

# **CEDS Update Meeting 4: New climate economy; transportation and mobility; and affordability**

**August 21, 2025**

# Insights on the **New climate economy**



# Minnesota House of Representatives

Get bill info



THE HOUSE STANDS ADJOURNED UNTIL 12:00 NOON, TUESDAY, FEBRUARY 17, 2026

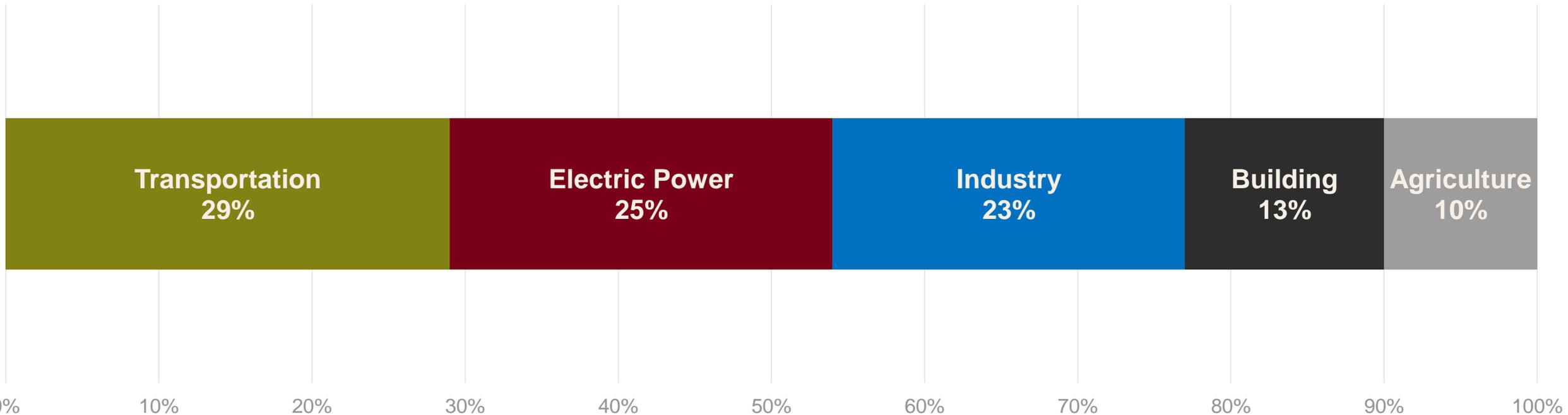
2023-2024 Regular Session

## State establishes standard of 100% carbon-free electricity by 2040



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# Five major economic sectors related to the new climate economy

