Minnesota Department of Employment and Economic Development

Review ONLINE

Minnesota Employment Review

http://mn.gov/deed/review

April 2014 Data...May 2014 Issue

County to County

Manufacturing in Central Minnesota

Manufacturing plays a large role in the economy of Central Minnesota. Even though the industry was surpassed by health care in terms of employment, manufacturing stands as the second largest industry. As recently as 2007 manufacturing was king in Central Minnesota and much of its regional dominance is still visible.

Many of the manufacturers that were the backbone of the economy still exist and thrive today. Manufacturing is still the largest industry in Benton, McLeod, and Meeker counties.

Manufacturing is significant in Central Minnesota not only because of the sheer number of jobs in the industry but also because the wages paid in the manufacturing industry are considerably higher than the average wage for all industries. The average hourly wage for all industries in Central Minnesota is $17.60 per hour, totaling $36,608 annually. Manufacturing occupations pays on average $21.68 per hour, averaging an annual salary of $45,084. This means that the manufacturing sector pay is about 24 percent higher than the average for all industries.

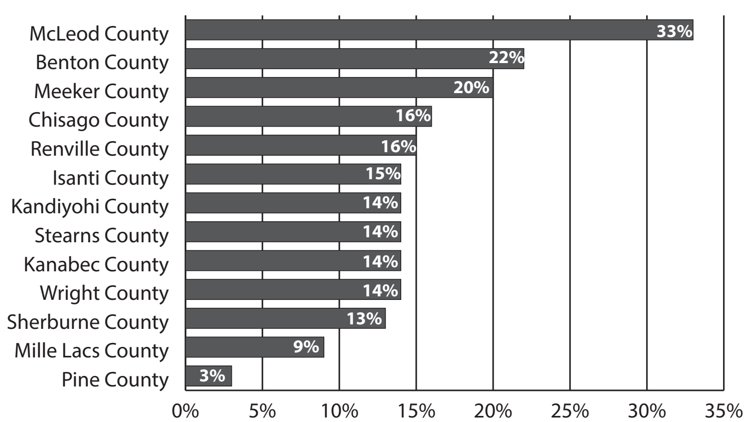
This article will look at side-by-side comparisons of the manufacturing industry in each of the 13 counties that make up the Central Planning Area. Third quarter data will be used for all comparisons unless otherwise noted to maintain consistency and because it is the most recent quarter data available.

The County Line

Each county of the Central Planning Area has a unique manufacturing sector that contributes greatly to the successes and struggles coming out of the recession. In most counties a very clear sector of manufacturing defines the goods they produce. A diverse manufacturing sector can bolster the economy by allowing strategic partnerships to complement other producers and help source parts locally. The mix also allows for important diversification that can allow an economy to sustain itself during volatile market fluctuations.

Figure one illustrates the relative share of employment among the 13 counties. McLeod County easily has the highest percentage of workers dedicated to manufacturing. All but Pine and Mille Lacs have a higher percentage of manufacturing employment than Minnesota's 11.5 percent.

Figure 1: Share of Employment in Manufacturing



Source: DEED, Quarterly Census of Employment and Wages (QCEW program)

Feature:

Chugging along in 2013

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Regional Spotlight CENTRAL MINNESOTA

Benton County

Manufacturing in Benton County employs 3,818 workers, 22.4 percent of all jobs in the county. The majority of these jobs are in the Food Manufacturing industry that employs 646 workers. Miscellaneous Manufacturing, largely medical equipment and supplies, is also worth mentioning because that industry has increased rapidly since 2009. If historical growth continues it will outpace the Food Manufacturing industry by next year. While the Manufacturing industry is still lagging in growth, areas such as Miscellaneous Manufacturing have excelled.

Chisago County

2,262 (16 percent) of all jobs in Chisago County are in the Manufacturing industry. More than 24 percent of Manufacturing jobs are in Plastics and Rubber Products Manufacturing. Manufacturing has fared well in Chisago and substantially outpaced the growth for all industries. Manufacturing in the county has also gained a larger share of employment since the end of the recession with a 3.7 percent increase.

Isanti County

1,537 jobs (14.5 percent) in Isanti County's workforce are in the Manufacturing industry. The largest sector is Fabricated Metal Product Manufacturing, employing more than a third of those in Manufacturing. The share of Manufacturing jobs increased since 2009 when 10.9 percent of jobs were in Manufacturing. The Fabricated Metals sector also gained a larger share of Manufacturing employees since 2009. Even though the growth for Fabricated Metals was a healthy amount since 2009, Manufacturing as a whole did extremely well, growing 38 percent.

Kanabec County

Kanabec County's workforce has 519 jobs (13.8 percent) in the Manufacturing sector. While the largest portions of them are employed in the Fabricated Metals Products industry, they represent less than 20 percent of all Manufacturing employees. This county has had negligible growth in general since the end of the recession. Manufacturing, however, has boomed, growing over 61 percent.

Kandiyohi County

3,309 (14.5 percent) of Kandiyohi jobs were in Manufacturing in 2013. It should be no surprise that Food Manufacturing is the largest sector by a large margin. Fully 61.4 percent of manufacturing employees are engaged in the Food sector. While the share of Manufacturing employment has increased about 1 percent, the share of those in Food Manufacturing has decreased about 3.5 percent. Manufacturing growth surpassed the growth of all industries combined by about 8 percent since 2009.

McLeod County

5,769 (33.1 percent) of all McLeod County jobs were in manufacturing. This has ticked up slightly from 2009 when 32.5 percent were employed in the industry. Food Manufacturing is the largest sub-sector with 22.7 percent of Manufacturing employees. The food plants have seen a healthy 38.1 percent gain since 2009, while the entire Manufacturing industry experienced a more modest 7.6 percent.

Meeker County

1,344 (19.6 percent) of the county's workforce is employed in Manufacturing with the largest portion in Machinery Manufacturing, roughly 27 percent. The third quarter of 2013 fluctuated significantly in Machinery Manufacturing resulting in decrease in employment and share among Manufacturing sectors. Closer examination of the first and second quarters of 2013 also shows similar figures, indicating the third-quarter loss is not isolated.

Mille Lacs County

With 848 (8.9 percent) jobs in Manufacturing, Mille Lacs County has experienced large gains in the sector since the recession. Manufacturing in this county has outpaced the average growth by nearly 30 percent. The largest industry, Furniture and Related Product Manufacturing, gained an astonishing 172 percent. Much of that gain is attributed to regaining employees from a drop in employment that started in the third quarter of 2009. The previous two quarters of 2009 averaged 133 employees. If we were to start at the previous two quarters instead, we would see a more nearly normal growth of 55 percent.

Pine County

With 249 (3 percent) covered jobs provided by manufacturers, this county has the lowest share of Manufacturing employment in the central area. The employment is highly concentrated in Fabricated Metal production with 62.7 percent of all Manufacturing jobs in the sector. Average growth across all industries has been stagnant while Manufacturing grew at a respectable 13.2 percent.

Renville County

836 jobs in Renville County are in the Manufacturing sector. Although Food Manufacturing is the largest industry in the subsector with 45 percent of all the jobs, the share of employment for all Manufacturing as well as Food Manufacturing has decreased since 2009.

Sherburne County

3,262 (13 percent) of Sherburne County's workforce is employed by the Manufacturing industry. Fabricated Metal Products is the largest sector of Manufacturing, and 32.1 percent of Manufacturing employees work in the industry. Manufacturing has outpaced the growth of all industries, but the Fabricated Metals Product industry has experienced a much less robust growth period.

Stearns County

The largest economy in the central region is much more diverse, with a modest 14.1 percent of all jobs in Manufacturing (11,524). The largest subsector is Food Manufacturing with almost one of every five Manufacturing jobs. The entire Manufacturing industry is very diverse with many subsectors employing similar amounts. The second largest, Fabricated Metals Products, employs more than 1,700, and the next three largest all employ more than 1,100. Only one, Printing and Related Support activity, has experienced negative growth since 2009.

Wright County

Wright County's labor force has 13.7 percent (5,202) in the Manufacturing business. Fabricated Metal Production is the largest area with 23.9 percent of Manufacturing jobs in the subsector. The share of Manufacturing employment has increased slightly since 2009, from

Table 1: Manufacturing Employment in Central Minnesota Planning Area

County	Industry	Percent Change 2009-2013	2013 Qtr. 3	2012 Qtr. 3	2011 Qtr. 3	2010 Qtr. 3	2009 Qtr. 3	Trends
Benton	**Total, All Industries**	**4.7%**	**17,068**	**16,391**	**16,224**	**16,152**	**16,308**	
	Manufacturing	-14.2%	3,818	3,871	4,107	4,112	4,449	
	Food Manufacturing	-8.0%	646	626	651	712	702	
	Miscellaneous Manufacturing	41.0%	602	657	517	486	427	
Chisago	**Total, All Industries**	**3.7%**	**14,171**	**14,022**	**13,802**	**13,679**	**13,663**	
	Manufacturing	34.2%	2,262	2,191	1,985	1,872	1,686	
	Plastics and Rubber Products Mfg.	16.9%	554	560	535	517	474	
Isanti	**Total, All Industries**	**3.9%**	**10,610**	**10,141**	**10,190**	**10,065**	**10,211**	
	Manufacturing	38.0%	1,537	1,455	1,238	1,155	1,114	
	Fabricated Metal Product Mfg.	19.1%	529	536	495	451	444	
Kanabec	**Total, All Industries**	**2.9%**	**3,768**	**3,744**	**3,677**	**3,671**	**3,663**	
	Manufacturing	61.7%	519	499	378	345	321	
	Fabricated Metal Product Mfg.	-2.8%	103	119	111	90	106	
Kandiyohi	**Total, All Industries**	**2.5%**	**22,891**	**22,801**	**22,755**	**22,369**	**22,326**	
	Manufacturing	10.6%	3,309	3,217	3,151	2,998	2,992	
	Food Manufacturing	4.7%	2,033	1,973	1,957	1,888	1,941	
McLeod	**Total, All Industries**	**5.6%**	**17,418**	**16,875**	**17,163**	**16,613**	**16,488**	
	Manufacturing	7.6%	5,769	5,304	5,426	5,466	5,363	
	Food Manufacturing	38.1%	1,308	1,045	957	966	947	
Meeker	**Total, All Industries**	**4.5%**	**6,847**	**6,652**	**6,646**	**6,480**	**6,552**	
	Manufacturing	12.8%	1,344	1,300	1,355	1,286	1,192	
	Machinery Manufacturing	-3.4%	369	429	415	415	382	
Mille Lacs	**Total, All Industries**	**5.5%**	**9,477**	**9,465**	**9,146**	**8,783**	**8,979**	
	Manufacturing	33.5%	848	705	601	576	635	
	Furniture and Related Product Mfg.	172.4%	207	166	39	28	76	
Pine	**Total, All Industries**	**0.4%**	**8,225**	**8,162**	**8,182**	**8,261**	**8,191**	
	Manufacturing	13.2%	249	215	197	189	220	
	Fabricated Metal Product Mfg.	25.8%	156	150	158	154	124	
Renville	**Total, All Industries**	**0.2%**	**5,704**	**5,683**	**5,522**	**5,726**	**5,692**	
	Manufacturing	-2.1%	836	928	920	921	854	
	Food Manufacturing	-10.0%	376	469	450	401	418	
Sherburne	**Total, All Industries**	**12.7%**	**25,103**	**23,140**	**22,799**	**22,327**	**22,268**	
	Manufacturing	15.1%	3,262	3,014	2,938	2,926	2,833	
	Fabricated Metal Product Mfg.	6.6%	1,048	993	1,011	1,080	983	
Stearns	**Total, All Industries**	**5.7%**	**81,626**	**81,456**	**79,302**	**77,603**	**77,213**	
	Manufacturing	5.2%	11,524	11,643	11,260	10,755	10,954	
	Food Manufacturing	0.4%	2,216	2,130	2,143	2,170	2,207	
	Printing and Related Support Activities	-29.3%	1,076	1,199	1,375	1,355	1,522	
	Nonmetallic Mineral Product Mfg.	9.4%	1,163	1,071	1,059	1,023	1,063	
	Fabricated Metal Product Mfg.	19.8%	1,677	1,882	1,681	1,449	1,400	
	Transportation Equipment Mfg.	31.7%	1,453	1,472	1,298	1,157	1,103	
Wright	**Total, All Industries**	**8.3%**	**37,890**	**37,295**	**36,200**	**35,460**	**34,988**	
	Manufacturing	33.6%	5,202	5,037	4,409	4,183	3,895	
	Fabricated Metal Product Mfg.	22.2%	1,245	1,226	1,164	1,076	1,019	

Source: DEED, Quarterly Census of Employment and Wages (QCEW program)

11.1 percent to 13.7 percent. Growth in this county has been exceptional for Manufacturing with a gain of 33.6 percent since 2009.

