



SOUTHERN IDAHO
ECONOMIC DEVELOPMENT
ORGANIZATION

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Southern Idaho Agribusiness

Food production, processing, and science serve as the economic foundation for southern Idaho's "All Things Food" region. Southern Idaho's six-county "Magic Valley" region leads the states agribusiness industry by contributing nearly half of the state's record \$9.7 billion total ag receipts. In 2015, Southern Idaho received the national "stamp of approval" by being the fourth and smallest region in the U.S. to earn the prestigious Federal Manufacturing Community Designation in the Food category. This designation further cements this small region's economic dominance in all things food in the global marketplace.



This unique region boasts some impressive agribusiness stats:

- Sold almost \$7 billion of related goods and services and contributed \$2.5 billion to Idaho's gross state product
- Over 15,000 of total area jobs are farm or processing related
- Almost 1/2 of Magic Valley jobs are directly or indirectly created by agribusiness
- 2 of every 3 sales dollars are directly or indirectly created by agribusiness
- Southern Idaho ranks in the top third of U.S. states for food processing

The area boasts a strong agricultural base of row crop farming of sugar beets, potatoes, barley, winter/summer wheat, alfalfa hay, corn, and seed production as well as pork processing, cattle/calves, dairy production/processing, aquaculture, lamb, mink, and honey production. Few if any other region in the country has this depth in agribusiness.

These diverse food categories have generated a wide range of products and complimentary support services that sustain and help grow this economic base including food processing, food science, R&D, warehousing, distribution, cheese/yogurt production, potato processing, and meat processing to name a few.



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DAIRY & CHEESE

Nowhere else in Idaho are there more dairy farms than in southern Idaho. Almost half of agribusiness export sales are from the area's dairy processing industry. This region is ideal for dairy farming, offering excellent cow feed availability for quality and generally cool year-round climate that improves milk production. 70% of Idaho dairy cows and over 76% of dairies are located just in southern Idaho. This region accounts for 80% of the state's milk production - 14.1 billion pounds annually - securing the state's #3 rank in the U.S. for milk and #3 rank in cheese production. Southern Idaho ranks #1 in cheese production for the state.

Producing over 37 million pounds of milk per day, southern Idaho's Magic Valley dairy processing accounts for over \$4.9 billion in sales

Chobani brand Greek Yogurt, America's #1 selling yogurt brand, operates the largest yogurt processing plant in the world in Twin Falls. Chobani selected southern Idaho largely because of the substantial supply of available milk and stringent standards for milk quality.

Several cheese manufacturers have operated here for many years supporting the dairy industry.

Glanbia Foods is the world's largest producer of American Style cheese. Headquartered in Twin Falls, Idaho, Glanbia processes nearly 23 million pounds of milk everyday into cheese from three world class manufacturing facilities, two in Southern Idaho. With the help of over 1,000 employees, Glanbia and its sister company Southwest Cheese makes, sells, and ships more than 830 million pounds of cheese and 170 million pounds of value-added shey products annually to over 30 countries.

Other southern Idaho major cheese processors include **Jerome Cheese**, **Brewster Cheese**, **Gossner Foods**, and **Ballard Cheese**.

Glanbia Foods, **Idaho Milk Products**, **High Desert Milk**, **Darigold**, **Cloverleaf Creamery**, and **Commercial Creamery** produce whey, milk protein powders, concentrated filtrated milk, milk lactose permeate powder, and/or cream for use in nutritional supplements, cheese, yogurt, and other dairy based foods.

CALVA PRODUCTS, INC. is a leading manufacturer of infant animal milk formulas and care products. Their milk replacer facility, built next to Brewster West Cheese, converts Brewster's and other local manufacturers' cheese by-products into liquid milk replacer for calves.

	Southern Idaho Rank	National Rank
Dairy Cows	1	4
Cheese	1	3
Milk Production	1	3

POTATOES & SUGAR BEETS

Potato and sugar processing in southern Idaho fall right behind dairy processing in economic impact for the region, at 12% and 9% respectively.