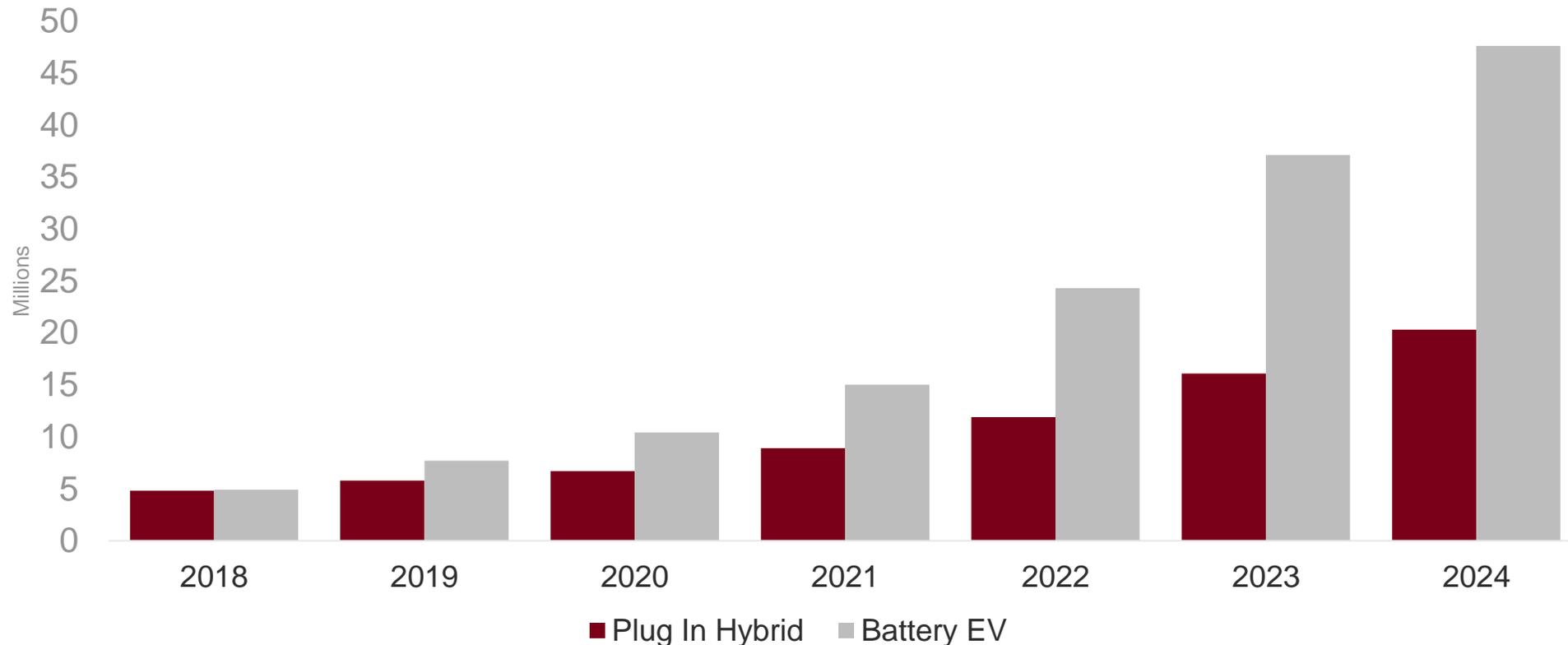


Source: Great Plains Institute

# Electric vehicle registrations continue to increase

**82%** of EVs are registered in the Twin Cities metro

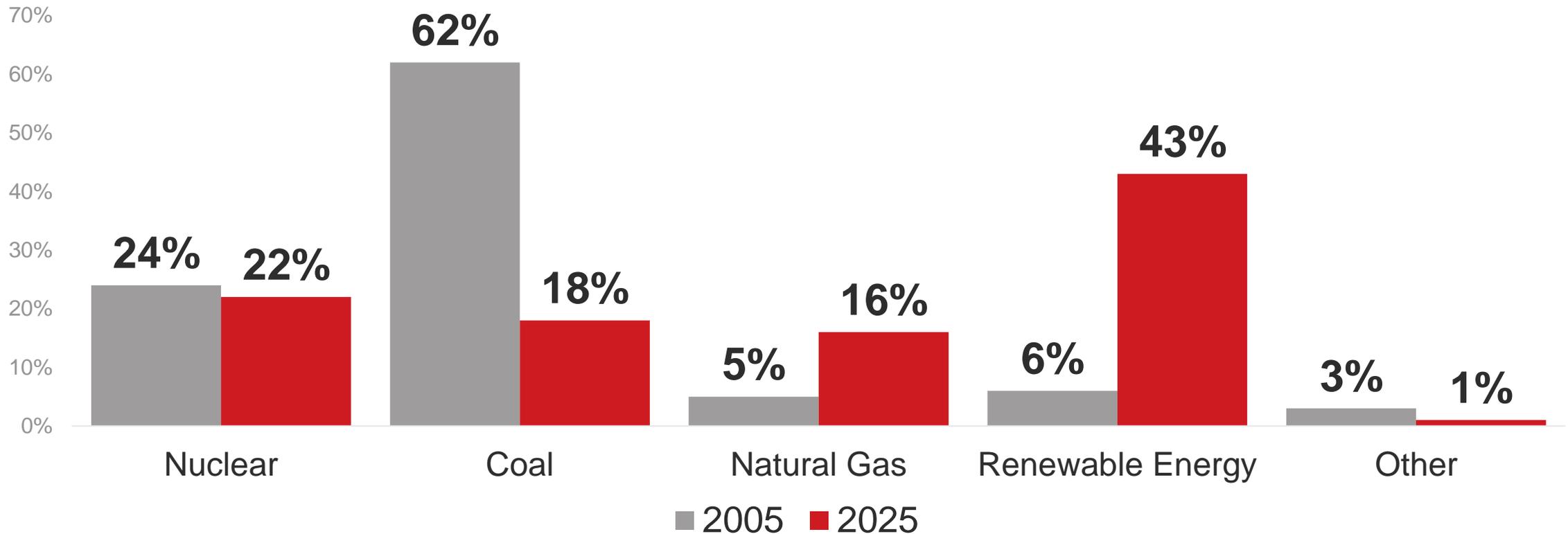
Electric vehicles registered in Minnesota