Building the Future

The future of Manufacturing is far from its demise often discussed in the media. Although the projected growth is 6.7 percent less than the projected growth for all industries, it is still projected to grow. Table 2 highlights the growth of Manufacturing in Central Minnesota's future. Leading future net gains of more than 1,400 jobs, Fabricated Metal Product Manufacturing is substantial and will create many opportunities for the workers who have the required skillset. With a projected net gain of more than 4,000 jobs, the central region will grow faster than manufacturing across the entire state by 6.7 percent. The Northwest is the only region with a higher projected growth at 16.6 percent.

Rising labor costs in Asian countries, particularly China, coupled with problematic logistics and unexpected changes in government policies should deter mass relocations of manufacturers. This will also nurture a more competitive environment for manufacturers located in Central Minnesota.

Tightening labor markets will be a significant factor for expansions and sustainable manufacturing density in the region moving forward. As technology molds the way goods are produced, it will also affect the training programs required to supply an adequate labor pool. Education programs, on-the-job training, and apprenticeships are a major driving force that can either restrict or promote expansion of manufacturing in the area. Those being trained today will need specialized skills to produce the goods of tomorrow.

Table 2: Central Minnesota Employment Projections

Industry	2010	2020	2010-2020 Percent Change	2010-2020 Numeric Change
Manufacturing	**35,603**	**39,725**	**11.6%**	**4,122**
Food Manufacturing	7,208	7,640	6.0%	432
Printing and Related Support Activities	1,987	2,060	3.7%	73
Chemical Manufacturing	270	302	11.9%	32
Plastics and Rubber Products Manufacturing	2,293	2,790	21.7%	497
Nonmetallic Mineral Product Manufacturing	1,931	2,306	19.4%	375
Fabricated Metal Product Manufacturing	5,842	7,258	24.2%	1,416
Machinery Manufacturing	2,732	3,127	14.5%	395
Transportation Equipment Manufacturing	1,884	2,221	17.9%	337
Furniture and Related Product Manufacturing	1,875	2,270	21.1%	395
Miscellaneous Manufacturing	1,289	1,380	7.1%	91

Source: DEED. 2010-2020 Employment Projections

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Featuring the QCEW

by Brent Pearson

Last January, we premiered the new series entitled, “Featuring the QCEW” in which we provided some historical background for the Quarterly Census of Employment and Wages (QCEW) Labor Market Information (LMI) data tool. This month’s column will highlight the data elements contained in the QCEW and practical uses for them.

The QCEW provides a comprehensive view of labor market economies (approximately 97 percent of all jobs are covered under UI) by industry. As a census of employment, its usefulness extends well beyond generating new LMI tools. Anyone with a need for labor market information can use the QCEW for analysis. How many jobs and employers are in a given region? What are some of the highest paying industries? How do these regions compare with neighboring municipalities, counties, states, and the national? What is the percentage of public and private jobs and establishments? The QCEW answers all these questions and more.

Table 1 is an example of the power of the QCEW. Using the data it provides, we can examine Minnesota’s labor market, private jobs by employment share, employer share, and average weekly wage, and compare it nationally — a simple analysis with long-term planning possibilities.

While employment and employers are two key measures of local labor economies, total wages create another measure of a labor market. In addition to contributing to the tax base of a given region, analyzing total wages offers an alternative to simple job counts in that it shows which specific industries pumped the most payroll dollars into the local economy. For a deeper dive, we can also use the QCEW data to show the annual average of total wages for all employment in a given region, both public and private, across all NAICS sectors dating back to 2000.

As an analytical tool, the QCEW is one of the leading public LMI datasets. It has, however, some limitations which we will discuss in a future article. Future articles will also touch on some of the more advanced features of the QCEW and a few analytical tips that will allow the user to identify industry clusters and concentration.

So, what are some of the major industries in your region? Head to DEED’s QCEW page and begin using the QCEW data tool at: **www.mn.gov/deed/qcew**.

Table 1: Percentage Private Employment by Industry Sector (3rd Quarter, 2013)

Industry	Percentage Employment		Percentage Establishment		Average Weekly Wage	
	U.S.	MN	U.S.	MN	U.S.	MN
Total, All Industries	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**$914**	**$944**
Agriculture, Forestry, Fishing, and Hunting	1.2%	0.9%	1.1%	1.6%	$555	$587
Mining	0.7%	0.3%	0.4%	0.1%	$1,765	$1,591
Construction	5.3%	4.8%	8.3%	10.2%	$1,005	$1,087
Manufacturing	10.6%	13.1%	3.7%	5.1%	$1,125	$1,145
Utilities	0.5%	0.6%	0.2%	0.3%	$1,676	$1,702
Wholesale Trade	5.1%	5.6%	6.9%	8.6%	$1,261	$1,426
Retail Trade	13.2%	12.2%	11.6%	12.1%	$534	$501
Transportation and Warehousing	3.7%	3.1%	2.5%	2.9%	$891	$866
Information	2.4%	2.3%	1.6%	2.1%	$1,622	$1,242
Finance and Insurance	4.9%	5.9%	5.2%	5.8%	$1,507	$1,544
Real Estate and Rental and Leasing	1.8%	1.7%	3.9%	4.0%	$896	$972
Professional, Scientific, and Technical Services	7.1%	5.7%	12.1%	12.4%	$1,528	$1,560
Management of Companies and Enterprises	1.8%	3.3%	0.7%	0.8%	$1,864	$2,068
Administrative and Support and Waste Management and Remediation Services	7.4%	5.8%	5.5%	5.0%	$656	$613
Educational Services	2.2%	1.9%	1.2%	1.4%	$909	$752
Health Care and Social Assistance	15.4%	17.9%	15.2%	8.8%	$858	$850
Arts, Entertainment, and Recreation	2.0%	1.9%	1.4%	1.8%	$595	$546
Accommodation and Food Services	10.9%	9.3%	7.3%	7.2%	$351	$305
Other Services (except Public Administration)	3.7%	3.7%	8.9%	9.7%	$623	$553

Source: Minnesota Department of Employment & Economic Development Quarterly Census of Employment and Wages (QCEW)

Labor Force Estimates

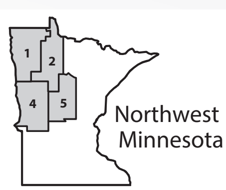
County/Area	Labor Force Apr 2014	Labor Force Mar 2014	Labor Force Apr 2013	Employment Apr 2014	Employment Mar 2014	Employment Apr 2013	Unemployment Apr 2014	Unemployment Mar 2014	Unemployment Apr 2013	Rate of Unemployment Apr 2014	Rate of Unemployment Mar 2014	Rate of Unemployment Apr 2013
United States ('000s)												
(Seasonally adjusted)	155,421	156,227	155,238	145,669	145,742	143,579	9,753	10,486	11,659	6.3%	6.7%	7.5%
(Unadjusted)	154,845	155,627	154,739	145,767	145,090	143,724	9,079	10,537	11,014	5.9	6.8	7.1
Minnesota												
(Seasonally adjusted)	3,001,543	3,002,431	2,975,653	2,860,414	2,856,843	2,822,110	141,129	145,588	153,543	4.7	4.8	5.2
(Unadjusted)	2,977,908	2,987,270	2,964,363	2,844,103	2,824,509	2,810,541	133,805	162,761	153,822	4.5	5.4	5.2
Metropolitan Statistical Areas (MSA)*												
Mpls.-St. Paul MSA	1,871,965	1,875,976	1,868,253	1,795,198	1,783,666	1,778,712	76,767	92,310	89,541	4.1	4.9	4.8
Duluth-Superior MSA	145,850	146,298	145,956	137,280	136,454	136,738	8,570	9,844	9,218	5.9	6.7	6.3
Rochester MSA	105,120	106,074	105,637	100,972	101,053	101,000	4,148	5,021	4,637	3.9	4.7	4.4
St. Cloud MSA	109,297	110,293	107,393	104,290	103,501	101,397	5,007	6,792	5,996	4.6	6.2	5.6
Mankato-N Mankato MSA	59,185	59,392	58,010	57,136	56,905	55,638	2,049	2,487	2,372	3.5	4.2	4.1
Fargo-Moorhead MSA	123,202	122,513	121,860	119,797	118,431	117,634	3,405	4,082	4,226	2.8	3.3	3.5
Grand Forks MSA	53,941	54,282	53,998	52,064	52,020	51,874	1,877	2,262	2,124	3.5	4.2	3.9
Region One	**51,083**	**51,651**	**50,636**	**48,401**	**48,265**	**47,454**	**2,682**	**3,386**	**3,182**	**5.3**	**6.6**	**6.3**
Kittson	2,638	2,673	2,588	2,519	2,523	2,446	119	150	142	4.5	5.6	5.5
Marshall	5,731	5,767	5,603	5,281	5,169	5,076	450	598	527	7.9	10.4	9.4
Norman	3,491	3,567	3,495	3,317	3,351	3,294	174	216	201	5.0	6.1	5.8
Pennington	9,667	9,770	9,719	9,098	8,987	8,922	569	783	797	5.9	8.0	8.2
Polk	18,098	18,286	17,956	17,230	17,270	17,034	868	1,016	922	4.8	5.6	5.1
Red Lake	2,343	2,337	2,273	2,176	2,126	2,058	167	211	215	7.1	9.0	9.5
Roseau	9,115	9,251	9,002	8,780	8,839	8,624	335	412	378	3.7	4.5	4.2
Region Two	**40,432**	**41,072**	**40,156**	**37,435**	**37,481**	**36,844**	**2,997**	**3,591**	**3,312**	**7.4**	**8.7**	**8.2**
Beltrami	22,160	22,487	22,109	20,748	20,816	20,512	1,412	1,671	1,597	6.4	7.4	7.2
Clearwater	4,451	4,574	4,325	3,827	3,810	3,706	624	764	619	14.0	16.7	14.3
Hubbard	9,097	9,061	9,007	8,398	8,206	8,223	699	855	784	7.7	9.4	8.7
Lake of the Woods	2,257	2,459	2,241	2,133	2,336	2,087	124	123	154	5.5	5.0	6.9
Mahnomen	2,467	2,491	2,474	2,329	2,313	2,316	138	178	158	5.6	7.1	6.4
Region Three	**167,861**	**168,815**	**168,281**	**157,320**	**156,629**	**156,815**	**10,541**	**12,186**	**11,466**	**6.3**	**7.2**	**6.8**
Aitkin	7,114	7,160	7,109	6,567	6,499	6,539	547	661	570	7.7	9.2	8.0
Carlton	17,994	18,063	17,893	16,830	16,727	16,764	1,164	1,336	1,129	6.5	7.4	6.3
Cook	3,068	3,032	3,013	2,838	2,790	2,798	230	242	215	7.5	8.0	7.1
Itasca	22,414	22,732	22,642	20,820	20,838	20,824	1,594	1,894	1,818	7.1	8.3	8.0
Koochiching	6,454	6,555	6,424	5,779	5,872	5,785	675	683	639	10.5	10.4	9.9
Lake	5,980	6,060	6,083	5,674	5,695	5,678	306	365	405	5.1	6.0	6.7
St. Louis	104,837	105,213	105,117	98,812	98,208	98,427	6,025	7,005	6,690	5.7	6.7	6.4
City of Duluth	45,940	46,001	46,080	43,617	43,351	43,447	2,323	2,650	2,633	5.1	5.8	5.7
Balance of St. Louis County	58,897	59,212	59,037	55,195	54,857	54,980	3,702	4,355	4,057	6.3	7.4	6.9
Region Four	**127,033**	**126,586**	**124,704**	**121,576**	**119,758**	**118,350**	**5,457**	**6,828**	**6,354**	**4.3**	**5.4**	**5.1**
Becker	17,964	17,871	17,787	16,972	16,579	16,666	992	1,292	1,121	5.5	7.2	6.3
Clay	35,502	35,445	34,758	34,233	33,955	33,336	1,269	1,490	1,422	3.6	4.2	4.1
Douglas	20,877	20,821	20,755	20,076	19,843	19,753	801	978	1,002	3.8	4.7	4.8
Grant	3,254	3,256	3,119	3,064	2,995	2,891	190	261	228	5.8	8.0	7.3
Otter Tail	30,868	30,717	30,261	29,286	28,718	28,393	1,582	1,999	1,868	5.1	6.5	6.2
Pope	6,576	6,544	6,367	6,336	6,224	6,097	240	320	270	3.6	4.9	4.2
Stevens	6,390	6,335	6,133	6,209	6,095	5,929	181	240	204	2.8	3.8	3.3
Traverse	1,729	1,758	1,672	1,649	1,652	1,581	80	106	91	4.6	6.0	5.4
Wilkin	3,873	3,839	3,852	3,751	3,697	3,704	122	142	148	3.2	3.7	3.8
Region Five	**82,586**	**82,479**	**82,128**	**76,923**	**75,319**	**75,922**	**5,663**	**7,160**	**6,206**	**6.9**	**8.7**	**7.6**
Cass	13,743	13,662	13,841	12,632	12,267	12,575	1,111	1,395	1,266	8.1	10.2	9.1
Crow Wing	32,573	32,280	32,642	30,444	29,564	30,306	2,129	2,716	2,336	6.5	8.4	7.2
Morrison	17,531	17,679	17,107	16,226	16,019	15,738	1,305	1,660	1,369	7.4	9.4	8.0
Todd	12,530	12,586	12,374	11,852	11,749	11,614	678	837	760	5.4	6.7	6.1
Wadena	6,209	6,272	6,164	5,769	5,720	5,689	440	552	475	7.1	8.8	7.7
Region Six East	**66,113**	**66,339**	**65,044**	**62,715**	**62,131**	**61,200**	**3,398**	**4,208**	**3,844**	**5.1**	**6.3**	**5.9**
Kandiyohi	24,760	24,875	24,397	23,602	23,418	23,146	1,158	1,457	1,251	4.7	5.9	5.1
McLeod	19,695	19,682	19,432	18,652	18,378	18,203	1,043	1,304	1,229	5.3	6.6	6.3
Meeker	12,615	12,670	12,462	11,936	11,822	11,670	679	848	792	5.4	6.7	6.4
Renville	9,043	9,112	8,753	8,525	8,513	8,181	518	599	572	5.7	6.6	6.5