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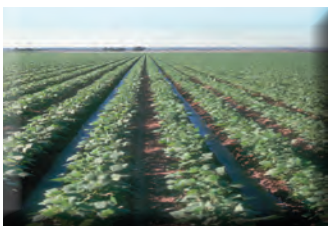
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Con Agra/Lamb-Weston is the #1 producer of frozen French fries in the United States and a leading supplier of frozen potato, appetizer, and vegetable products to restaurants and consumers throughout the world.

McCain Foods – the world's largest processor of French fries, producing 1/3 of the world's supply. **Arrowhead Potatoes, Purely Supreme Foods, and Rite Stuff Foods** – which specializes in twice-baked stuffed potatoes, potato skins, and whole backed potatoes for the food service, retail, and restaurant industry – also have operations here.

Southern Idaho is the largest producer of sugar beets in Idaho and one of the largest in the United States. Sugar beet farming has gross sales of \$140 million with virtually all beets processed locally. **Amalgamated Sugar** operates two large plants here and one of the premier research and development facilities for sugar in the United States.

	Southern Idaho Rank	National Rank
Potatoes	4	1
Sugar Beets	2	2

LIVESTOCK

Southern Idaho ranks #1 in the state for cattle/calves, pork processing, sheep/lambs, and wool. **Independent Meat Company**-100 year family owned - is the largest pork products processor in the Intermountain West distributing under the Falls Brand and Salmon Creek labels. A full line of related pork products are distributed nationally and to the Pacific Rim. Meat processors include **Carlin, Allan Ward 7 Brothers Meats, Dale T. Smith Meat Packing, and Scarrow Meats. Hy-Line North America** has the only nationwide chick production network in the American egg industry with several regional production centers with one in southern Idaho. Buffalo and Yak operators are also being established here. The regions's growing sheep/lamb industry provides consumers with quality lamb and wool products.

	Southern Idaho Rank	National Rank
Cattle/Calves	1	13
Pork Processing	1	n/a
Sheep/Lamb	1	7
Wool	1	7

CROPS

Millions of acres of premium crops like dry edible beans, winter/summer wheat, barley, alfalfa hay, corn, and seeds are grown in Southern Idaho every year producing the widest variety of bean seed in the U.S.. Over half of dry beans grown here are for seed; both seed and edible dry beans are shipped all over the world.

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Coors, Anheuser Busch, and other breweries contract with southern Idaho farmers to produce malting barley. Any extra barley is processed at local grain elevators and used for livestock feed.

The region is also an international seed breeding and production area. Sugar Snap Peas were first developed in this region in 1979. Numerous premier seed developers and producers call this region home including **Kelly Bean Co., Centennial Seed Co., Idaho Seed Bean Co., Kimberly Seeds International, Inc., Rangen, Inc., Soranco Bean Products, Gentec, Inc., Seneca Foods, Agrisource, Betaseed, Harris Moran Seed Co., Seminis, and Reed Grain & Bean Co..**

	Southern Idaho Rank	National Rank
Dry Edible Beans	2	4
Alfalfa Hay	1	9
Barley	1	2
Spring Wheat	3	5
All Wheat	5	7

FISH & AQUACULTURE

Southern Idaho's Snake River aquifer and countless springs with constant 58 degree water make this region ideal for raising trout and other fish.

ClearSpringsFoods is the world's largest commercial freshwater Rainbow Trout farm and #1 producer of commercial fresh Rainbow Trout in the United States producing 27 million pounds in 2016.

Clear Springs is a vertically integrated company; including a state-of-the-art trout farms, trout processing, feed manufacturing, and R&D facilities is the #1 producer of commercial trout in Idaho producing 22 million pounds of trout annually. Southern Idaho accounts for 77% of food size trout sold nationally.

