



Montana Manufacturing

By Paul E. Polzin

Director Emeritus

The Bureau of Business and Economic Research

Manufacturing is...

“Obsolete...”

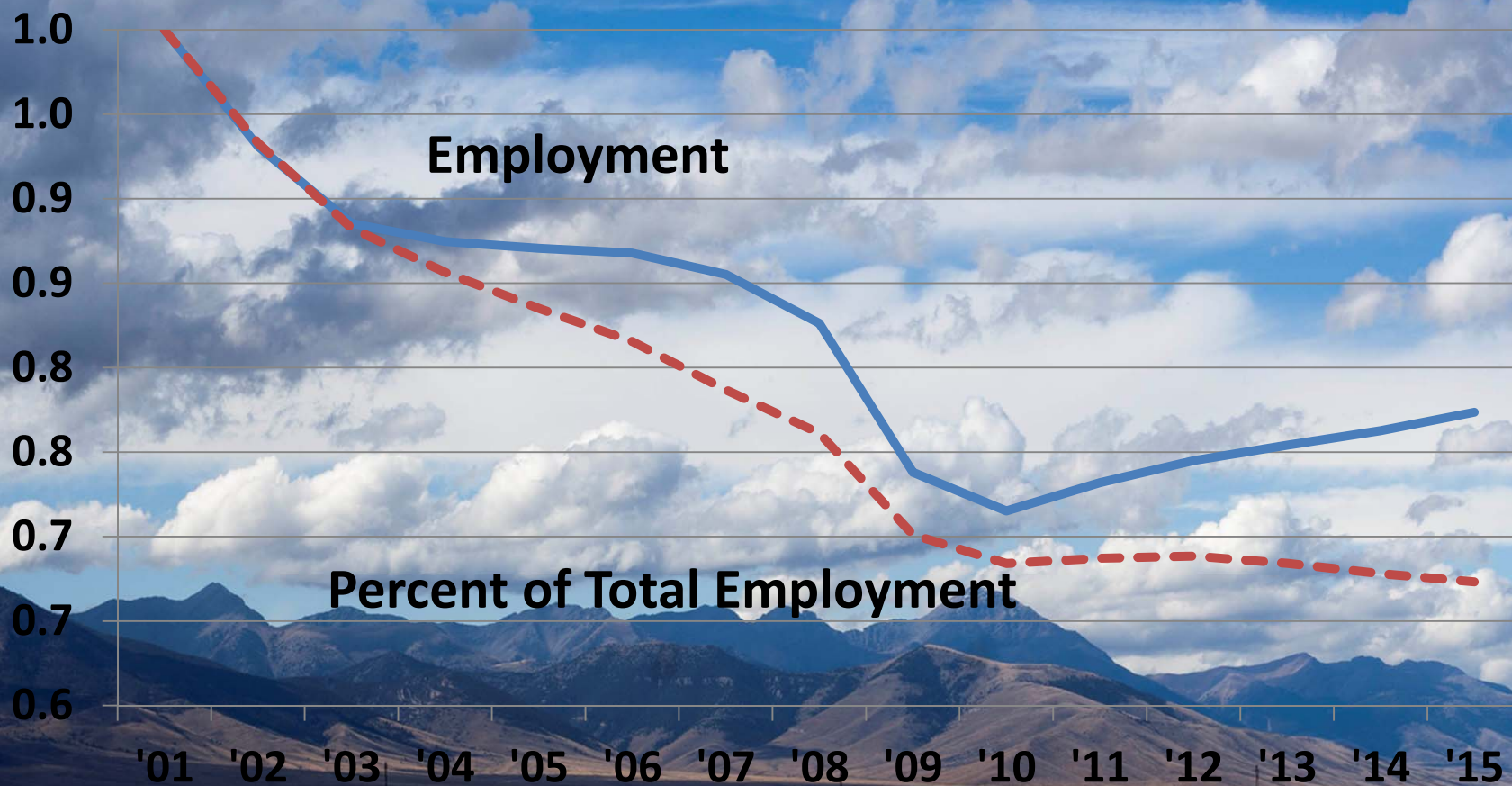
“Rust Belt...”

“Declining...”

“The Big Whooshing Sound...”