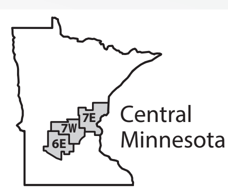
*Minneapolis-St. Paul Metropolitan Statistical Area (MSA) now includes Sherburne County in Minnesota and Pierce County in Wisconsin. St. Cloud MSA is now comprised of Benton and Stearns counties.

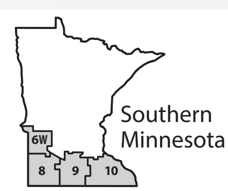
Labor Force Estimates

Numbers are unadjusted unless otherwise labeled.
Source: Department of Employment and Economic Development, Local Area Unemployment Statistics, and North Dakota Job Service, 2014.

County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Apr 2014	Mar 2014	Apr 2013	Apr 2014	Mar 2014	Apr 2013	Apr 2014	Mar 2014	Apr 2013	Apr 2014	Mar 2014	Apr 2013
Region Six West	**24,488**	**24,639**	**24,067**	**23,347**	**23,178**	**22,721**	**1,141**	**1,461**	**1,346**	**4.7%**	**5.9%**	**5.6%**
Big Stone	2,595	2,617	2,548	2,467	2,456	2,382	128	161	166	4.9	6.2	6.5
Chippewa	7,196	7,224	7,053	6,849	6,813	6,676	347	411	377	4.8	5.7	5.3
Lac Qui Parle	4,047	4,070	3,963	3,861	3,829	3,750	186	241	213	4.6	5.9	5.4
Swift	5,104	5,137	5,011	4,854	4,808	4,708	250	329	303	4.9	6.4	6.0
Yellow Medicine	5,546	5,591	5,492	5,316	5,272	5,205	230	319	287	4.1	5.7	5.2
Region Seven East	**84,545**	**85,169**	**84,186**	**78,538**	**77,874**	**77,547**	**6,007**	**7,295**	**6,639**	**7.1**	**8.6**	**7.9**
Chisago	28,569	28,747	28,604	26,911	26,737	26,664	1,658	2,010	1,940	5.8	7.0	6.8
Isanti	20,967	21,119	20,955	19,640	19,514	19,460	1,327	1,605	1,495	6.3	7.6	7.1
Kanabec	8,206	8,303	8,102	7,391	7,287	7,256	815	1,016	846	9.9	12.2	10.4
Mille Lacs	12,345	12,482	12,250	11,299	11,165	11,141	1,046	1,317	1,109	8.5	10.6	9.1
Pine	14,458	14,518	14,275	13,297	13,171	13,026	1,161	1,347	1,249	8.0	9.3	8.7
Region Seven West	**229,327**	**231,197**	**227,291**	**218,047**	**216,524**	**214,111**	**11,280**	**14,673**	**13,180**	**4.9**	**6.3**	**5.8**
Benton	22,713	23,037	22,381	21,523	21,360	20,926	1,190	1,677	1,455	5.2	7.3	6.5
Sherburne	49,654	50,093	49,496	47,032	46,729	46,601	2,622	3,364	2,895	5.3	6.7	5.8
Stearns	86,584	87,256	85,012	82,767	82,141	80,471	3,817	5,115	4,541	4.4	5.9	5.3
Wright	70,376	70,811	70,402	66,725	66,294	66,113	3,651	4,517	4,289	5.2	6.4	6.1
Region Eight	**68,781**	**68,979**	**67,814**	**66,198**	**65,675**	**64,783**	**2,583**	**3,304**	**3,031**	**3.8**	**4.8**	**4.5**
Cottonwood	6,393	6,486	6,298	6,154	6,188	6,010	239	298	288	3.7	4.6	4.6
Jackson	7,507	7,555	7,253	7,292	7,288	6,989	215	267	264	2.9	3.5	3.6
Lincoln	3,470	3,477	3,405	3,312	3,273	3,224	158	204	181	4.6	5.9	5.3
Lyon	15,070	15,009	14,872	14,480	14,267	14,203	590	742	669	3.9	4.9	4.5
Murray	5,917	5,875	5,727	5,646	5,508	5,437	271	367	290	4.6	6.2	5.1
Nobles	11,387	11,429	11,398	10,988	10,941	10,951	399	488	447	3.5	4.3	3.9
Pipestone	5,526	5,538	5,485	5,327	5,258	5,240	199	280	245	3.6	5.1	4.5
Redwood	7,901	7,985	7,874	7,533	7,509	7,408	368	476	466	4.7	6.0	5.9
Rock	5,610	5,625	5,502	5,466	5,443	5,321	144	182	181	2.6	3.2	3.3
Region Nine	**131,795**	**132,306**	**130,338**	**125,828**	**124,920**	**123,550**	**5,967**	**7,386**	**6,788**	**4.5**	**5.6**	**5.2**
Blue Earth	39,339	39,469	38,564	37,934	37,780	36,939	1,405	1,689	1,625	3.6	4.3	4.2
Brown	15,467	15,473	15,458	14,720	14,516	14,633	747	957	825	4.8	6.2	5.3
Faribault	7,155	7,266	7,044	6,724	6,733	6,594	431	533	450	6.0	7.3	6.4
Le Sueur	15,147	15,162	14,784	14,146	13,907	13,667	1,001	1,255	1,117	6.6	8.3	7.6
Martin	10,425	10,537	10,493	9,937	9,934	9,928	488	603	565	4.7	5.7	5.4
Nicollet	19,846	19,923	19,446	19,202	19,125	18,699	644	798	747	3.2	4.0	3.8
Sibley	9,292	9,258	9,404	8,868	8,705	8,883	424	553	521	4.6	6.0	5.5
Waseca	9,584	9,619	9,693	9,076	8,999	9,086	508	620	607	5.3	6.4	6.3
Watonwan	5,540	5,599	5,452	5,221	5,221	5,121	319	378	331	5.8	6.8	6.1
Region Ten	**272,997**	**274,619**	**272,376**	**261,347**	**260,428**	**259,183**	**11,650**	**14,191**	**13,193**	**4.3**	**5.2**	**4.8**
Dodge	11,191	11,379	11,313	10,664	10,673	10,667	527	706	646	4.7	6.2	5.7
Fillmore	11,241	11,329	10,877	10,700	10,626	10,256	541	703	621	4.8	6.2	5.7
Freeborn	16,157	16,242	16,088	15,422	15,331	15,271	735	911	817	4.5	5.6	5.1
Goodhue	25,491	25,736	25,419	24,373	24,347	24,128	1,118	1,389	1,291	4.4	5.4	5.1
Houston	10,881	10,953	10,766	10,239	10,143	10,066	642	810	700	5.9	7.4	6.5
Mower	21,262	21,365	21,323	20,419	20,361	20,330	843	1,004	993	4.0	4.7	4.7
Olmsted	82,146	82,810	82,501	79,069	79,133	79,091	3,077	3,677	3,410	3.7	4.4	4.1
City of Rochester	60,006	60,487	60,241	57,717	57,764	57,733	2,289	2,723	2,508	3.8	4.5	4.2
Rice	32,577	32,487	32,332	30,964	30,575	30,489	1,613	1,912	1,843	5.0	5.9	5.7
Steele	21,109	21,212	20,811	20,197	20,155	19,760	912	1,057	1,051	4.3	5.0	5.1
Wabasha	11,783	11,886	11,823	11,239	11,248	11,242	544	638	581	4.6	5.4	4.9
Winona	29,159	29,220	29,123	28,061	27,836	27,883	1,098	1,384	1,240	3.8	4.7	4.3
Region Eleven	**1,630,866**	**1,633,421**	**1,627,347**	**1,566,428**	**1,556,328**	**1,552,063**	**64,438**	**77,093**	**75,284**	**4.0**	**4.7**	**4.6**
Anoka	191,364	191,953	190,911	182,871	181,692	181,194	8,493	10,261	9,717	4.4	5.3	5.1
Carver	51,689	51,786	51,525	49,512	49,193	49,058	2,177	2,593	2,467	4.2	5.0	4.8
Dakota	233,226	233,639	232,786	224,095	222,650	222,040	9,131	10,989	10,746	3.9	4.7	4.6
Hennepin	667,582	668,105	665,859	642,355	638,213	636,464	25,227	29,892	29,395	3.8	4.5	4.4
City of Bloomington	49,236	49,233	49,028	47,354	47,049	46,920	1,882	2,184	2,108	3.8	4.4	4.3
City of Minneapolis	217,802	218,034	217,215	209,268	207,918	207,348	8,534	10,116	9,867	3.9	4.6	4.5
Ramsey	275,805	276,170	275,349	264,633	262,927	262,206	11,172	13,243	13,143	4.1	4.8	4.8
City of St. Paul	147,056	147,354	146,987	140,805	139,897	139,513	6,251	7,457	7,474	4.3	5.1	5.1
Scott	76,413	76,583	76,385	73,349	72,876	72,677	3,064	3,707	3,708	4.0	4.8	4.9
Washington	134,787	135,185	134,532	129,613	128,777	128,424	5,174	6,408	6,108	3.8	4.7	4.5







Industrial Analysis

Monthly analysis is based on ***seasonally adjusted*** employment data; yearly analysis is based on ***unadjusted*** employment data.*

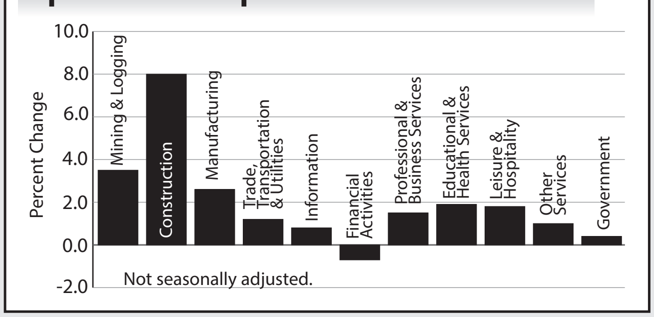
Overview

Seasonally adjusted employment declined slightly in April, dropping by 4,200 (0.1 percent) to settle at 2,807,800. March's employment estimate was also revised downward, coming in 1,900 lower than initial estimates. April's monthly losses came primarily from service providing industries, as employment in goods producing industries was largely flat. Industries with sizeable monthly employment declines were Construction (down 2,200 or 2.0 percent), Transportation and Warehousing (1,300, 1.4 percent), Real Estate and Rental and Leasing (1,100, 2.7 percent), Administrative and Support and Waste Management and Remediation Services (2,900, 2.1 percent), and Arts, Entertainment, and Recreation (1,100, 2.6 percent). The picture looks much better when compared to April 2013, as unadjusted employment is up 41,934 (1.5 percent) over the year. Employment in goods producing industries was up 15,138 (3.8 percent) over the year while service providers saw an increase of 26,796 (1.1 percent). Most major industry groups have added significant employment since 2013, the lone exception being Financial Activities which is down 1,325 (0.7 percent).