Fish Breeders utilize the natural abundance of 90 degree geothermal water to fuel a successful aquaculture operation of catfish, tilapia, caviar, and over 60 species of tropical fish. **Silver Creek Farms** is another premier producer and processor of a variety of freshwater fish including Rainbow Trout and tilapia. **SeaPac of Idaho** produces boneless Rainbow Trout and some tilapia. Other aquaculture operations include **Rangen, Affordable Caviar, Canyon Springs, and Rana Ranch Bullfrogs.**

	Southern Idaho Rank	National Rank
Commercial Trout	1	1

HONEY & MINK

Southern Idaho ranks #1 in Idaho for honey beehives. **Belliston Brothers Apiaries, Morts Apiaries, Inc., Tubbs Berry Farm, and B & B Apiaries** produce thousands of pounds of honey annually.

Southern Idaho is the largest producer of mink in Idaho and fourth nationally with eight different mink farms that export products to China, Russia, Greece, and Korea.

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Moyle Mink Farms is one of the world's first vertically integrated farms producing, tanning, manufacturing coats, and accessories and is one of seven area mink farms.

	Southern Idaho Rank	National Rank
Honey	4	12
Mink	1	n/a

AREA FOOD SCIENCE R & D

GLANBIA FOODS, INC.: In addition to cheese processing, Glanbia has one additional plant solely dedicated to whey processing, producing 18 million pounds of dairy ingredients annually – one of the largest in the U.S.. The whey processing plants in Richfield and Gooding are two of the most technically advanced facilities in the U.S., addressing a burgeoning global marketplace in nutritionals.

Glanbia Nutritionals Ingredient Technology (GNIT) focuses on core research and innovative solutions development for whey proteins and milk minerals.

Glanbia's Collaboration Center takes whey products and applies them in a variety of food products and processes. In spring 2013, Glanbia invested over \$15 million to build an office complex and **Cheese Innovation Center** to support Glanbia's growing export and new product innovation efforts. The CIC provides additional resources to further collaborate with national/international customers, suppliers, and universities in develop new cheese making process and products. Also on site is a bakery for Glanbia scientists to study how to incorporate superfood ancient seeds and grains into various products.

Glanbia Nutritionals is a leading international supplier of nutritional and functional dairy-based ingredients to the functional foods, performance/health enhancing beverages, and supplements markets for adult nutrition and health, infant/medical use, topical/oral health, and animal nutrition/health.

IDAHO MILK PRODUCTS TECHNICAL CENTER focuses on new product development, product research, evaluation of new technologies, sales, and brand development.

CLEAR SPRINGS FOODS: Clear Springs Center for Global Aquaculture Research and Quality Assurance is the world's premier R&D center for freshwater Rainbow Trout. The center is primarily focused on optimizing fish production through fish nutrition, fish health management, fish reproduction, brood stock management, and environmental science. All work is done to insure consistent, premier quality trout are produced in an economically and environmentally responsible manner.

Healthy fish are vital to optimizing Rainbow Trout production. Clear Springs has developed various strategies from brood stock, to egg, and harvestable sized trout.

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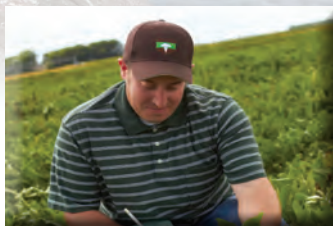
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More than 80 million Rainbow Trout eggs are produced here annually and intensely monitored throughout their life stages to ensure their well-being. Sophisticated and sensitive instrumentation is routinely used to test water quality, feed nutritional content, and product quality. Advanced detection methods are employed to look for potential fish pathogens in fish and water.

As new tools or techniques are developed they are first tested in controlled environments prior to farm implementation. The center operates its own feed mill and develops new feed formulations that help in Clear Springs' efforts to ensure environmental sustainability. Ongoing research projects include nutrition, waste management, and fish culture.