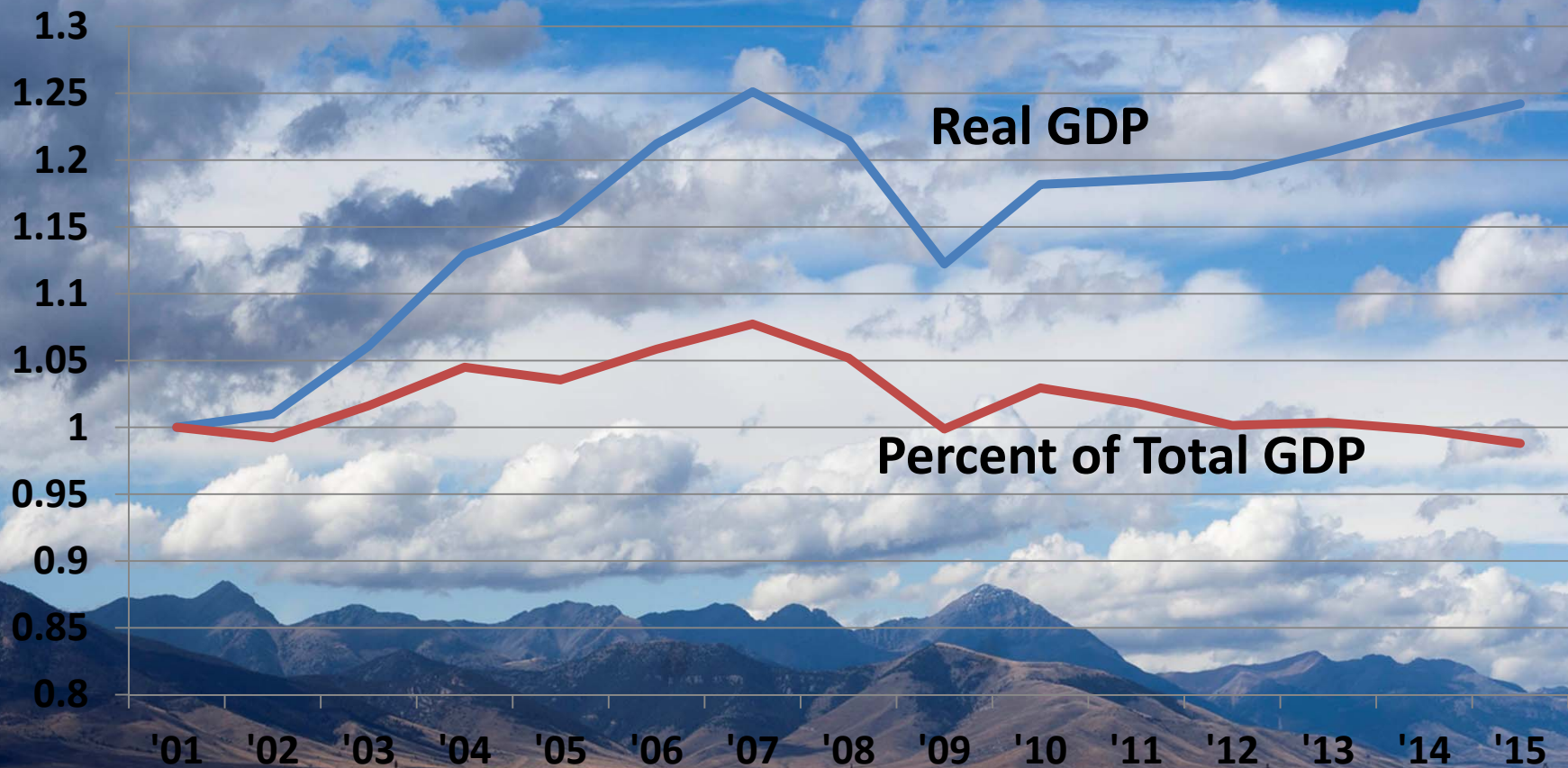


U.S. Manufacturing Employment (2001=1.00)



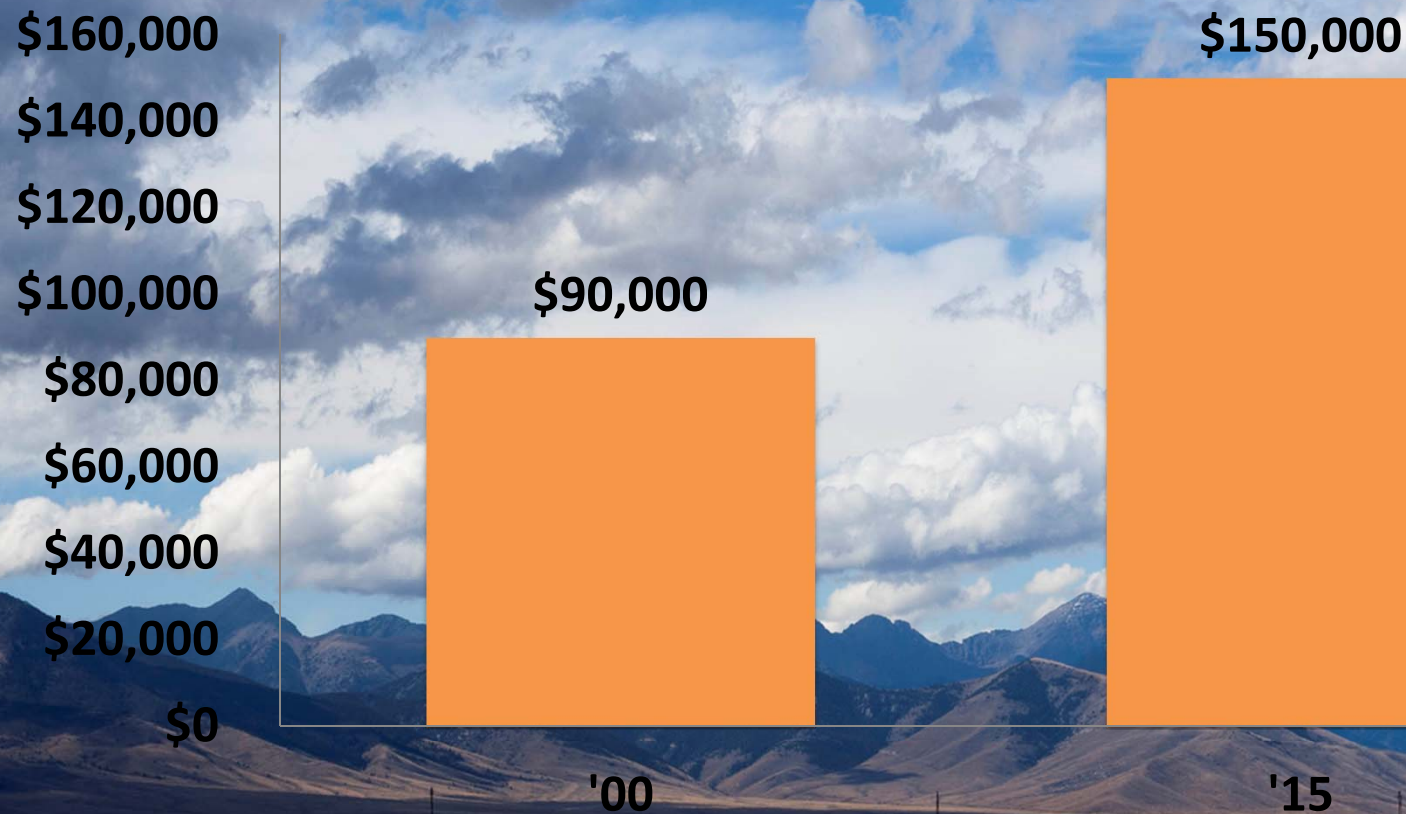
Source: U.S. Bureau of Economic Analysis

U.S. Manufacturing Real GDP (2001=1.00)



Source: U.S. Bureau of Economic Analysis

Manufacturing GDP per Worker, Constant 2009 Dollars



Sources: U.S. Bureau of Economic Analysis; Bureau of Business and Economic Research, University of Montana

Manufacturing Employment, U.S. and Montana, 2009 and 2015

	2009	2015	Percent Change
U.S. Manufacturing	12,489,200	13,091,200	4.8

Sources: U.S. Bureau of Economic Analysis, Bureau of Business and Economic Research, University of Montana.