Source: Public Utilities Commission

# Electric power generation has shifted significantly in 20 years

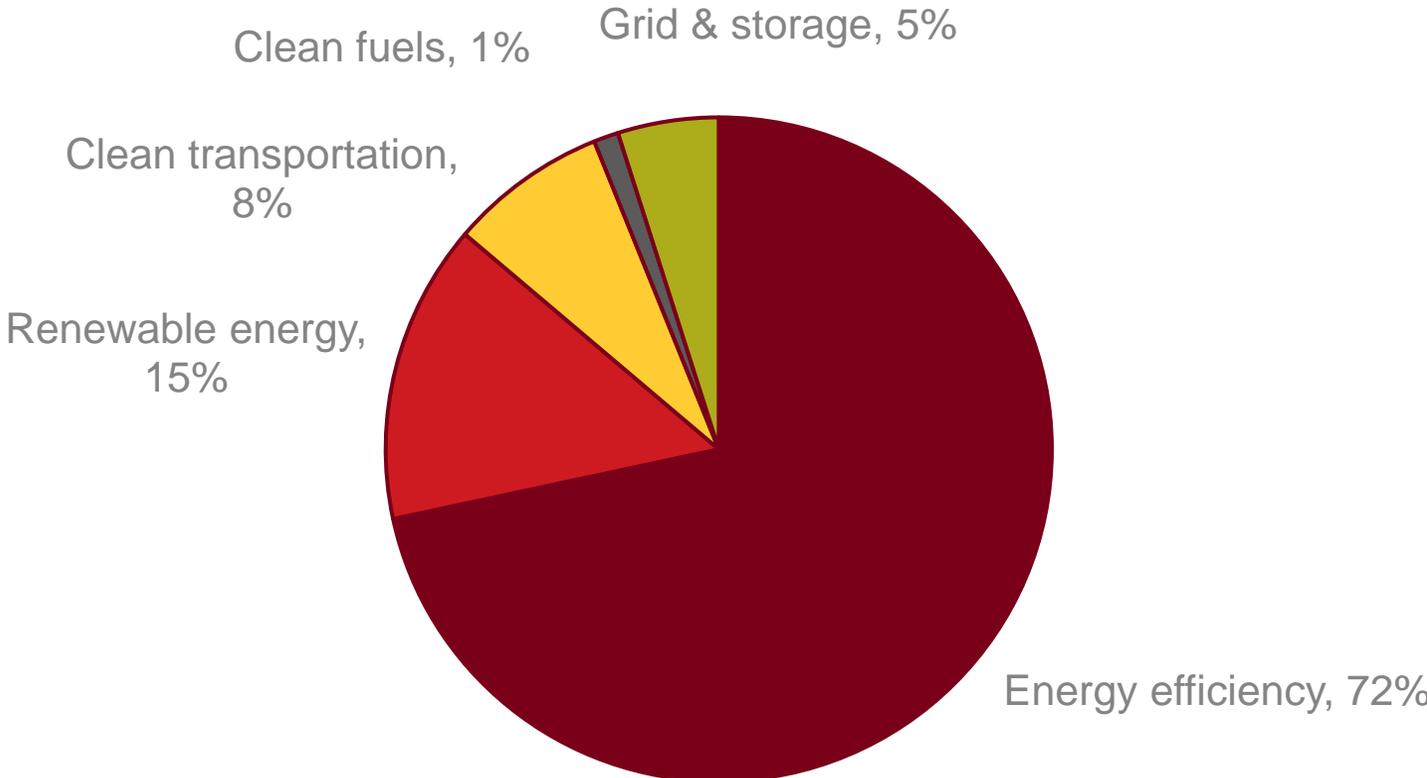
Utility-scale net electricity generation (share of total), Minnesota



Source: US Energy Information Administration

# Increasing number of clean energy jobs

Clean energy jobs by sector, Minnesota, 2023



**38,380**  
jobs are in  
the Twin  
Cities (62%)

Source: Clean Energy Economy MN

# Insights on **Transportation and mobility**



# How should we measure transportation?

## mobility

- speed, delay, volume
- vehicle movement
- fastest is best

## accessibility

- can people reach destinations?
- slower is safer, closer is better
- easiest is best