Mining and Logging

Mining and Logging lost a small amount of employment in April, shedding 100 jobs (1.4 percent) to land at 7,100, giving back the slight gains made last month. This is the first seasonally adjusted decline in Mining and Logging since December. Mining and Logging employment remains up for the year, adding 232 jobs (3.5 percent) since April 2013.

MN Employment Growth
April 2013 to April 2014



Source: Department of Employment and Economic Development, Current Employment Statistics, 2014.

Construction

Employment in the Construction industry was down in April. The industry group lost 2,200 jobs (2.2 percent) for the month following an employment spike in March. Employment remains strong on an annual basis, gaining 7,158 jobs (8 percent) since 2013. There were gains in Construction of Buildings (up 234, 1.1 percent), Heavy and Civil Engineering Construction (2,159, 19.6 percent), and Specialty Trade Contractors (4,765, 8.4 percent). In spite of the seasonally adjusted monthly losses, Construction appears to be on an upward trajectory as April marks 12 straight months with year-over-year unadjusted gains. Annual average employment in construction has grown every year since 2010.

Manufacturing

Employment in Manufacturing industries had another month of small increases in April, adding 2,400 jobs (0.8 percent) over March levels. Gains were split between Durable and Non-Durable Goods Manufacturing, each adding 0.8 percent (1,500 and 900 jobs, respectively). This increase comes on the heels of a small loss in the previous month, as March's estimate was revised downward. For the year, Manufacturing employment is up 7,748 (2.5 percent) with increases in both Durable and Non-Durable Goods Manufacturing. Significant gains have occurred in the component industries of Fabricated Metal Product Manufacturing (up 1,454 or 3.5 percent) and Food Manufacturing (2,254, 5.1 percent) to help drive the annual increase.

Trade, Transportation, and Utilities

Employment in Trade, Transportation, and Utilities was flat in April, remaining at 512,900. This continues a trend of flat or declining employment in the industry group, which hasn't gained employment since December. Monthly losses in Wholesale Trade (down 500, 0.4 percent) and Transportation and Warehousing (1,300, 1.4 percent) were offset by a gain of 1,800 or 0.6 percent in Retail Trade. For the year, the industry group has added 5,873 jobs (1.2 percent) with gains in Wholesale and Retail Trade (up 3.1 percent and 0.8 percent, respectively), offsetting the small losses in Transportation, Warehousing, and Utilities, down 296 or 0.3 percent.

*Over-the-year data are not seasonally adjusted because of small changes in seasonal adjustment factors from year to year. Also, there is no seasonality in over-the-year changes.

Information

Employment in Information was up slightly in April, adding 200 jobs (0.4 percent) since March and giving the industry group gains in back-to-back months after it had experienced sharp declines in the previous two months. Employment in the supersector has shown increases for the year as well, up 427 or 0.8 percent, over April 2013, despite losses in both Publishing and Telecommunications.

Financial Activities

Employment in Financial Activities decreased 800 (0.4 percent) in April, continuing the industry group's trend of back-and-forth employment in recent months. Slight gains in Finance and Insurance (up 300 or 0.2 percent) were not enough to overcome a loss of 1,100 (2.7 percent) in Real Estate and Rental and Leasing. Employment in the industry group remains down for the year as well, with 1,325 (0.7 percent) fewer jobs than in April 2013. Finance and Insurance appears to be the primary culprit in the group's struggles, as it is down 2,291 (1.6 percent) on the year, thanks largely to a decline of 1,717 (3.1 percent) in Credit Intermediation and Related Activities.

Professional and Business Services

Employment in Professional and Business Services declined in April, shedding 2,200 (0.6 percent) jobs for the month. Slight gains in Professional, Scientific, and Technical Services (up 100 or 0.1 percent) and Management of Companies (600, 0.8 percent) were not enough to overcome a sharp decline in employment in Administrative and Support and Waste Management and Remediation Services, which lost 2,900 jobs (2.1 percent). For the year, the supersector has gained 5,256 jobs (1.5 percent) with increases spread across a number of subgroups. The only major group to lose employment for the year was Legal Services which dropped 159 jobs (0.8 percent).

Educational and Health Services

Employment in Educational and Health Services dipped slightly in April, losing 700 jobs (0.1 percent). This is the third straight month of seasonally adjusted employment losses in the industry group following a relatively strong 2013. Employment in the supersector remains up over April 2013, with 9,244 (1.9 percent) more jobs than a year ago. Educational Services is up 3,781 (5.5 percent) while Health Care and Social Assistance is up 5,463 (1.3 percent).

Leisure and Hospitality

Employment in Leisure and Hospitality was off by 1,700 (0.7 percent) for April, with declines in both major subgroups. Arts, Entertainment, and Recreation was down 1,100 (2.6 percent) while Accommodation and Food Service lost 600 jobs (0.3 percent). The supersector remains strong for the year, however, as it maintained a gain of 4,396 (1.8 percent) over April 2013. Arts, Entertainment, and Recreation is up 2,499 (7 percent) over 2013, while Food Services and Drinking Places has gained 2,582 (1.4 percent) for the year.

Other Services

Other Services employment dipped slightly in April, losing 600 jobs (0.5 percent) for the month. On the year, employment levels rose 1,161 (1 percent) with gains in all three major component groups. Repair and Maintenance leads the way with an increase of 432 (2.1 percent) over April 2013.

Government

Government employment grew in April as 1,500 jobs (0.4 percent) were added, largely thanks to an increase of 1,600 (0.6 percent) in Local Government employment. This marks the third straight month of seasonally adjusted growth for the supersector. Government employment also increased for the year, up 1,764 (0.4 percent) over 2013.

by Nick Dobbins

Seasonally Adjusted Nonfarm Employment

In 1,000's

Industry	April 2014	March 2014	February 2014
Total Nonagricultural	**2,807.8**	**2,812.0**	**2,811.3**
Goods-Producing	**427.6**	**427.5**	**426.5**
Mining and Logging	7.1	7.2	7.1
Construction	105.5	107.7	105.7
Manufacturing	315.0	312.6	313.7
Service-Providing	**2,380.2**	**2,384.5**	**2,384.8**
Trade, Transportation, and Utilities	512.9	512.9	515.1
Information	53.2	53.0	52.9
Financial Activities	179.5	180.3	179.4
Professional and Business Services	349.8	352.0	348.8
Educational and Health Services	497.6	498.3	498.8
Leisure and Hospitality	252.3	254.0	256.2
Other Services	117.5	118.1	118.6
Government	417.4	415.9	415.0

Source: Department of Employment and Economic Development Current Employment Statistics, 2013.

Regional Analysis

Monthly analysis is based on ***unadjusted*** employment data.

Minneapolis-St. Paul-Bloomington Metropolitan Statistical Area (MSA)

Employment showed strong growth in April before seasonal adjustment, adding 21,875 jobs or 1.2 percent. Increases were split between goods producers (up 5,389 or 2.3 percent) and service providers (16,486, 1.1 percent). The only supersector to lose jobs in April was the Others Services group which dropped 448 or 0.6 percent. Employment gains were spread through the remaining industry groups. Some of the largest numerical increases were in Mining, Logging, and Construction (4,947, 9.2 percent), Professional and Business Services (3,703, 1.4 percent), and Leisure and Hospitality (5,689, 3.5 percent). Employment is also up for the year, with 28,735 (1.6 percent) more jobs in April 2014 than 12 months ago.

Duluth -Superior MSA

Employment started recovering from winter in earnest in April, adding 1,390 (1.1 percent), following their small loss in March. Most industry groups showed employment that was either up or flat, with the three job shedders, Information, Financial Services, and Other Services, down just 25, 11, and 1, respectively. There were significant monthly increases in Mining, Logging, and Construction (up 559 or 7 percent), Leisure and Hospitality (447, 3.3 percent) and Professional and Business Services (129, 1.7 percent). Employment in Duluth-Superior is also up slightly for the year, although job gains and losses are spread throughout a variety of industry groups.

Rochester MSA

Employment was up 593 (0.6 percent) in April as the spring weather helped warm up the job market. While there was a sizeable decrease in Manufacturing employment (down 135, 1.4 percent), employment increased or was flat in the remainder of the supersectors. Mining, Logging, and Construction, as would be expected in spring, added 281 jobs (9.3 percent) making it the fastest grower of the month. Other notable increases showed up in Trade, Transportation, and Utilities (200, 1.2 percent) and Leisure and Hospitality (164, 1.8 percent). Rochester's employment is also up for the year, although by just 288 (0.3 percent) over April 2013.

St. Cloud MSA

Employment continued its recent growth trend, adding 1,383 jobs (1.3 percent) in April. Nearly every industry group showed an increase for the month, as the only major industry group to show any decrease was Information which had an estimated loss of one job, making employment essentially flat. Mining, Logging, and Construction and Leisure and Hospitality both saw notable jumps in April (263 or 6.1 percent and 109 or 1.2 percent, respectively). For the year, St. Cloud gained 2,906 jobs (2.9 percent) thanks to strong annual increases across a spectrum of industry groups.

Mankato-North Mankato MSA

Employment grew in April, adding 553 jobs (1 percent) for a total of 55,367. Private sector gains of 564 (4.2 percent) overcame a small decline in Government employment for the month. The increase was split between goods producers (up 289 or 3 percent) and service providers (264, 0.6 percent). Since April 2013, the MSA has seen an increase of 1,671 jobs (3.1 percent), with private sector gains once again overwhelming losses in Government employment (down 179, 1.9 percent).

Fargo-Moorhead MSA

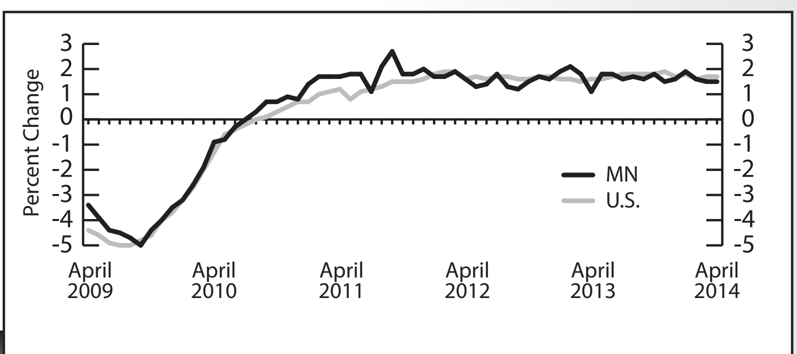
Employment grew by 1,808 (1.4 percent) in April. Job gains were widely distributed among major industry groups, with some notable changes including an increase of 530 (3.4 percent) in Professional and Business Services and growth of 519 (6.7 percent) in Mining, Logging, and Construction. As was common across the state in April, Leisure and Hospitality also saw significant employment growth. For the year, employment in the MSA increased 4,780 (3.7 percent) with job growth in every major industry group.

