

FOOD PROCESSING INDUSTRY IN IDAHO



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Food Processing Industry in Idaho



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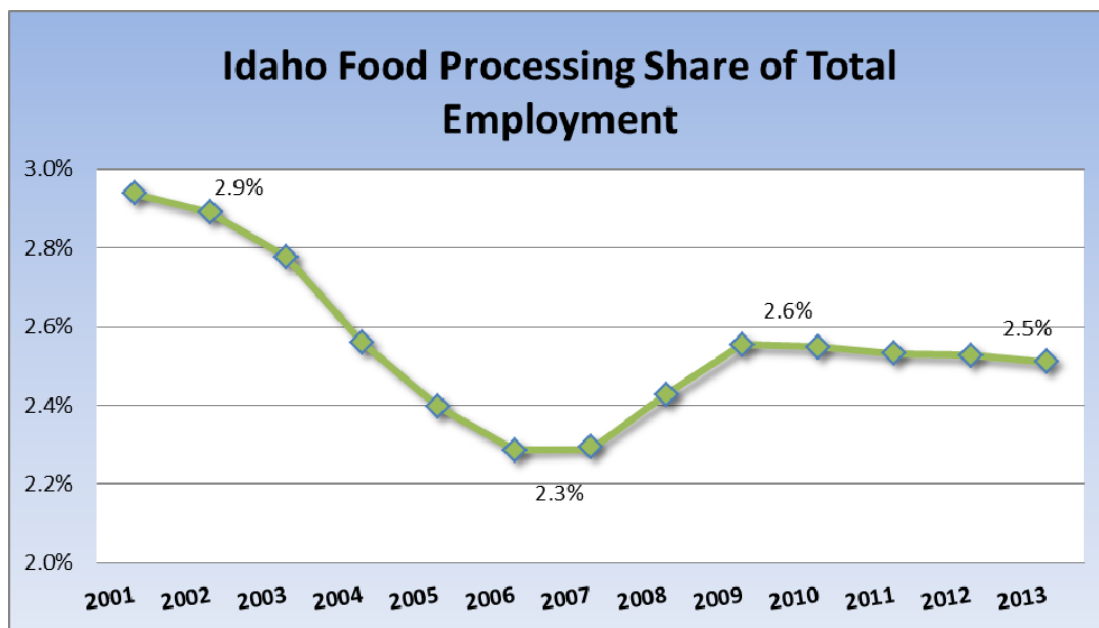
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SUMMARY OF KEY FINDINGS

Food processing is much more concentrated in Idaho than in most other states, and its average wage is a third higher than Idaho's average wage for all jobs. Idaho's median wage for all jobs, however, ranked 47th in the nation, reflecting the comparatively low wage levels overall in the state. The high concentration of food processing has put a sharply competitive edge on wages, especially for higher skills that are in short supply.

Attracting a qualified workforce comes down to wage and benefit packages and the cost of living. Idaho pays a little more to attract candidates from neighboring states where wages are generally higher for various reasons including higher minimum wages, greater union activity or higher costs of living

Food processing accounted for 2.5 percent of all Idaho jobs in 2013, down from a peak of 2.9 percent in 2001, likely the result of technological improvements. Nationally food processing accounted for 1.1 percent of all jobs.



Source: Economic Modeling Specialists Inc.

Food processing is concentrated in southwestern and south central Idaho with growth occurring in the south central region, which has become the epicenter of a developing food processing cluster. The other four regions saw job losses from 2009 to 2013. All six regions saw losses in total jobs, but the food processing cluster kept south central Idaho's overall loss to half the percentage loss statewide over the five-year span. Growth over the last five years in south central Idaho's food processing industry was four times greater than the next best region, north central Idaho.

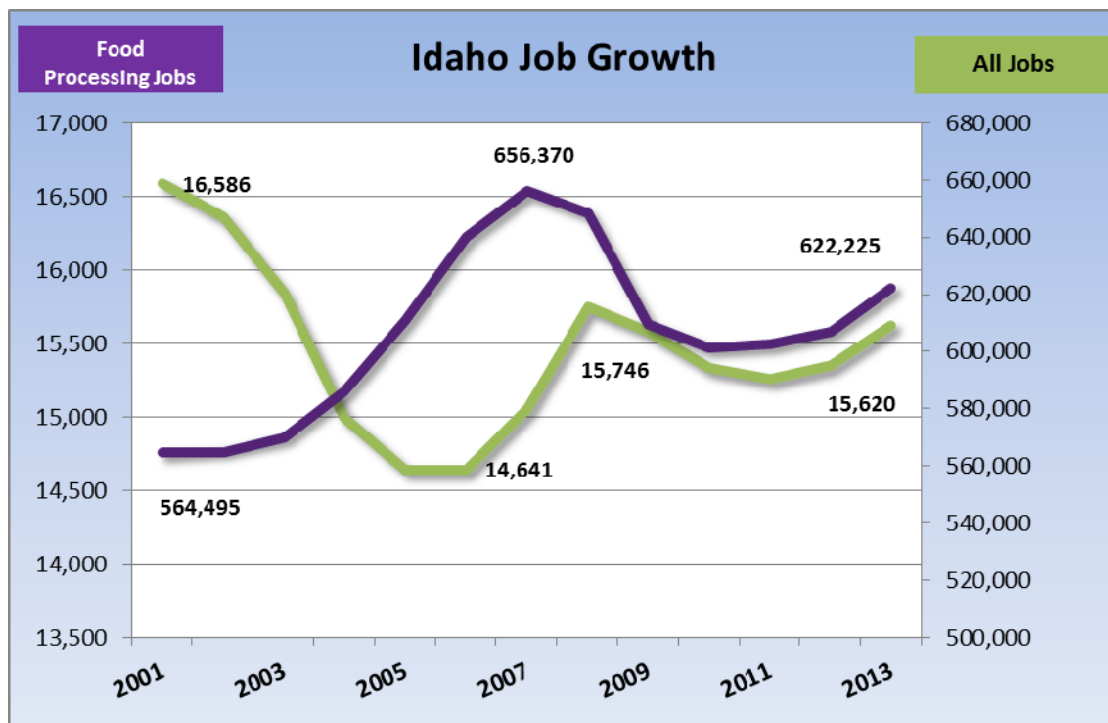
Idaho's Food Processing Industry

Milk is Idaho's top commodity based on market receipts, making the dairy industry the leading sector in food processing. Seventy-five percent of the state's dairy cows are in south central Idaho. An expanding export market contributes to Idaho's growth in dairy product manufacturing, driven by increasing demand in China and other Pacific Rim countries. New dairy products and residual-based products are being developed from the value-added process – whey- and casein-based protein powders and coatings are examples. Greek yogurt and custom cheese powders are making inroads domestically.

BACKGROUND IN IDAHO

Idaho's food processing sector traces back to J.R. Simplot when the future Idaho billionaire dehydrated potatoes to be shipped overseas to the troops during World War II. Many food processors have followed with greater employment, more than a handful national companies and conglomerates.

As the industry has evolved over the past seven decades in Idaho and nationally, automation has led to a decline in total sector jobs. Some national companies have also out-sourced manufacturing processes to Canada or Mexico in response to the North American Free Trade Agreement 20 years ago.



Source: Economic Modeling Specialists Inc.

Because demand for potato products is high in Mexico, processors can relocate plants there to be closer to customers, reducing shipping costs and taking advantage of lower labor costs. Mexico is also looking to develop the crop so purchasing equipment from Idaho manufacturers contributes to the cluster impact that comes from marketing high-profile food production and processing. Examples of foreign companies doing business in Idaho include McCain Foods of Canada; Glanbia Cheese of Ireland; Sorrento Lactalis of Italy and Frulact of Portugal.

Diversification

Food processing has had its ups and downs in Idaho but has not necessarily followed economic ebbs and flows. Diversification has benefited the industry over decades. Dairy manufacturing has been the latest example as demand nationally and globally has increased for cheese, yogurt, whey and protein concentrates. The Greek yogurt market has increased exponentially over the last five years while whey and protein have been developing over a longer period. Because of its small population, Idaho processors must rely on other areas and countries for the demand side of their equation.

Driven by the commodities Idaho produces, food processing is a large contributor to the state's gross product. Idaho vies with New York state as the nation's third largest dairy producer, passing the state's iconic potato as the number one agricultural product a decade ago even though Idaho continues to be the country's top spud producer. Soil type, the growing season and water availability through irrigation, natural springs and geothermal sources are the underpinnings of a vibrant food processing sector in such a small state. The processing plants are sleek, stainless steel and employ fewer workers with higher skill levels to handle commodities of high quality and sufficient quantity.