Source: Eric Lind, Center for Transportation Studies, University of Minnesota

# Regional accessibility compared to peers



in the percentage of population (68)  
within a 30-minute commute, 2025

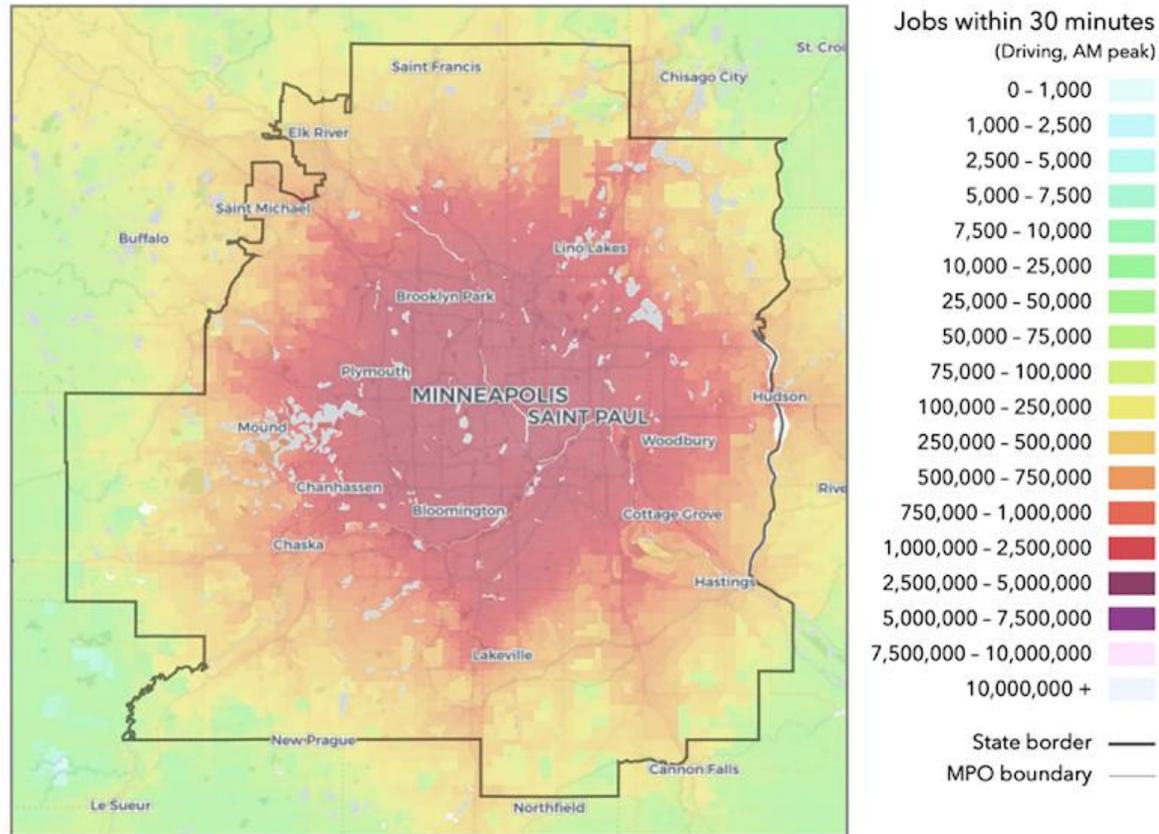
\*same ranking as 2015

Source: Greater MSP analysis of Center for Transportation accessibility data

# Accessibility to jobs by automobile



## Metropolitan Council



- Overall, **very high levels of accessibility**
- Job accessibility by car **improved during COVID but declined afterward.**
- Teleworking increased job accessibility by car **due to fewer commuting trips.**

Source: Greater MSP analysis of Center for Transportation accessibility data

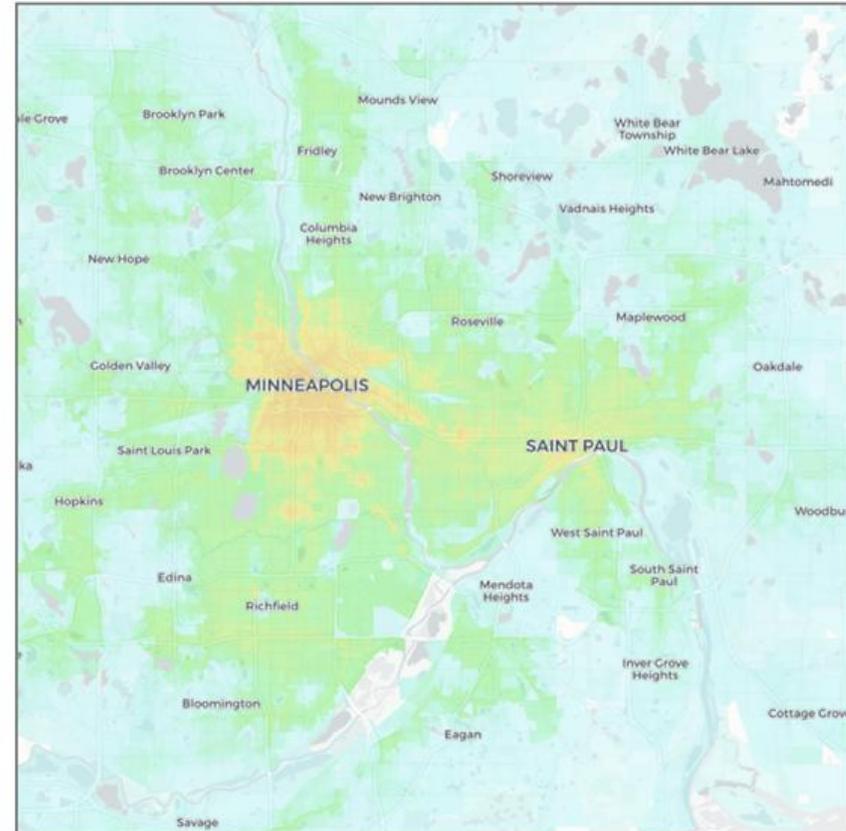
# Accessibility to jobs by transit



- **Teleworking reduced job accessibility** by transit since many commuter routes to suburbs were cut.
- Accessibility is **very dependent on location** within metro region