Grand Forks-East Grand Forks MSA

Employment remained nearly flat in April, adding just 41 jobs (0.1 percent). This is the second straight month that employment in the MSA has been largely unchanged, in contrast to statewide numbers in Minnesota and North Dakota, as well as most metros in the area which generally had significant employment growth in April. The area also bucked the regional trend of a strong month in Leisure and Hospitality employment, with the industry group losing 137 jobs (2.2 percent) during a month when most other metros were adding jobs in the supersector. For the year, employment in the MSA has grown by 1,019 (1.8 percent).

by Nick Dobbins

Source: Department of Employment and Economic Development, Current Employment Statistics, 2014; Bureau of Labor Statistics, U.S. Department of Labor, Current Employment Statistics, 2014.



Total Nonfarm Jobs
U.S. and MN over-the-year percent change

Employer Survey of Minnesota Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted.

Note: State, regional and local estimates from past months (for all tables pages 11-13) may be revised from figures previously published.

Industry	Jobs* (Thousands)			Percent Change From**		Production Workers Hours and Earnings: Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Apr 2014	Mar 2014	Apr 2013	Mar 2014	Apr 2013	Apr 2014	Apr 2013	Apr 2014	Apr 2013	Apr 2014	Apr 2013
TOTAL NONFARM WAGE AND SALARY	**2,788.3**	**2,762.6**	**2,747.2**	**0.9%**	**1.5%**	—	—	—	—	—	—
GOODS-PRODUCING	**414.1**	**406.2**	**399.4**	**1.9**	**3.7**	—	—	—	—	—	—
Mining and Logging	**6.8**	**6.8**	**6.6**	**0.0**	**3.0**	—	—	—	—	—	—
Construction	**96.7**	**91.0**	**89.0**	**6.3**	**8.7**	—	—	—	—	—	—
Specialty Trade Contractors	61.9	59.9	56.7	3.3	9.2	$1,176.56	$1,208.48	38.5	39.3	$30.56	$30.75
Manufacturing	**310.6**	**308.4**	**303.8**	**0.7**	**2.2**	**817.24**	**820.55**	**41.4**	**41.4**	**19.74**	**19.82**
Durable Goods	197.9	196.3	193.2	0.8	2.4	822.78	823.18	42.0	41.2	19.59	19.98
Wood Product Manufacturing	10.2	10.0	10.1	2.0	1.0	—	—	—	—	—	—
Fabricated Metal Production	42.6	42.6	41.3	0.0	3.2	—	—	—	—	—	—
Machinery Manufacturing	32.0	32.0	32.1	0.0	-0.3	—	—	—	—	—	—
Computer and Electronic Product	44.8	44.6	45.0	0.5	-0.4	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	24.7	24.6	24.6	0.4	0.4	—	—	—	—	—	—
Transportation Equipment	11.6	11.5	10.9	0.9	6.4	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	15.2	15.2	15.2	0.0	0.0	—	—	—	—	—	—
Nondurable Goods	112.7	112.1	110.6	0.5	1.9	807.60	816.49	40.4	41.7	19.99	19.58
Food Manufacturing	46.3	46.1	44.2	0.4	4.8	—	—	—	—	—	—
Paper Manufacturing	32.3	32.2	33.4	0.3	-3.3	—	—	—	—	—	—
Printing and Related	23.3	23.2	23.5	0.4	-0.9	—	—	—	—	—	—
SERVICE-PROVIDING	**2,374.2**	**2,356.4**	**2,347.8**	**0.8**	**1.1**	—	—	—	—	—	—
Trade, Transportation, and Utilities	**507.5**	**503.8**	**501.5**	**0.7**	**1.2**	—	—	—	—	—	—
Wholesale Trade	133.3	133.0	129.4	0.2	3.0	986.31	963.07	39.0	38.4	25.29	25.08
Retail Trade	281.2	278.1	279.4	1.1	0.6	388.63	369.65	27.7	27.2	14.03	13.59
Motor Vehicle and Parts	33.0	32.4	31.4	1.9	5.1	—	—	—	—	—	—
Building Material and Garden Equipment	25.9	24.2	25.6	7.0	1.2	—	—	—	—	—	—
Food and Beverage Stores	50.6	50.2	49.5	0.8	2.2	—	—	—	—	—	—
Gasoline Stations	23.2	23.0	22.8	0.9	1.8	—	—	—	—	—	—
General Merchandise Stores	59.6	59.5	59.7	0.2	-0.2	300.61	303.30	28.2	27.8	10.66	10.91
Transportation,Warehouse, Utilities	93.0	92.7	92.7	0.3	0.3	—	—	—	—	—	—
Transportation and Warehousing	79.8	79.6	79.7	0.3	0.1	627.44	641.14	36.8	38.3	17.05	16.74
Information	**53.4**	**53.2**	**53.1**	**0.4**	**0.6**	**805.14**	**724.59**	**34.9**	**31.6**	**23.07**	**22.93**
Publishing Industries	21.0	20.9	21.4	0.5	-1.9	—	—	—	—	—	—
Telecommunications	13.3	13.3	13.4	0.0	-0.8	—	—	—	—	—	—
Financial Activities	**178.8**	**179.0**	**180.3**	**-0.1**	**-0.8**	—	—	—	—	—	—
Finance and Insurance	138.9	138.8	141.3	0.1	-1.7	930.65	959.41	35.0	36.3	26.59	26.43
Credit Intermediation	53.5	53.6	55.2	-0.2	-3.1	750.38	712.31	34.5	34.9	21.75	20.41
Securities, Commodity Contracts, and Other	18.6	18.5	18.4	0.5	1.1	—	—	—	—	—	—
Insurance Carriers and Related	66.2	66.4	66.5	-0.3	-0.5	—	—	—	—	—	—
Real Estate and Rental and Leasing	39.9	40.2	39.0	-0.8	2.3	—	—	—	—	—	—
Professional and Business Services	**345.8**	**342.6**	**341.1**	**0.9**	**1.4**	—	—	—	—	—	—
Professional, Scientific, and Technical Services	138.5	137.8	136.1	0.5	1.8	—	—	—	—	—	—
Legal Services	18.7	18.6	18.9	0.5	-1.1	—	—	—	—	—	—
Accounting, Tax Preparation	17.7	17.7	17.1	0.0	3.5	—	—	—	—	—	—
Computer Systems Design	32.4	32.1	32.2	0.9	0.6	—	—	—	—	—	—
Management of Companies and Enterprises	78.3	77.8	76.6	0.6	2.2	—	—	—	—	—	—
Administrative and Support Services	129.0	127.0	128.4	1.6	0.5	—	—	—	—	—	—
Educational and Health Services	**502.4**	**500.1**	**492.4**	**0.5**	**2.0**	—	—	—	—	—	—
Educational Services	72.9	70.1	69.2	4.0	5.4	—	—	—	—	—	—
Health Care and Social Assistance	429.5	430.0	423.2	-0.1	1.5	—	—	—	—	—	—
Ambulatory Health Care	140.0	139.8	135.5	0.1	3.3	1,220.10	1,168.26	34.9	34.3	34.96	34.06
Offices of Physicians	66.8	66.7	66.2	0.2	0.9	—	—	—	—	—	—
Hospitals	105.3	105.3	104.5	0.0	0.8	—	—	—	—	—	—
Nursing and Residential Care Facilities	104.5	104.9	104.8	-0.4	-0.3	425.01	419.62	29.7	28.8	14.31	14.57
Social Assistance	79.7	80.0	78.4	-0.4	1.7	—	—	—	—	—	—
Leisure and Hospitality	**244.9**	**237.7**	**241.1**	**3.0**	**1.6**	—	—	—	—	—	—
Arts, Entertainment, and Recreation	38.4	35.5	35.6	8.2	7.9	—	—	—	—	—	—
Accommodation and Food Services	206.5	202.2	205.5	2.1	0.5	—	—	—	—	—	—
Food Services and Drinking Places	182.6	179.1	180.9	2.0	0.9	239.09	223.15	20.7	20.7	11.55	10.78
Other Services	**118.0**	**118.4**	**116.6**	**-0.3**	**1.2**	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	68.8	69.6	68.2	-1.2	0.9	—	—	—	—	—	—
Government	**423.4**	**421.6**	**421.7**	**0.4**	**0.4**	—	—	—	—	—	—
Federal Government	31.2	30.9	31.4	1.0	-0.6	—	—	—	—	—	—
State Government	103.9	103.0	105.1	0.9	-1.1	—	—	—	—	—	—
State Government Education	65.5	64.9	67.8	0.9	-3.4	—	—	—	—	—	—
Local Government	288.3	287.7	285.2	0.2	1.1	—	—	—	—	—	—
Local Government Education	144.7	145.0	144.7	-0.2	0.0	—	—	—	—	—	—

Note: Not all industry subgroups are shown for every major industry category.

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2014.

Employer Survey of Twin Cities Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted. Note: State, regional and local estimates from past months (for all tables pages 11-13) may be revised from figures previously published.