Manufacturing Employment, U.S. and Montana, 2009 and 2015

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Montana Manufacturing	21,220	24,413	15.0

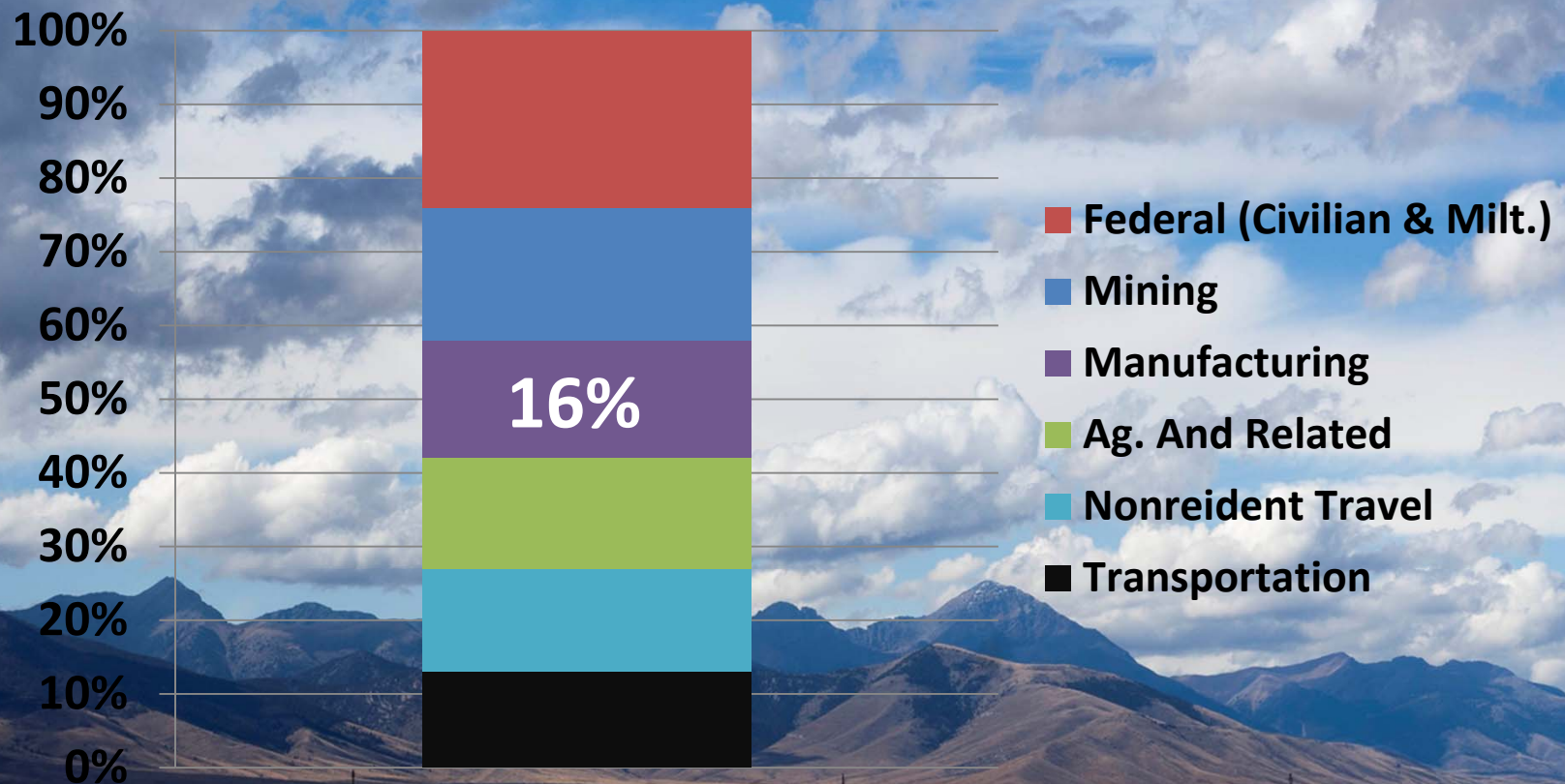
Sources: U.S. Bureau of Economic Analysis, Bureau of Business and Economic Research, University of Montana.

Manufacturing Employment, U.S. and Montana, 2009 and 2015

	2009	2015	Percent Change
U.S. Manufacturing	12,489,200	13,091,200	4.8
Montana Manufacturing	21,220	24,413	15.0
Wood and Paper Products	4,041	3,337	-17.4
All Other Manufacturing	17,179	21,076	22.7

Sources: U.S. Bureau of Economic Analysis, Bureau of Business and Economic Research, University of Montana.

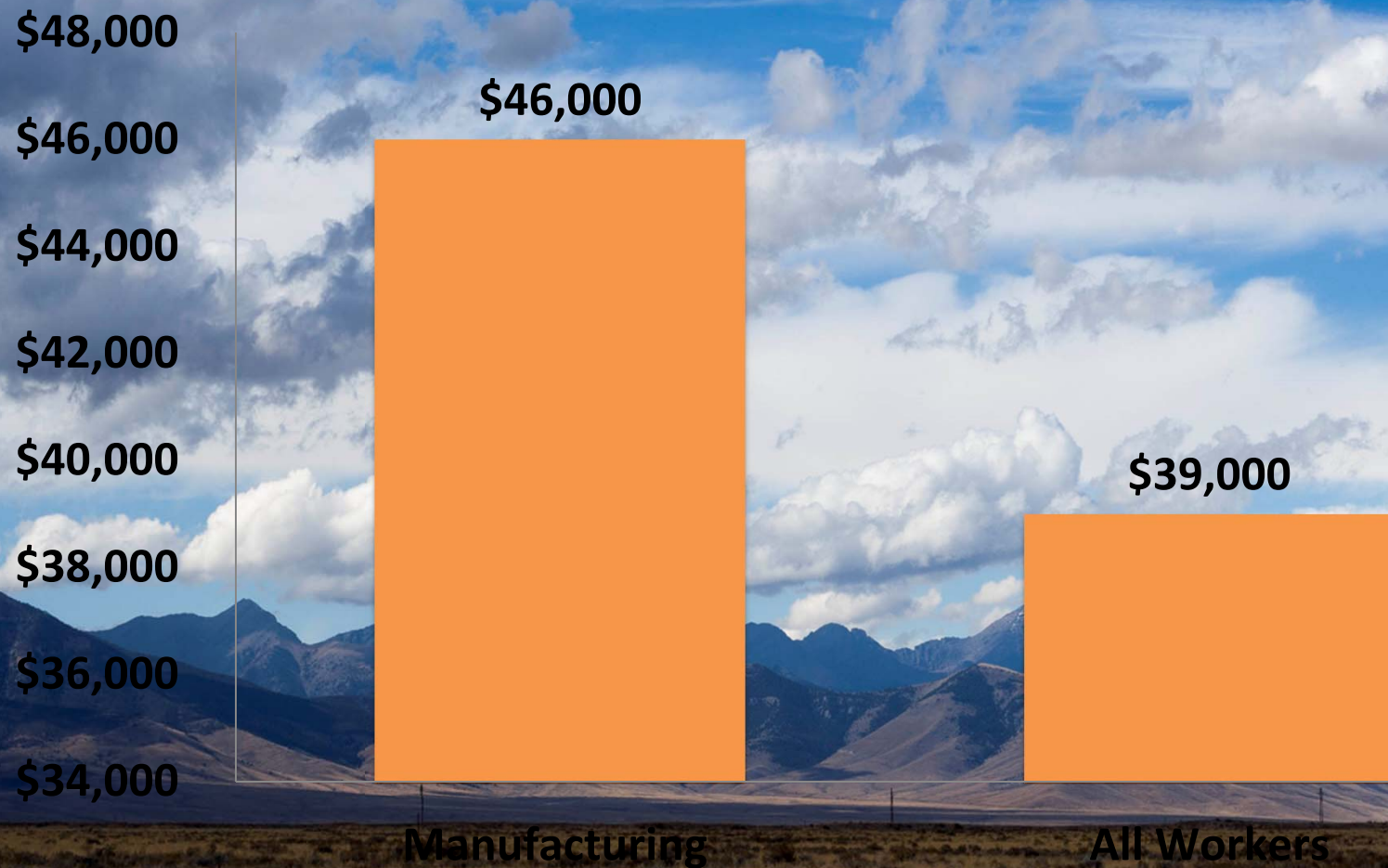
Worker Earnings in Basic Industries Montana, 2013-2015



