement and Recreation Services, N.E.C., State &amp; Local Government – Education, Hospitals, and Electromedical Apparatus. Hay and Pasture, Boat Building and Repairing, State &amp; Local Government – Education are all among the fastest growing in Morrison, as well.</td>
</tr>
<tr>
<td>Area (Sq.Miles)</td>
<td>1,125</td>
<td></td>
</tr>
<tr>
<td>Employment</td>
<td>16,496</td>
<td></td>
</tr>
<tr>
<td>Number of Industries</td>
<td>136</td>
<td></td>
</tr>
<tr>
<td>Households</td>
<td>11,836</td>
<td></td>
</tr>
<tr>
<td>Income per household</td>
<td>$53,498</td>
<td>Hay and Pasture, Boat Building and Repairing, State &amp; Local Government – Education are all among the fastest growing in Morrison, as well. Hay and Pasture (and agricultural products like dairy and eggs) are important to the County. as well as being concentrated in Morrison County more densely than in the State.</td>
</tr>
<tr>
<td>Total Person Income</td>
<td>$633,203,008</td>
<td></td>
</tr>
</tbody>
</table>

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xi
<table>
<thead>
<tr>
<th>County</th>
<th>Population</th>
<th>Area (Sq.Miles)</th>
<th>Employment</th>
<th>Number of Industries</th>
<th>Households</th>
<th>Income per household</th>
<th>Total Person Income</th>
<th>Major Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pine</td>
<td>26,530</td>
<td>1,411</td>
<td>11,867</td>
<td>125</td>
<td>9,908</td>
<td>$50,732</td>
<td>$502,652,000</td>
<td>The major industries as well as the growth industries in the County are Amusement and Recreation Services, Logging Camps and Logging Contractors, Photographic Equipment and Supplies, Sand and Gravel, Wood Household Furniture, and are in dense concentration in Pine County.</td>
</tr>
<tr>
<td>Sherburne</td>
<td>64,417</td>
<td>25,866</td>
<td>159</td>
<td>21,625</td>
<td>$73,256</td>
<td>$502,652,000</td>
<td>$1,584,152,064</td>
<td>The fastest growing employers are: Industrial and Fluid Valves, Accounting Auditing and Bookkeeping, Industrial Machines N.E.C., State &amp; Local Government – Education, and Concrete Products, Electric Services, Forest Products, Paperboard Mills, Ready-mixed Concrete, Structural Wood Members, and Wood Kitchen Cabinets.</td>
</tr>
<tr>
<td>Wright</td>
<td>89,986</td>
<td>661</td>
<td>40,876</td>
<td>196</td>
<td>31,415</td>
<td>$77,788</td>
<td>$2,443,699,968</td>
<td>The industry sectors Motor Freight Transport and Warehousing, State &amp; Local Government – Education, and Wholesale Trade are also reported as the fastest growing industries of the County.</td>
</tr>
</tbody>
</table>

The major industries as well as the growth industries in the County are Amusement and Recreation Services, Hay and Pasture, State & Local Government – Education.
Summary of East Central Region’s Economic Base: Analysis of the Region

This analysis looked at three measures for the East Central Region (output: production of goods in millions of dollars; employment; value added: compensation in millions of dollars), and ranks them according to size to show the largest industries in the Region. Regional industries are also analyzed according to relative importance (as compared to the State), and for growth trends. (Comparisons to the U.S. are available in the appendix tables.)

1) What are the largest industries in the Region?

In brief, State and Local Government-Education, Eating and Drinking, and Amusement and Recreation Services are the largest employers in the Region. New Residential Structures, Electric Services and Banking have the largest production of goods and services in the Region. Electric Services, State and Local Government-Education and Banking have the largest compensation in the Region.

2) What are the most concentrated industries in the Region (compared to the State)?

The Forestry/Wood Products industries are extremely well represented in the industry ranking, showing that these industries are more densely represented in the East Central Region that elsewhere in the State.

3) What are the fastest growing industries in the Region (compared to the State)?

The tourism related sectors of Amusement and Recreation Services, N.E.C. and Eating & Drinking are listed here as fast growing employment sectors.

Regional Profile Highlights

- Electric Services are high in value added and output, but low in employment.
- Out of the top 25 employers, four of them are in the Medical and Care industries.
- State and Local Government-Education is a very important industry, in terms of employment, value added and output.
- Also true of the Medical and Care industries, which include: Hospital, Residential Care, Nursing And Protective Care, and Doctors And Dentists.
- Tourism also plays an important role in the economy, as shown by the strength of the Amusement and Recreation Services and Eating and Drinking sectors.
- Wholesale and Retail Trade along with Banking and Construction are strong sectors in the East Central Region.
• Forestry/Wood Products industries are densely concentrated in the Region compared to elsewhere in the state.

**Which forest products industries are most densely concentrated and fastest growing in the Region?**

When analyzing the forest products industry for the East Central Counties as a Region, comparing all three measures (employment, output, value added) the most densely represented and forest products industry sectors are: Paperboard Mills, Veneer and Plywood, Wood Kitchen Cabinets, and Woodworking Machinery.

These industries are all heavily represented in the top ten concentrated industries rankings, when compared to the State. They are deeply embedded in the structure of the Region’s economic base. Although they are concentrated in the Region, they are not fast growing industries.

Checking the top hundred industry sector rankings for fastest growing industries in the East Central Region, using the employment measure, only some Forestry/Wood Products industry sectors are represented and are ranked as follows:

<table>
<thead>
<tr>
<th>Rank</th>
<th>Industry Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>Furniture &amp; Home Furnishings Stores</td>
</tr>
<tr>
<td>26</td>
<td>Forest Products</td>
</tr>
<tr>
<td>38</td>
<td>Wood Kitchen Cabinets</td>
</tr>
<tr>
<td>60</td>
<td>Millwork</td>
</tr>
<tr>
<td>77</td>
<td>Structural Wood Members, N.E.C</td>
</tr>
<tr>
<td>89</td>
<td>Veneer and Plywood</td>
</tr>
<tr>
<td>98</td>
<td>Woodworking Machinery</td>
</tr>
<tr>
<td>102</td>
<td>Wood Products, N.E.C</td>
</tr>
</tbody>
</table>

Although Forestry/Wood Products industries do not rank in the top ten fastest growing industries, recreation and tourism, which depend on the forested landscape, are represented in fast growing employment industries. For instance in the top ten ranking for fastest growing are 3rd ranked Amusement and Recreation Services, N.E.C., and 4th ranked Eating & Drinking, both part of the “hospitality industry” and related to tourism.
INTRODUCTION

Previous studies in this series: This project and report follow a previous project in which the University of Minnesota Duluth Bureau of Business and Economic Research (BBER) completed a contract with the Minnesota Department of Natural Resources on behalf of the Minnesota Forest Resources Council to collect and analyze data on the importance of forestry to northern Minnesota.1 BBER also has done specialized analysis on the impact of Minnesota forestry in the subsequent “Bottleneck Analysis,” also part of this series.2

Regional definitions: The project in this report relates to the eastern Central Region as identified by the Minnesota Forest Resources Council. This project establishes an economic and social baseline of the current status of the East Central Landscape, consisting of: Pine, Chisago, Isanti, Kanabec, Mille Lacs, Morrison, Benton, Sherburne, and Wright counties. The project is based entirely on secondary data sources along with an analysis of what the data indicate for the region. Note: the 52,928 acres of Camp Ripley, near NW Morrison County are not included in the study area. Camp Ripley National Guard Training Facility partners with the Minnesota Department of Natural Resources and The Nature Conservancy.

Data was collected from the U.S. Census, U.S. Census of Business and Government, U.S. County Business Patterns, U.S. Regional Economic Information Service, Minnesota State Demographer’s Office, State Economic and Employment Department, IMPLAN, Minnesota Forest Resources Council. Data was organized using the following procedures: Input-Output Analysis, Social Indicator Analysis, Shift-Share Analysis, Location Quotient Analysis, Statistical and Econometric Analysis.

Industry definitions are included in the appendix material.

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1 The contract called for the collection and analysis of data, including: 1. Measure the importance of forestry to Minnesota and northern Minnesota, the actual study regions to be determined in consultation with the Forest Resources Council. 2. Select two communities for separate analysis. 3. Report the economic base of the selected regions. 4. Analyze regional economic trends. 5. Although not included in the original grant, the research team also looked into the possibility of updating information contained in the Generic Environmental Impact Statement on Timber Harvesting and Forest Management in Minnesota (GEIS), published in December 1992 by Jaakko Poyry and Associates. 6. Also not included in the original grant but included in the research was a request to provide “expert” impressions of the data by the research team. 7. Commentary on the economic diversity of the regions being studied was requested. 8. Finally, and also not in the contract, was a request to analyze tourism. Interested readers may find this report at http://www.d.umn.edu/sbe/departments/bber/ under funded research projects titled “Northern Minnesota Forestry Analysis 2001.”

2 The Minnesota Sustainable Forest Resources Act of 1995 calls for long-term planning for forest sustainability in the state. Sustainability must consider social, ecological and economic factors. The research charge, for the UMD LSBE Bureau of Business and Economic Research (BBER) was to model the economic impacts to the current economy of northern MN when the wood supply changes in volume and species mix due to ecological considerations. See http://www.d.umn.edu/sbe/departments/bber/projects/projects.htm.
Figure 1. The East Central Region, consisting of Pine, Chisago, Isanti, Kanabec, Mille Lacs, Morrison, Benton, Sherburne, and Wright counties.

Source: Bureau of Business and Economic Research
http://www.lmic.state.mn.us/datanetweb//answers/bfiles/mn-count.gif
FINDINGS: SOCIAL ENVIRONMENT

The variables that describe the relationships that characterize ecosystems—in addition to the natural and physical features—include among others, demographic and economic variables. These two categories of variables focus on descriptions of who people are and the types of activities in which they are engaged. The development of plans or strategies for managing ecosystems can be effectively informed through the description and analyses of these two sets of variables.

Who people are and what they are like are questions that can be used to help frame the range of alternatives that might be available for managing ecosystems. More specifically, the changes that have occurred over a specified time frame and the trends that might be projected from those changes can at least raise points of consideration for the management of small areas and for landscapes. The following analysis highlights some of the demographic conditions of the East Central Landscape (ECL) and provides an interpretation of those conditions and selected observations regarding the significance that those conditions may have for planning for the management of the forest and forest related features of the ECL.

The following discussion focuses on descriptions across the nine counties in the ECL and makes comparisons across the counties. This format is used in order to point out the similarities and differences between and among the counties so that a landscape-related-profile might emerge. It is thought that since the management challenge is focused at the landscape level, it makes sense to present data in such a way that the analyses instruct the landscape perspective. Thus, the county is used as the primary unit of analysis in order to produce a landscape perspective.

► Demographic Patterns

While there are a large number of variables that pertain to demographic patterns for the ECL, seven have been selected for consideration: They are:

1) population size (including changes over the past 50 years) and distribution
2) population migration patterns
3) average travel time to work
4) age distribution
5) housing
6) income
7) poverty level
8) persons per household

Note: Employment is covered in the Economic section.
1) Population Size and Distribution

Figure 2. East Central MN Region Population Change over Time by Counties

Central MN counties population change 1900 to 2000
source: http://www.census.gov/population/cencounts/mn190090.txt

The discussion begins with the data pertaining to population size. The data in Figure 2 show that the population in most of the counties over the period 1900 thru 1950 virtually constant. From 1960 to the 2000 census, the population in all of the counties shows an increase in population with Wright, Sherburne, Chisago counties (Figure 2) showing the greatest increases. The population in Wright County virtually tripled between 1960 to 2000. Sherburne county almost quadrupled and Chisago county about doubled. Other counties also showed rates that approached doubling but have lower population totals.
Overall, all counties show larger “rural” populations than “urban” populations, except Benton county, which has 59% of the population as “urban.” This is due to the proximity to St. Cloud. The rural/urban distribution in the other counties range from just over 50% for Wright county to almost 90% for Pine county. The rural/urban distributions are presented in Table 2 and in Figure 3.