Industry	Jobs* (Thousands)			Percent Change From**		Production Workers Hours and Earnings					
						Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Apr 2014	Mar 2014	Apr 2013	Mar 2014	Apr 2013	Apr 2014	Apr 2013	Apr 2014	Apr 2013	Apr 2014	Apr 2013
TOTAL NONFARM WAGE AND SALARY	**1,808.9**	**1,788.5**	**1,781.9**	**1.1%**	**1.5%**	—	—	—	—	—	—
GOODS-PRODUCING	**243.6**	**238.4**	**237.1**	**2.2**	**2.7**	—	—	—	—	—	—
Mining, Logging, and Construction	**58.5**	**53.5**	**56.1**	**9.4**	**4.3**	—	—	—	—	—	—
Construction of Buildings	14.4	13.8	12.8	4.4	12.5	—	—	—	—	—	—
Specialty Trade Contractors	39.4	37.5	37.4	5.1	5.4						
Manufacturing	**185.1**	**184.9**	**181.0**	**0.1**	**2.3**	**$854.50**	**$843.67**	**41.4**	**40.6**	**$20.64**	**$20.78**
Durable Goods	126.9	127.1	124.3	-0.2	2.1	874.23	865.92	42.5	41	20.57	21.12
Fabricated Metal Production	28.2	28.1	28.0	0.4	0.7	—	—	—	—	—	—
Machinery Manufacturing	19.3	19.4	19.5	-0.5	-1.0	—	—	—	—	—	—
Computer and Electronic Product	35.5	35.3	35.3	0.6	0.6	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	23.2	23.0	23.1	0.9	0.4	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	14.0	14.1	14.0	-0.7	0.0	—	—	—	—	—	—
Nondurable Goods	58.2	57.8	56.7	0.7	2.7	817.55	803.19	39.4	39.9	20.75	20.13
Food Manufacturing	13.3	13.2	13.0	0.8	2.3	—	—	—	—	—	—
Printing and Related	14.9	14.8	14.9	0.7	0.0	—	—	—	—	—	—
SERVICE-PROVIDING	**1,565.3**	**1,550.1**	**1,544.8**	**1.0**	**1.3**	—	—	—	—	—	—
Trade, Transportation, and Utilities	**315.8**	**314.3**	**314.3**	**0.5**	**0.5**	—	—	—	—	—	—
Wholesale Trade	82.2	82.2	81.1	0.0	1.4	927.56	971.67	38.6	38.3	24.03	25.37
Merchant Wholesalers - Durable Goods	44.9	44.7	42.9	0.5	4.7	—	—	—	—	—	—
Merchant Wholesalers - Nondurable Goods	24.5	24.3	24.6	0.8	-0.4	—	—	—	—	—	—
Retail Trade	171.9	170.8	171.5	0.6	0.2	410.09	356.40	28.9	27.5	14.19	12.96
Food and Beverage Stores	28.9	28.7	28.3	0.7	2.1	—	—	—	—	—	—
General Merchandise Stores	37.2	36.9	36.7	0.8	1.4	311.39	316.61	29.6	29.1	10.52	10.88
Transportation, Warehouse, Utilities	61.7	61.3	61.7	0.7	0.0	—	—	—	—	—	—
Utilities	7.7	7.7	7.8	0.0	-1.3	—	—	—	—	—	—
Transportation and Warehousing	54.0	53.6	53.9	0.8	0.2	825.11	713.50	44.1	41.1	18.71	17.36
Information	**38.4**	**38.3**	**38.7**	**0.3**	**-0.8**						
Publishing Industries	16.7	16.6	16.8	0.6	-0.6	—	—	—	—	—	—
Telecommunications	9.5	9.5	9.5	0.0	0.0	—	—	—	—	—	—
Financial Activities	**141.8**	**141.2**	**141.1**	**0.4**	**0.5**	—	—	—	—	—	—
Finance and Insurance	109.0	108.6	109.2	0.4	-0.2	1,066.93	1,103.72	35.6	37.2	29.97	29.67
Credit Intermediation	37.8	37.8	38.4	0.0	-1.6	—	—	—	—	—	—
Securities, Commodity Contracts, and Other	16.9	16.8	16.4	0.6	3.1	—	—	—	—	—	—
Insurance Carriers and Related	53.3	53.3	53.2	0.0	0.2	—	—	—	—	—	—
Real Estate and Rental and Leasing	32.8	32.6	31.9	0.6	2.8	—	—	—	—	—	—
Professional and Business Services	**271.2**	**268.1**	**272.8**	**1.2**	**-0.6**	—	—	—	—	—	—
Professional, Scientific, and Technical Services	107.5	106.7	107.7	0.8	-0.2	—	—	—	—	—	—
Legal Services	15.6	15.6	15.8	0.0	-1.3	—	—	—	—	—	—
Architectural, Engineering, and Related	15.5	15.4	15.1	0.7	2.7	—	—	—	—	—	—
Computer Systems Design	26.4	26.3	26.3	0.4	0.4	—	—	—	—	—	—
Management of Companies and Enterprises	69.8	69.5	68.7	0.4	1.6	—	—	—	—	—	—
Administrative and Support Services	93.9	91.9	96.4	2.2	-2.6	—	—	—	—	—	—
Employment Services	45.3	44.9	46.5	0.9	-2.6	—	—	—	—	—	—
Educational and Health Services	**307.1**	**304.6**	**296.5**	**0.8**	**3.6**	—	—	—	—	—	—
Educational Services	48.6	45.9	45.2	5.9	7.5	—	—	—	—	—	—
Health Care and Social Assistance	258.5	258.7	251.3	-0.1	2.9	—	—	—	—	—	—
Ambulatory Health Care	84.5	84.1	80.6	0.5	4.8	—	—	—	—	—	—
Hospitals	61.2	61.3	60.8	-0.2	0.7	—	—	—	—	—	—
Nursing and Residential Care Facilities	57.0	56.9	55.6	0.2	2.5	—	—	—	—	—	—
Social Assistance	55.8	56.4	54.3	-1.1	2.8	—	—	—	—	—	—
Leisure and Hospitality	**168.9**	**163.4**	**163.5**	**3.4**	**3.3**	—	—	—	—	—	—
Arts, Entertainment, and Recreation	29.5	27.2	28.0	8.5	5.4	—	—	—	—	—	—
Accommodation and Food Services	139.4	136.2	135.5	2.4	2.9	275.72	257.87	22.6	22.7	12.2	11.36
Food Services and Drinking Places	126.6	123.4	122.6	2.6	3.3	266.61	249.51	21.8	22.1	12.23	11.29
Other Services	**77.7**	**78.0**	**76.8**	**-0.4**	**1.2**	—	—	—	—	—	—
Repair and Maintenance	13.3	13.4	13.1	-0.8	1.5	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	43.0	43.3	42.4	-0.7	1.4	—	—	—	—	—	—
Government	**244.4**	**242.2**	**241.1**	**0.9**	**1.4**	—	—	—	—	—	—
Federal Government	20.1	19.9	20.2	1.0	-0.5	—	—	—	—	—	—
State Government	70.2	68.9	69.6	1.9	0.9						
State Government Education	44.5	43.3	44.6	2.8	-0.2						
Local Government	154.1	153.4	151.3	0.5	1.9						
Local Government Education	89.0	89.1	88.3	-0.1	0.8						

Note: Not all industry subgroups are shown for every major industry category.

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2010.

Employer Survey

Industry	Duluth-Superior MSA Jobs Apr 2014	Jobs Mar 2014	Jobs Apr 2013	% Chg. From Mar 2014	% Chg. From Apr 2013	Rochester MSA Jobs Apr 2014	Jobs Mar 2014	Jobs Apr 2013	% Chg. From Mar 2014	% Chg. From Apr 2013
TOTAL NONFARM WAGE AND SALARY	**132,000**	**131,200**	**131,700**	**0.6%**	**0.2%**	**106,900**	**106,500**	**106,800**	**0.4%**	**0.1%**
GOODS-PRODUCING	**15,400**	**15,200**	**15,900**	**1.3**	**-3.1**	**13,000**	**12,800**	**13,400**	**1.6**	**-3.0**
Mining, Logging, and Construction	8,200	8,000	8,600	2.5	-4.7	3,300	3,000	3,100	10.0	6.5
Manufacturing	7,200	7,200	7,300	0.0	-1.4	9,700	9,800	10,300	-1.0	-5.8
SERVICE-PROVIDING	**116,600**	**116,000**	**115,800**	**0.5**	**0.7**	**93,900**	**93,700**	**93,400**	**0.2**	**0.5**
Trade, Transportation, and Utilities	23,700	23,500	23,900	0.9	-0.8	16,500	16,400	16,200	0.6	1.9
Wholesale Trade	3,100	3,000	3,200	3.3	-3.1	2,300	2,300	2,300	0.0	0.0
Retail Trade	15,000	14,900	14,900	0.7	0.7	11,800	11,700	11,400	0.9	3.5
Transportation, Warehouse, Utilities	5,600	5,600	5,800	0.0	-3.5	2,400	2,400	2,500	0.0	-4.0
Information	1,400	1,400	1,500	0.0	-6.7	1,700	1,700	1,600	0.0	6.3
Financial Activities	5,500	5,500	5,300	0.0	3.8	2,600	2,600	2,500	0.0	4.0
Professional and Business Services	7,500	7,400	7,800	1.4	-3.9	5,400	5,400	5,300	0.0	1.9
Educational and Health Services	31,500	31,400	31,100	0.3	1.3	43,700	43,700	44,200	0.0	-1.1
Leisure and Hospitality	13,800	13,400	12,800	3.0	7.8	9,200	9,000	9,000	2.2	2.2
Other Services	6,400	6,400	6,300	0.0	1.6	3,800	3,800	3,700	0.0	2.7
Government	26,800	27,000	27,100	-0.7	-1.1	11,000	11,100	10,900	-0.9	0.9

Employer Survey

Industry	St. Cloud MSA Jobs Apr 2014	Jobs Mar 2014	Jobs Apr 2013	% Chg. From Mar 2014	% Chg. From Apr 2013	Mankato MSA Jobs Apr 2014	Jobs Mar 2014	Jobs Apr 2013	% Chg. From Mar 2014	% Chg. From Apr 2013
TOTAL NONFARM WAGE AND SALARY	**104,800**	**103,400**	**101,900**	**1.4%**	**2.9%**	**55,300**	**54,700**	**53,700**	**1.1%**	**3.0%**
GOODS-PRODUCING	**19,500**	**18,800**	**19,000**	**3.7**	**2.6**	**9,900**	**9,600**	**9,400**	**3.1**	**5.3**
Mining, Logging, and Construction	4,700	4,300	4,300	9.3	9.3	--	--	--	--	--
Manufacturing	14,800	14,500	14,700	2.1	0.7	--	--	--	--	--
						--	--	--	--	--
SERVICE-PROVIDING	**85,300**	**84,600**	**82,900**	**0.8**	**2.9**	**45,400**	**45,100**	**44,300**	**0.7**	**2.5**
Trade, Transportation, and Utilities	20,500	20,300	20,100	1.0	2.0	--	--	--	--	--
Wholesale Trade	4,200	4,100	4,000	2.4	5.0	--	--	--	--	--
Retail Trade	12,900	12,800	12,700	0.8	1.6	--	--	--	--	--
Transportation, Warehouse, Utilities	3,400	3,400	3,400	0.0	0.0	--	--	--	--	--
Information	1,700	1,700	1,700	0.0	0.0	--	--	--	--	--
Financial Activities	4,500	4,500	4,400	0.0	2.3	--	--	--	--	--
Professional and Business Services	9,200	9,000	8,600	2.2	7.0	--	--	--	--	--
Educational and Health Services	20,400	20,400	19,700	0.0	3.6	--	--	--	--	--
Leisure and Hospitality	9,100	9,000	8,500	1.1	7.1	--	--	--	--	--
Other Services	3,500	3,500	3,500	0.0	0.0	--	--	--	--	--
Government	16,400	16,200	16,400	1.2	0.0	9,000	9,000	9,200	0.0	-2.2

Employer Survey

Industry	Fargo-Moorhead MSA Jobs Apr 2014	Jobs Mar 2014	Jobs Apr 2013	% Chg. From Mar 2014	% Chg. From Apr 2013	Grand Forks-East Grand Forks MSA Jobs Apr 2014	Jobs Mar 2014	Jobs Apr 2013	% Chg. From Mar 2014	% Chg. From Apr 2013
TOTAL NONFARM WAGE AND SALARY	**135,840**	**134,032**	**131,060**	**1.4%**	**3.7%**	**56,534**	**56,493**	**55,515**	**0.1%**	**1.8%**
GOODS-PRODUCING	**18,262**	**17,726**	**16,804**	**3.0**	**8.7**	**6,374**	**6,225**	**5,952**	**2.4**	**7.1**
Mining, Logging, and Construction	8,272	7,753	7,026	6.7	17.7	2,871	2,741	2,474	4.7	16.1
Manufacturing	9,990	9,973	9,778	0.2	2.2	3,503	3,484	3,478	0.6	0.7
SERVICE-PROVIDING	**117,578**	**116,306**	**114,256**	**1.1**	**2.9**	**50,160**	**50,268**	**49,563**	**-0.2**	**1.2**
Trade, Transportation, and Utilities	29,523	29,309	28,838	0.7	2.4	12,286	12,117	11,989	1.4	2.5
Wholesale Trade	9,168	9,052	8,806	1.3	4.1	1,995	1,966	1,988	1.5	0.4
Retail Trade	15,446	15,413	15,278	0.2	1.1	8,263	8,135	7,966	1.6	3.7
Transportation, Warehouse, Utilities	4,909	4,844	4,754	1.3	3.3	2,028	2,016	2,035	0.6	-0.3
Information	3,266	3,274	3,198	-0.2	2.1	611	618	587	-1.1	4.1
Financial Activities	9,875	9,815	9,389	0.6	5.2	1,716	1,715	1,713	0.1	0.2
Professional and Business Services	16,198	15,668	15,349	3.4	5.5	2,752	2,722	2,864	1.1	-3.9
Educational and Health Services	22,047	22,021	21,497	0.1	2.6	9,849	9,847	9,755	0.0	1.0
Leisure and Hospitality	13,316	12,854	13,104	3.6	1.6	6,025	6,162	5,907	-2.2	2.0
Other Services	5,246	5,201	5,177	0.9	1.3	2,088	2,074	2,027	0.7	3.0
Government	18,107	18,164	17,704	-0.3	2.3	14,833	15,013	14,721	-1.2	0.8

Source: Department of Employment and Economic Development, Current Employment Statistics, and North Dakota Job Service, 2014.

Minnesota Economic Indicators

Highlights

The **Minnesota Index** barely increased in April, inching up just 0.1 percent for the second consecutive month. The index has been losing momentum since the beginning of the year as Minnesota's job growth has stalled out. Declining wage and salary employment and waning average weekly manufacturing hours held the index in check in April despite a drop in the unemployment rate. The index hasn't increased this slowly over a two-month period since early 2010. The U.S. index, which also slowed during the first few months of the year, rebounded in April, climbing 0.3 percent.