FOOD PROCESSING INDUSTRY

Nationwide

The concentration of food processing in south central Idaho is about 6½ times greater than the nation. The concentration of establishments is 3½ times the country's while the concentration of workers is three times greater. The average food processing wage in south central Idaho, using data from Economic Modeling Specialists International, is \$53,971 – 35 percent higher than the average of all jobs at \$40,061, reflecting the competition created among companies for high quality workers.

Statewide

Idaho's food processing industry focuses on the state's dominant commodities – dairy, potatoes, barley, sugar beets and trout – with the J.R. Simplot Co. an example of a stable yet dynamic player. Currently Simplot is consolidating potato processing operations to one new, highly automated plant in southwestern Idaho. This will reduce the jobs impact of

Simplot, which has plants in Washington, North Dakota, Arkansas, Canada and Mexico in addition to Idaho. Many of the other established potato processors still have comparatively large payrolls even as some automate. McCain Foods is revamping its plant in Burley but is maintaining its workforce. The new equipment will enhance plant efficiency. Further expansion is planned including new lines, and that will increase the skill level required of new hires. Programmable logic controllers will command pay about 45 percent above traditional line jobs but will require partnerships and cooperative efforts with educational institutions.

Projections and the Pipeline

With the workforce stabilizing amid increasing automation over the past two decades, growth in food processing is projected to be limited to 2.4 percent during the next decade, well below the national growth rate of 3.6 percent to rank 30th among the states. It appears that most of the automation that could reduce existing jobs in Idaho will be completed by the end of 2014. The industry, however, got a boost in 2013 when Chobani Yogurt built its multimillion-dollar Greek yogurt plant in Twin Falls. This high-profile company was followed by other food processors, whose arrivals in Idaho may not be definitively linked to Chobani but do reinforce the cluster trend. These entries into Idaho food processing offset the loss of jobs through the consolidation of three Simplot plants into one and the closures of North American Foods in Glens Ferry in 2008 and the Heinz plant in Pocatello in 2014.

Export growth could enhance job projections. Since the U.S. market is essentially mature limiting future growth, other nations are becoming target markets, especially those developing nations as their incomes and living standards rise. In "Globalization of the Frozen Potato Industry," Charles Plummer of the U.S. Department of Agriculture's Economic Research Service suggested Idaho was well positioned to take advantage of this since three of Idaho's potato processors are the largest in the world with 75 percent of the market share. Frozen potato product exports totaled almost \$39 million in 2013, up 12 percent from the previous year. The main customer was Mexico, which purchased 76 percent of the total while Canada bought 19 percent. While this export total is relatively small considering the large employers operating in Idaho, it underscores the continuing strength of the domestic market. There has been a tremendous increase in dairy product exports, up 16 percent in 2013 to \$314 million. South Korea, Mexico and Japan bought 81 percent of the cheese and curd worth over \$50 million, up a robust 34 percent. Milk and cream products went primarily to China, Mexico and Indonesia with total exports hitting \$129 million, an increase of 55 percent in just a year. Butter, a lesser-valued export, has more volatility, depending on demand for cream. But in 2013, foreign butter sales rose 160 percent. The top three purchasers accounting for 63 percent of sales were Morocco, Egypt and the Ukraine.

Idaho's Food Processing Industry

Offsetting that advantage is the prospect that companies could build processing plants in those nations to curtail shipping costs. Idaho processors such as McCain Foods, Glanbia Cheese and Sorrento Lactalis have done just that. Frulact and Materne N.A. are strategically siting their future plants for both supply chain benefit and market access. The Pacific Northwest is acknowledged as having a comparative advantage in accessing the Pacific Rim and Asia as Canada secures the eastern and midwestern U.S. Both countries compete intensely for market share in South and Central America.

Dramatic job loss from 2001 through 2006 put food processing at odds with an otherwise expanding Idaho economy. This job loss reflects advances in technology and decisions to outsource work that had been done in Idaho rather than any decline in consumer demand. Seneca Foods Corp.'s canned sweet corn plant in south central Idaho is a case in point. Seneca made its own cans and provided temporary housing for migrant workers needed during its relatively short season. But several years ago it moved the canning operation overseas and focused on frozen corn and vegetables in Idaho.

When the Great Recession took hold, jobs across the rest of the economy were lost while food processing climbed and seemed to stabilize, trending with the rest of the economy during the recovery. Seneca and others have private label business that the industry estimates is growing 6 percent a year since the recession hit. Market penetration has been 17.4 percent. In what could be another boost to exports, Diane Toops of Food Processing magazine points out that private labels are even more popular in Europe, where 24.2 percent of the products are private labels. Consumer behavior abroad often dictates plant decisions since exports continue to be the source of growth for food processors.

Dairy product manufacturing is on the cusp of marked job growth. Its largest employer projects 1,200 on its payroll within two years as it and others recover from the recession. Producers suffered severely weak prices in 2009 that ate up their equity at a time lenders became tightfisted with an industry rife with complexities. Their efforts to cull herds to reduce volume and boost price became more difficult with the closing of a slaughter plant in southwestern Idaho. That left them paying a premium for both time and fuel to haul animals out of state. In the aftermath, two commercial meat slaughtering companies plan operations in Jerome and Cassia counties, adding up to 250 workers. A European company specializing in fruit processing also plans to start an Idaho operation that would become part of the yogurt supply chain.

Idaho's Top Five Food Processing Sectors

Idaho-Statewide	Description	2013 Jobs	2023 Jobs	Change	% Change	2013 Earnings	2012 National Location Quotient
311411	Frozen Fruit, Juice and Vegetable Manufacturing	3,938	3,788	(1,174)	(24%)	\$55,519	28.52
311423	Dried and Dehydrated Food Manufacturing	2,243	1,853	(1,123)	(38%)	\$46,608	44.04
311513	Cheese Manufacturing	2,009	2,368	1,218	106%	\$53,007	9.63
311313	Beet Sugar Manufacturing	1,431	1,512	128	9%	\$73,050	46.08
311612	Meat Processed from Carcasses	917	1,368	620	83%	\$34,173	1.67

Source: Economic Modeling Specialists Inc.

Idaho's Food Processing Industry

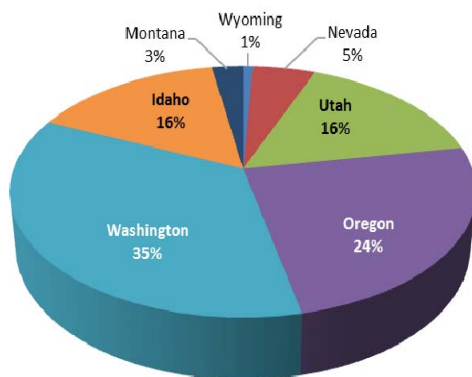
In all, five food processors have plans to open operations in Idaho. Line operating skills are transferrable within food processing and to some durable manufacturing operations, but higher-level skill sets are harder to find and increasingly in demand with automation. Idaho postsecondary institutions are discussing development of training programs to address these industry issues.

Company	Cap Expenditure (in \$ millions)	Job Creation	Type of Product	Corporate Headquarters	Location
Frulact	\$39	100	Fruit Processing	Portugal	Rupert
Clif Bar	\$90	250	Non Chocolate Confectionary Manufacturing	California	Twin Falls
Materne North America	\$85	230	Fruit Processing	France	Nampa
Dale T. Smith & Sons Meat Packing	\$7.50	100	Beef Processing	Utah	Jerome
7 Brothers Meats	\$5	100	Beef Processing	Idaho	Burley
McCain Foods	\$60 renovation	130	Potato Processing	Canada	Burley

Source: Economic Modeling Specialists Inc.

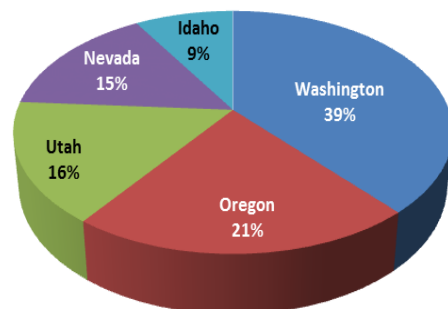
As the two most populous states with the largest labor forces in the region, Washington and Oregon also have the lion's share of food processing jobs, enhanced by their strong fish processing sectors. These two states also have higher wage rates, which enlarges their labor pools. In contrast, Utah with a civilian labor force almost double that of Idaho's has the same share of regional food processing jobs as Idaho. Nevada and Utah emphasize mining, hospitality and leisure jobs more than food processing.