**Bicycle accessibility is expanding**, but still primarily limited to urban core

## Metropolitan Council

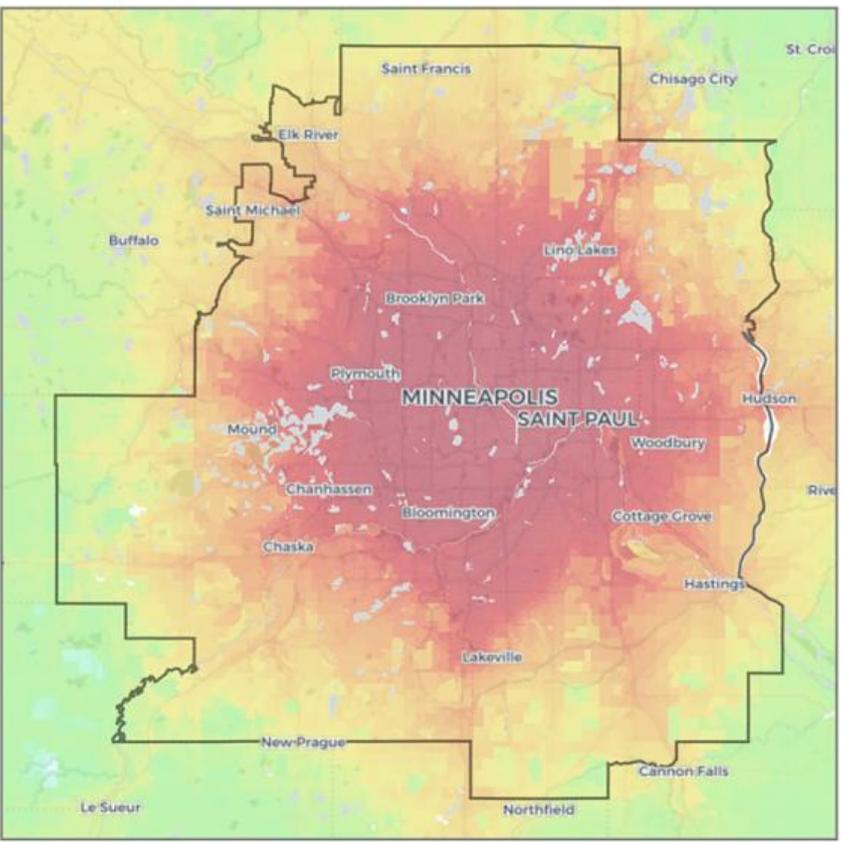


Source: Greater MSP analysis of Center for Transportation accessibility data

# How easily can people reach jobs in the region?



Metropolitan Council



- Jobs within 30 minutes  
(Driving, AM peak)
- 0 - 1,000
  - 1,000 - 2,500
  - 2,500 - 5,000
  - 5,000 - 7,500
  - 7,500 - 10,000
  - 10,000 - 25,000
  - 25,000 - 50,000
  - 50,000 - 75,000
  - 75,000 - 100,000
  - 100,000 - 250,000
  - 250,000 - 500,000
  - 500,000 - 750,000
  - 750,000 - 1,000,000
  - 1,000,000 - 2,500,000
  - 2,500,000 - 5,000,000
  - 5,000,000 - 7,500,000
  - 7,500,000 - 10,000,000
  - 10,000,000 +
- State border —  
MPO boundary —