BETASEED: Betaseed is North America's leading research and breeding organization devoted entirely to developing and marketing high yielding, multiple disease tolerant sugar beet seed varieties. Southern Idaho's city of Kimberly is home to one of just three North America locations conducting research for the development of disease-resistant sugar beet seed.

Betaseed's research program in Kimberly has focused on creating curly top tolerant sugar beet hybrids since 1973. Curly top is a plant condition developed from a virus infection unique to western U.S. sugar beet production. Betaseed was the first sugar beet seed company to establish a research site dedicated to addressing curly top. Betaseed researchers in southern Idaho operate performance trials to evaluate developing sugar beet hybrids in Washington, Oregon, California, and Idaho. Over 20 scientists and technicians in Kimberly conduct plant breeding, pest and disease tolerance evaluations, and replicated yield trials on over 170 acres of irrigated farmland. Betaseed is the leading sugar beet seed brand for growers in North America. This facility is one of a few in the world conducting sugar beet curly top research, vital to long-term successful and healthy sugar beet production.

AMALGAMATED RESEARCH, INC.: Amalgamated Sugar in southern Idaho is one of the nation's top sugar producers and parent company of Amalgamated Research also located here. Amalgamated Research is a worldwide marketer of ultra-efficient technologies for over 200 years. The goal of its collaborated research is to manage a project completely from lab scale evaluation to industrial implementation. This includes specializing in creation and management of innovative technology from lab and pilot to full-scale industrial implementation while providing bench/pilot scale process research, scale-up design and implementation, analytical services, and contract research.

Amalgamated Research offers wet chemistry, instrument, and microbiology labs as well as two large pilot areas used to develop new processes and execute pilot projects for customers. A variety of equipment is available here and in-house automation capability provides precise and individualized control of tested processes.

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RANGEN: Rangen's Aquaculture Division is an international leader in the production of feeds and feed additives for the aquaculture industry for over 60 years. Rangen operates three divisions in southern Idaho including aquaculture, general feed, and commodities. Rangen's primary business is the production and marketing of specialized high quality aquaculture feeds including trout, salmon, shrimp feed, and premixes.

MONSANTO WHEAT TECHNOLOGY CENTER: Monsanto's Wheat Technology Center in the Twin Falls is dedicated to supporting the development of best-in-class wheat varieties to help farmers increase their productivity. The facility serves as Monsanto's core wheat breeding research and development facility with about 24 research positions housed there. The Twin Falls research facility is welcomed by the wheat industry outside of Idaho because it signals a major commitment by Monsanto to research and develop improved wheat varieties.

R & D SUPPORT: Research and Development in southern Idaho will continue to impact the U.S. and the world thanks to the support of two world class entities. Idaho National Lab (INL) is one of the Department of Energy's 10 multi-program national laboratories performing work in energy, national security, science, and environment. While INL is the nation's leading center for nuclear energy research and development, the lab serves as a critical source of support for local and state R&D efforts.

Further support is offered by Idaho's only land-grant research university, the University of Idaho (U of I). U of I, with more than 70 locations across the state, is dedicated to addressing the needs of the state, the region, and the world through knowledge, discovery, excellence in teaching, and service.

SUSTAINABILITY:

The College of Southern Idaho (CSI) has an integrated workforce development program that offers programs flexible to industry's needs and customized training to assure the local workforce is qualified to meet the challenges brought on by a rapidly changing and growing economy. CSI's Food Quality Management degree program equips students for highly skilled food processing jobs.

CONCLUSION:

The diversity of Southern Idaho's agricultural base provides an abundant resource of raw materials for many food processors. The region has long been committed to sustainability of its natural resources, vital to maintaining quality land, water, and air. Thus ongoing environmental stewardship ensures that current and future agribusiness goods and services are produced economically and responsibly.

In addition, a fully developed infrastructure is in place to process, package, store, and transport products to market locally, nationally, and internationally.

In summary, work force availability, raw materials, and business incentives make southern Idaho one of the best place in the United States to locate a food manufacturing or related service.

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