**Figure 3. Rural/Urban Comparisons**

Source: 2000 Census SF3 Profile

<table>
<thead>
<tr>
<th>County</th>
<th>2000 Population*</th>
<th>1990 Population*</th>
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<tr>
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<td>30185</td>
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<tr>
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<td>29604</td>
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<td>Isanti</td>
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<td>25921</td>
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<tr>
<td>Pine</td>
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<tr>
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<td>18670</td>
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<tr>
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<td>12802</td>
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*Source: *2000 Census SF1 Profile

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<th>Rural Population</th>
<th>Total Population</th>
<th>Urban Percent</th>
<th>Rural Percent</th>
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<td>3018</td>
<td>23512</td>
<td>26530</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>Mille Lacs</td>
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<td>18340</td>
<td>22330</td>
<td>18%</td>
<td>82%</td>
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<tr>
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<td>3084</td>
<td>11912</td>
<td>14996</td>
<td>21%</td>
<td>79%</td>
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<tr>
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<td>31287</td>
<td>27%</td>
<td>73%</td>
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<tr>
<td>Morrison</td>
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<td>22560</td>
<td>31712</td>
<td>29%</td>
<td>71%</td>
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<tr>
<td>Chisago</td>
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<td>41101</td>
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<td>64%</td>
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<tr>
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<tr>
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<tr>
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<td>34226</td>
<td>59%</td>
<td>41%</td>
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*Source: 2000 Census SF3 Profile*
Figure 4 shows that the counties with the higher percentage of urban populations are closer to the Metropolitan Area, with the exception of Benton County, and those with the largest populations are also the ones closer to the Metropolitan Area. The counties with the highest levels of in-migration also have a positive net migration.
Table 3. Urban, Rural (Farm, Nonfarm) Population, East Central Region 1980-2000

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<th>Year</th>
<th>1980</th>
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<th>2000</th>
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<td>30,185</td>
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<td>Urban</td>
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<td>14,141</td>
<td>14,009</td>
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<td>Nonfarm</td>
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<td>12,052</td>
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<tr>
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<td>Total Population</td>
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<td>20,827</td>
<td>22,960</td>
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<tr>
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<td>Farm</td>
<td>2,703</td>
<td>1,953</td>
<td>1,570</td>
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<tr>
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<tr>
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<td>16,801</td>
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Source: U.S. Census
Migration is an important demographic pattern. Population changes through two major mechanisms—births/deaths, and migration. While both patterns are significant, migration usually has the potential to produce social changes of the largest magnitude. Births obviously produce changes that occur over time and deaths usually occur in the older segment of the population. Migration often involves family units—units that are both producing and consuming units. All of the counties have dynamic migration patterns. Wright, Sherburne, and Chisago counties (three counties that are close to the Twin Cities area) have the highest numbers of “in-migrants.” All counties except Morrison County have positive net migration rates (in-migration minus out-migration).

Table 4 shows the counties of origin for the in-migrants and the exit counties—those to which the out-migrants moved. A review of the data show that if we consider ECL to be non-metro and the counties immediately south to be in the “Metropolitan Area,” all of the ECL counties, with the exception of Benton and Sherburne counties (both near St. Cloud), had the largest number of in-migrants from the Metropolitan Area counties. Figure 5 shows comparative net migration flows.
Table 4. East Central MN County Inflows (1990 and 2000 Population)
Source: www.census.gov/population/www/cen2000/ctytoctyflow.html

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<th>FIPS</th>
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<td>Otter Tail County, Minnesota</td>
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<td>Douglas County, Minnesota</td>
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<td>Kandiyohi County, Minnesota</td>
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</tbody>
</table>

UMD Bureau of Business and Economic Research / Labovitz School of Business and Economics
| 27 | 095 | Sherburne County, Minnesota | 790 |
| 27 | 093 | Hennepin County, Minnesota | 60 |
| 27 | 093 | Anoka County, Minnesota | 526 |
| 27 | 123 | Ramsey County, Minnesota | 207 |
| 27 | 145 | Stearns County, Minnesota | 179 |
| 27 | 059 | Isanti County, Minnesota | 154 |
| 27 | 065 | Kanabec County, Minnesota | 151 |
| 27 | 009 | Benton County, Minnesota | 137 |
| 27 | 035 | Crow Wing County, Minnesota | 118 |
| 27 | 171 | Wright County, Minnesota | 112 |
| 27 | 099 | Morrison County, Minnesota | 110 |
| 27 | 115 | Pine County, Minnesota | 84 |
| 27 | 041 | Dakota County, Minnesota | 6b |
| 27 | 163 | Washington County, Minnesota | 75 |
| 27 | 137 | St. Louis County, Minnesota | 73 |
| 27 | 025 | Chisago County, Minnesota | 52 |
| 27 | 111 | Otter Tail County, Minnesota | 50 |
| 27 | 093 | Meeker County, Minnesota | 49 |
| 27 | 131 | Rice County, Minnesota | 45 |
| 06 | 073 | San Diego County, California | 38 |
| 27 | 001 | Aitkin County, Minnesota | 38 |
| 27 | 021 | Cass County, Minnesota | 3U |
| 27 | 199 | Scott County, Minnesota | 2f |
| 17 | 031 | Cook County, Illinois | 26 |
| 06 | 071 | San Bernardino County, California | 25 |
| 08 | 041 | El Paso County, Colorado | 23 |

4,883
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### MN County List

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<td>Kandiyohi County, Minnesota</td>
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*UMD Bureau of Business and Economic Research / Labovitz School of Business and Economics*
The data in Table 5 and Figure 5 show the population changes – in terms of both natural increase and net migration. The data represented in Figure 4 shows the net migration data. The counties with the highest net migration rates are Sherburne, Chisago, Pine, and Wright.

### Table 5. East Central MN Natural Increase and Residual Net Migration by County, 1990 to 2000, Ranked by Net Migration

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<td>Sherburne</td>
<td>41,945</td>
<td>64,417</td>
<td>22,472</td>
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<td>2991</td>
<td>5514</td>
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<td>Wright</td>
<td>68,710</td>
<td>89,986</td>
<td>21,276</td>
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<td>4908</td>
<td>7609</td>
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<td>Chisago</td>
<td>30,521</td>
<td>41,101</td>
<td>10,580</td>
<td>5372</td>
<td>2674</td>
<td>2698</td>
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<td>Pine</td>
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<td>31,287</td>
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<td>1523</td>
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<td>Mille Lacs</td>
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<td>3989</td>
<td>2854</td>
<td>1135</td>
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<tr>
<td>Minnesota</td>
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<td>365,606</td>
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Notes: Natural increase = (births - deaths). Net migration = (population change - natural increase). Net migration rate is per 100 population in 1990.

The data in Figure 5 show the levels of magnitude of the migration in and out of each of the counties. Note for instance the magnitude of differences: for Morrison county, 4081 in, 4865 out, net = sum total 88. Note also the implication that although the net change is not huge, the number of different individuals, 4865 recent citizens departed and 4081 new, completely different citizens arrived. There is a much larger change in “who” now resides in the county. County inflows and outflows show citizens of the Metropolitan Area moving to the counties that ring the Metro. Some of the values that might be changing with the change in citizenry are:

- ways in which residents see the natural resources
- how and what residents value about natural resources
- how dependent residents are on specific resources for their livelihood and/or recreation
- residents willingness and capacity to participate in a policy development process
- residents “lifestyles and opportunity structures”
- amount and type of “social capital” in communities
- ability, willingness, and capacity to “adapt to changes” in the ecosystem.
Table 6. East Central MN Average Travel Times

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<th>Average travel time to work (minutes)**</th>
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Source: **2000 Census SF3 Profile

NOTE: See Appendix for County-to-County Migration Flow Data

3) Travel time

While a number of factors may account for the population changes in the counties, one of the interesting correlations is the amount of time that people travel to work. Figure 6 and Table 6 show that some of the longest average commute times in Minnesota ranging from 30 to 32 minutes each-occurred in the Greater Minnesota counties of Isanti, Chisago, Kanebec, Pine and Sherburne. These counties are all located between the Twin Cities and Duluth.
“Area workers have a choice between one of three major labor markets: the Twin Cities, with an average wage of $21.51; Sherburne/Wright Counties, with an average wage of $18.64; and St. Cloud MSA, with an average wage of $14.40. Residents of St. Cloud MSA who commute to the Twin Cities have higher wages because they are employed in higher paying occupations. After adjusting for skill level, the Benton and Stearns County workers are paid uniformly about 26% less than identical workers in the Twin Cities, regardless of occupation. Older St. Cloud Area workers are especially penalized, with their wages being about 41.2% lower than their counterparts in Sherburne and Wright counties. The wage gap due to age does not exist for older workers who live in Sherburne/Wright Counties because they can more easily commute to the Twin Cities. About 75% of the wage differential between the Twin Cities’ and the Sherburne/Wright labor market is that the highly skilled Sherburne/Wright residents commute to the Twin Cities. Employees in Sherburne/Wright counties have lower education levels, and thus work in low-paying jobs.”

Region 7W Labor-Force Assessment: Workforce Availability 2001
4) **Age**

The counties with smaller populations—located more distant from the Metropolitan Area—have populations with higher median ages. The larger counties—located closer to the Metropolitan Area—have larger percentages of the population in the 18-65 years range. It is this range that is sometimes referred to as the “employment” base. Wright and Sherburne counties have the largest number of “school age” children. See tables 7 and 8 and figures 7 and 7 for age break-out detail.