Manufacturing Establishments By Employment Size, Montana 2014

Employment	Number of Establishments	Percent
Total	1,251	100
1 to 4	643	51.4
5 to 9	237	18.9
10 to 19	181	14.5
20 to 49	111	8.9
50 to 99	41	3.3
100 to 249	32	2.6
250 to 499	6	0.5
500 to 999	0	0.0
1,000 or more	0	0.0

Earnings per Worker, Montana



Manufacturing

Durable goods manufacturing

- Wood product manufacturing**
- Nonmetallic mineral product manufacturing**
- Primary metal manufacturing**
- Fabricated metal product manufacturing**
- Machinery manufacturing**
- Computer and electronic product manufacturing**
- Electrical equipment, appliance,
and component manufacturing**
- Motor vehicles, bodies and trailers,
and parts manufacturing**
- Other transportation equipment manufacturing**
- Furniture and related product manufacturing**
- Miscellaneous manufacturing**

Nondurable goods manufacturing

- Food manufacturing**
- Beverage and tobacco product manufacturing**
- Textile mills**
- Textile product mills**
- Apparel manufacturing**
- Leather and allied product manufacturing**
- Paper manufacturing**
- Printing and related support activities**
- Petroleum and coal products manufacturing**
- Chemical manufacturing**
- Plastics and rubber products manufacturing**

Rank Order of Manufacturing Industries, Employment

Rank	Montana	U.S.
1	Wood Products	Food Products



Rank Order of Manufacturing Industries, Employment

Rank	Montana	U.S.
1	Wood Products	Food Products
2	Food Products	Fabricated Metal Products

Rank Order of Manufacturing Industries, Employment

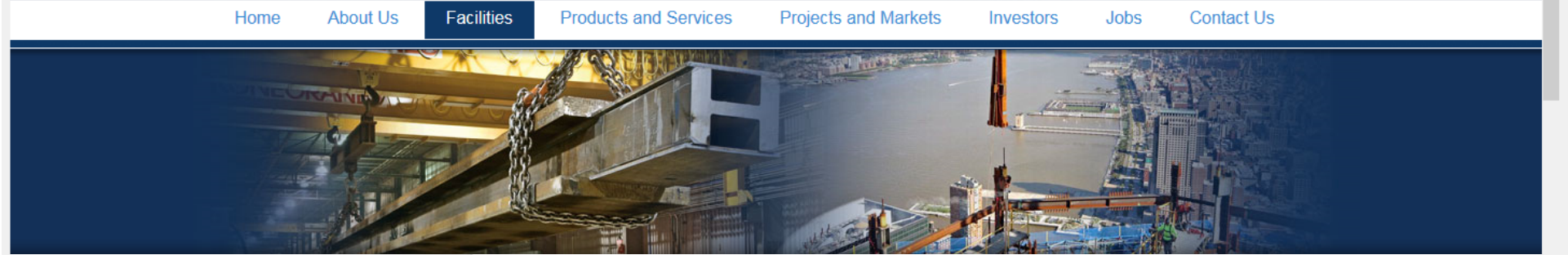
Rank	Montana	U.S.
1	Wood Products	Food Products
2	Food Products	Fabricated Metal Products
3	Fabricated Metal Products	Machinery Manufacturing

Rank Order of Manufacturing Industries, Employment

Rank	Montana	U.S.
1	Wood Products	Food Products
2	Food Products	Fabricated Metal Products
3	Fabricated Metal Products	Machinery Manufacturing
4	Miscellaneous Manufacturing	Computers and Electronics.



American Chemet Corporation, established in 1946, is a privately owned manufacturer and marketer of metal-based chemicals.



- > Terrebonne, Quebec, Canada
- > Great Falls, Montana, USA**
- > Miami, Florida, USA

Great Falls, Montana, USA

Fabrication Plant, Module Assembly Yard and Paint Shop



**ANNUAL FABRICATION CAPACITY:
25,000 TONS**

- » Fabrication plant of 9,290 m² (100,000 ft²)
- » Specialized paint shop of 5,200 m² (56,000 ft²) (June 2014)
- » 100-acre lot, 70 acres of which for pre-assembly of modular steel construction work

