Snapshot of Idaho Agriculture
Agriculture in Idaho:
- 20% of all sales in the state
- 14% of jobs
- 16% of gross domestic product
Idaho Agriculture

- Arid state dependent on irrigation
- Diverse: 180 commodities but dominated by dairy and beef
  - Livestock industries account for more than half of ag receipts
- Agriculture and food processing: $16 billion
- Agriculture is still respected – in our Capitol and in communities
- Small population with big ag impact
  - Strong percentage of total state GDP

![Farm GDP as % of Total GDP, 2015](chart.png)

Data source: University of Idaho CALS
Idaho is Nation’s Fastest-Growing State
Population Change From July 1, 2016, to July 1, 2017

Percent population change
- Greater than 2.0
- 0.5 to 2.0
- 0.0 to 0.4
- Population loss

Percent change by region
- Northeast: 0.2
- Midwest: 0.3
- South: 1.0
- West: 1.0

Source: Vintage 2017 Population Estimates
www.census.gov/programs-surveys/popest
Growth & Examples from Idaho’s Dairy Sector
Idaho’s Dairy Industry

- Idaho’s No. 1 Ag Sector
- No. 4 Dairy State in U.S.
- 1/3 of state’s total ag receipts
- State’s top export
- $10.4 billion in economic output

Data source: USDA NASS Survey
Idaho’s Dairy Industry

Milk Production (lbs/head)

Data source: USDA NASS Survey
Idaho’s Dairy Industry

Competitive milk prices
• Averaged $0.55 lower than U.S. all milk price

Not part of federal milk marketing order
• At $15/cwt our breakeven costs are lower than other large dairy states

Processors able to negotiate
• Can contract based on market conditions

Production increases year after year
• Doubled production in just 16 years

Location quotient
• Higher than average farm and processing employment concentration
One of the top-paying & highest density food processing areas in the U.S. (non-metropolitan)

Population
Ag Production
Processing
Transportation

Data sources: USDA NASS Survey & UI CALS
✓ Established by the Governor to move at the speed of business
✓ Highly collaborative to capitalize on group expertise
✓ Works with companies to address regulatory hurdles

- Governor
- Lt. Governor
- Dept. of Agriculture
- Dept. of Commerce
- Dept. of Labor
Chobani
✓ Chose Idaho to build the largest, most tech-advanced yogurt plant in the world
✓ Plant was built and running in just 326 days
✓ State, county and city all pulled together to provide resources
✓ Direct & indirect employment: 7,000 (including several hundred refugees)
✓ Chobani CEO Hamdi Ulukaya: southcentral Idaho is the "Silicon Valley of food"
✓ Recently broke ground to add a major expansion
  • $20 million
  • 70,000 sq. ft. expansion focused on research & innovation

A proud part of the Magic Valley Miracle
A great place to build...

Chobani  GoGo Squeeze  Amy’s Kitchen  Clif Bar  Caviness/Simpot

Dow

And grow...

Glanbia  Albertsons  McCain Foods  Agri Beef/PerforMix  Monsanto
Concerns & Challenges
Foreign-born labor provides 90% of on-dairy jobs in Idaho. Seen as a moral & business issue for many Idaho ag sectors, especially dairy. Dairy industry cannot utilize the current H2A program.
Idaho is an export-dependent state

- 20% of our commodities are exported
  - 1 in 6 rows of potatoes planted for export
  - 50% of Idaho grain is exported
- More than 88% of our ag exporters are small businesses
- Trade missions led by the State of Idaho team
  - Idaho ag exports have nearly doubled since 2007

NAFTA

- Since NAFTA, Idaho exports to Canada grew 289% and 994% to Mexico
- NAFTA partners account for nearly half of Idaho ag exports
- In the absence of NAFTA, Idaho could see a jump in tariffs to 45% for cheese and 20% for French fries
• Farming is still inherently risky
• Commodity prices
• Farm Bill
• Public’s general lack of knowledge about agriculture or misperceptions
The next generation
More than just the numbers...
Questions?