<table>
<thead>
<tr>
<th>Table 7. East Central MN Age of County Population, 18 Years of Age, 65 Years of Age, and Employment Base</th>
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</thead>
<tbody>
<tr>
<td><strong>Median age</strong></td>
</tr>
<tr>
<td>-----------------</td>
</tr>
<tr>
<td>Pine</td>
</tr>
<tr>
<td>Mille Lacs</td>
</tr>
<tr>
<td>Kanabec</td>
</tr>
<tr>
<td>Morrison</td>
</tr>
<tr>
<td>Isanti</td>
</tr>
<tr>
<td>Chisago</td>
</tr>
<tr>
<td>Wright</td>
</tr>
<tr>
<td>Benton</td>
</tr>
<tr>
<td>Sherburne</td>
</tr>
</tbody>
</table>

Source: 2000 Census SF1 Profile

<table>
<thead>
<tr>
<th>Table 8. East Central MN Age of County Population, Percents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
</tr>
<tr>
<td>Benton</td>
</tr>
<tr>
<td>Chisago</td>
</tr>
<tr>
<td>Isanti</td>
</tr>
<tr>
<td>Kanabec</td>
</tr>
<tr>
<td>Mille Lacs</td>
</tr>
<tr>
<td>Morrison</td>
</tr>
<tr>
<td>Pine</td>
</tr>
<tr>
<td>Sherburne</td>
</tr>
<tr>
<td>Wright</td>
</tr>
</tbody>
</table>

Source: 2000 Census SF1 Profile
Figure 7. Population Details, East Central Region by Age Breakout
Source: 2000 Census SF1 Profile

5) ▶▶ Income and Poverty level

The “southern tier” of counties (those closest to the Twin Cities) have Median Household Incomes in the $50,000 - $57,000 range. The remaining counties have Median Household Incomes that range from $36,000 to $42,000. It should be noted that there is almost a $10,000 difference in Median Household Income between the top four counties and the other 5 counties. Data in Table 8 show that those counties with the highest Median Household Incomes have the lowest percentage below the poverty level. These patterns are basically the same for Median Family Income.
Table 9. Number of East Central MN Households, 1999 Median Household Income by County

<table>
<thead>
<tr>
<th>County</th>
<th>Number of households*</th>
<th>1999 Median household income**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sherburne</td>
<td>21581</td>
<td>$57,014</td>
</tr>
<tr>
<td>Wright</td>
<td>31465</td>
<td>$53,945</td>
</tr>
<tr>
<td>Chisago</td>
<td>14454</td>
<td>$52,012</td>
</tr>
<tr>
<td>Isanti</td>
<td>11236</td>
<td>$50,127</td>
</tr>
<tr>
<td>Benton</td>
<td>13065</td>
<td>$41,968</td>
</tr>
<tr>
<td>Kanabec</td>
<td>5759</td>
<td>$38,012</td>
</tr>
<tr>
<td>Pine</td>
<td>9939</td>
<td>$37,379</td>
</tr>
<tr>
<td>Morrison</td>
<td>11816</td>
<td>$37,047</td>
</tr>
<tr>
<td>Mille Lacs</td>
<td>8638</td>
<td>$36,977</td>
</tr>
</tbody>
</table>

Source: 2000 Census SF1 & SF3 Profile

Table 9a. Number and Percent of East Central MN Counties below Poverty Level

<table>
<thead>
<tr>
<th>County</th>
<th>Percent of population below poverty level**</th>
<th>Population below poverty level**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pine</td>
<td>11.3</td>
<td>2831</td>
</tr>
<tr>
<td>Morrison</td>
<td>11.1</td>
<td>3488</td>
</tr>
<tr>
<td>Mille Lacs</td>
<td>9.6</td>
<td>2084</td>
</tr>
<tr>
<td>Kanabec</td>
<td>9.5</td>
<td>1402</td>
</tr>
<tr>
<td>Benton</td>
<td>7.1</td>
<td>2397</td>
</tr>
<tr>
<td>Isanti</td>
<td>5.7</td>
<td>1753</td>
</tr>
<tr>
<td>Chisago</td>
<td>5.1</td>
<td>2052</td>
</tr>
<tr>
<td>Wright</td>
<td>4.7</td>
<td>4211</td>
</tr>
<tr>
<td>Sherburne</td>
<td>4.4</td>
<td>2776</td>
</tr>
</tbody>
</table>

Source: 2000 Census SF1 & SF3 Profile

Figure 8. Percent of East Central MN Counties below Poverty Level

Source: 2000 Census SF3 Profile
6) Housing Units own/rent/ vacant-seasonal

One of the major factors affecting the landscape is the development of housing, both year round and seasonal. While one would expect that the rank order of the counties for number of housing units would follow the rank order of population, this appears not to be the case in the ECL counties. While the top and bottom ranks are similar, the middle ranks have an interesting anomaly. Pine County ranks 7th in population but virtually tied for third (15,353) with Chisago County (15,533) for the number of Housing Units. While one might expect that population increase trends follow the past patterns, a question needs to be asked about the housing unit anomaly. It appears that the explanation might rest heavily on the data in Table 10 pertaining to the percent of Vacant Housing Units, and the percentage of vacant units that are categorized as “Seasonal, Recreational, or Occasional Use” units. Pine County has both the highest number (5414) of Vacant Housing Units and has the highest percentage of Vacant Housing Units (84.5%) and that are in the “Seasonal, Recreational, or Occasional Use” category. It should be noted that other counties also have high percentages of Vacant Housing units that are in the “Seasonal, Recreational, or Occasional Use” category, but the numbers of Vacant Housing Units are from 3000 to approximately 300. See table 10 and figure 9.

Table 10. East Central Region Counties Total Number Housing Units, Number Vacant and the Number Vacant/Seasonal

<table>
<thead>
<tr>
<th>County</th>
<th>Total housing units</th>
<th>Vacant housing units</th>
<th>Vacant housing units, seasonal, recreational or occasional use %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pine County</td>
<td>15353</td>
<td>5414</td>
<td>84.5</td>
</tr>
<tr>
<td>Morrison County</td>
<td>13870</td>
<td>2054</td>
<td>81.3</td>
</tr>
<tr>
<td>Mille Lacs County</td>
<td>10467</td>
<td>1829</td>
<td>79.3</td>
</tr>
<tr>
<td>Kanabec County</td>
<td>6846</td>
<td>1087</td>
<td>74.6</td>
</tr>
<tr>
<td>Wright County</td>
<td>34355</td>
<td>2890</td>
<td>71.3</td>
</tr>
<tr>
<td>Sherburne County</td>
<td>22827</td>
<td>1246</td>
<td>67.7</td>
</tr>
<tr>
<td>Chisago County</td>
<td>15533</td>
<td>1079</td>
<td>62.9</td>
</tr>
<tr>
<td>Isanti County</td>
<td>12062</td>
<td>826</td>
<td>50.5</td>
</tr>
<tr>
<td>Benton County</td>
<td>13460</td>
<td>395</td>
<td>20</td>
</tr>
</tbody>
</table>

Figure 9. Total and Vacant Housing Units, Vacant Seasonal Units East Central Region

Data Set: Census 2000 Summary File 1 (SF 1)

Table 11. Average Household Size, 1970 to 2000, East Central Region

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Benton</td>
<td>3.6</td>
<td>3.0</td>
<td>2.7</td>
<td>2.6</td>
<td>-1.0, -29%</td>
</tr>
<tr>
<td>Morrison</td>
<td>3.5</td>
<td>3.0</td>
<td>2.8</td>
<td>2.6</td>
<td>-0.9, -27%</td>
</tr>
<tr>
<td>Wright</td>
<td>3.5</td>
<td>3.2</td>
<td>3.0</td>
<td>2.8</td>
<td>-0.7, -20%</td>
</tr>
<tr>
<td>Mille Lacs</td>
<td>3.1</td>
<td>2.8</td>
<td>2.7</td>
<td>2.5</td>
<td>-0.6, -20%</td>
</tr>
<tr>
<td>Pine</td>
<td>3.1</td>
<td>2.8</td>
<td>2.6</td>
<td>2.5</td>
<td>-0.6, -19%</td>
</tr>
<tr>
<td>Kanabec</td>
<td>3.2</td>
<td>2.8</td>
<td>2.7</td>
<td>2.6</td>
<td>-0.6, -18%</td>
</tr>
<tr>
<td>Isanti</td>
<td>3.3</td>
<td>3.0</td>
<td>2.9</td>
<td>2.7</td>
<td>-0.6, -18%</td>
</tr>
<tr>
<td>Sherburne</td>
<td>3.5</td>
<td>3.2</td>
<td>3.0</td>
<td>2.9</td>
<td>-0.6, -16%</td>
</tr>
<tr>
<td>Chisago</td>
<td>3.3</td>
<td>3.0</td>
<td>2.8</td>
<td>2.8</td>
<td>-0.5, -15%</td>
</tr>
</tbody>
</table>

Source: USA Counties 1998 Census
2000 Census

Average household size, between 1970 and 2000 dropped for all counties of the East Central Region. The ranking of percentage change in these years shows that Benton and Morrison dropped household size the most, as much as one person per household, and Sherburne and Chisago dropped the least, around .5 persons per household.

This trend follows the state-wide averages: the average Minnesota household contained 2.52 people in 2000, barely lower than the 2.58 figure recorded in 1990. This contrasts with the marked decline in household size from 3.20 to 2.58 between 1970 and 1990.

<table>
<thead>
<tr>
<th>County</th>
<th>Year</th>
<th>1980</th>
<th>1990</th>
<th>2000</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Population</td>
<td>25,187</td>
<td>30,185</td>
<td>34,226</td>
</tr>
<tr>
<td>Benton</td>
<td>Urban</td>
<td>11,685</td>
<td>16,044</td>
<td>20,217</td>
</tr>
<tr>
<td></td>
<td>Rural</td>
<td>13,502</td>
<td>14,141</td>
<td>14,009</td>
</tr>
<tr>
<td></td>
<td>Farm</td>
<td>3,862</td>
<td>2,595</td>
<td>1,957</td>
</tr>
<tr>
<td></td>
<td>Nonfarm</td>
<td>9,640</td>
<td>11,546</td>
<td>12,052</td>
</tr>
<tr>
<td>Isanti</td>
<td>Total Population</td>
<td>23,600</td>
<td>25,921</td>
<td>31,287</td>
</tr>
<tr>
<td></td>
<td>Urban</td>
<td>3,170</td>
<td>5,094</td>
<td>8,327</td>
</tr>
<tr>
<td></td>
<td>Rural</td>
<td>20,430</td>
<td>20,827</td>
<td>22,960</td>
</tr>
<tr>
<td></td>
<td>Farm</td>
<td>2,703</td>
<td>1,953</td>
<td>1,570</td>
</tr>
<tr>
<td></td>
<td>Nonfarm</td>
<td>17,727</td>
<td>18,874</td>
<td>21,390</td>
</tr>
<tr>
<td>Kanabec</td>
<td>Total Population</td>
<td>12,161</td>
<td>12,802</td>
<td>14,996</td>
</tr>
<tr>
<td></td>
<td>Urban</td>
<td>2,890</td>
<td>2,905</td>
<td>3,084</td>
</tr>
<tr>
<td></td>
<td>Rural</td>
<td>9,271</td>
<td>9,897</td>
<td>11,912</td>
</tr>
<tr>
<td></td>
<td>Farm</td>
<td>2,331</td>
<td>1,552</td>
<td>1,106</td>
</tr>
<tr>
<td></td>
<td>Nonfarm</td>
<td>6,940</td>
<td>8,345</td>
<td>10,806</td>
</tr>
<tr>
<td>Mille Lacs</td>
<td>Total Population</td>
<td>18,430</td>
<td>18,670</td>
<td>22,330</td>
</tr>
<tr>
<td></td>
<td>Urban</td>
<td>3,144</td>
<td>3,717</td>
<td>3,990</td>
</tr>
<tr>
<td></td>
<td>Rural</td>
<td>15,286</td>
<td>14,953</td>
<td>18,340</td>
</tr>
<tr>
<td></td>
<td>Farm</td>
<td>3,001</td>
<td>1,767</td>
<td>1,290</td>
</tr>
<tr>
<td></td>
<td>Nonfarm</td>
<td>12,285</td>
<td>13,186</td>
<td>17,050</td>
</tr>
<tr>
<td>Morrison</td>
<td>Total Population</td>
<td>29,908</td>
<td>41,945</td>
<td>64,417</td>
</tr>
<tr>
<td></td>
<td>Urban</td>
<td>11,208</td>
<td>18,464</td>
<td>28,087</td>
</tr>
<tr>
<td></td>
<td>Rural</td>
<td>18,700</td>
<td>23,481</td>
<td>36,330</td>
</tr>
<tr>
<td></td>
<td>Farm</td>
<td>1,839</td>
<td>1,265</td>
<td>1,217</td>
</tr>
<tr>
<td></td>
<td>Nonfarm</td>
<td>16,616</td>
<td>22,216</td>
<td>35,113</td>
</tr>
<tr>
<td>Pine</td>
<td>Total Population</td>
<td>58,681</td>
<td>68,710</td>
<td>89,986</td>
</tr>
<tr>
<td></td>
<td>Urban</td>
<td>7,466</td>
<td>19,279</td>
<td>41,968</td>
</tr>
<tr>
<td></td>
<td>Rural</td>
<td>51,215</td>
<td>49,431</td>
<td>48,018</td>
</tr>
<tr>
<td></td>
<td>Farm</td>
<td>7,608</td>
<td>4,710</td>
<td>3,286</td>
</tr>
<tr>
<td></td>
<td>Nonfarm</td>
<td>43,607</td>
<td>44,721</td>
<td>44,732</td>
</tr>
</tbody>
</table>

Source: U.S. Census
Land Use

Types of Use

The land use maps for each of the counties are provided in the Appendix. Table 13 provides the data which show the number of acres in each county for the land use categories.