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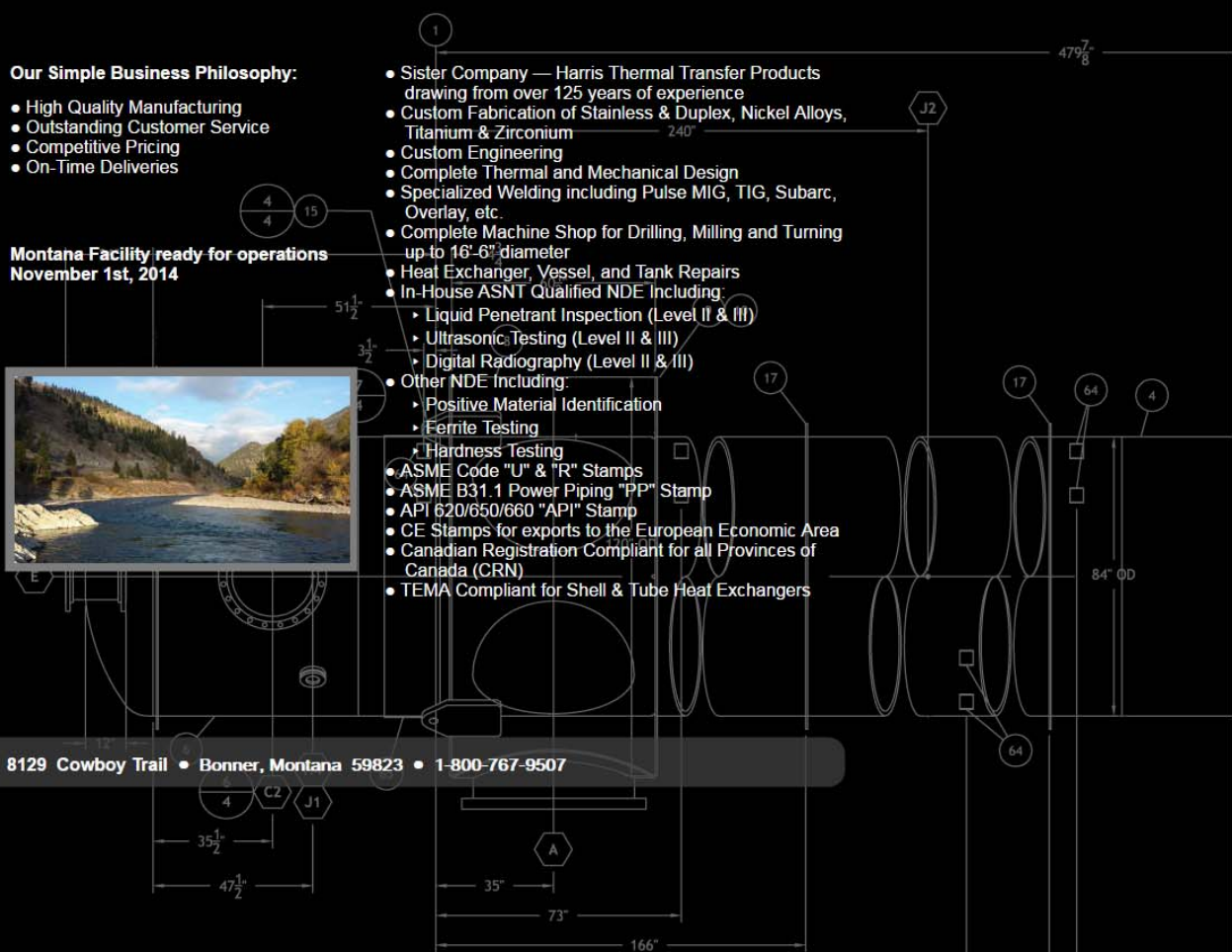
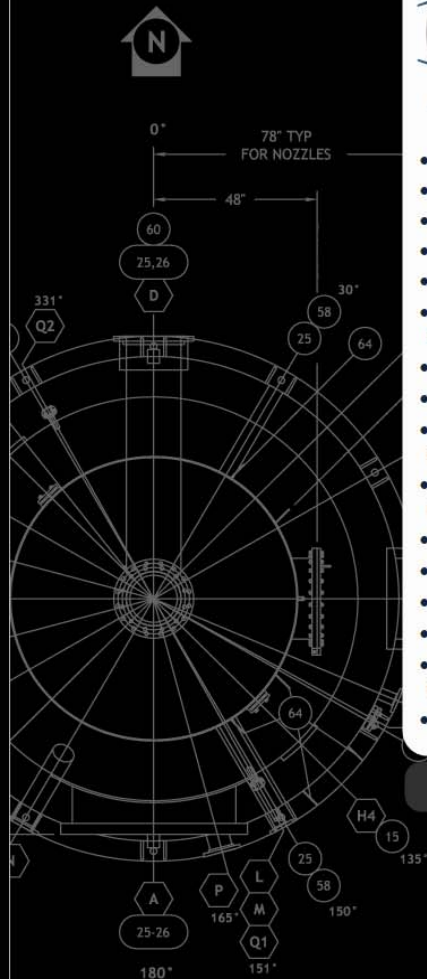
Montana Facility ready for operations
November 1st, 2014



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- Heat Exchanger, Vessel, and Tank Repairs
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 - ▶ Ultrasonic Testing (Level II & III)
 - ▶ Digital Radiography (Level II & III)
- Other NDE Including:
 - ▶ Positive Material Identification
 - ▶ Ferrite Testing
 - ▶ Hardness Testing
- ASME Code "U" & "R" Stamps
- ASME B31.1 Power Piping "PP" Stamp
- API 620/650/660 "API" Stamp
- CE Stamps for exports to the European Economic Area
- Canadian Registration Compliant for all Provinces of Canada (CRN)
- TEMA Compliant for Shell & Tube Heat Exchangers

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About us
The Billings Refinery started operations in 1948, processing an average of 20,000 barrels per day of crude oil.

Emergency preparedness and response
The Billings Refinery supports a volunteer in-plant emergency response team, including a 50-time emergency response exercise a 24-hour fire brigade, a 10-member rescue squad and a 12-member spill response team.

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Safety is the number one priority at the Billings Refinery, where we have a motto: "Nobody gets hurt."



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CHS Refinery at Laurel



Our Laurel, Mont., refinery has a 56,000 barrels-per-day refining capacity and distributes products throughout the northern tier of the U.S. A multimillion-dollar project is under way that will increase refinery production of gasoline and diesel products to 880 million gallons per year. CHS purchased the Laurel refinery in 1943. You can reach the main office at 406-628-5200.





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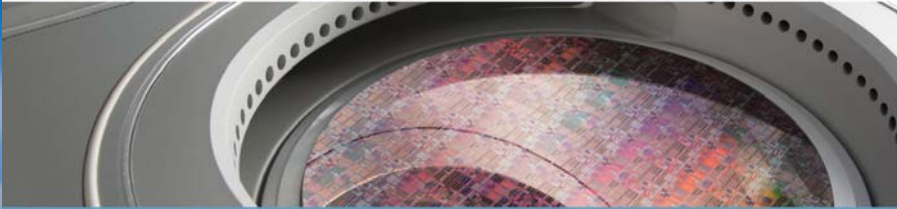


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Through the years, AFFCO has forged great relationships with many fine customers. The rewards go beyond the work and extend to the many fine people affiliated with these companies. An example is an article re-printed from the Holnam, Inc. March 2000 Newsletter.