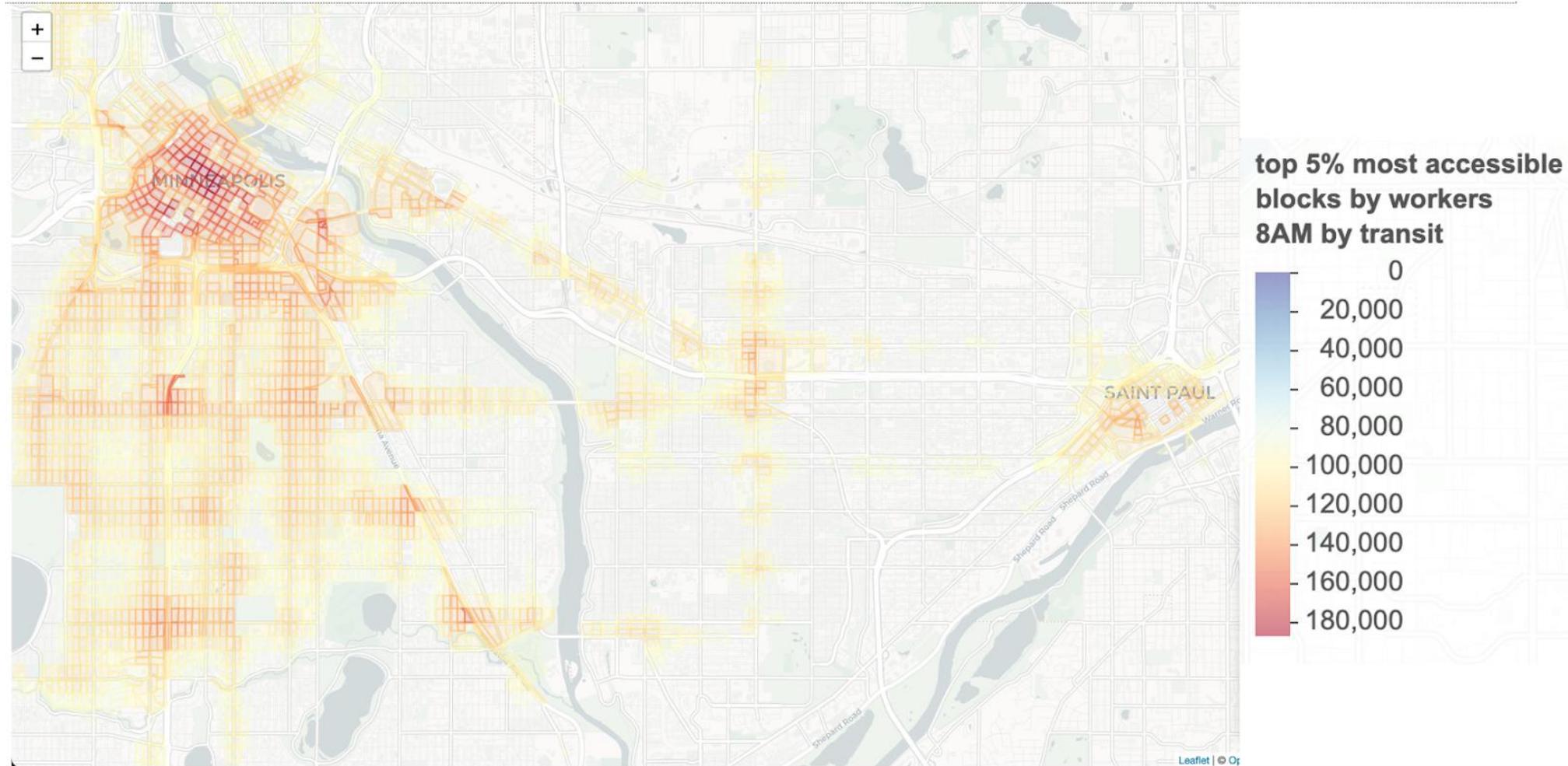


Metropolitan Council



- Jobs within 30 minutes  
(Transit, AM peak)
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  - 1,000 - 2,500
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  - 7,500 - 10,000
  - 10,000 - 25,000
  - 25,000 - 50,000
  - 50,000 - 75,000
  - 75,000 - 100,000
  - 100,000 - 250,000
  - 250,000 - 500,000
  - 500,000 - 750,000
  - 750,000 - 1,000,000
  - 1,000,000 - 2,500,000
  - 2,500,000 - 5,000,000
  - 5,000,000 - 7,500,000
  - 7,500,000 - 10,000,000
  - 10,000,000 +
- State border —  
MPO boundary —

# Where should employers locate to be easily reachable?



# Mobility of workers versus mobility of goods and commerce

## Example:

### Amazon Fulfillment Center in Shakopee

- Location outside the core makes the site attractive from a freight mobility perspective.
- Location further from the core increased the difficulty of finding workers that were willing to commute to the facility for the offered wage rates.



# Mobility of goods and commerce



## Truck

- **Moving bottlenecks**
- **High truck travel time reliability**
- **Not enough truck parking**



## Rail

- **Lack of intermodal facilities** with parking options
- **Need to protect rail-connect industrial lands**



## Aviation

- **Strong passenger hub**
- **Not a cargo hub**
- **Land-locked** airport, limiting expansion options



## Maritime

- **Land use concerns** due to a **lack of space**
- **Origin/destination** for maritime freight
- **Impact of river tourism**



## E-Commerce

- **Increasing last-mile delivery distances**
- **Need for industrial cargo-oriented development**

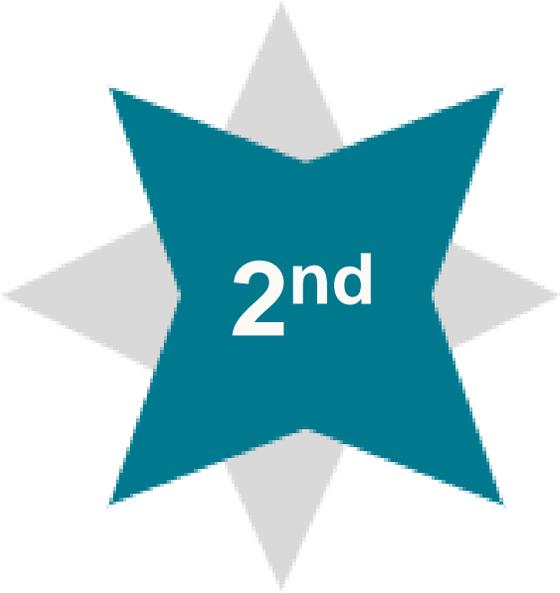
Source: Greater MSP analysis of Center for Transportation accessibility data

# Insights on **Affordability**



# Headline: Twin Cities is more affordable than most peer regions.

Among 11 peer regions:



2<sup>nd</sup>

share of jobs that pay a family sustaining wage

70% of households pay a family sustaining wage



2<sup>nd</sup>  
lowest

number of “cost burdened” households in 2025

32.2% of households are “cost burdened”  
Up from 32.7% in 2015

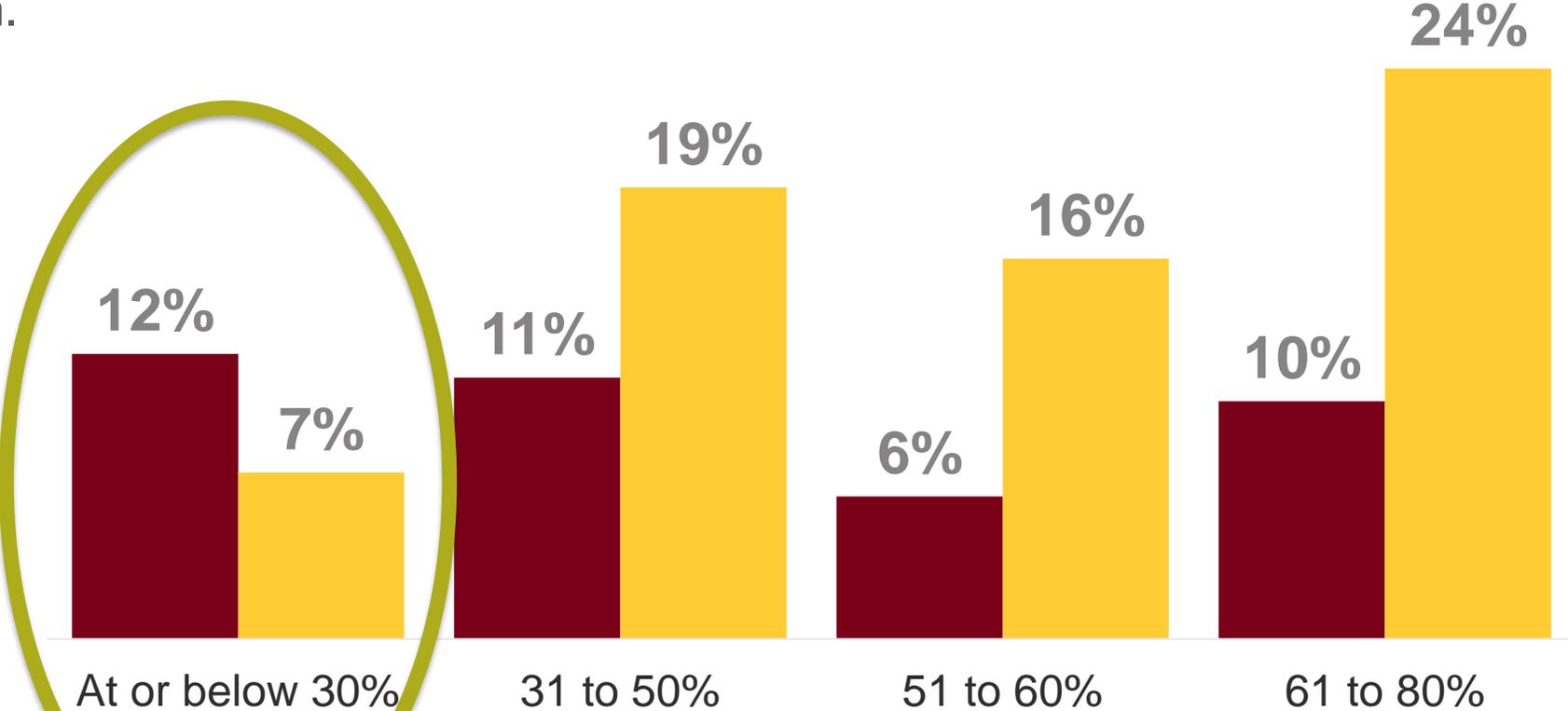


# Subtext: Not everyone has access to affordable housing.

The region has more households at or below 30% of Area Median Income (AMI) than housing units affordable to them.

Share of region's households in AMI band

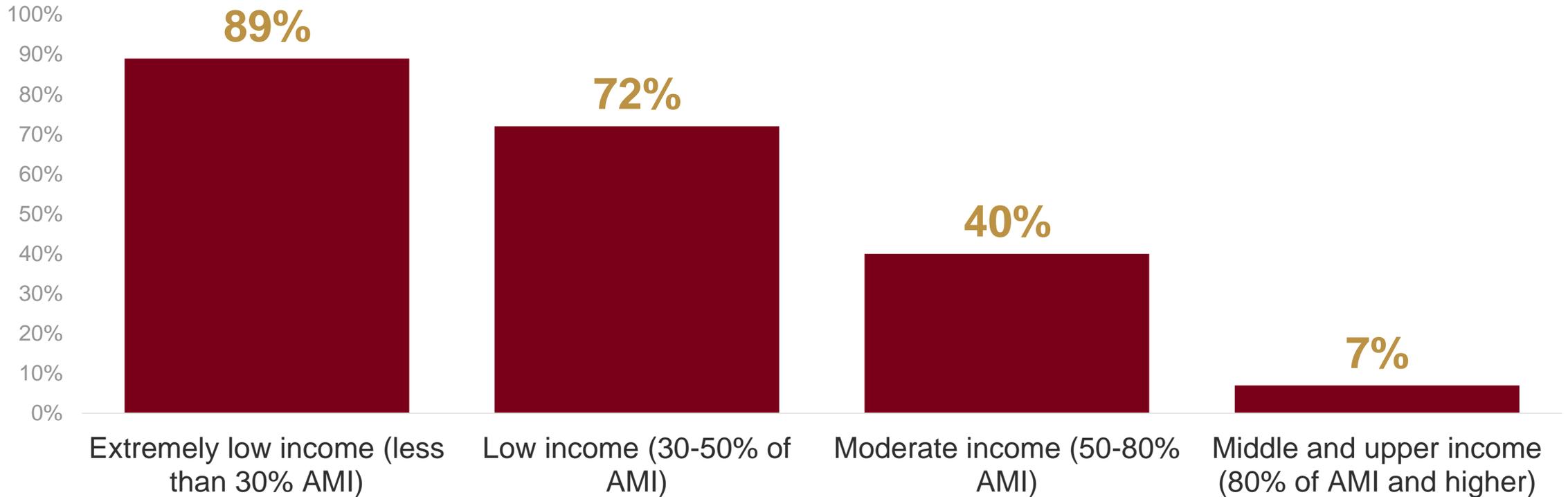
Share of region's housing units in AMI band