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>Benton</th>
<th>Chisago</th>
<th>Isanti</th>
<th>Kanabec</th>
<th>Mille Lacs</th>
<th>Morrison</th>
<th>Pine</th>
<th>Sherburne</th>
<th>Wright</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deciduous Forest</td>
<td>30,109</td>
<td>73,888</td>
<td>68,444</td>
<td>141,137</td>
<td>133,740</td>
<td>163,740</td>
<td>635,702</td>
<td>76,791</td>
<td>59,194</td>
</tr>
<tr>
<td>Cultivated Land</td>
<td>137,656</td>
<td>98,188</td>
<td>103,355</td>
<td>69,244</td>
<td>42,152</td>
<td>238,508</td>
<td>38,232</td>
<td>102,622</td>
<td>244,598</td>
</tr>
<tr>
<td>Grassland</td>
<td>62,992</td>
<td>56,944</td>
<td>55,826</td>
<td>66,878</td>
<td>121,752</td>
<td>166,708</td>
<td>227,953</td>
<td>60,837</td>
<td>71,423</td>
</tr>
<tr>
<td>Wetlands</td>
<td>6,483</td>
<td>9,003</td>
<td>7,973</td>
<td>18,960</td>
<td>0</td>
<td>34,506</td>
<td>0</td>
<td>158,091</td>
<td>12,400</td>
</tr>
<tr>
<td>Water</td>
<td>3,439</td>
<td>16,151</td>
<td>9,022</td>
<td>6,416</td>
<td>70,939</td>
<td>16,686</td>
<td>21,295</td>
<td>21,295</td>
<td>6,907</td>
</tr>
<tr>
<td>Grassland-Shrub-Tree ComSx (Decid.)</td>
<td>10,049</td>
<td>8,383</td>
<td>20,806</td>
<td>26,273</td>
<td>0</td>
<td>43,691</td>
<td>0</td>
<td>9,054</td>
<td>3,300</td>
</tr>
<tr>
<td>Coniferous Forest</td>
<td>3,275</td>
<td>6,726</td>
<td>9,083</td>
<td>3,937</td>
<td>5,999</td>
<td>15,178</td>
<td>3,726</td>
<td>124</td>
<td>49,120</td>
</tr>
<tr>
<td>Wetlands: Marsh and Fens</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Regeneration/Young Forest</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>28,289</td>
<td>0</td>
<td>31,433</td>
<td>0</td>
<td>34,242</td>
</tr>
<tr>
<td>Mixed Forest</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>165</td>
<td>0</td>
<td>30,438</td>
<td>0</td>
<td>30,603</td>
</tr>
<tr>
<td>Wetlands: Bogs</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>8,994</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>8,994</td>
</tr>
<tr>
<td>Transitional Agricultural Land</td>
<td>49</td>
<td>511</td>
<td>790</td>
<td>969</td>
<td>0</td>
<td>820</td>
<td>0</td>
<td>480</td>
<td>166</td>
</tr>
<tr>
<td>Grassland-Shrub-Tree Comolx (Conif.)</td>
<td>77</td>
<td>353</td>
<td>965</td>
<td>430</td>
<td>0</td>
<td>1,158</td>
<td>0</td>
<td>151</td>
<td>3</td>
</tr>
<tr>
<td>Shrubby Grassland</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>807</td>
<td>0</td>
<td>863</td>
<td>0</td>
<td>1,669</td>
</tr>
<tr>
<td>Exposed Soil</td>
<td>6</td>
<td>16</td>
<td>13</td>
<td>3</td>
<td>0</td>
<td>11</td>
<td>0</td>
<td>71</td>
<td>151</td>
</tr>
<tr>
<td>Unlabeled/unclassified/Outside State or County</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Bare Rock</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>2</td>
<td>12</td>
</tr>
<tr>
<td>Total (Developed Land)</td>
<td>264,063</td>
<td>282,861</td>
<td>288,611</td>
<td>341,054</td>
<td>435,722</td>
<td>687,731</td>
<td>917,147</td>
<td>286,357</td>
<td>456,964</td>
</tr>
<tr>
<td>Total (Developed Land)</td>
<td>9,293</td>
<td>11,898</td>
<td>10,554</td>
<td>7,088</td>
<td>5,885</td>
<td>11,147</td>
<td>8,118</td>
<td>13,316</td>
<td>25,742</td>
</tr>
</tbody>
</table>

Sources: [http://mapserver.lmic.state.mn.us/landuse](http://mapserver.lmic.state.mn.us/landuse)

1The above category "Developed Land" is taken from USDA definitions and includes the definitions for large urban and built-up areas, rural transportation and land, and small built-up areas.

* Three of these categories “Forest”, “Grassland”, and “Water” are aggregations of related land use types. Cultivated Land is a “single” type, and “Other” combines a number of different types. It should be noted that the types combined to produce the “Other” category have extremely small acreages.

The data in Table 14 presents a summary of the land use data using five categories: Forest, Grassland, Cultivated Land, Water, and Other.

Settlement and land use varies across the counties. Some counties have relatively little land classified as Forest (Benton and Wright counties). Other counties have quite large acreages classified as Forest (Pine, Morrison, and Kanabec counties). Still other counties have high acreages of land classified as Grassland and/or Cultivated Land (Morrison, Wright, Isanti, Benton and Sherburne). Two counties (Mille Lacs and Pine) have high acreages classified as Wetlands.
Table 14. Summary of the Land Use Data Using Five Categories: Forest, Grassland, Cultivated Land, Water, and Other, East Central Region Counties

<table>
<thead>
<tr>
<th></th>
<th>Benton (264,063 acres)</th>
<th>Chisago (282,661 acres)</th>
<th>Isanti (288,611 acres)</th>
<th>Kanabec (341,054 acres)</th>
<th>Mille Lacs (435,722 acres)</th>
<th>Morrison (687,731 acres)</th>
<th>Pine (917,147 acres)</th>
<th>Sherburne (266,357 acres)</th>
<th>Wright (456,964 acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Forest Total</strong></td>
<td>33,384</td>
<td>80,614</td>
<td>77,527</td>
<td>145,075</td>
<td>138,185</td>
<td>169,496</td>
<td>462,751</td>
<td>80,517</td>
<td>59,318</td>
</tr>
<tr>
<td>% of total county</td>
<td>13%</td>
<td>28%</td>
<td>27%</td>
<td>43%</td>
<td>32%</td>
<td>25%</td>
<td>50%</td>
<td>28%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Grassland Total</strong></td>
<td>73,118</td>
<td>65,681</td>
<td>77,597</td>
<td>93,290</td>
<td>122,559</td>
<td>210,557</td>
<td>228,655</td>
<td>70,042</td>
<td>74,725</td>
</tr>
<tr>
<td>% of total county</td>
<td>28%</td>
<td>25%</td>
<td>29%</td>
<td>35%</td>
<td>46%</td>
<td>80%</td>
<td>87%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Water/Wetland Total</strong></td>
<td>9,922</td>
<td>25,953</td>
<td>18,775</td>
<td>25,376</td>
<td>126,962</td>
<td>51,192</td>
<td>179,386</td>
<td>19,307</td>
<td>52,193</td>
</tr>
<tr>
<td>% of total county</td>
<td>4%</td>
<td>10%</td>
<td>7%</td>
<td>10%</td>
<td>48%</td>
<td>19%</td>
<td>68%</td>
<td>7%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Cultivated Land</strong></td>
<td>137,656</td>
<td>98,188</td>
<td>103,355</td>
<td>69,244</td>
<td>42,152</td>
<td>238,508</td>
<td>38,232</td>
<td>102,622</td>
<td>244,598</td>
</tr>
<tr>
<td>% of total county</td>
<td>52%</td>
<td>37%</td>
<td>39%</td>
<td>26%</td>
<td>16%</td>
<td>90%</td>
<td>14%</td>
<td>39%</td>
<td>93%</td>
</tr>
<tr>
<td><strong>sub TOTALS</strong></td>
<td>254,079</td>
<td>270,436</td>
<td>277,254</td>
<td>332,984</td>
<td>429,857</td>
<td>669,753</td>
<td>909,025</td>
<td>272,488</td>
<td>430,834</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>9,984</td>
<td>12,425</td>
<td>11,357</td>
<td>8,070</td>
<td>5,865</td>
<td>17,978</td>
<td>8,122</td>
<td>13,869</td>
<td>26,130</td>
</tr>
<tr>
<td>% of total county</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>7%</td>
<td>3%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>264,063</td>
<td>282,861</td>
<td>288,611</td>
<td>341,054</td>
<td>435,722</td>
<td>687,731</td>
<td>917,147</td>
<td>286,357</td>
<td>456,964</td>
</tr>
</tbody>
</table>

The relative location and size of the land use units varies within the counties. For example, the Forest Land in Chisago County lies largely along the eastern border of the county. In Pine County, there are relatively large tracts of land classified as Forest and they are located throughout the County. In Wright County, the land classified as Forest is highly fragmented. Therefore, in some counties “restoration” would be essential if there is an expectation of managing the landscape to reduce fragmentation; in other counties maintenance of existing tract size would be essential. Pressures related to population will produce conflict within and across counties depending upon the landscape management strategies.
Figure 10. Category Totals in Acres for East Central Region Counties, by Category

Source: http://www.mnplan.state.mn.us/maps/LandUse/
Figure 11. East Central Region Land Totals by County

Source: http://www.mnplan.state.mn.us/maps/LandUse/
See also Land Use and Cover by county in Appendix

▶ Trends and Implications

Natural Resource planning which focuses on the landscape requires a number of things to be successful: Data, including natural, physical, and social/economic are certainly important. Some set of over-arching goals is also critical. The ways in which the natural, physical and social/economic data interact provides a more advanced level of information. The preceding descriptions have presented some of the high lights of some of the social data which pertain to the East Central Landscape, including:

County Population
- Counties differ in population—larger counties are found closer to the Metropolitan Area
- Counties differ in the percent rural/urban—counties with larger urban populations are closer to the Metropolitan Area, rural counties more distant from the Metropolitan Area
- Counties differ in the level of population change—seven of the counties with Net Migration Rates 3 to 8 times higher than the Minnesota rate
- Counties differ in the rate of population increase—some counties doubled and one tripled in population over the past 40 years, with increases between 10,000 to 20,000 in the past 10 years.
- Counties differ in age structure—the counties with smaller populations tend to have higher median age for the county and larger counties tend to have larger percentages of the population in the labor force range (18 – 65 years)
 Counties differ in income levels—the counties closer to the Metropolitan Area have higher median household incomes, and four counties (Kanabec, Mille Lacs, Morrison, and Pine) have between 9.5 and 11.3 percent of the population below the poverty level.

**Travel Time**
Average travel times to work in the East Central Region range between just over 20 minutes to almost 35 minutes.