2013 Food Processing Employment Regional Share



Source: Economic Modeling Specialists Inc.

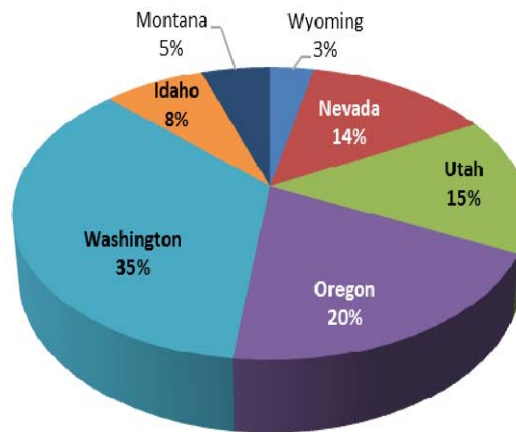
Regional Civilian Labor Force Share-Top 5 States
(12/2013, Bureau of Labor Statistics)



Source: Economic Modeling Specialists Inc.

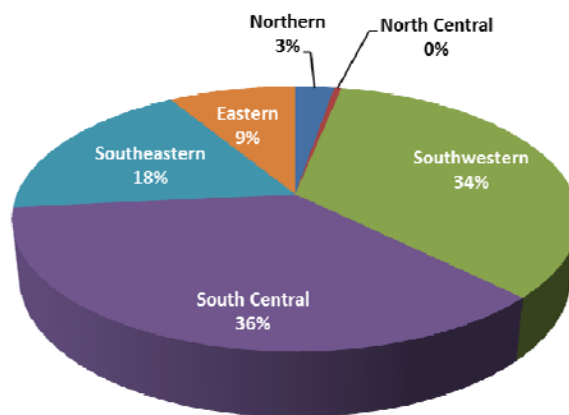
Idaho's
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Industry

2013 All Industry Employment - Regional Share

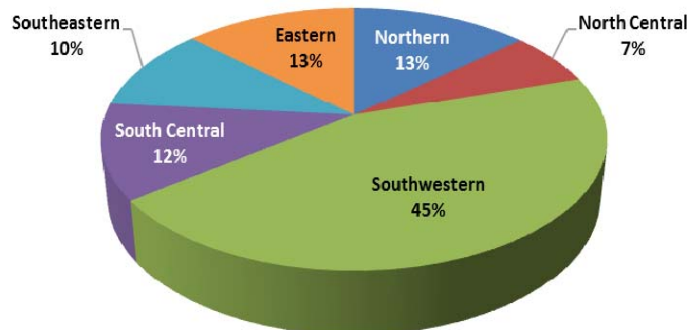


Source: Economic Modeling Specialists Inc.

Idaho Average Food Processing Employment
by Region



2012 Idaho Population Regional Breakout

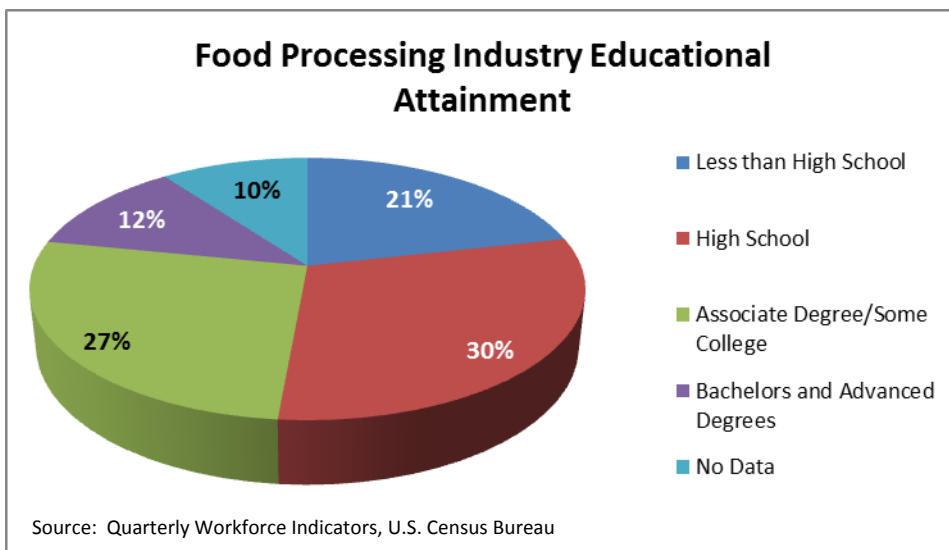


Source: Economic Modeling Specialists Inc.

WORKFORCE CHARACTERISTICS

Demographically the food processing workforce has a higher concentration of men, lower educational attainment and higher wages than Idaho's workforce overall. It is predominantly white, reflecting the state's population, but has a higher concentration of Hispanics than the population overall.

Based on Quarterly Workforce Indicators for 2012 compiled by the Census Bureau and the Bureau of Labor Statistics, 66 percent of food processing workers were men compared to 51.2 percent of all workers. The wage gap was still significant. Men in food processing earned 50 percent more than women. But in the overall Idaho economy, men earned two-thirds more than women. The occupations within the food processing industry include food scientists, human resource specialists and managers, maintenance workers, accountants, line workers that sort, package, and operate machines and those individuals who provide several services and skill sets such as programmable logic controller technicians. Staffing patterns are shown in Appendix 6.

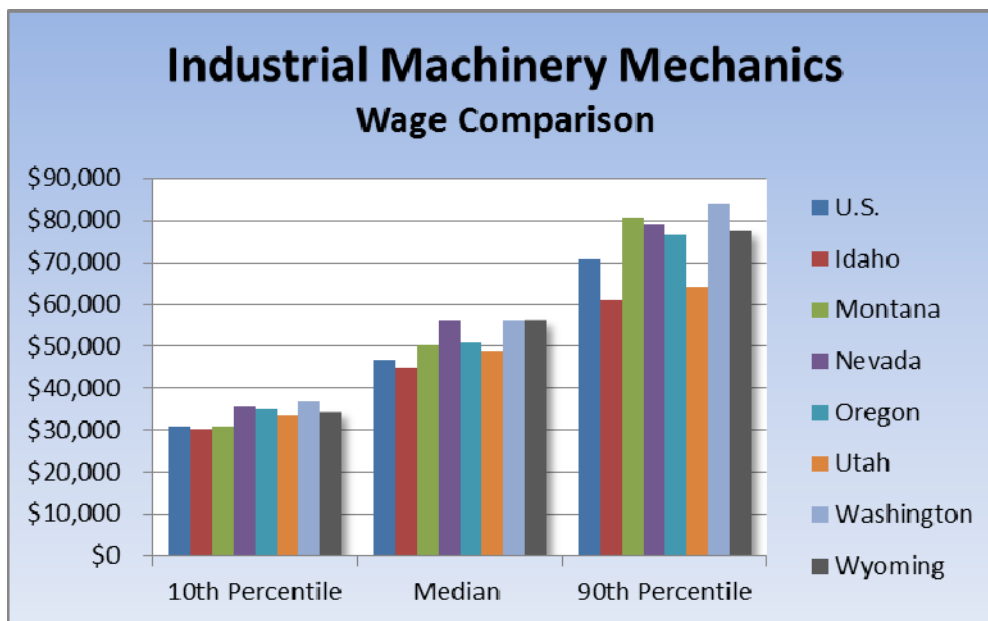


OCCUPATIONS

Idaho's Hot Jobs through 2020 include only three food processing occupations – industrial machinery mechanic, industrial engineer and industrial production manager. All rank high in wages, growth and number of jobs. Industrial machinery mechanic reflects a common type of food processing work that combines skills in electronics, programming and mechanics.

Washington with its high number of food processing jobs, high union participation and high minimum wage pays the best wages for industrial machinery mechanics followed by Montana and Nevada, where mining and energy compete for these skills. Oregon is next with its diverse group of food processing industries including fish, cheese and fruit.

Industrial Machinery Mechanic Jobs, 10-year Growth			
	2002	2012	% change
Wyoming	1,217	2,325	91%
Utah	2,957	3,966	34%
Nevada	1,296	1,652	27%
Montana	624	771	24%
Washington	6,020	6,869	14%
Idaho	1,463	1,615	10%
Oregon	3,780	3,844	2%
Nation	303,187	306,680	1%
Source: Economic Modeling Specialists Inc.			