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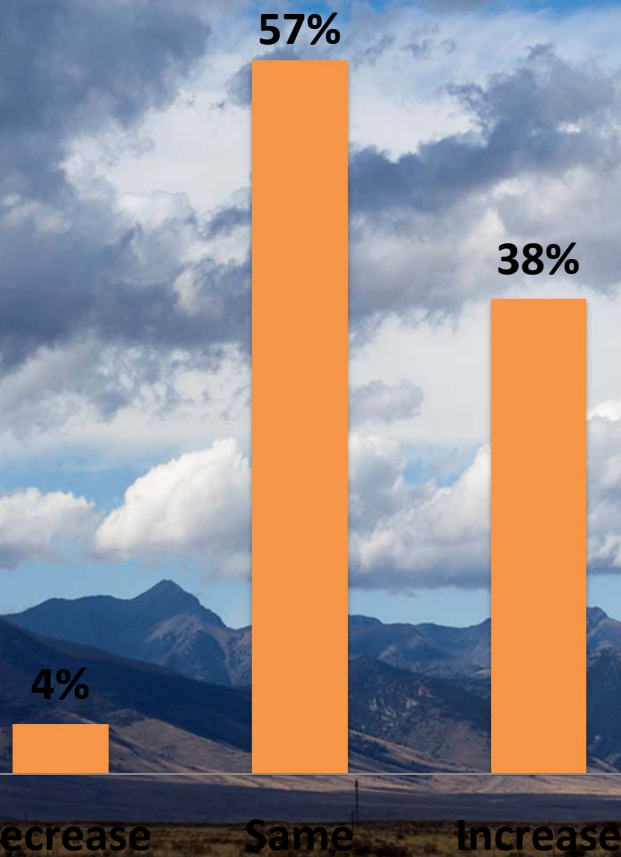


The slide features a background image of a Montana landscape with rolling hills and a blue sky with white clouds. A large orange shape, resembling a sticky note, is overlaid on the left side of the image. The title text is written in white on this orange background.