**Housing**
- The number of housing units varies along the lines of population size, but the number and percent of vacant housing units follows an inverse trend—counties with smaller populations tend to have higher percentages of vacant housing units.
- The percent of vacant housing units which are seasonal, recreational, or occasional use units is higher in the less densely populated counties—Pine county has the highest percentage of vacant housing units, and the highest percentage of vacant housing units which are for seasonal, recreational, or occasional use.

**Land Use**
- Counties vary in total acreage—Pine County is almost three times larger than five of the other counties. Morrison is about 66% as large as Pine. Wright and Mille Lacs are about one half the size of Pine County.
- Settlement and accompanying land use patterns vary across the counties—urban and industrial use acreage varies from almost 9,000 acres in Wright County to between 1300 and 2200 acres in Kanabec, Mille Lacs, and Pine counties. These three counties rank lowest in the number of acres for Farmsteads, Rural Residences and Rural Residential Development.
- Land use patterns vary across counties, not only in amount but in distribution—Chisago County has some forest, but it tends to be concentrated along the eastern border. Wright County has some forest but it is highly fragmented.
- Counties vary by the percent of land classified as Forest, Grassland, Water/wetland, and Cultivated land. Pine County has the largest total acreage of Forest, with Kanabec, Mille Lacs, and Morrison following in decreasing amounts.

**Considerations for Policy Development**
Social and economic variables provide a framework within which landscape management can be developed. The preceding descriptions have presented an overview of some of the social conditions within the East Central Landscape. There are, however, some further considerations with regard to those variables that may help inform the planning process. One of the major considerations is that the East Central area is not homogeneous. There are important differences across the area with regard to population size, composition, income, housing, land use, etc. The variability in the demographics of the area may well be related to a number of important considerations for landscape management, such as:

- the ways in which the residents see the natural resources,
how and what they value about those resources,
how dependent they are upon the resources for their livelihood and/or recreation,
their willingness and capacity to participate in a policy development process,
their lifestyles and opportunity structures,
the amount and type of social capital in communities and
the ability, willingness, and capacity to adapt to changes in the ecosystem.

All these points for discussion should involve recognition of the position of the natural resources-dependent tourism and forest products industries, relative to the State and the nation. For instance, compared to the State, concentrated in the region are the industries of Boat Building and Repairing, Paperboard Mills, Veneer and Plywood, Wood Kitchen Cabinets, Woodworking Machinery. And among the forest products industries in the analysis, the densely represented and fastest growing are Millwork, Structural Wood Members, N.E.C, Wood Products, N.E.C, Logging Camps and Logging Contractors, Wood Pallets and Skids, Wood Containers, Sawmills and Planing Mills, General, Paper Mills, Except Building Paper, and Reconstituted Wood Products.

In addition, there are apparent limitations on the landscape for sustaining some level of human activity and to respond to attempts to restore some of the natural and physical features which have been changed. It is important, therefore, to not only consider the importance of similarities, it is also necessary to consider heterogeneity across the East Central Landscape, when developing policy. That is, there are differences as one views the ECL from a north to south direction in terms of population, land use, etc.

**FINDINGS: ECONOMIC BASE**

The following discussion summarizes the economic base of the East Central Region by looking at the top industries in terms of three measures: production of goods (output), employment, and compensation (value-added). The discussion of economic base also reports on the findings of two analyses of these three measures:

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3 The source for these tables is 2000 IMPLAN data and software. Industry Output and Value-Added are reported in millions of dollars, noted with an asterisk (*) in the supporting data tables available in the appendix.
Also note: Census data used in the social environment analysis reports data by place of residence. IMPLAN data used for the economic analyses reports data by place of work.
The rankings are out of a possible 528 industries in the input-output system.
Output is defined as the production and distribution, in dollar terms, of intermediate goods (to other industries) and final goods demand sectors.
Value added is the dollar value of compensation and proprietor’s income.
Employment is total employment and not fulltime equivalent employment. Note: The employment data sets used in IMPLAN are the ES202, Regional Economic Information System (REIS), and County Business Patterns. [From the U.S. Department of Commerce definition of Employment, employment includes all wage and salary employees, including self-employed jobs. Full-time and part-time employees are both included and are measured in terms of annual average jobs. ] Thus, industries such as Retail Trade and Eating and Drinking Places, will show up as major employers in the region due to the large number of part time employees employed by these industries.
1) **Analysis of industry importance:** How Important is an Industry? This analysis shows how concentrated an industry is in the county, relative to the same industry in the region and state. Industries reported as highly concentrated can be described as basic to the regional economy—one of the drivers of the local economy.\(^4\) The following discussion presents only the top ranked industries as findings for the county-by-county profiles. More detailed data for these rankings can be found in the appendix to this report.

2) **Analysis of trends:** this analysis describes regional or county activity in relation to state or national activity.\(^5\) Again, the following discussion presents only the top ranked industries as findings for the county-by-county profiles. More detailed data for these rankings can be found in the appendix to this report.

Note: The source for these tables is 2000 IMPLAN data and software.\(^6\) Industry Output and Value-Added are reported in millions of dollars, noted with an asterisk (*). Also note: Census data used in the social environment analysis reports data by place of residence. IMPLAN data used for the economic analyses reports data by place of work.

► **County-by-County Profiles**

This analysis looks at three measures for each of the nine counties in the East Central Region (production of goods in millions of dollars; employment; compensation in millions of dollars), and rank them according to size to show the leading industries in the county. County industries are also analyzed according to relative importance to the county (as compared to the State of Minnesota), and also analyzed for growth trends.

Some IMPLAN industry sectors have been cut from the discussion of county economic base as they can be misleading when they appear in the rankings. For the location quotient and shift-share analyses, for instance, construction and real estate industries, and related IMPLAN sectors such as “Owner Occupied Dwellings” (which accounts for expenditures by home owners which do not create direct employment), can represent industries which have special relationships within the input-output tables, or which fluctuate greatly because of variables not necessarily related to the following discussion. Such sectors, which are not good measures of tracking the county economy for purposes of showing relative importance and significant growth trends, have been removed from the discussion but can be found in the appendix tables.

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\(^4\) Shift-share analysis was performed for each measure of each of the nine counties.

\(^5\) Location quotient analysis was performed for each measure of each of the nine counties.

\(^6\) Data and software: Minnesota IMPLAN Group, Inc., IMPLAN System (data and software), 1725 Tower Drive West, Suite 140, Stillwater, MN 55082 www.implan.com
Benton County

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

Table 15, Benton County Profile
Source: 2000 IMPLAN data and software

<table>
<thead>
<tr>
<th>County</th>
<th>profile:</th>
<th>Largest industries</th>
<th>Most concentrated industries</th>
<th>Fastest growing industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benton</td>
<td></td>
<td>Commercial Printing</td>
<td>Woodworking Machinery</td>
<td>Commercial Printing</td>
</tr>
<tr>
<td></td>
<td>34,226</td>
<td>Wholesale Trade</td>
<td>Ophthalmic Goods</td>
<td>Wholesale Trade</td>
</tr>
<tr>
<td></td>
<td>408</td>
<td></td>
<td>Wood Kitchen Cabinets</td>
<td></td>
</tr>
<tr>
<td></td>
<td>19,384</td>
<td></td>
<td>Flavoring Extracts and Syrups</td>
<td></td>
</tr>
<tr>
<td></td>
<td>146</td>
<td></td>
<td>Textile</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13,067</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$64,465</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$842,363,008</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What are the largest industries in the county?
- Commercial Printing’s production and distribution of goods ($147 million), its employment (1,166), and its compensation ($60 million) are very important to the county.
- Wholesale Trade’s production and distribution of goods ($120 million), employment (1,299), and compensation ($82 million) are also very important to the County.
- Also important to the County’s economy is the production of Sausages and Other Prepared Meats, and the number of people employed in Nursing and Protective Care.

What are the most concentrated industries in the county?
- Industries that are more concentrated in Benton County than in the State include Woodworking Machinery, Ophthalmic Goods, Wood Kitchen Cabinets, Flavoring Extracts and Syrups, and Textile Bags.
- The employment density for the Woodworking Machinery industry is the most concentrated of all the industries in the County, followed by Ophthalmic Goods, and Wood Kitchen Cabinets.

Where is the growth happening in the county’s economic structure?
Growth industries in Benton County are Commercial Printing, Hay and Pasture, Wholesale Trade, Detective and Protective Services, and Real Estate.

Benton County profile:
Benton County has the highest percent of urban population of the East Central Region, (near St. Cloud), and shows the shortest travel time to work of the nine counties. Benton County has relatively little land classified as Forest, and relatively high acreage of land classified as Grassland and/or Cultivated land.
Chisago County

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

Table 16. Chisago County Profile
Source: IMPLAN 2000 data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Largest industries</th>
<th>Most concentrated industries</th>
<th>Fastest growing industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chisago</td>
<td>State &amp; Local Government – Education, and Residential Care are major employer industries for the County</td>
<td>Boat Building and Repairing</td>
<td>State &amp; Local Government – Education and Residential Care are the fastest growing major employer industries for the County</td>
</tr>
<tr>
<td></td>
<td>State &amp; Local Government – Education and Residential Care</td>
<td>Ready-mixed Concrete</td>
<td>Miscellaneous Plastics Products and Banking are the fastest growing major producers of goods, and sources of compensation for Chisago County.</td>
</tr>
<tr>
<td></td>
<td>Forest Products</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What are the largest industries in the county?

- Miscellaneous Plastics Products’ production and distribution of goods ($123 million), and it’s compensation ($39 million) are most important to the county.
- Banking’s production and distribution of goods ($59 million), and compensation ($39 million), are also very important to the County.
- Also important to the County’s economy are the number of people employed in Residential Care (1,432), Eating & Drinking (1,088), and Government – both Education and Non-Education (2,098).

What are the most concentrated industries in the county?

- Industries that are significantly more concentrated in the County than in the State include Boat Building and Repairing, Residential Care, Ready-mixed Concrete, Miscellaneous Plastics Products, and Forest Products.
- The employment density for the Boat Building and Repairing industry is the most concentrated of all the industries in the County, followed by Residential Care.
- Forest Products has significant density of production of goods and compensation compared to the State but less density for employment.
- Sheet Metal Work appears significant for employment but less significant for production and compensation.

Where is the growth happening in the county’s economic structure?

Growth industries in the County include Sheet Metal Work, Banking, Government – Education, and in employment terms, Hay and Pasture, and Eating & Drinking.

Chisago County profile:

Chisago County has one of the highest number of in-migrants and one of the highest net migrations of the East Central Region. Chisago has the second longest travel to work time of the nine-county Region. Chisago has the third highest median household income
in the East Central Region, and is also third in total number of housing units. Chisago shows how the relative location and size of the land use units varies within the counties, for example, the Forest land that Chisago County includes lies largely along the eastern border of the county.

**Isanti County**

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

Table 17. Isanti County Profile

Source: IMPLAN 2000 data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Population</th>
<th>Area (Sq.Miles)</th>
<th>Employment</th>
<th>Number of Industries</th>
<th>Households</th>
<th>Income per household</th>
<th>Total Person Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Isanti</td>
<td>31,287</td>
<td>439</td>
<td>16,454</td>
<td>145</td>
<td>11,266</td>
<td>$69,611</td>
<td>$784,240,000</td>
</tr>
</tbody>
</table>

### Largest industries
- State & Local Government-Education, and Hospital’s production and employment ($77 million), and it’s compensation ($51 million) are very important to the county.
- State & Local Government-Education’s production and distribution of goods ($46 million), and its place as a top employer with 1,195 employees makes it a very important industry to the County.
- Hospital’s production and distribution of goods ($63 million), it’s employment (1,011, second only to Government-Education), and it’s compensation ($38 million) are very important to the county.
- Nursing and Protective Care is an important employer in the County (738 employees).
- Also significant, but just under the top three combined rankings is Industrial Machines, which contributes $46 million in production of goods, and $22 million in compensation.