The recent slowdown in both Minnesota and U.S. indices is consistent with a national economy that shrank during the first quarter of 2014. U.S. GDP growth for the first quarter was revised down to a negative 1.0 percent on a seasonally adjusted annual rate basis. The drop marked the economy's first contraction in three years with a large share of downturn blamed on the severe winter weather. Most economists see the U.S. economy rebounding sharply during the second quarter which should help pull Minnesota out of its early 2014 doldrums. Minnesota's economy, which increased slightly faster than the U.S. economy during the last six months of 2013, has been lagging behind U.S. growth since 2014 began.

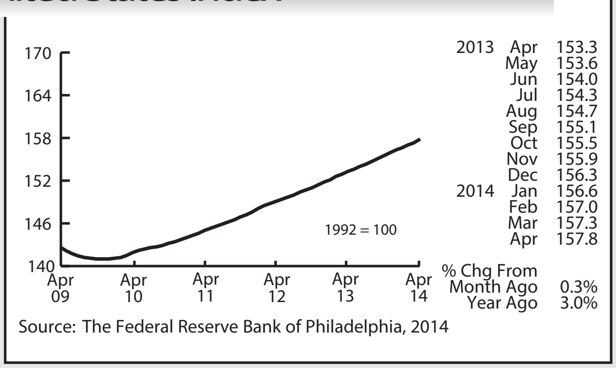
Minnesota's adjusted **Wage and Salary Employment c**rashed in April with 4,200 jobs lost. April's job decline was the steepest since July 2013. The decline would have been even worse if not for the addition of 1,500 public sector jobs. The loss of 5,700 private sector jobs was the highest since May 2012. Cutbacks occurred in seven sectors with Construction, Professional and Business Services, and Leisure and Hospitality reducing payrolls the most. The only positive job development was 2,400 new manufacturing jobs.

Job growth over the year in Minnesota remained unchanged from last month at 1.5 percent while the U.S. rate inched up to 1.7 percent. Minnesota's job growth has slipped below the national rate over the last few months.

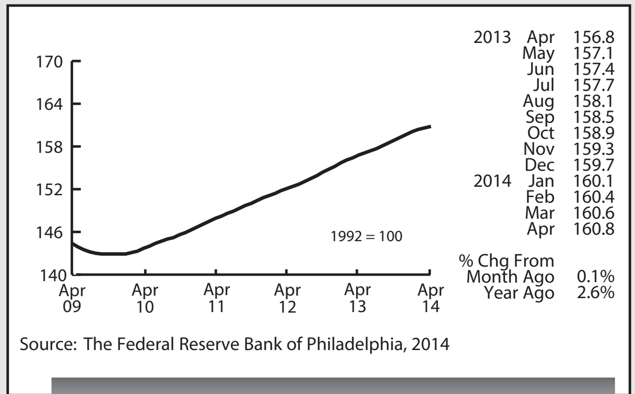
Minnesota's adjusted online **Help-Wanted Ads** declined sharply for the second consecutive month in April, sending the ad level down to its lowest level in nearly three years. The drop-off, if it holds, implies that labor demand in Minnesota has tailed off. Ads in Minnesota shrank 10 percent in April while increasing 0.6 percent nationwide.

Minnesota's **Purchasing Managers' Index (PMI)** retreated a bit from last month's three-year high, falling off to a still very healthy 64.9 reading in April. The index has now been above 60 for three consecutive months pointing toward improving growth in the next three to six months. The strength of this indicator is inconsistent with an economy that is stuck in neutral. Minnesota's PMI has easily topped the U.S. PMI over the last five months which means that Minnesota businesses are more optimistic about future growth than their national counterparts.

United States Index



Adjusted **Manufacturing Hours** tailed off for the second month in a row in April, sliding to a still robust 41.6 hours per week. The factory workweek has been above 41 hours for 14 straight months which is the longest streak above 41 hours since 2000. Minnesota's factory workweek remains high by historical standards, indicating manufacturing in the state is in expansion mode. **Manufacturing Earnings** also slid in April falling off to $815.91, the smallest factory paycheck in over a year.



Minnesota Index

The **Minnesota Leading Index** inched up for the second straight month in April after having recorded its lowest reading in four years in February. The uptick is promising since a rising leading index points toward stronger economic activity over the next six months.

Adjusted **Residential Building Permits** moved backward in April, declining 22.6 percent. Minnesota's home building market, like many markets across the nation, after picking up speed in early 2013, began to stall out during the second half of last year. The home building market has improved over the last few years but the improvement has been very uneven.

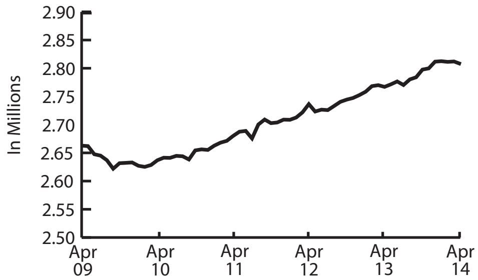
Adjusted **Initial Claims for Unemployment Benefits (UB)** dropped in April, falling below 20,000 for the second time this year. Monthly initial claims have fallen from 1.5 percent of the labor force during the worst of the recession in 2009 to 0.7 percent in April. During the boom years of the late 1990s, initial claim filings dipped to 0.5 percent of the labor force.

by Dave Senf

Note: All data except for Minnesota's PMI have been seasonally adjusted. See the feature article in the Minnesota Employment Review, May 2010, for more information on the Minnesota Index.

Minnesota Economic Indicators

Wage and Salary Employment



seasonally adjusted

2013	Nov	2.7998
	Dec	2.8117
2014	Jan	2.8125
	Feb	2.8113
	Mar	2.8120
	Apr	2.8078

% Chg From Month Ago -0.1%

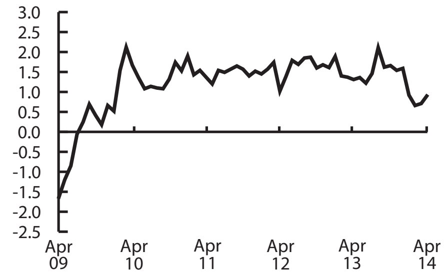
unadjusted

2013	Apr	2.7472
2014	Apr	2.7892

% Chg From Year Ago 1.5%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2014

Minnesota Leading Index

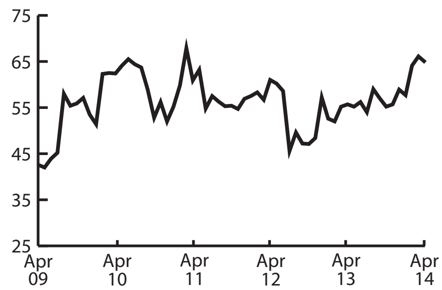


2013	Apr	1.31
	May	1.36
	Jun	1.22
	Jul	1.46
	Aug	2.11
	Sep	1.62
	Oct	1.66
	Nov	1.54
	Dec	1.59
2014	Jan	0.92
	Feb	0.66
	Mar	0.71
	Apr	0.92

% Chg From Month Ago 28.6%
Year Ago -30.2%

Source: The Federal Reserve Bank of Philadelphia, 2014

Purchasing Managers' Index

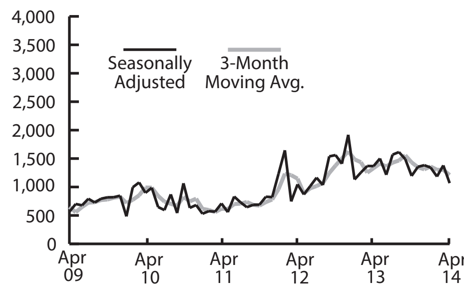


2013	Apr	55.7
	May	55.2
	Jun	56.2
	Jul	54.0
	Aug	59.0
	Sep	57.0
	Oct	55.2
	Nov	55.7
	Dec	58.9
2014	Jan	57.7
	Feb	64.1
	Mar	66.1
	Apr	64.9

% Chg From Month Ago -1.8%
Year Ago 16.5%

Source: Creighton University, Mid-America Survey of Business Conditions, 2014

Residential Building Permits



seasonally adjusted

2013	Nov	1,355
	Dec	1,383
2014	Jan	1,342
	Feb	1,184
	Mar	1,380
	Apr	1,068

% Chg From Month Ago -22.6%

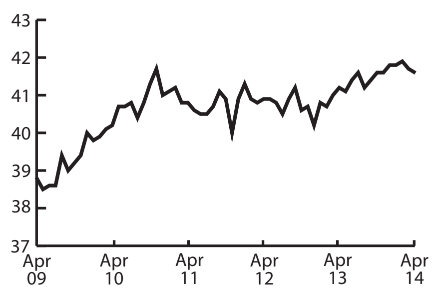
unadjusted

2013	Apr	1,460
2014	Apr	1,082

% Chg From Year Ago -25.9%

Source: Residential Building Permits, Census Bureau, U.S. Department of Commerce, 2014

Average Weekly Manufacturing Hours



seasonally adjusted

2013	Nov	41.6
	Dec	41.8
2014	Jan	41.8
	Feb	41.9
	Mar	41.7
	Apr	41.6

% Chg From Month Ago -0.2%

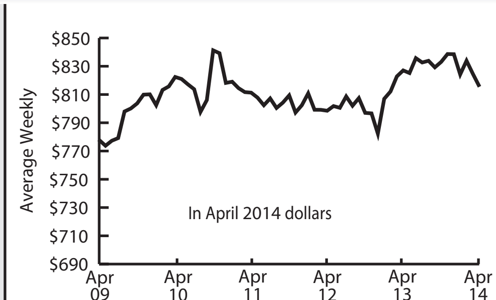
unadjusted

2013	Apr	41.4
2014	Apr	41.4

% Chg From Year Ago 0.0%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2014

Manufacturing Earnings



seasonally adjusted

2013	Nov	838.64
	Dec	838.53
2014	Jan	824.19
	Feb	833.90
	Mar	824.64
	Apr	815.91

% Chg From Month Ago -1.1%

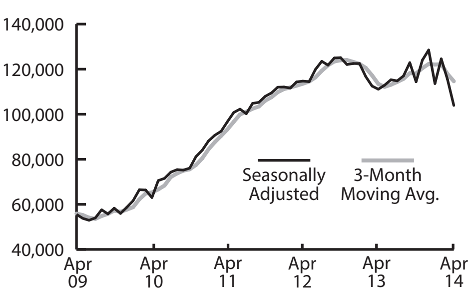
unadjusted

2013	Apr	820.6
2014	Apr	817.2

% Chg From Year Ago -0.4%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2014

Online Help-Wanted Advertising

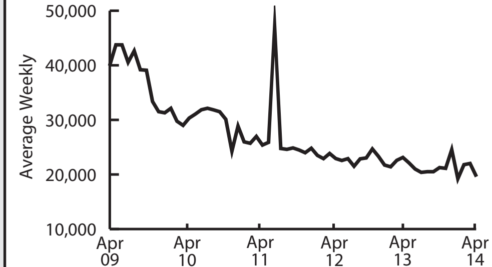


2013	Apr	113,433
	May	112,167
	Jun	113,100
	Jul	114,333
	Aug	115,700
	Sep	118,233
	Oct	118,100
	Nov	120,433
	Dec	122,300
2014	Jan	122,033
	Feb	122,233
	Mar	117,867
	Apr	114,633

% Chg From Month Ago -2.7%
Year Ago 1.1%

Source: The Conference Board Inc., 2014

Initial UB Claimants



seasonally adjusted

2013	Nov	21,123
	Dec	24,554
2014	Jan	19,219
	Feb	21,796
	Mar	22,017
	Apr	19,707

% Chg From Month Ago -10.5%

unadjusted

2013	Apr	20,435
2014	Apr	17,153

% Chg From Year Ago -16.1%

Source: Department of Employment and Economic Development, Unemployment Insurance Program, 2014

Minnesota Employment Review

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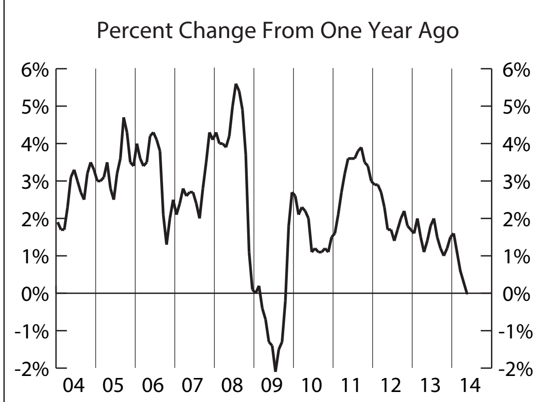
U.S. Consumer Price Index for All Urban Consumers (CPI-U)

The CPI-U increased 0.4 percent in May on a seasonally adjusted basis. The increase in the all items index was the largest since February 2013. The food index posted its largest increase since August 2011, with the index for food at home rising 0.7 percent. Increases in the electricity and gasoline indices led to a 0.9 percent rise in the energy index. The index for all items less food and energy rose 0.3 percent in May, its largest increase since August 2011. Along with indices for shelter and airline fares, the medical care, apparel, and new vehicle indices all increased.