Source: Economic Modeling Specialists, Inc.

Idaho's Food Processing Industry

Industrial Machinery Mechanic Wages			
	10th Percentile	Median	90th Percentile
Nation	\$30,800	\$46,900	\$70,800
Idaho	\$30,300	\$44,900	\$60,900
Montana	\$30,900	\$50,400	\$80,600
Nevada	\$35,700	\$56,200	\$79,000
Oregon	\$35,200	\$51,000	\$76,500
Utah	\$33,500	\$48,800	\$64,300
Washington	\$37,100	\$56,000	\$84,100
Wyoming	\$34,200	\$55,900	\$77,300

Source: Economic Modeling Specialists Inc.

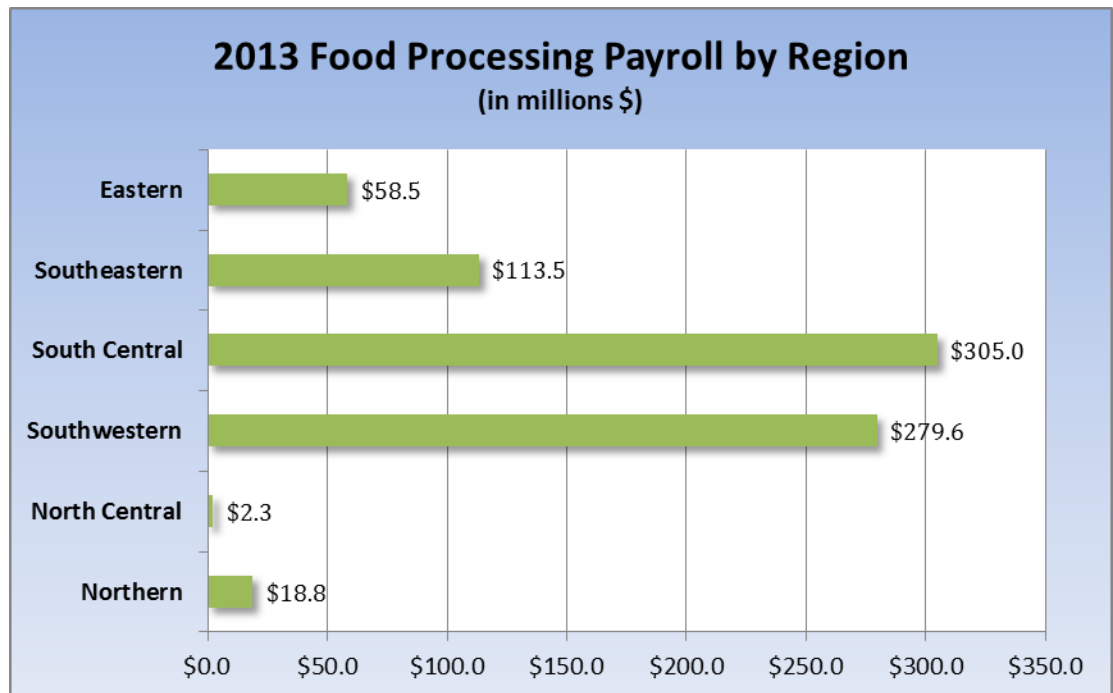
Industrial Machinery Mechanic Surrounding States 10-year Growth Projections			
	2012	2022	% change
Nevada	1,340	1,950	45%
Utah	3,060	4,170	36%
Idaho	1,270	1,630	28%
Wyoming	2,020	2,550	26%
Montana	860	1,050	22%
Nation	319,300	379,600	19%
Washington	5,920	6,800	15%
Oregon	3,640	4,100	0%

Source: Economic Modeling Specialists Inc.

WAGES

Data compiled by Economic Modeling Specialists International finds south central Idaho with the highest aggregate payroll of all regions at over \$300 million in food processing.

The Idaho food processing sector's underlying strength is being reinforced by new companies interested in working directly with commodity producers. These companies should increase Idaho's competitiveness domestically and globally.



Source: Economic Modeling Specialists Inc.

Appendix 1 - Data Sources

Idaho's Food Processing Industry

IN-HOUSE DATA

The Idaho Department of Labor has in-house data available for analysis from the Quarterly Census of Employment and Wages, Occupational Employment Statistics, occupational and industry projections and exports. The quarterly census data comes from employers who pay unemployment insurance taxes and are referred to as covered employment data. They provide numbers of establishments, employment and earnings by industry. The Occupational Employment Statistics program develops the wage survey publication. It provides data on employment and wages by occupations and information to determine staffing patterns. Projections are developed statewide and by region for the short term – two years – and the long term – 10 years. Export data by country and by commodity are available from Global Trade Information Services developed in cooperation with the U.S. Census Bureau.

These data allow the Department of Labor to conduct numerous industry and occupational analyses for Idaho and its regions. There are limitations, however. QCEW and OES include only covered jobs, which are about 90 percent of total jobs. There is a lack of readily available information for state-to-state comparisons. There are strict confidentiality rules on the use of both QCEW and OES data. This means that even though Idaho Labor might have data, the information will not be released if there is a chance that an individual or business could be identified.

PURCHASED DATA

The Idaho Department of Labor contracts with Economic Modeling Specialists Inc. to obtain industry and occupational estimates for all 50 states. To estimate industry data, EMSI “combines covered employment data from Quarterly Census of Employment and Wages produced by the Department of Labor with total employment data in the Regional Economic Information System published by the U.S. Bureau of Economic Analysis, augmented with County Business Patterns and Nonemployer Statistics published by the U.S. Census Bureau.” EMSI bases occupation estimates “on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey” conducted by the U.S. Census Bureau.

EMSI data are not subject to the same confidentiality requirements as the department's in-house data. In some instances in this report, actual QCEW data was replaced with EMSI estimated data to protect the integrity of state and national comparisons by using the same methodology.

DATA SET DIFFERENCES

There are obvious differences between the data sets of the department and Economic Modeling Specialists Inc. because EMSI uses estimates. EMSI's "complete" employment figures are significantly higher than the department's "covered" employment data, which include only employment covered by the unemployment insurance program. EMSI's "complete" employment estimates also include employment outside the unemployment insurance program like the self-employed and the military, pulling data from a variety of sources including the Census Bureau's American Community Survey.

TYPES OF DATA

OCCUPATION AND INDUSTRY

Food processing in Idaho can be measured by occupation and industry. Occupational data includes employment and wages for specific occupations. For example, "19-1012 food scientists" would count all database administrators whether working in a food processing industry such as cheese manufacturing or an industry not considered food processing such as a large research facility. Sometimes multiple job titles are grouped in one occupation.

Industry information also tracks employment and earnings along with establishments. But it includes every occupation in the industry, whether it is directly related to the industry or not. For example, data on an establishment identified as part of cheese manufacturing would include not just the actual production workers but all the clerks, secretaries, maintenance personnel and other nonproduction workers. Thus, a food processing industry will have both food processing and non-food processing occupations.

WHY HAVE TWO MEASURES?

Occupation information gives what is often referred to as a "workforce oriented" view. This information allows stakeholders such as institutions of higher education to identify occupational shortages or specific occupation needs and to develop career ladders or paths of advancement for a specific career.

Industry information can be useful to economic developers. It provides a wide-angle view of the makeup of an economy and is therefore useful in identifying industry clusters or businesses that may cluster with other similar or supportive industries. This kind of measure allows economic developers to target the identified industries that offer higher wages because, like the high-tech industry, wages can be higher at every occupational level for an entire industry. For businesses willing to relocate entirely rather than move only a few occupations, this wide-angle view can be very useful.

ESTABLISHMENTS, EMPLOYMENT, EARNINGS AND WAGES

An establishment is a single location for an employer. A single employer may have more than one establishment such as a retailer who may be under one company with several locations around the state. Establishments under one company may be assigned to different industry or North American Industry Classification System codes depending on their specific function.

Employment is a count of people working and does not differentiate between full time, part time or people who work multiple jobs. Earnings, for this business scan, include either EMSI's proprietary earnings per worker calculation, which includes estimated benefits, or the quarterly census information on total wages paid by employers to employees. Wages for this business scan include EMSI's estimates on median hourly wage, EMSI's estimated 10th and 90th percentile wage, which for this paper provides a proxy for a starting and supervisory wages, and the hourly wage estimates provided by OES.