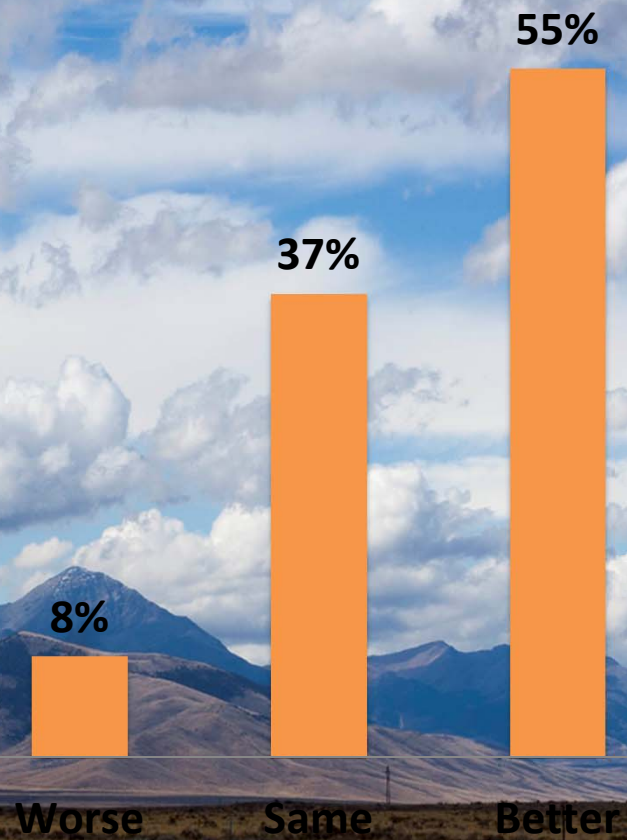
Montana Manufacturers' Outlook

Montana Manufacturers' Outlook for 2017

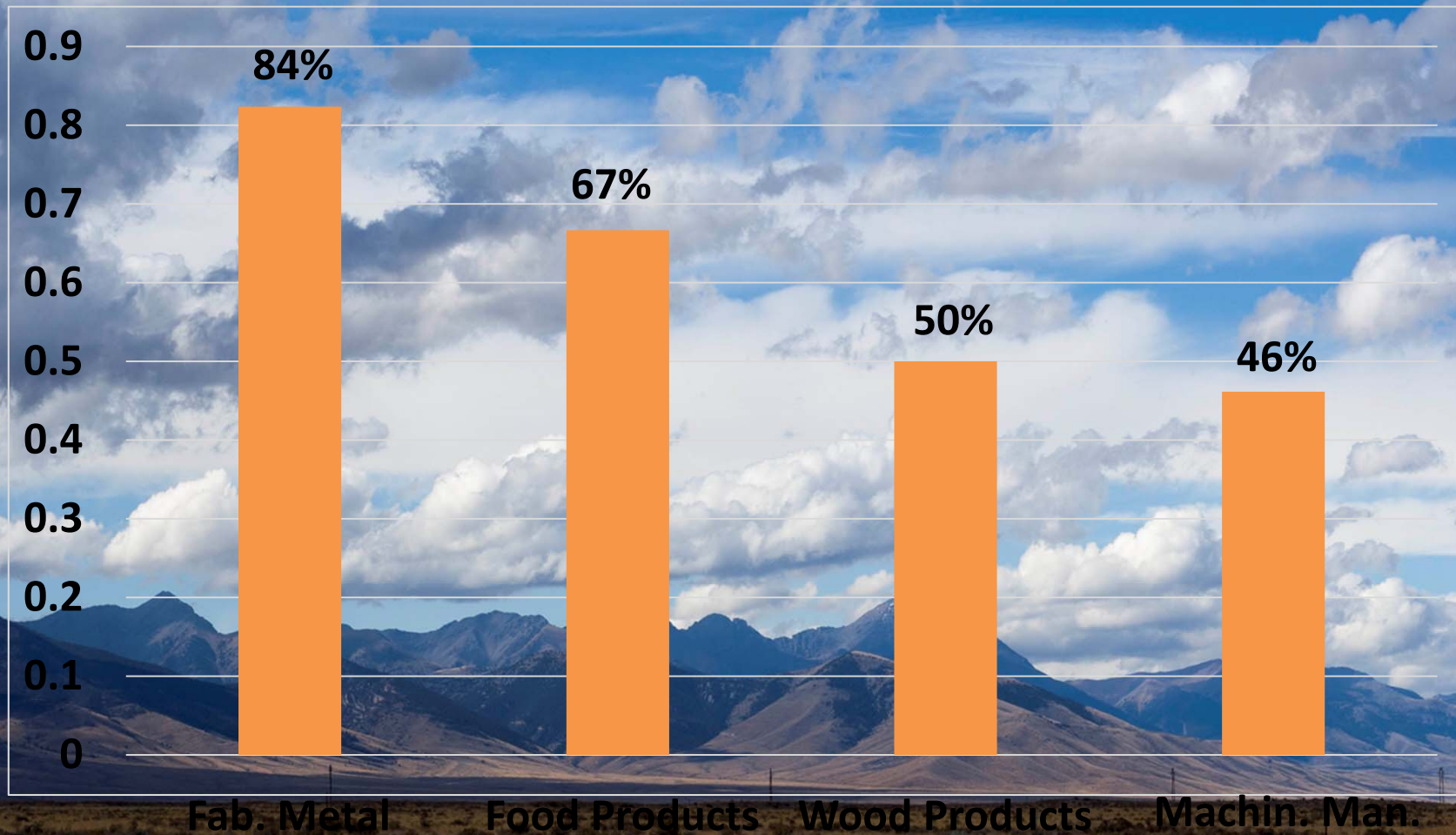
Employment Change



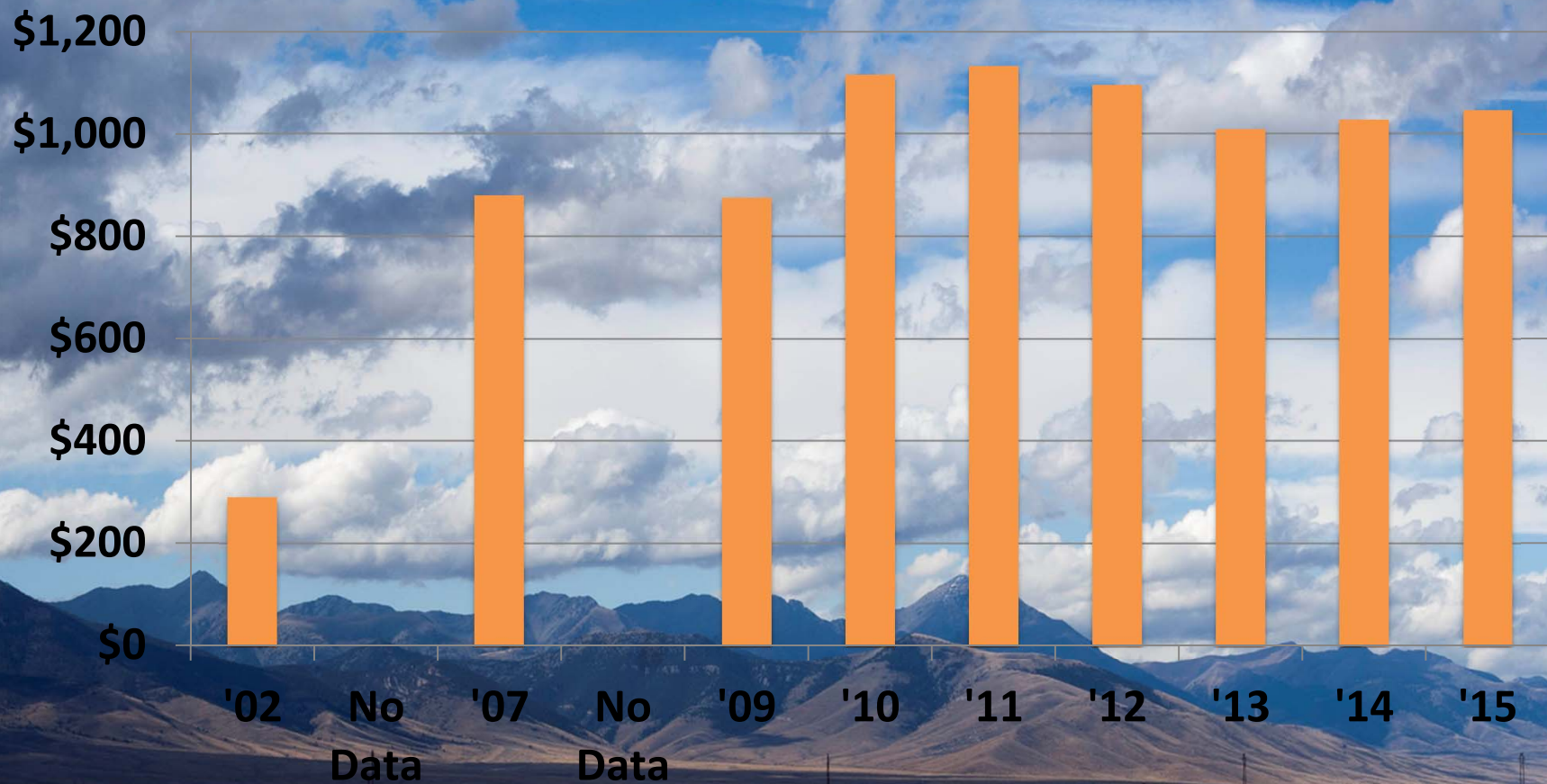
Overall Outlook



Montana Manufacturers Expecting Better, 2017



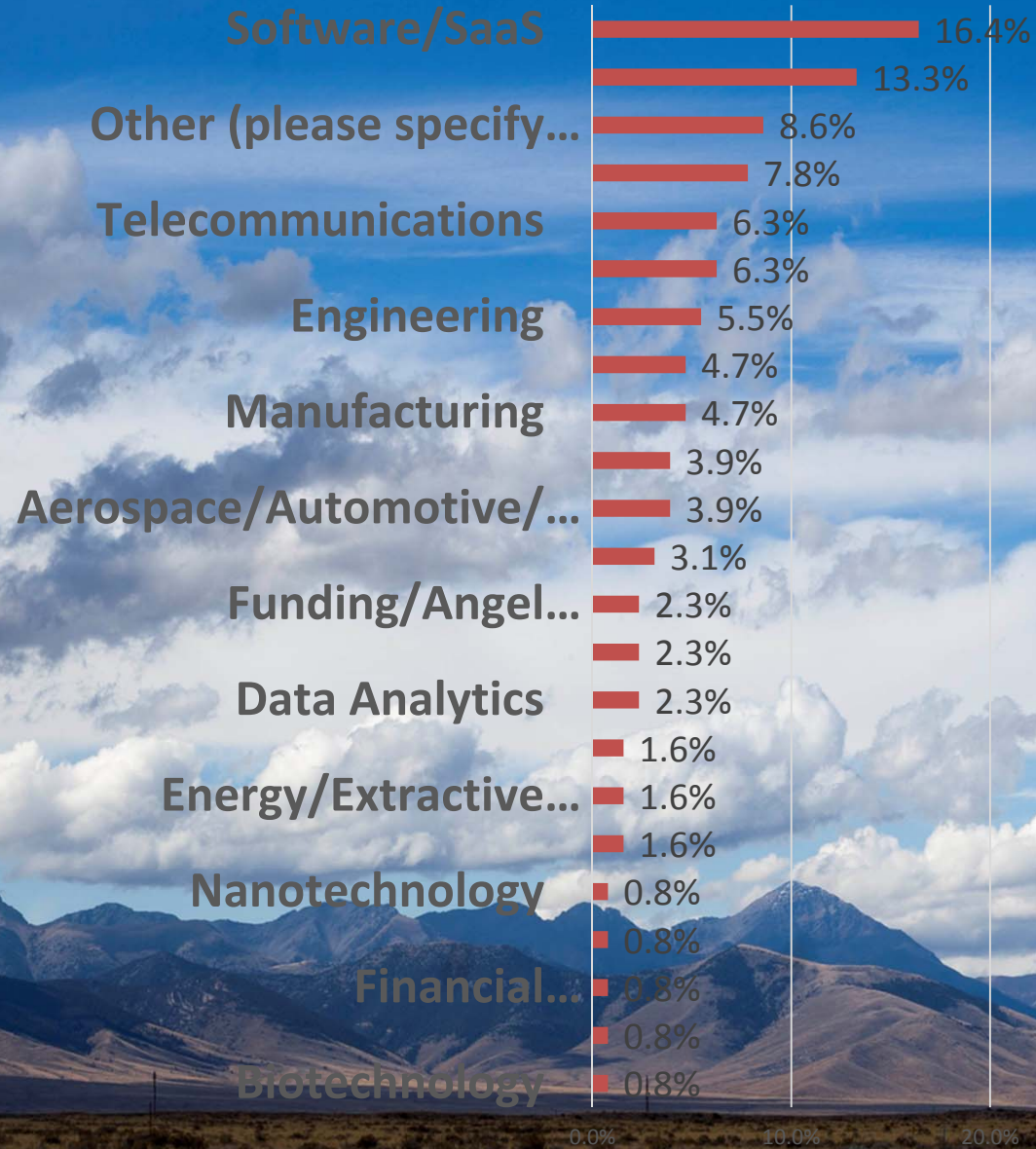
Montana Manufacturing Exports, (millions of current dollars)



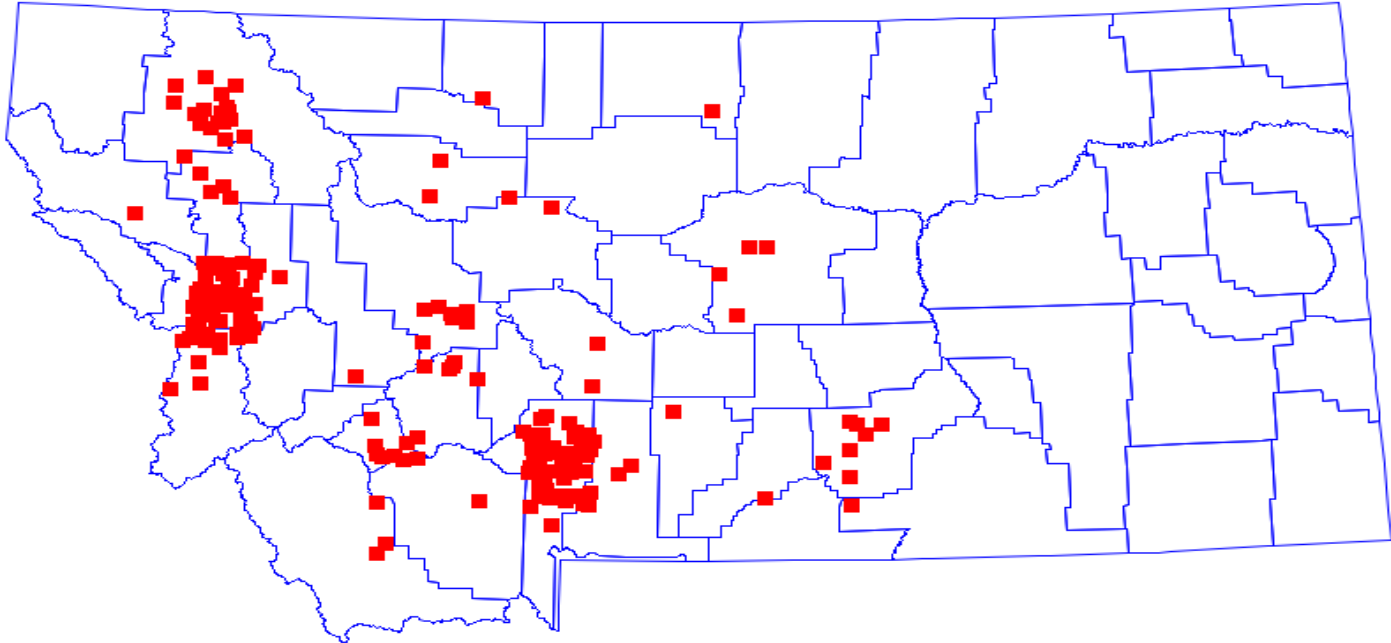


Montana's High-Tech Industries

High-Tech Business Types



High Tech Business Alliance Members



Montana High Tech Alliance Facts

Number of members doubled from 2014 to 2015

Surveyed businesses generated \$867,000,000 in gross sales in 2015

Surveyed businesses employed 3,574 workers in 2015

Surveyed businesses expected a 19.4 employment growth rate in 2016

Surveyed businesses reported average worker wages of \$65,126, well above statewide average of \$39,372.

Surveyed businesses very bullish about future capital investment plans in Montana



Questions?