For more information on the U.S. CPI or the semi-annual Minneapolis-St. Paul CPI, call: 651.259.7384 or toll free 1.888.234.1114.

What's Going On?

New microsite for bioscience jobs in Minnesota introduced

Making its debut at the International BIO conference in San Diego is mn-bioscience.jobs, a new bioscience jobs microsite developed by DEED, LifeScience Alley, and the National Labor Exchange for the bioscience industry. Employers with bioscience jobs in Minnesota now have a dedicated microsite to showcase their jobs.

Companies that have MinnesotaWorks.net or US.jobs accounts will have their jobs appear on MinnesotaWorks.net and on mn-bioscience.jobs via an automatic feed.

There are nice features, too: The microsite is mobile-enabled and search engine optimized and has social media-sharing capabilities.

The employment and unemployment data in this publication were produced in cooperation with the Bureau of Labor Statistics, U.S. Department of Labor.

Minnesota
Department of Employment and Economic Development

Chugging along in 2013

PHOTO: ANDREW STAMER

Minnesota's 2013 job growth was fairly substantial, with an annual average increase of 48,534 (1.8 percent) over 2012. This was an improvement from the 38,868 jobs added in 2012 and was slightly better than the U.S. growth rate of 1.7 percent.

Growth was widely distributed with most industries seeing gains of between 1.4 and 2.5 percent. There were exceptions: Mining and Logging employment declined 0.5 percent. Mining and Logging is a very small industry; the annual average employment in 2013 was only 6,967 for the whole state. It also did very well in the last few years as new mining operations opened up in the Northeast part of the state. The total decline of 33 jobs may simply be the industry settling in to a new normal after abrupt growth. Nationally, the industry grew 2.3 percent, but the mix of Mining and Logging operations varies quite a bit by region.

Table 1: Employment Growth by Supersector, 2011 - 2013

				Year-to Year Change 2012-2013		
				Minnesota		U.S.
Industry Title	2013	2012	2011	Numeric	Percent	Percent
Total Nonfarm	**2,779,617**	**2,731,083**	**2,688,250**	**48,534**	**1.8**	**1.7**
Total Private	2,366,242	2,318,708	2,277,350	47,534	2.1	2.1
Goods-Producing excl. Ag.	416,258	407,833	398,800	8,425	2.1	1.5
Service-Providing	2,363,358	2,323,250	2,289,450	40,108	1.7	1.7
Private Service-Providing	1,949,983	1,910,875	1,878,550	39,108	2.0	2.2
Mining and Logging	6,967	7,000	6,608	-33	-0.5	2.3
Construction	101,233	94,950	91,567	6,283	6.6	3.2
Manufacturing	308,058	305,883	300,625	2,175	0.7	0.7
Trade, Transportation, and Utilities	511,475	503,475	496,883	8,000	1.6	1.5
Retail Trade	287,392	282,800	279,808	4,592	1.6	1.6
Transportation and Warehousing	93,283	91,950	91,408	1,333	1.4	1.8
Information	53,667	53,600	53,783	67	0.1	0.3
Financial Activities	181,217	177,908	174,217	3,309	1.9	1.2
Professional and Business Services	345,208	336,742	329,542	8,466	2.5	3.5
Educational and Health Service	491,192	477,725	469,417	13,467	2.8	2
Leisure and Hospitality	249,675	245,550	239,558	4,125	1.7	3.4
Other Services (Private Only)	117,550	115,875	115,150	1,675	1.4	0.6
Government	413,375	412,375	410,900	1,000	0.2	-0.3

Source: Minnesota Department of Employment and Economic Development, Current Employment Statistics

Information employment also increased much less than other industries with a total gain of only 0.1 percent (67 jobs). Growth in the industry has been stagnant for several years now. Since this industry includes newspapers, telecommunications, software publishing and web development and search engines, the component industries may have dramatically different trends that cancel each other out in terms of overall employment impacts. The low rate of growth is consistent with the national increase of 0.3 percent.

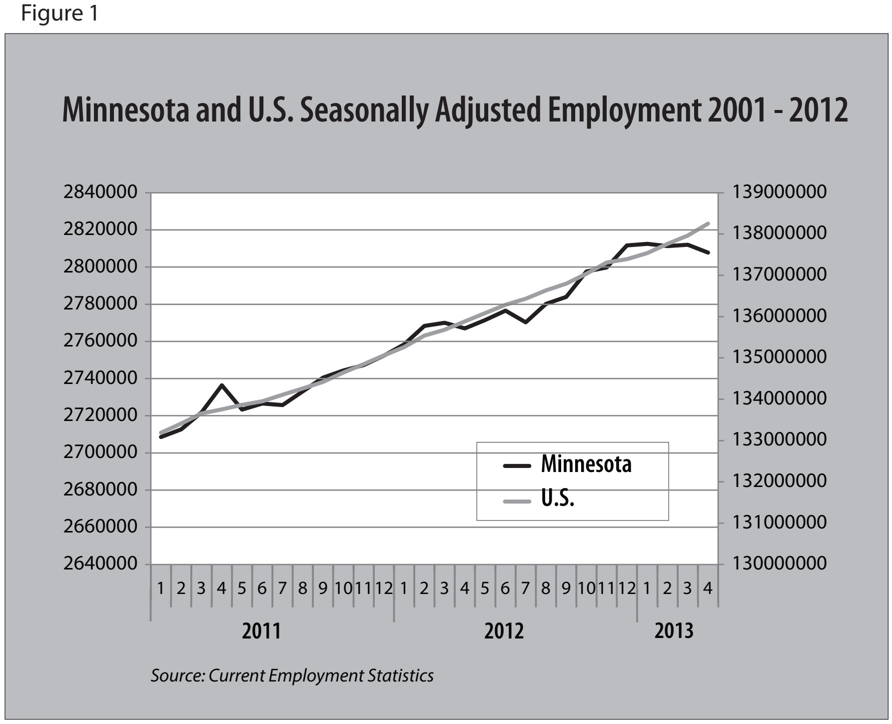
Government employment also was nearly flat, increasing only 0.2 percent for 2013. This is in contrast with the national decline of 0.3 percent in Government employment. Last year saw a similar gain in Minnesota.

The industry that fared the best was Construction which gained 6,283 jobs (6.6 percent) compared to 3.2 percent nationally. Strong growth in this industry is promising for its impacts on other industries — new building usually is a sign of money in the economy — but as a jobs creation engine, construction jobs can be inconsistent and short term.

In Figure 1 seasonally adjusted employment for the U.S. and Minnesota is displayed. Minnesota employment has largely been on a growth trajectory, except for July of 2012 when there was a decline and return to increases, then again in March and April of 2014 when employment slowed. The overall trend has mostly kept pace with the nation except for the past two months.

Over-the-year rates of growth by quarter show that growth was pretty consistent through the year (Table 2). Total Nonfarm quarterly employment over-the-year growth rates varied only 0.3 percent for the quarters of 2013. At the industry level the growth rates weren't always as resolute. The most inconsistent industries were Construction, Information, Financial Activities, Mining and Logging, and Other Services. Except for Information the inconsistency of these industries can be largely attributed to the overall seasonal pattern. Information in general has a more volatile employment pattern.

Figure 1



UNEMPLOYMENT

Following several years of steady declines, the unemployment rate is now holding roughly steady just below 5.0 percent — 4.7 percent seasonally adjusted in April. Although Minnesota's unemployment rate has been consistently better than the U.S. rate, the gap is beginning to close as Minnesota seems to reach normal and the nation as a whole continues to work toward that end.

INITIAL CLAIMS

Initial claims are falling, too. Last January seasonally adjusted initial claims bottomed out at 19,219, below the pre-recession low of 21,727 in December 2007. Except for a spike during the state shutdown in 2011, seasonally adjusted initial claims have been falling reliably but not very evenly since September 2009. This marks a return to relatively normal levels.

GROWTH INDUSTRIES

In the top 25 growth industries below the supersector level, seven industries were in the construction industry and five were related to construction and building maintenance. Given that construction was the largest growth industry by multiple measures, this is not surprising. It speaks to pent-up demand for housing and to building improvements that are finally being tapped as other parts of the economy recover.

Other growth industries are high-skilled service industries. Insurance Carriers,

Table 2: Minnesota Year-over-Year Growth by Quarter

	2013 Quarterly Annual Growth Rates			
	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Total Nonfarm	**1.9**	**1.6**	**1.6**	**1.7**
Total Private	2.1	1.8	2.0	2.1
Goods-Producing excl. Ag.	1.8	1.2	1.9	3.2
Service-Providing	2.0	1.6	1.6	1.4
Private Service Providing	2.2	1.9	2.0	1.9
Mining and Logging	0.7	-1.7	-1.5	-1.4
Construction	4.3	3.3	7.4	10.6
Manufacturing	1.2	0.6	0.1	0.9
Trade, Transportation, and Utilities	1.5	1.2	1.8	1.6
Information	0.2	-0.9	-0.7	1.5
Financial Activities	2.9	1.9	1.7	0.7
Professional and Business Services	3.2	2.6	2.3	1.6
Educational and Health Services	2.7	3.0	2.6	2.9
Leisure and Hospitality	2.0	1.4	1.6	1.2
Other Services (Private Only)	0.9	1.4	1.7	2.6
Government	0.9	0.3	-0.4	-0.7

Source: Current Employment Statistics

Architectural, Engineering, and Related Services, Accounting, Tax Preparation, Bookkeeping and Payroll, Professional, Scientific, and Technical, and Schools are all industries that deal in information and very specific services. The kinds of jobs being created are likely higher-skilled and may be pulling from the pool of newly minted college graduates or people who had left the labor force rather than take a job below their skill level. In either case, the unemployment rate would remain unaffected since new entrants and non-participants are not counted among the unemployed.

Minnesota's employment in 2013 returned to pre-recession normal. Although growth has been measured, and workers are still picking up the pieces after a tough few years, our measures of economic progress have evened out and are ready to tell a new story.

by Amanda Rohrer
Labor Market Information Office
Minnesota Department of Employment and Economic Development

Table 3: Minnesota Industries with the Highest Rates of Growth

Industry Title	2012-2013 Growth	
	Numeric	Percent
Residential Building Construction	822	8.7
Nondepository Credit Intermediation	707	8.5
Transportation Equipment Manufacturing	716	6.9
Construction of Buildings	1,450	6.7
Specialty Trade Contractors	3,956	6.6
Construction	6,216	6.5
Heavy and Civil Engineering Construction	810	5.9
Services to Buildings and Dwellings	1,379	5.2
Building Equipment Contractors	1,245	4.5
Insurance Carriers	2,086	4.5
Architectural, Engineering, and Related Services	746	4.1
Accounting, Tax Preparation, Bookkeeping, and Payroll Services	573	3.9
Computer Systems Design and Related Services	1,194	3.9
Social Assistance	2,920	3.8
Ambulatory Health Care Services	4,773	3.6
Building Material and Garden Equipment and Supplies Dealers	872	3.5
Elementary and Secondary Schools	686	3.5
Foundation, Structure, and Building Exterior Contractors	383	3.4
Credit Intermediation and Related Activities	1,791	3.4
Offices of Physicians	2,153	3.4
Insurance Carriers and Related Activities	2,153	3.3
Professional, Scientific, and Technical Services	4,369	3.3
Motor Vehicle and Parts Dealers	979	3.2
Health Care and Social Assistance	12,277	3.0
State Government excluding Education	1,088	3.0

Source: Current Employment Statistics

Minnesota
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