Appendix 2 - Food Processing Industry Workforce Metrics

Size				Relative Size				Relative Growth of Food Processing				Projected Growth of Food Processing				Relative Earnings				Earnings to State				Relative Establishments										
Employment to Nation				Employment in State				Growth in Employment				Growth in Employment				Employment				Earnings Per Worker				State Food Proc to State Total				Food Processing Est. to Total Est.						
Area	%	Rank		Area	%	Rank		Area	%	Rank		Area	%	Rank		Area	%	Rank		Area	%	Rank		Area	%	Rank		Area	%	Rank				
National	100.0%			Arkansas	3.9%	1		Nevada	26.4%	1		Vermont	26.2%	1		Arizona	23.2%	1		Georgia	\$63,834	1		Georgia	114.8%	1		Alaska	0.9%	1		Alaska	0.9%	1
California	9.8%	1		Nebraska	3.8%	2		Montana	16.5%	2		Wyoming	16.2%	2		Massachusetts	15.0%	2		New Hampshire	\$63,735	2		New Hampshire	114.0%	2		Iowa	0.8%	2		Hawaii	0.8%	2
Texas	5.7%	2		Idaho	2.5%	3		Alaska	14.7%	3		South Dakota	15.8%	3		Utah	14.9%	3		New Jersey	\$63,633	3		Idaho	113.2%	3		Wisconsin	0.7%	3		Vermont	0.7%	3
Illinois	5.2%	3		Arkansas	2.8%	4		Arizona	9.5%	4		South Carolina	13.1%	4		Alaska	10.5%	4		Illinois	\$63,536	4		New Hampshire	111.3%	4		Wisconsin	0.7%	4		Wisconsin	0.7%	4
Pennsylvania	4.5%	4		Idaho	2.5%	5		Oregon	6.8%	5		Rhode Island	10.8%	5		Colorado	10.3%	5		Maryland	\$59,900	5		Maryland	108.5%	5		Iowa	0.6%	5		Iowa	0.6%	5
Georgia	4.3%	5		Kansas	2.3%	6		Michigan	6.8%	6		Kentucky	9.8%	6		Oregon	9.9%	6		Ohio	\$58,263	6		Tennessee	107.7%	6		Rhode Island	0.5%	6		Rhode Island	0.5%	6
Wisconsin	4.2%	6		Wisconsin	2.3%	7		Utah	6.6%	7		Nevada	9.1%	7		Oklahoma	9.7%	7		Tennessee	\$57,294	7		South Dakota	106.5%	7		Nebraska	0.5%	7		Nebraska	0.5%	7
Ohio	3.9%	7		Delaware	2.2%	8		Indiana	5.7%	8		Colorado	8.9%	8		Nebraska	9.6%	8		Iowa	\$57,060	8		Missouri	106.0%	8		Idaho	0.5%	8		Idaho	0.5%	8
North Carolina	3.6%	8		South Dakota	2.2%	9		Kentucky	5.0%	9		Massachusetts	8.5%	9		Vermont	9.5%	9		Pennsylvania	\$56,527	9		Wisconsin	103.6%	9		Oregon	0.5%	9		Oregon	0.5%	9
Iowa	3.5%	9		Mississippi	2.1%	10		Vermont	4.1%	10		Arizona	8.0%	10		New Mexico	9.4%	10		Michigan	\$55,716	10		Vermont	102.3%	10		Minnesota	0.5%	10		Minnesota	0.5%	10
New York	3.5%	10		Alabama	1.8%	11		North Carolina	4.0%	11		Utah	7.7%	11		North Carolina	8.9%	11		North Dakota	\$55,500	11		Illinois	100.5%	11		Maine	0.5%	11		Maine	0.5%	11
Minnesota	3.1%	11		Minnesota	1.7%	12		Missouri	3.6%	12		Louisiana	7.2%	12		Tennessee	8.5%	12		Massachusetts	\$55,044	12		Kentucky	100.3%	12		North Dakota	0.4%	12		North Dakota	0.4%	12
Arkansas	3.0%	12		Vermont	1.7%	13		Delaware	3.6%	13		New Jersey	7.1%	13		Texas	7.8%	13		Missouri	\$54,647	13		Indiana	99.9%	13		Illinois	0.4%	13		Illinois	0.4%	13
Missouri	2.7%	13		Georgia	1.7%	14		Wyoming	2.9%	14		Minnesota	7.0%	14		Iowa	7.0%	14		Washington	\$54,466	14		North Dakota	99.9%	14		Montana	0.4%	14		Montana	0.4%	14
Washington	2.4%	14		Missouri	1.6%	15		Oklahoma	2.9%	15		Ohio	6.3%	15		Rhode Island	6.8%	15		Minnesota	\$53,357	15		Nebraska	99.3%	15		New Jersey	0.4%	15		New Jersey	0.4%	15
Indiana	2.4%	15		Kentucky	1.5%	16		Iowa	2.5%	16		New Mexico	6.3%	16		South Dakota	6.4%	16		Wisconsin	\$53,337	16		Michigan	97.4%	16		South Dakota	0.4%	16		South Dakota	0.4%	16
Nebraska	2.3%	16		Oregon	1.5%	17		Georgia	2.1%	17		Connecticut	4.6%	17		Kentucky	6.2%	17		California	\$53,094	17		Kansas	97.3%	17		Oklahoma	0.4%	17		Oklahoma	0.4%	17
Michigan	2.3%	17		Illinois	1.4%	18		Massachusetts	1.9%	18		Oregon	3.7%	18		New Hampshire	6.2%	18		Vermont	\$52,656	18		Pennsylvania	96.6%	18		Washington	0.4%	18		Washington	0.4%	18
Tennessee	2.2%	18		North Carolina	1.4%	19		South Dakota	0.9%	19		Indiana	3.6%	19		New Jersey	5.7%	19		Montana	\$51,512	19		Florida	94.4%	19		Utah	0.4%	19		Utah	0.4%	19
Alabama	2.1%	19		Utah	1.3%	20		North Dakota	0.7%	20		Wisconsin	3.6%	20		Montana	5.7%	20		Connecticut	\$51,512	20		Utah	92.1%	20		New York	0.4%	20		New York	0.4%	20
New Jersey	2.1%	20		Tennessee	1.2%	21		Colorado	-0.5%	21		Washington	2.4%	21		Alabama	5.3%	21		Alabama	\$50,981	20		Maine	90.9%	21		Kansas	0.4%	21		Kansas	0.4%	21
Kansas	2.1%	21		Indiana	1.2%	22		Idaho	-0.6%	22		Nebraska	2.1%	22		South Carolina	5.1%	22		Idaho	\$50,768	21		Maryland	90.8%	22		Ohio	0.4%	22		Ohio	0.4%	22
Virginia	2.0%	22		Pennsylvania	1.2%	23		Washington	-1.1%	23		New York	2.0%	23		Louisiana	5.1%	23		Indiana	\$50,537	22		New Jersey	90.8%	23		Pennsylvania	0.4%	23		Pennsylvania	0.4%	23
Florida	2.0%	23		Washington	1.2%	24		California	-1.8%	24		Iowa	1.8%	24		Georgia	4.7%	24		Kentucky	\$50,455	23		Arizona	90.4%	24		Michigan	0.4%	24		Michigan	0.4%	24
Kentucky	1.8%	24		South Carolina	1.2%	25		South Carolina	-1.8%	25		Tennessee	1.5%	25		Arkansas	4.0%	25		Arizona	\$50,019	24		Minnesota	89.9%	25		Missouri	0.4%	25		Missouri	0.4%	25
Massachusetts	1.7%	25		Ohio	1.1%	26		Kansas	-1.8%	26		North Dakota	0.2%	26		National	3.6%	-		Kansas	\$49,182	25		Montana	88.3%	26		Louisiana	0.4%	26		Louisiana	0.4%	26
Oregon	1.6%	26		New Hampshire	1.1%	27		New Hampshire	-1.9%	27		Florida	0.1%	27		Florida	3.4%	26		Florida	\$48,895	26		Nevada	87.8%	27		Massachusetts	0.3%	27		Massachusetts	0.3%	27
Mississippi	1.5%	27		South Carolina	1.1%	-		Alabama	-2.1%	28		Alaska	0.0%	28		Nevada	3.4%	27		South Dakota	\$48,020	27		Louisiana	87.1%	28		Indiana	0.3%	28		Indiana	0.3%	28
Colorado	1.4%	28		Hawaii	1.0%	28		Rhode Island	-2.2%	29		National	-0.3%	-		Washington	3.0%	28		Colorado	\$47,972	28		National	86.3%	-		Arkansas	0.3%	29		Arkansas	0.3%	29
South Carolina	1.3%	29		Oklahoma	1.0%	29		Hawaii	-2.5%	30		Kansas	-0.4%	29		Delaware	2.4%	29		Nebraska	\$47,456	29		Oklahoma	86.2%	29		New Mexico	0.3%	30		New Mexico	0.3%	30
Louisiana	1.2%	30		California	1.0%	30		Wisconsin	-2.5%	31		Hawaii	-0.8%	30		Idaho	2.4%	30		Virginia	\$47,197	30		Washington	85.5%	30		Mississippi	0.3%	31		Mississippi	0.3%	31
Utah	1.1%	31		Maine	1.0%	31		Ohio	-3.8%	32		Illinois	-0.8%	31		New York	2.1%	31		Texas	\$47,113	31		Arkansas	84.0%	31		Arkansas	0.3%	32		Arkansas	0.3%	32
Idaho	1.1%	32		Louisiana	0.9%	32		Texas	-3.9%	33		Illinois	-0.9%	32		Indiana	2.0%	32		Utah	\$46,968	32		New Mexico	83.4%	32		Texas	0.3%	32		Texas	0.3%	32
Oklahoma	1.0%	33		Michigan	0.9%	33		Illinois	-4.0%	34		Michigan	-0.9%	33		Missouri	1.8%	33		Nevada	\$46,468	33		Oregon	81.1%	33		Wyoming	0.3%	33		Wyoming	0.3%	33
Maryland	1.0%	34		Colorado	0.9%	34		Connecticut	-4.6%	35		Virginia	-1.1%	34		Wisconsin	1.8%	34		Louisiana	\$46,119	34		North Carolina	80.7%	34		Colorado	0.3%	34		Colorado	0.3%	34
Arizona	0.8%	35		New Jersey	0.8%	35		National	-5.1%	-		National	-1.2%	35		North Dakota	1.8%	35		Alaska	\$45,995	35		South Carolina	79.5%	35		Alabama	0.3%	35		Alabama	0.3%	35
Alaska	0.6%	36		Virginia	0.8%	36		New York	-5.8%	36		Montana	-1.5%	36		Minnesota	0.9%	36		Oklahoma	\$44,866	36		Colorado	79.5%	36		Connecticut	0.3%	36		Connecticut	0.3%	36
Delaware	0.6%	37		Texas	0.8%	37		Arkansas	-6.4%	37		Pennsylvania	-2.5%	37		Virginia	0.8%	37		Oregon	\$44,041	37		California	78.3%	37		North Carolina	0.3%	37		North Carolina	0.3%	37
South Dakota	0.6%	38		Massachusetts	0.8%	38		Nebraska	-7.1%	38		New Hampshire	-2.6%	38		Michigan	0.7%	38		Maine	\$43,206	38		Texas	78.1%	38		Kentucky	0.3%	38		Kentucky	0.3%	38
Connecticut	0.5%	39		Rhode Island	0.7%	39		New Jersey	-7.1%	39		Missouri	-2.9%	39		Ohio	0.6%	39		New Mexico	\$42,311	39		Mississippi	76.4%	39		Delaware	0.3%	39		Delaware	0.3%	39
Hawaii	0.4%	40		New Mexico	0.7%	40		Tennessee	-7.2%	40		Delaware	-3.0%	40		California	0.4%	40		North Carolina	\$41,861	40		Massachusetts	76.0%	40		New Hampshire	0.3%	40		New Hampshire	0.3%	40
New Mexico	0.4%	41		New York	0.6%	41		Minnesota	-7.3%	41		Texas	-3.4%	41		Mississippi	-0.1%	41		Montana	\$41,036	41		Virginia	75.5%	41		Georgia	0.3%	41		Georgia	0.3%	41
Maine	0.4%	42		Montana	0.6%	42		Maryland	-8.0%	42		Mississippi	-4.8%	42		Illinois	-1.5%	42		Delaware	\$40,226	42		West Virginia	74.7%	42		Tennessee	0.3%	42		Tennessee	0.3%	42
Nevada	0.3%	43		Maryland	0.6%	43		Pennsylvania	-9.2%	43		California	-5.0%	43		Pennsylvania	-2.6%	43		Arkansas	\$39,547	43		Alabama	72.9%	43		Nevada	0.3%	43		Nevada	0.3%	43
North Dakota	0.3%	44		West Virginia	0.5%	44		West Virginia	-9.9%	44		Georgia	-5.1%	44		Maryland	-3.0%	44		Rhode Island	\$39,191	44</												