### Most concentrated industries
- Industries that are significantly more concentrated in the County than in the State include Fabricated Plate Work (Boiler Shops) and Forest Products.
- Industrial Machines N.E.C. also ranks as densely represented in production of goods, employment, and compensation, compared to the State.

### Fastest growing industries
- State & Local Government-Education, and Hospital’s production and employment rankings, and their rankings as growth industries make them very important industries to the County.
- Fabricated Plate Work (Boiler Shops) is densely represented and also ranks as a fast growth industry.

What are the largest industries in the county?
- Banking’s production and distribution of goods ($77 million), and it’s compensation ($51 million) are very important to the county.
- State & Local Government-Education’s production and distribution of goods ($46 million), and its place as a top employer with 1,195 employees makes it a very important industry to the County.
- Hospital’s production and distribution of goods ($63 million), it’s employment (1,011, second only to Government-Education), and it’s compensation ($38 million) are very important to the county.
- Nursing and Protective Care is an important employer in the County (738 employees).
- Also significant, but just under the top three combined rankings is Industrial Machines, which contributes $46 million in production of goods, and $22 million in compensation.

What are the most concentrated industries in the county?
- Industries that are significantly more concentrated in the County than in the State include Fabricated Plate Work (Boiler Shops) and Forest Products.
- Industrial Machines N.E.C. also ranks as densely represented in production of goods, employment, and compensation, compared to the State.

Where is the growth happening in the county’s economic structure?
- Growth industries in the County include State & Local Government – Education, Hospitals, Maintenance and Repair Other Facilities, Hay and Pasture, and
Fabricated Plate Work (Boiler Shops).

**Isanti County Profile:**

Isanti commuters have the longest travel to work time in the East Central Region. Isanti County has a high percent of acreage of land classified as “grassland” and/or “cultivated land.” In most respects the County falls in the middle rankings of most variables reported for the nine counties.

**Kanabec County**

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

**Table 18. Kanabec County Profile**

Source: IMPLAN 2000 data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Largest industries</th>
<th>Most concentrated industries</th>
<th>Fastest growing industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kanabec</td>
<td>14,996 Miscellaneous Retail</td>
<td>Photofinishing</td>
<td>Commercial Photography</td>
</tr>
<tr>
<td></td>
<td>525 Miscellaneous Plastics Products Hay and Pasture</td>
<td>Commercial Photography is a County specialization, the industry appears on the top ten goods producing list, and is also ranked high in the fastest growing industries in the County.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6,738 State &amp; Local Government – Education and State &amp; Local Government - Non-Education are major employers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>107 Maintenance and Repair Other Facilities brings $16 million in production of goods to the county, the employment ranking in the top ten with 234 employees, and compensation of $11 million make this industry important to the County.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5,754 Banking’s production and distribution of goods ($36 million), it’s employment ranking in the top ten (179 employees), and it’s compensation ($24 million) are very important to the county.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>951,423 Commercial Photography is a County specialization, the industry appears on the top ten goods producing list, and is also ranked high in the fastest growing industries in the County.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$295,889,984 Miscellaneous Plastics Products, Banking, and State &amp; Local Government - Non-Education are major producers of goods, and major sources of compensation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$51,423 Commercial Photography is a County specialization, the industry appears on the top ten goods producing list, and is also ranked high in the fastest growing industries in the County.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What are the largest industries in the county?

- Miscellaneous Plastics Products’ production and distribution of goods ($88 million), and it’s compensation ($26 million) are very important to the county.
- State & Local Government - Non-Education’s production and distribution of goods ($17 million), its employment ranking in the top five with 396 employees, and it’s compensation ($17 million) are very important to the county.
- Maintenance and Repair Other Facilities brings $16 million in production of goods to the county, the employment ranking in the top ten with 234 employees, and compensation of $11 million make this industry important to the County.
- Banking’s production and distribution of goods ($36 million), it’s employment ranking in the top ten (179 employees), and it’s compensation ($24 million) are very important to the county.
- Also important to the County’s economy are the number of people employed in Miscellaneous Retail.
What are the most concentrated industries in the county?
- Industries that are significantly more concentrated in Kanabec County than in the State include Miscellaneous Plastics Products, Photofinishing, Commercial Photography, and Hay and Pasture.

Where is the growth happening in the county’s economic structure?
Growth industries in the County are Hay and Pasture, State & Local Government - Non-Education, and Photofinishing, Commercial Photography.

**Kanabec County profile:**
Kanabec, Mille Lacs, Morrison, and Pine) have between 9.5 and 11.3 percent of the population below the poverty level between 1300 and 2200 acres in Kanabec, Mille Lacs, and Pine counties – these three counties rank lowest in the number of acres for Farmsteads, Rural Residences and Rural Residential Development. Pine county has the largest total acreage of “forest”, with Kanabec, Mille Lacs, and Morrison following in decreasing amounts

**Mille Lacs County**

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

**Table 19. Mille Lacs County Profile**
Source: IMPLAN 2000 data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Profile</th>
<th>Largest industries</th>
<th>Most concentrated industries</th>
<th>Fastest growing industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mille Lacs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population</td>
<td>22,330</td>
<td>The County's largest goods producers and</td>
<td>Most concentrated industries include Apparel From Purchased Materials,</td>
<td>Growth industries in the County are,</td>
</tr>
<tr>
<td>Area (Sq.Miles)</td>
<td>575</td>
<td>employers are also where most of the</td>
<td>Electromedical Apparatus, Amusement and Recreation</td>
<td>in order of employment growth</td>
</tr>
<tr>
<td>Employment</td>
<td>13,197</td>
<td>growth and the industry concentration is</td>
<td>Amusement and Recreation Services, N.E.C., Millwork and</td>
<td>ranking: Amusement and Recreation</td>
</tr>
<tr>
<td>Number of Industries</td>
<td>126</td>
<td>located: Amusement and Recreation</td>
<td>Hardwood Dimension and Flooring</td>
<td>Services, N.E.C., State &amp; Local</td>
</tr>
<tr>
<td>Households</td>
<td>8,648</td>
<td>Services, N.E.C.</td>
<td>Education</td>
<td>Government - Education, Hospitals,</td>
</tr>
<tr>
<td>Income per household</td>
<td>$55,031</td>
<td>State &amp; Local Government - Hospitals, and Electromedical Apparatus</td>
<td></td>
<td>and Electromedical Apparatus.</td>
</tr>
<tr>
<td>Total Person Income</td>
<td>$475,910,016</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What are the largest industries in the county?
- Amusement and Recreation Services, N.E.C.production and distribution of goods ($90 million), it’s employment (2,330) and it’s compensation ($60 million) are very important to the county.
- Electromedical Apparatus’ production and distribution of goods ($98 million), it’s employment (466) and it’s compensation ($15 million) are also very important to the county.
- Hospitals bring $40 million in production and distribution of goods, employ 632, and show $25 million in compensation, making this industry important to the County.
• The State & Local Government – Education industry sector brings $33 million in production and distribution of goods, employs 885, and shows $33 million in compensation, making this industry important to the County.

What are the most concentrated industries in the county?

• Industries that are significantly more concentrated in Mille Lacs County than in the State include Apparel Made From Purchased Materials, Electromedical Apparatus, Amusement and Recreation Services, N.E.C., Millwork and Hardwood Dimension and Flooring Mills

Where is the growth happening in the County’s economic structure?

Growth industries in the County are, in order of employment growth ranking: Amusement and Recreation Services, N.E.C., State & Local Government – Education, Hospitals, and Electromedical Apparatus. Growth in production of goods is also seen in Miscellaneous Plastics Products.

Mille Lacs County profile:

Mille Lacs can be described as a county that has the second smallest population base, a lower median income and greater poverty level than the counties closer to the Metropolitan Area in the East Central Region. The total acreage represented by Mille Lacs County is about half the size of Pine County which is almost three times larger in total acres than five of the other counties. Mille Lacs (and Pine) has high acreages of the county classified as “wetlands” compared to other counties in the Region. Mille Lacs, (along with Kanabec and Pine counties) ranks lowest in the number of acres for Farmsteads, Rural Residences and Rural Residential Development

Morrison County

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

Table 20. Morrison County Profile
Source: IMPLAN 2000 data and software
What are the largest industries in the county?

- Boat Building and Repairing’s production and distribution of goods ($137 million), employment (1,123), and its compensation ($55 million) are very important to the county.
- State & Local Government – Education’s production and distribution of goods ($38 million), its employment ranking in the top five with 924 employees, and its compensation ($38 million) are also very important to the county.
- Wholesale Trade brings $33 million in production of goods to the county, the employment ranking in the top ten with 432 employees, and compensation of $23 million make this industry important to the County.
- Hay and Pasture’s production and distribution of goods ($33 million), and its employment ranking in the top ten (1,286 employees), are very important to the county.

What are the most concentrated industries in the county?

- Industries that are significantly more concentrated in Morrison County than in the State include Boat Building and Repairing, Commercial Fishing, and Canned and Cured Sea Foods.
- Dairy Farm Products, Hay and Pasture, Poultry and Eggs are also more densely represented in Morrison County than in the State.

Where is the growth happening in the county’s economic structure?

Among the fastest growing industries in the County are Hay and Pasture, Boat Building and Repairing, State & Local Government – Education, Residential Care, and Agricultural, Forestry, Fishery Services.

### Morrison County profile:

Morrison is about two thirds as large as Pine (the largest ECL county) in total acreage. Morrison has the fourth largest total acreage of Forest. Morrison is among the counties which have high acreages of land classified as Grassland and/or Cultivated land.

All counties except Morrison County have positive net migration rates (in-migration minus out-migration). Morrison has the second shortest travel to work time. Four counties (Kanabec, Mille Lacs, Morrison, and Pine) have between 9.5 and 11.3 percent of the population below the poverty level.
The 52,928 acres of Camp Ripley, near NW Morrison County are not included in the study area. Camp Ripley National Guard Training Facility partners with the Minnesota Department of Natural Resources and The Nature Conservancy.