Source: U.S. Census Bureau, 2018-2022 American Community Survey five-year Public Use Microdata Sample

# Lower income households struggle with housing costs.

Percentage of Cost-Burdened Households  
(paying more than 30% of income on housing costs)



# Prospective workers cannot afford housing.

## Housing cost burden is especially high for low-wage earners.

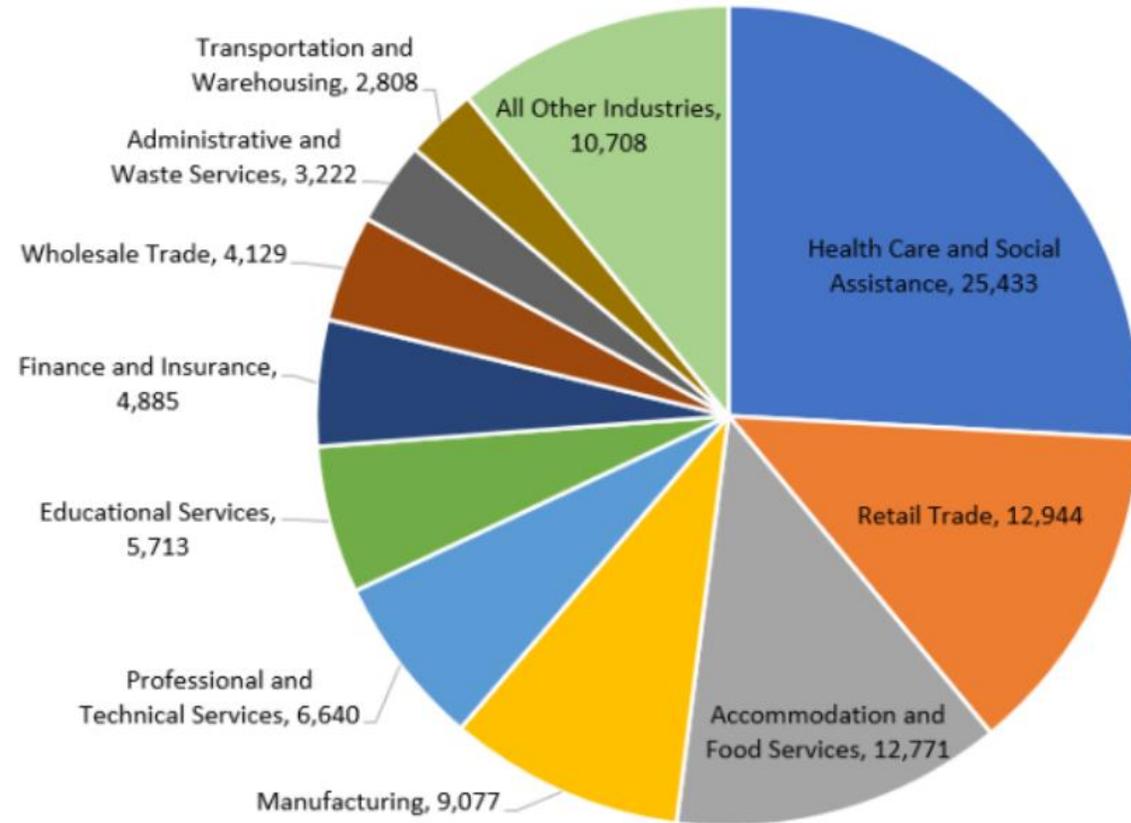
•Over half of the region's job vacancies are in low-wage sectors such as:

- Retail
- Accommodation and Food Services
- Health Care and Social Assistance

•Housing costs are too high for many low-wage earners.

•It is hard to fill job vacancies when housing cost-burden is high for prospective employees.

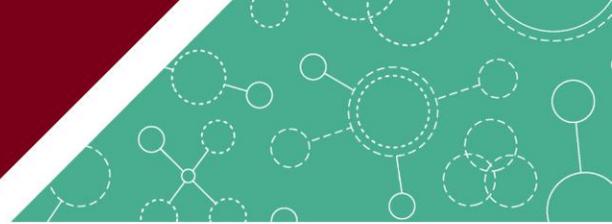
Figure 5. Metro Area Job Vacancies by Industry, 2022





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**Driven to Discover**<sup>SM</sup>



# Prepared by Brigid Tuck and Kathryn Leys

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