Appendix 3 - Food Processing Occupation Workforce Metrics

Food Processing Industry Labor Force Metrics for Idaho by Region - 2013

Size			Relative Size			Relative Growth					
Share of Food Processing Employment in Idaho by Region			Food Processing Employment as % of All Industry Employment			Growth in Food Processing Employment					
Area	Percent	Rank	Area	Percent	Rank	Area	2003-2008	Rank	Area	2008-2013	Rank
State	100%	-	South Central	6.8%	1	Northern	33.6%	1	South Central	16.5%	1
South Central	36.0%	1	Southeastern	4.6%	2	Southeastern	14.6%	2	North Central	4.1%	2
Southwestern	34.2%	2	State	2.4%	-	South Central	2.0%	3	State	0.0%	-
Southeastern	17.9%	3	Southwestern	1.8%	3	State	-0.6%	-	Southwestern	-3.0%	3
Eastern	8.7%	4	Eastern	1.6%	4	Southwestern	-8.2%	4	Eastern	-4.3%	4
Northern	2.7%	5	Northern	0.5%	5	Eastern	-12.6%	5	Northern	-4.5%	5
North Central	0.5%	6	North Central	0.2%	6	North Central	-24.5%	6	Southeastern	-16.5%	6

Projected Growth			Earnings			Food Process Earnings to State			Relative Establishments		
Projected Growth of Food Processing Employment			Food Processing Earnings Per Worker (EPW)			EPW in Food Processing as % of EPW in All Industries			2012 Food Processing Establishments as % of All Industry Establishments		
Area	2013-2023	Rank	Area	EPW	Rank	Area	Percent	Rank	Area	Percent	Rank
Southwestern	17.9%	1	South Central	\$53,791	1	South Central	134.3%	1	South Central	1.1%	1
State	1.3%	-	Southwestern	\$51,823	2	Southeastern	113.9%	2	Eastern	0.6%	2
South Central	-4.1%	2	State	\$50,637	-	State	113.5%	-	State	0.5%	-
Eastern	-4.4%	3	Southeastern	\$47,322	3	Southwestern	108.6%	3	Southeastern	0.5%	3
Northern	-5.0%	4	Northern	\$44,578	4	Northern	105.2%	4	Southwestern	0.4%	4
Southeastern	-15.0%	5	Eastern	\$42,785	5	Eastern	98.0%	5	North Central	0.3%	5
North Central	-26.0%	6	North Central	\$29,336	6	North Central	69.5%	6	Northern	0.3%	6

Source: Economic Modeling Specialists Inc.

Food Processing Industry Labor Force Metrics for Surrounding and Top-Ranked States - 2013

Size			Relative Size			Relative Growth					
Share of Food Processing Employment by Select States			Food Processing Employment as % of All Industry Employment			Growth in Food Processing Employment					
Area	Percent	Rank	Area	Percent	Rank	Area	2001-2007	Rank	Area	2007-2013	Rank
National	100%	-	National	1.1%	-	National	-5.1%	-	National	-0.3%	-
California	9.8%	1	Arkansas	3.9%	1	Nevada	29.9%	1	Vermont	32.5%	1
Texas	5.7%	2	Nebraska	3.8%	2	Arizona	20.4%	2	South Dakota	17.0%	2
Illinois	5.2%	3	Iowa	3.5%	3	Montana	13.3%	3	Wyoming	15.6%	3
Pennsylvania	4.5%	4	Alaska	2.8%	4	Utah	5.6%	4	Utah	14.9%	4
Georgia	4.3%	5	Idaho	2.5%	5	North Carolina	4.6%	5	Colorado	14.2%	5
Washington	2.4%	14	Kansas	2.3%	6	Indiana	3.8%	6	Rhode Island	14.0%	6
Oregon	1.6%	26	Oregon	1.5%	17	Oregon	3.6%	7	South Carolina	12.8%	7
Utah	1.1%	31	Utah	1.3%	20	Delaware	3.5%	8	Nevada	8.5%	10
Idaho	1.1%	32	Washington	1.2%	24	Alaska	3.4%	9	Oregon	5.8%	16
Nevada	0.3%	43	Montana	0.6%	42	Washington	-8.4%	35	Idaho	3.8%	20
Montana	0.2%	48	Nevada	0.4%	47	Idaho	-9.2%	37	Washington	3.0%	23
Wyoming	0.1%	50	Wyoming	0.3%	50	Wyoming	-11.7%	43	Montana	-1.4%	32