Pine County

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

Table 21. Pine County Profile
Source: IMPLAN 2000 data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Profile</th>
<th>Largest Industries</th>
<th>Most Concentrated Industries</th>
<th>Fastest Growing Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pine</td>
<td>26,530</td>
<td>The major industries as well as the growth Amusement and Recreation</td>
<td>Amusement and Recreation Services, Logging Camps and Logging Contractors</td>
<td>Services, Hay and Pasture, State &amp; Local Government – Education</td>
</tr>
<tr>
<td>Population</td>
<td>1,411</td>
<td>industries in the county are Amusement Services, Logging Camps and Logging Contractors</td>
<td>State &amp; Local Government – Education</td>
<td>Amusement and Recreation</td>
</tr>
<tr>
<td>Area (Sq.Miles)</td>
<td>11,867</td>
<td>and Recreation Services</td>
<td>Logging Contractors</td>
<td>Services, Hay and Pasture, State &amp; Local Government – Education</td>
</tr>
<tr>
<td>Employment</td>
<td>9,908</td>
<td>Hay and Pasture</td>
<td>Photographic Equipment and Supplies</td>
<td>State &amp; Local Government – Education</td>
</tr>
<tr>
<td>Number of Industries</td>
<td>125</td>
<td>State &amp; Local Government – Education</td>
<td>Sand and Gravel</td>
<td>State &amp; Local Government – Education</td>
</tr>
<tr>
<td>Households</td>
<td>9,908</td>
<td>Eating &amp; Drinking</td>
<td>Wood Household Furniture</td>
<td>Wood Household Furniture</td>
</tr>
<tr>
<td>Income per Household</td>
<td>$50,732</td>
<td>Education.</td>
<td>are in dense concentration in</td>
<td>are in dense concentration in</td>
</tr>
<tr>
<td>Total Person Income</td>
<td>$502,652,000</td>
<td>Eating &amp; Drinking</td>
<td>Pine</td>
<td>County.</td>
</tr>
</tbody>
</table>

What are the largest industries in the county?
- Amusement and Recreation Services, N.E.C. production and distribution of goods ($104 million), its employment (2,740), and it’s compensation ($68 million) are very important to the county.
- State & Local Government – Education’s production and distribution of goods ($28 million), its employment ranking in the top five with 636 employees, and it’s compensation ($28 million) are very important to the county.
- Eating & Drinking production and distribution of goods ($28 million), its employment ranking in the top five with 846 employees, and it’s compensation ($14 million) are very important to the county.

What are the most concentrated industries in the county?
- Industries that are significantly more concentrated in Pine County than in the State include Amusement and Recreation Services, Fabricated Metal Products, Forest Products, Hay and Pasture, Logging Camps and Logging Contractors, Photographic Equipment and Supplies, Sand and Gravel, and Wood Household Furniture.

Where is the growth happening in the county’s economic structure?
Growth industries in the County are Amusement and Recreation Services, Hay and Pasture, State & Local Government – Education, which are all ranked on the major industries lists for current production of goods, employment and compensation as well as here as the fastest growing industries of the County.

Pine County profile:
Pine is among the four counties that have between 9.5 and 11.3 percent of the population below the poverty level. Pine County has the highest percentage of vacant housing units and the highest percentage of vacant housing units which are designated seasonal, recreational, or occasional use. Pine County is almost three times larger in total acres than five of the other counties. Pine County has the largest total acreage of forest.

Pine is among the three counties which rank lowest in the number of acres for Farmsteads, Rural Residences and Rural Residential Development.

**Sherburne County**

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

### Table 22. Sherburne County Profile
Source: IMPLAN 2000 data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Profile:</th>
<th>Largest Industries</th>
<th>Most Concentrated Industries</th>
<th>Fastest Growing Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sherburne</td>
<td></td>
<td>Wholesale Trade</td>
<td>Concrete Products</td>
<td>The fastest growing employers are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>State &amp; Local Government – Education</td>
<td>Electric Services</td>
<td>Industrial and Fluid Valves</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>are large employers, producers of goods,</td>
<td>Accounting Auditing and</td>
</tr>
<tr>
<td></td>
<td></td>
<td>and contributors of compensation for the</td>
<td>Bookkeeping</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>County.</td>
<td>Industrial Machines N.E.C.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nursing and Protective Care is an important</td>
<td>Structural Wood Members</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>industry employer, and Electric Services is</td>
<td>Wood Kitchen Cabinets.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>very important as a producer of goods and</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>compensation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What are the largest industries in the county?
- Wholesale Trade production and distribution of goods ($94 million), its employment (906), and its compensation ($65 million) are very important to the county.
- State & Local Government – Education’s production and distribution of goods ($87 million), its employment ranking in the top five with 2,118 employees, and its compensation ($87 million) are very important to the county.
- Also important are Nursing and Protective Care as an important industry employer (1,116 employees), and Electric Services with $246 million in production of goods, and $207 million in compensation.

What are the most concentrated industries in the county?
- Industries that are significantly more concentrated in Sherburne County than in the State include Concrete Products, Electric Services, Forest Products, Industrial and Fluid Valves, Paperboard Mills, Ready-mixed Concrete, Structural Wood Members, and Wood Kitchen Cabinets.

Where is the growth happening in the county’s economic structure?

Growth industries in the County are, according to the employment rankings,

Sherburne County profile:

From 1960 to the 2000 census, for the East Central Region counties, Wright and Sherburne show the greatest increases in population. Sherburne County almost quadrupled. Wright and Sherburne, and Chisago counties (three counties that are close to the Twin Cities area) have the highest numbers of in-migrants. The counties with the highest net migration rates are Sherburne, Chisago, Pine, and Wright. Some of the longest commute times in Minnesota, ranging from 30 to 32 minutes each, occurred in the Greater Minnesota counties of Isanti, Chisago, Kanabec, Pine and Sherburne. Wright and Sherburne counties have the largest number of school-age children. Sherburne is one of the East Central counties with high acreage of land classified as Grassland and/or Cultivated land.

Wright County

Note: See also the appendix to this report for tables of industry rankings, location quotient, and shift-share analysis of county data. For clarification of industry definitions, please see appendix to this report.

Table 23. Wright County Profile
Source: IMPLAN 2000 data and software

<table>
<thead>
<tr>
<th>County</th>
<th>Largest industries</th>
<th>Most concentrated industries</th>
<th>Fastest growing industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wright</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population</td>
<td>89,986</td>
<td>Wright County's largest industries are</td>
<td>The industry sectors</td>
</tr>
<tr>
<td>Area (Sq.Miles)</td>
<td>661</td>
<td>Electric Services</td>
<td>Motor Freight Transport and Warehousing</td>
</tr>
<tr>
<td>Employment</td>
<td>40,876</td>
<td>Wholesale Trade</td>
<td>State &amp; Local Government – Education</td>
</tr>
<tr>
<td>Number of Industries</td>
<td>196</td>
<td>Motor Freight Transport and Warehousing</td>
<td>Wholesale Trade</td>
</tr>
<tr>
<td>Households</td>
<td>31,415</td>
<td>State &amp; Local Government – Education</td>
<td>State &amp; Local Government – Education</td>
</tr>
<tr>
<td>Income per household</td>
<td>37,788</td>
<td>Automotive Dealers &amp; Service Stations</td>
<td>State &amp; Local Government – Education</td>
</tr>
<tr>
<td>Total Person Income</td>
<td>$2,443,699.9</td>
<td>Maintenance and Repair Other Facilities.</td>
<td>State &amp; Local Government – Education</td>
</tr>
</tbody>
</table>

What are the largest industries in the county?

- Electric Services’s production and distribution of goods ($219 million), and it’s compensation ($185 million) are very important to the county.
- Wholesale Trade’s production and distribution of goods ($153 million), its employment ranking in the top five with 1,379 employees, and it’s compensation ($105 million) are very important to the county.
- Motor Freight Transport and Warehousing’s production and distribution of goods ($117 million), its employment ranking in the top ten with 1,010 employees, and it’s compensation ($53 million) are very important to the county.
- State & Local Government – Education’s production and distribution of goods ($101 million), especially its employment ranking in the top five with 2,751 employees, and it’s compensation ($101 million) are very important to the county.
• Automotive Dealers & Service Stations’s production and distribution of goods ($94 million), its employment ranking in the top ten with 1,507 employees, and it’s compensation ($71 million) are very important to the county.
• Maintenance and Repair Other Facilities’ production and distribution of goods ($94 million), its employment ranking in the top ten with 1,315 employees, and it’s compensation ($66 million) are very important to the county.

What are the most concentrated industries in the county?
Industries that are significantly more concentrated in Sherburne County than in the State include Veneer and Plywood, Textile Goods, N.E.C, and Hand and Edge Tools, N.E.C. Also concentrated in the County but less important are the industries of Roasted Coffee, and Sporting and Athletic Goods, N.E.C.

Where is the growth happening in the county’s economic structure?
Growth industries in the County are, according to the employment, goods production and compensation rankings, Motor Freight Transport and Warehousing, State & Local Government – Education, and Wholesale Trade. Also growing faster than other industries are Hay and Pasture, and Maintenance and Repair Other Facilities.

**Wright County profile:**
Wright has the largest population of the counties in the region, and the second largest population increase from 1990-2000. The population in Wright County virtually tripled between 1960 to 2000. Wright, County, close to the Twin Cities area, has one of the highest numbers of in-migrants. Wright and Sherburne counties have the largest number of school-age children.

Wright County has the largest Urban and Industrial acreage in the Region, almost 9,000 acres. Wright County has some Forest but it is highly fragmented. Settlement and land use varies across the counties. Wright County has relatively little land classified as Forest. In Wright County, the land classified as Forest is highly fragmented. Wright also has relatively high acreages of land classified as Grassland and/or Cultivated land.
Region’s Economic Base

This analysis looked at three measures for the East Central Region (output: production of goods in millions of dollars; employment; value added: compensation in millions of dollars), and ranks them according to size to show the largest industries in the Region. Regional industries are also analyzed according to relative importance (as compared to the State), and for growth trends. (Comparisons to the U.S. are available in the appendix tables.)

1) What are the largest industries in the Region?

Table 24. Top 25 East Central Region Industry Rankings, Employment, Output, and Value Added