Projected Growth			Earnings			Food Processing: Earnings to State			Relative Establishments		
Projected Growth of Food Processing Employment			Food Processing Earnings Per Worker (EPW)			EPW in Food Processing as % of EPW in All Industries			2012 Food Processing Establishments as % of All Industry Establishments		
Area	2013-2023	Rank	Area	EPW	Rank	Area	Percent	Rank	Area	Percent	Rank
National	3.6%	-	National	\$ 51,762	-	National	86.3%	-	National	0.3%	-
Arizona	23.2%	1	Georgia	\$ 63,854	1	Georgia	114.8%	1	Alaska	0.9%	1
Massachusetts	15.0%	2	New Hampshire	\$ 63,735	2	Iowa	114.0%	2	Hawaii	0.8%	2
Utah	14.9%	3	New Jersey	\$ 63,633	3	Idaho	113.2%	3	Vermont	0.7%	3
Alaska	10.5%	4	Illinois	\$ 63,536	4	New Hampshire	111.3%	4	Wisconsin	0.7%	4
Colorado	10.3%	5	Maryland	\$ 59,900	5	Ohio	108.5%	5	Iowa	0.6%	5
Oregon	9.9%	6	Washington	\$ 54,446	14	Tennessee	107.7%	6	Idaho	0.5%	8
Oklahoma	9.7%	7	Idaho	\$ 50,768	21	Utah	92.1%	20	Oregon	0.5%	9
Montana	5.7%	20	Utah	\$ 46,968	32	Montana	88.3%	26	Montana	0.4%	14
Nevada	3.4%	27	Nevada	\$ 46,468	33	Nevada	87.8%	27	Washington	0.4%	18
Washington	3.0%	28	Oregon	\$ 44,041	37	Washington	85.5%	30	Utah	0.4%	19
Idaho	2.4%	30	Montana	\$ 41,036	41	Oregon	81.1%	33	Wyoming	0.3%	33
Wyoming	-7.2%	49	Wyoming	\$ 35,708	49	Wyoming	65.2%	49	Nevada	0.3%	43

Source: Economic Modeling Specialists Inc. 2013.2

Appendix 4 - Idaho's Food Processing Sectors

Idaho Food Processing Industries	NAICS Code
Dog and cat food manufacturing	311111
Other animal food manufacturing	311119
Flour milling	311211
Rice milling	311212
Wet corn milling	311221
Soybean processing	311222
Other oil seeds processing	311223
Fats and oils refining & blending	311225
Beet sugar manufacturing	311313
Confectionary manufacturing from cacao bean	311320
Confectionary manufacturing from purchased chocolate	311330
Frozen fruit & vegetable manufacturing	311411
Frozen specialty food manufacturing	311412
Fruit & vegetable canning	311421
Specialty canning	311422
Dried & dehydrated food manufacturing	311423
Fluid milk manufacturing	311511
Creamery butter manufacturing	311512
Cheese manufacturing	311513
Dry, condensed & evaporated dairy products	311514
Ice cream & frozen dessert manufacturing	311520
Animal, except poultry, slaughtering	311611
Meat processed from carcasses	311612
Rendering & meat byproduct processing	311613
Poultry processing	311615
Fresh & frozen seafood processing	311712
Retail bakeries	311811
Commercial bakeries	311812
Frozen cakes & other pastries manufacturing	311813
Cookie & cracker manufacturing	311821
Dry pasta manufacturing	311823
Tortilla manufacturing	311830
Other snack food manufacturing	311919
Coffee and tea manufacturing	311920
Mayonnaise, dressing & sauce manufacturing	311941
Spice and extract processing	311942
Perishable prepared food manufacturing	311991
All other miscellaneous food manufacturing	311999

Source: Economic Modeling Specialists Inc

Appendix 5 - Idaho Food Processing Exports

Idaho World-Wide Exports - Dairy

Description	U.S. Dollar			% Share			% Change 2013/2012
	2011	2012	2013	2011	2012	2013	
Dairy/Eggs/Honey/	267,655,861	270,098,017	314,194,537	100	100	100	16.33
Milk/Cream/Sweet	89,548,914	83,075,366	128,458,270	33.46	30.76	40.88	54.63
Whey/Other Milk Prods	113,028,462	130,208,848	97,645,005	42.23	48.21	31.08	-25.01
Cheese and Curd	28,409,154	47,284,354	63,268,288	10.61	17.51	20.14	33.8
Butter/Oils From Milk	36,660,151	9,015,706	23,498,861	13.7	3.34	7.48	160.64
Buttermilk/Yogurt	0	494,963	1,162,545	0	0.18	0.37	134.88
Fresh Eggs	0	0	82,947	0	0	0.03	
Processed Eggs	9,180	18,780	78,621	0	0.01	0.03	318.64

Source: World Trade Statistics Online

Idaho Cheese and Curd Exports by Country

Rank	Country	U.S. Dollar			% Share			% Change 2013/2012
		2011	2012	2013	2011	2012	2013	
	_World	\$28,409,154	\$47,284,354	\$63,268,288	100	100	100	33.8
1	Korean Republic	\$10,511,589	\$28,830,343	\$34,871,269	37.0	61.0	55.1	21.0
2	Mexico	\$6,364,608	\$6,935,819	\$11,870,028	22.4	14.7	18.8	71.1
3	Japan	\$786,197	\$2,239,232	\$4,283,536	2.8	4.7	6.8	91.3
4	Australia	\$0	\$629,171	\$2,874,967	0.0	1.3	4.5	356.9
5	Bahrain	\$282,147	\$176,127	\$1,534,438	1.0	0.4	2.4	771.2
6	China	\$2,601,004	\$3,894,352	\$1,513,387	9.2	8.2	2.4	-61.1
7	Trinidad and Tobago	\$1,262,649	\$963,264	\$1,060,198	4.4	2.0	1.7	10.1
8	Morocco	\$206,736	\$364,253	\$1,020,855	0.7	0.8	1.6	180.3
9	Egypt	\$1,390,799	\$1,278,246	\$978,942	4.9	2.7	1.5	-23.4
10	Saudi Arabia	\$2,952,623	\$585,792	\$645,007	10.4	1.2	1.0	10.1
11	Philippines	\$296,676	\$87,685	\$540,689	1.0	0.2	0.9	516.6
12	Netherlands	\$0	\$0	\$406,843	0.0	0.0	0.6	
13	United Arab Emirates	\$0	\$228,000	\$345,704	0.0	0.5	0.5	51.6
14	Jamaica	\$363,101	\$203,549	\$344,428	1.3	0.4	0.5	69.2
15	Hong Kong	\$5,497	\$72,000	\$229,110	0.0	0.2	0.4	218.2
16	Taiwan	\$312,384	\$206,633	\$214,217	1.1	0.4	0.3	3.7
17	Kuwait	\$0	\$0	\$187,049	0.0	0.0	0.3	
18	Qatar	\$0	\$0	\$185,047	0.0	0.0	0.3	
19	Jordan	\$207,492	\$0	\$92,201	0.7	0.0	0.1	
20	Barbados	\$15,964	\$54,211	\$70,373	0.1	0.1	0.1	29.8
21	Canada	\$0	\$6,362	\$0	0.0	0.0	0.0	-100.0
22	El Salvador	\$0	\$83,904	\$0	0.0	0.2	0.0	-100.0
23	French Polynesia	\$14,008	\$0	\$0	0.0	0.0	0.0	
24	Guatemala	\$171,114	\$0	\$0	0.6	0.0	0.0	
25	Israel	\$80,446	\$0	\$0	0.3	0.0	0.0	
26	Panama	\$584,120	\$0	\$0	2.1	0.0	0.0	
27	Malaysia	\$0	\$122,844	\$0	0.0	0.3	0.0	-100.0
28	Tunisia	\$0	\$322,567	\$0	0.0	0.7	0.0	-100.0

Source: Global Trade World Information Services, Inc. Annual Series 2011-2013

Appendix 5 - Idaho Food Processing Exports (cont.)

Idaho Milk, Concentrate or Sweetened Cream Exports by Country

January - December								
Rank	Country	U.S. Dollar			% Share			% Change
		2011	2012	2013	2011	2012	2013	
	World	\$89,548,914	\$83,075,366	\$128,458,270	100.0%	100.0%	100.0%	54.6%
1	China	\$1,355,671	\$3,792,928	\$30,697,904	1.5%	4.6%	23.9%	709.4%
2	Mexico	\$2,161,563	\$12,479,329	\$25,005,994	2.4%	15.0%	19.5%	100.4%
3	Indonesia	\$27,695,220	\$23,982,511	\$19,439,377	30.9%	28.9%	15.1%	-18.9%
4	Philippines	\$12,057,306	\$8,610,413	\$15,158,682	13.5%	10.4%	11.8%	76.1%
5	Chile	\$7,487,463	\$6,119,144	\$9,161,009	8.4%	7.4%	7.1%	49.7%
6	Malaysia	\$15,320,591	\$4,695,043	\$7,446,657	17.1%	5.7%	5.8%	58.6%
7	Thailand	\$8,029,316	\$6,991,560	\$6,133,898	9.0%	8.4%	4.8%	-12.3%
8	Korean Republic	\$707,518	\$863,934	\$2,793,827	0.8%	1.0%	2.2%	223.4%
9	Sri Lanka	\$495,957	\$2,561,288	\$2,681,436	0.6%	3.1%	2.1%	4.7%
10	Singapore	\$247,439	\$132,412	\$1,977,215	0.3%	0.2%	1.5%	1393.2%
11	Vietnam	\$6,050,904	\$3,482,387	\$1,895,068	6.8%	4.2%	1.5%	-45.6%
12	Australia	\$0	\$166,250	\$1,382,426	0.0%	0.2%	1.1%	731.5%
13	Panama	\$0	\$133,860	\$1,253,151	0.0%	0.2%	1.0%	836.2%
14	Egypt	\$2,098,764	\$377,518	\$1,038,031	2.3%	0.5%	0.8%	175.0%
15	Saudi Arabia	\$2,392,235	\$659,728	\$956,203	2.7%	0.8%	0.7%	44.9%
16	Venezuela	\$0	\$0	\$671,828	0.0%	0.0%	0.5%	0.0%
17	United Arab Emirates	\$0	\$43,510	\$358,552	0.0%	0.1%	0.3%	724.1%
18	Taiwan	\$422,434	\$1,735,148	\$173,062	0.5%	2.1%	0.1%	-90.0%
19	El Salvador	\$0	\$267,655	\$69,900	0.0%	0.3%	0.1%	-73.9%
20	Canada	\$337,425	\$181,604	\$66,478	0.4%	0.2%	0.1%	-63.4%
21	Brazil	\$0	\$39,450	\$51,572	0.0%	0.1%	0.0%	30.7%
22	Guatemala	\$103,715	\$77,406	\$46,000	0.1%	0.1%	0.0%	-40.6%
23	Jamaica	\$0	\$248,571	\$0	0.0%	0.3%	0.0%	-100.0%
24	Japan	\$1,103,685	\$483,645	\$0	1.2%	0.6%	0.0%	-100.0%
25	Jordan	\$126,456	\$0	\$0	0.1%	0.0%	0.0%	0.0%
26	Bahrain	\$735,470	\$93,678	\$0	0.8%	0.1%	0.0%	-100.0%
27	Germany	\$220,834	\$0	\$0	0.3%	0.0%	0.0%	0.0%
28	Colombia	\$0	\$113,429	\$0	0.0%	0.1%	0.0%	-100.0%
29	Dominican Republic	\$0	\$193,626	\$0	0.0%	0.2%	0.0%	-100.0%
30	South Africa	\$0	\$962,223	\$0	0.0%	1.2%	0.0%	-100.0%
31	Ukraine	\$165,348	\$0	\$0	0.2%	0.0%	0.0%	0.0%
32	Peru	\$0	\$1,391,792	\$0	0.0%	1.7%	0.0%	-100.0%
33	Morocco	\$233,600	\$53,738	\$0	0.3%	0.1%	0.0%	-100.0%
34	Nicaragua	\$0	\$1,610,934	\$0	0.0%	1.9%	0.0%	-100.0%
35	Nigeria	\$0	\$275,577	\$0	0.0%	0.3%	0.0%	-100.0%
36	Yemen Rep of	\$0	\$255,075	\$0	0.0%	0.3%	0.0%	-100.0%

Source: Word Trade Statistics Online

Appendix 5 - Idaho Food Processing Exports (cont.)

Idaho Frozen Potato Exports

Rank	Country	U.S. Dollar			% Share			% Change 2013/2012
		2011	2012	2013	2011	2012	2013	
	World	\$17,454,573	\$34,512,436	\$38,692,851	100	100	100	12.1%
1	Mexico	\$12,162,837	\$27,569,367	\$29,361,098	69.7	79.9	75.9	6.5%
2	Canada	\$4,506,018	\$6,059,765	\$7,486,557	25.8	17.6	19.3	23.5%
3	Korean Republic	\$472,086	\$655,098	\$594,603	2.7	1.9	1.5	-9.2%
4	Venezuela	\$0	\$0	\$427,270	0.0	0.0	1.1	n.a.
5	India	\$0	\$0	\$343,853	0.0	0.0	0.9	n.a.
6	China	\$0	\$0	\$221,274	0.0	0.0	0.6	n.a.
7	Chile	\$0	\$0	\$140,895	0.0	0.0	0.4	n.a.
8	Nicaragua	\$0	\$0	\$67,101	0.0	0.0	0.2	n.a.
9	Panama	\$0	\$50,200	\$50,200	0.0	0.1	0.1	0.0%
10	Netherlands	\$214,064	\$169,097	\$0	1.2	0.5	0.0	-100.0%
11	Bahamas	\$0	\$8,909	\$0	0.0	0.0	0.0	-100.0%
12	El Salvador	\$15,645	\$0	\$0	0.1	0.0	0.0	n.a.
13	Japan	\$83,923	\$0	\$0	0.5	0.0	0.0	n.a.

Source: World Trade Statistics Online

Appendix 6 - Staffing Patterns

Jobs in Food Processing in Idaho by Occupation and Percent of Total

SOC	Occupation	% of the Total Jobs in Industry (2014)
51-9111	Packaging and Filling Machine Operators and Tenders	9.6%
51-3092	Food Batchmakers	7.1%
51-3093	Food Cooking Machine Operators and Tenders	5.0%
51-1011	First-Line Supervisors of Production and Operating Workers	3.4%
49-9041	Industrial Machinery Mechanics	3.3%
51-2092	Team Assemblers	3.3%
53-7051	Industrial Truck and Tractor Operators	3.2%
53-7062	Laborers and Freight, Stock and Material Movers, Hand	3.2%
51-3011	Bakers	2.6%
51-3091	Food and Tobacco Roasting, Baking and Drying Machine Operators and Tenders	2.6%
45-2041	Graders and Sorters, Agricultural Products	2.6%
51-9198	Helpers--Production Workers	2.5%
49-9071	Maintenance and Repair Workers, General	2.4%
53-3032	Heavy and Tractor-Trailer Truck Drivers	2.3%
51-3023	Slaughterers and Meat Packers	2.1%
51-9012	Separating, Filtering, Clarifying, Precipitating and Still Machine Setters, Operators and Tenders	1.8%
51-3022	Meat, Poultry and Fish Cutters and Trimmers	1.8%
19-4011	Agricultural and Food Science Technicians	1.5%
53-7064	Packers and Packagers, Hand	1.5%
53-7061	Cleaners of Vehicles and Equipment	1.4%
51-9032	Cutting and Slicing Machine Setters, Operators and Tenders	1.4%
11-1021	General and Operations Managers	1.4%
53-3031	Driver/Sales Workers	1.3%
51-9061	Inspectors, Testers, Sorters, Samplers and Weighers	1.3%
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1.2%
43-5071	Shipping, Receiving and Traffic Clerks	1.2%
49-9043	Maintenance Workers, Machinery	1.2%
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	1.1%
51-9023	Mixing and Blending Machine Setters, Operators and Tenders	1.1%
43-9061	Office Clerks, General	0.9%
11-9199	Managers, All Other	0.8%
51-9193	Cooling and Freezing Equipment Operators and Tenders	0.8%
11-3051	Industrial Production Managers	0.8%

Source: Economic Modeling Specialists Inc.