<table>
<thead>
<tr>
<th>Rank</th>
<th>Industry</th>
<th>Employment</th>
<th>Output in millions of $</th>
<th>value added in millions of $</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>State &amp; Local Government - Educ</td>
<td>10,779</td>
<td>New Residential Structures 597</td>
<td>Electric Services 460</td>
</tr>
<tr>
<td>2</td>
<td>Eating &amp; Drinking</td>
<td>9,909</td>
<td>Electric Services        445</td>
<td>State &amp; Local Government - Educ 412</td>
</tr>
<tr>
<td>3</td>
<td>Amusement and Recreation Services</td>
<td>6,304</td>
<td>Banking                  521</td>
<td>State &amp; Local Government - Educ 345</td>
</tr>
<tr>
<td>4</td>
<td>State &amp; Local Government - Non-Fiscal</td>
<td>6,070</td>
<td>Wholesale Trade           496</td>
<td>Wholesale Trade 342</td>
</tr>
<tr>
<td>5</td>
<td>Wholesale Trade</td>
<td>5,214</td>
<td>State &amp; Local Government - Educ 412</td>
<td>Real Estate 280</td>
</tr>
<tr>
<td>6</td>
<td>Food Stores</td>
<td>5,160</td>
<td>Real Estate               402</td>
<td>State &amp; Local Government - Non-Fiscal 255</td>
</tr>
<tr>
<td>7</td>
<td>Nursing and Protective Care</td>
<td>5,149</td>
<td>Miscellaneous Plastics Products 374</td>
<td>Maintenance and Repair Other Fa 234</td>
</tr>
<tr>
<td>8</td>
<td>Maintenance and Repair Other Fa</td>
<td>5,058</td>
<td>Motor Freight Transport and Ware 367</td>
<td>Automotive Dealers &amp; Service Sta 213</td>
</tr>
<tr>
<td>9</td>
<td>Automotive Dealers &amp; Service Station</td>
<td>4,854</td>
<td>Maintenance and Repair Other Fa 336</td>
<td>Food Stores 161</td>
</tr>
<tr>
<td>10</td>
<td>Hay and Pasture</td>
<td>4,837</td>
<td>New Industrial and Commercial Bi 321</td>
<td>Motor Freight Transport and Ware 158</td>
</tr>
<tr>
<td>11</td>
<td>Miscellaneous Retail</td>
<td>4,401</td>
<td>Eating &amp; Drinking         298</td>
<td>Amusement and Recreation Servi 142</td>
</tr>
<tr>
<td>13</td>
<td>Real Estate</td>
<td>3,396</td>
<td>Automotive Dealers &amp; Service Sta 283</td>
<td>Doctors and Dentists 138</td>
</tr>
<tr>
<td>14</td>
<td>Motor Freight Transport and Ware</td>
<td>3,383</td>
<td>State &amp; Local Government - Non-Fiscal 255</td>
<td>Hospitals 129</td>
</tr>
<tr>
<td>15</td>
<td>Hospitals</td>
<td>3,361</td>
<td>Amusement and Recreation Servi 219</td>
<td>New Residential Structures 128</td>
</tr>
<tr>
<td>16</td>
<td>Accounting, Auditing and Bookkeeping</td>
<td>3,265</td>
<td>Doctors and Dentists       214</td>
<td>New Industrial and Commercial Bi 123</td>
</tr>
<tr>
<td>17</td>
<td>Labor and Civic Organizations</td>
<td>3,086</td>
<td>Hospitals                 212</td>
<td>Nursing and Protective Care 121</td>
</tr>
<tr>
<td>18</td>
<td>Residential Care</td>
<td>2,951</td>
<td>Industrial Machines N.E.C. 184</td>
<td>New Government Facilities 117</td>
</tr>
<tr>
<td>19</td>
<td>New Industrial and Commercial Bi</td>
<td>2,605</td>
<td>Other Business Services    183</td>
<td>Miscellaneous Plastics Products 111</td>
</tr>
<tr>
<td>20</td>
<td>Banking</td>
<td>2,563</td>
<td>Food Stores                177</td>
<td>Miscellaneous Retail 96</td>
</tr>
<tr>
<td>21</td>
<td>Doctors and Dentists</td>
<td>2,522</td>
<td>Boat Building and Repairing 176</td>
<td>Federal Government - Non-Mitig 91</td>
</tr>
<tr>
<td>22</td>
<td>General Merchandise Stores</td>
<td>2,417</td>
<td>Maintenance and Repair, Residen 172</td>
<td>Industrial Machines N.E.C. 87</td>
</tr>
<tr>
<td>23</td>
<td>Miscellaneous Plastics Products</td>
<td>2,126</td>
<td>Nursing and Protective Care 163</td>
<td>Other Business Services 84</td>
</tr>
<tr>
<td>24</td>
<td>Wood Kitchen Cabinets</td>
<td>1,931</td>
<td>Commercial Printing        160</td>
<td>Building Materials &amp; Gardening 81</td>
</tr>
<tr>
<td>25</td>
<td>Building Materials &amp; Gardening</td>
<td>1,833</td>
<td>Wood Kitchen Cabinets      159</td>
<td>Wood Kitchen Cabinets 76</td>
</tr>
<tr>
<td></td>
<td>source: IMPLAN</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In brief, State and Local Government-Education, Eating and Drinking, and Amusement and Recreation Services are the largest employers in the Region. New Residential Structures, Electric Services and Banking have the largest production of goods and services in the Region. Electric Services, State and Local Government-Education and Banking have the largest compensation in the Region.

2) What are the most concentrated industries in the Region (compared to the State)?

Analysis of industry importance: How Important is an Industry? This analysis shows how concentrated an industry is in the region, relative to the same industry in the State. Industries reported as highly concentrated can be described as basic to the regional economy—one of the drivers of the economy.7 The following list presents only the top

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7 Shift-share analysis was performed for each measure of the Region.
ranked industries as findings for the Regional profile. More detailed data for these rankings can be found in the appendix to this report.

Table 25. Ten Most Concentrated Industry Sectors in the East Central MN Region, Employment, Output, Value Added, Compared to the State

<table>
<thead>
<tr>
<th>rank</th>
<th>Top Ten Employment</th>
<th>rank</th>
<th>Top Ten Output</th>
<th>rank</th>
<th>Top Ten Value Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Paperboard Mills</td>
<td>1</td>
<td>Paperboard Mills</td>
<td>1</td>
<td>Paperboard Mills</td>
</tr>
<tr>
<td>2</td>
<td>Veneer and Plywood</td>
<td>2</td>
<td>Veneer and Plywood</td>
<td>2</td>
<td>Textile Goods, N.E.C</td>
</tr>
<tr>
<td>3</td>
<td>Boat Building and Repairing</td>
<td>3</td>
<td>Textile Goods, N.E.C</td>
<td>3</td>
<td>Veneer and Plywood</td>
</tr>
<tr>
<td>4</td>
<td>Wood Kitchen Cabinets</td>
<td>4</td>
<td>Canned and Cured Sea Foods</td>
<td>4</td>
<td>Canned and Cured Sea Foods Flavored Extracts and Syrups, N.E.C.</td>
</tr>
<tr>
<td>5</td>
<td>Woodworking Machinery</td>
<td>5</td>
<td>Flavoring Extracts and Syrups, N.E.C.</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Forest Products</td>
<td>6</td>
<td>Hand Saws and Saw Blades</td>
<td>6</td>
<td>Boat Building and Repairing</td>
</tr>
<tr>
<td>7</td>
<td>Commercial Fishing</td>
<td>7</td>
<td>Boat Building and Repairing</td>
<td>7</td>
<td>Wood Kitchen Cabinets</td>
</tr>
<tr>
<td>8</td>
<td>Poultry and Eggs</td>
<td>8</td>
<td>Wood Kitchen Cabinets</td>
<td>8</td>
<td>Roasted Coffee</td>
</tr>
<tr>
<td>9</td>
<td>Miscellaneous Livestock</td>
<td>9</td>
<td>Woodworking Machinery</td>
<td>9</td>
<td>Woodworking Machinery</td>
</tr>
<tr>
<td>10</td>
<td>Ready-mixed Concrete</td>
<td>10</td>
<td>Roasted Coffee</td>
<td>10</td>
<td>Commercial Fishing</td>
</tr>
</tbody>
</table>

Source: IMPLAN

The Forestry/Wood Products industries are extremely well represented in the above lists, showing that these industries are more densely represented in the East Central Region that elsewhere in the State.

3) What are the fastest growing industries in the Region (compared to the State)?

Analysis of trends: this analysis describes the fastest growing regional activity in relation to the State. Again, the following list presents only the top ranked industries as findings for the Regional profile. More detailed data for these rankings can be found in the appendix to this report.

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8 Location quotient analysis was performed for each measure of each of the Region.

UMD Bureau of Business and Economic Research / Labovitz School of Business and Economics
Table 26. Ten Fastest Growing Industry Sectors in the East Central MN Region, Employment, Output, Value Added, Compared to the State

<table>
<thead>
<tr>
<th>rank</th>
<th>Top Ten Employment</th>
<th>rank</th>
<th>Top Ten Output</th>
<th>rank</th>
<th>Top Ten Value Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hay and Pasture</td>
<td>1</td>
<td>New Residential Structures</td>
<td>1</td>
<td>State &amp; Local Government - Education</td>
</tr>
<tr>
<td>2</td>
<td>State &amp; Local Government - Education</td>
<td>2</td>
<td>Banking</td>
<td>2</td>
<td>Banking</td>
</tr>
<tr>
<td>3</td>
<td>Amusement and Recreation Services, N.E.C.</td>
<td>3</td>
<td>State &amp; Local Government - Education</td>
<td>3</td>
<td>Real Estate Maintenance and Repair Other Facilities</td>
</tr>
<tr>
<td>4</td>
<td>Eating &amp; Drinking</td>
<td>4</td>
<td>New Government Facilities</td>
<td>4</td>
<td>Maintenance and Repair Other Facilities</td>
</tr>
<tr>
<td>5</td>
<td>Accounting, Auditing and Bookkeeping</td>
<td>5</td>
<td>Real Estate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Maintenance and Repair Other Facilities</td>
<td>6</td>
<td>Wholesale Trade Motor Freight Transport and Warehousing</td>
<td>5</td>
<td>Wholesale Trade Automotive Dealers &amp; Service Stations</td>
</tr>
<tr>
<td>7</td>
<td>Facilities Automotive Dealers &amp; Service Stations</td>
<td>7</td>
<td>New Industrial and Commercial Buildings</td>
<td>6</td>
<td>Motor Freight Transport and Warehousing</td>
</tr>
<tr>
<td>8</td>
<td>New Residential Structures Motor Freight Transport and Warehousing</td>
<td>8</td>
<td>Other State and Local Govt Enterprises</td>
<td>7</td>
<td>New Industrial and Commercial Buildings</td>
</tr>
<tr>
<td>9</td>
<td>Eating &amp; Drinking</td>
<td>9</td>
<td>Automotive Dealers &amp; Service Stations</td>
<td>8</td>
<td>Food Stores</td>
</tr>
<tr>
<td>10</td>
<td>Hospitals</td>
<td>10</td>
<td>New Industrial and Commercial Buildings</td>
<td>9</td>
<td>New Residential Structures</td>
</tr>
</tbody>
</table>

Source: IMPLAN

The tourism related sectors of Amusement and Recreation Services, N.E.C. and Eating & Drinking are listed here as fast growing employment sectors.

Regional Profile Highlights

- Electric Services are high in value added and output, but low in employment.
- Out of the top 25 employers, four of them are in the Medical and Care industries.
- State and Local Government-Education is a very important industry, in terms of employment, value added and output.
- Also true of the Medical and Care industries, which include: Hospital, Residential Care, Nursing And Protective Care, and Doctors And Dentists.
- Tourism also plays an important role in the economy, as shown by the strength of the Amusement and Recreation Services and Eating and Drinking sectors.
- Wholesale and Retail Trade along with Banking and Construction are strong sectors in the East Central Region.
- Forestry/Wood Products industries are densely concentrated in the Region compared to elsewhere in the state.
Forest Products Importance to the Region

Which forest products industries are most densely concentrated and fastest growing in the Region?

When analyzing the forest products industry for the East Central Counties as a Region, comparing all three measures (employment, output, value added) the most densely represented and forest products industry sectors are: Paperboard Mills, Veneer and Plywood, Wood Kitchen Cabinets, and Woodworking Machinery.

These industries are all heavily represented in the top ten concentrated industries rankings, when compared to the State. They are deeply embedded in the structure of the Region’s economic base. Although they are concentrated in the Region, they are not fast growing industries.

Checking the top hundred industry sector rankings for fastest growing industries in the East Central Region, using the employment measure, only some Forestry/Wood Products industry sectors are represented and are ranked as follows:

<table>
<thead>
<tr>
<th>Rank</th>
<th>Industry Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>Furniture &amp; Home Furnishings Stores</td>
</tr>
<tr>
<td>26</td>
<td>Forest Products</td>
</tr>
<tr>
<td>38</td>
<td>Wood Kitchen Cabinets</td>
</tr>
<tr>
<td>60</td>
<td>Millwork</td>
</tr>
<tr>
<td>77</td>
<td>Structural Wood Members, N.E.C</td>
</tr>
<tr>
<td>89</td>
<td>Veneer and Plywood</td>
</tr>
<tr>
<td>98</td>
<td>Woodworking Machinery</td>
</tr>
<tr>
<td>102</td>
<td>Wood Products, N.E.C</td>
</tr>
</tbody>
</table>

Although Forestry/Wood Products industries do not rank in the top ten fastest growing industries, recreation and tourism, which depend on the forested landscape, are represented in fast growing employment industries. For instance in the top ten ranking for fastest growing are 3rd ranked Amusement and Recreation Services, N.E.C., and 4th ranked Eating & Drinking, both part of the “hospitality industry” and related to tourism.
APPENDIX

Land Use Data and Maps
County Inflow and Outflow
Economic Analyses
Data Sources