UTAH DEPARTMENT OF AGRICULTURE AND FOOD

2021 CENTENNIAL STRATEGIC PLAN

Promote.
Preserve.
Protect.

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A MESSAGE FROM COMMISSIONER CRAIG BUTTARS

Greetings,

Agriculture has long been a driving force of Utah's economy and the backbone of our state's heritage. This year, as the Utah Department of Agriculture and Food celebrates its 100th anniversary, there seemed no better time to initiate this Centennial Strategic Plan to create goals that will propel us into the century ahead. Throughout the strategic planning process we heard from producers, leaders, and representatives of agriculture throughout the state, held internal and external reviews of our divisions, programs, and statutory responsibilities, and worked with partners to identify the strengths, weaknesses, and opportunities for growth in Utah agriculture and food processing. The goals developed through this process, in alignment with those outlined in Governor Spencer J. Cox's One Utah Roadmap, address critical needs including expanding agricultural infrastructure (agristructure), developing a skilled workforce, and helping every citizen gain a greater understanding of and connection with local agriculture.

A safe, secure, and abundant local food supply is vital to the future of this state; there are no better partners to lead this vision to fruition than Utah's farmers, ranchers, and food processors. We recognize that the Department plays a meaningful role in the success and future of Utah agriculture; we are committed to organizational excellence and the continual improvement of our services to meet the needs ahead. With great optimism for the future of Utah agriculture and related industries, I am pleased to present these findings and strategic goals.

Craig W Buttars
Commissioner, Utah Department of Agriculture and Food

ABOUT UDAF

Who We Are

The Utah Department of Agriculture and Food is one of the state's oldest agencies. UDAF's roots date back to the year of Utah's statehood when the 1896 legislature formed the State Board of Horticulture, later combined with other agencies in 1921 to form the Department of Agriculture. The Department oversees dozens of legislatively mandated programs that promote the healthy growth of Utah agriculture, the conservation of our natural resources, and the protection of our food supply.

This year, 2021, UDAF is proud to celebrate the 100th anniversary. Whether large or small, urban or rural, UDAF serves our state's farmers, ranchers, and food producers as they support consumer access to safe and delicious food, a stronger economy, and the conservation of our beautiful mountain valleys and desert landscapes. As Utah's population continues to grow and technologies continue to advance, UDAF's programs and services will rise to meet the needs and challenges ahead.

What We Do

The Utah Department of Agriculture and Food is responsible for the administration of Utah's agricultural laws, which mandate a wide variety of responsibilities including inspection, regulation, education, rulemaking, loan issuance, pest and disease control, marketing and development of the economic position of agriculture, and consumer protection.

Divisions

Office of the Commissioner: The Office of the Commissioner is the executive office within the Department and ensures all divisions work to meet statutory responsibilities; includes the Agricultural Mediation Program, Grazing Improvement Program, Homeland Security and Risk Assessment, and the Industrial Hemp and Medical Cannabis Program. The Commissioner serves on the governor's cabinet and represents the needs of agriculture across the state while the Deputy Commissioner sees to the day-to-day operations of the Department.

Administrative Services: Provides support to all divisions within the Department to ensure state policies and procedures are implemented to meet both internal and external audit standards.

Animal Industry: Ensures the health and productivity of Utah livestock, poultry, and aquaculture, preserves industry commerce, and protects human health. Includes the Animal Health, Aquaculture, Brand Inspection, Domestic Elk, Meat and Poultry Inspection, and Predator Control programs.

Conservation: Preserves and protects Utah's soil and water resources and ensures proper development and utilization through grant and loan programs which help the agriculture community achieve goals for productivity, efficiency, and environmental stewardship. Includes the Agriculture Resource Development (ARDL) Program, Agricultural Voluntary Incentives Program (AgVIP), Soil Health Program, and Water Optimization Program.

Laboratory Services: Provides analytical services to the other divisions within the Department and provides chemical, physical, and microbiological analyses for a wide variety of products to protect the state's consumers, farmers, and industry.

Marketing and Economic Development: Provides communications support to all divisions and economic development support to Utah's agriculture and food businesses. Includes the Utah's Own program, Specialty Crop Block Grant Program, and International Trade Program.

Plant Industry: Ensures disease and pest-free plants, grains, and seeds, properly labeled agricultural commodities, the safe application of pesticides and farm chemicals, and assists farmers and ranchers in caring for and enhancing Utah's natural resources.

Regulatory Services: Protects public health and promotes fair and equitable trade of commodities through food, product, weights and measures oversight. Includes the Bedding, Upholstered Furniture, and Quilted Clothing , Dairy Compliance , Manufactured and Retail Foods Programs, Kratom, Utah Produce Safety, and Weights and Measures Programs.

UDAF
VISION, MISSION, VALUES

Vision

The vision of the Utah Department of Agriculture and Food is to lead Utah towards self-reliance by promoting, preserving, and protecting all forms of agricultural production and processing to ensure a safe and abundant supply of locally produced foods for all Utahns.

Mission

The mission of the Utah Department of Agriculture and Food is to support the development of Utah's agriculture and food industries, serve as a steward of our natural resources, safeguard public health, protect consumers, and ensure a quality food supply.

Values

Accountability: We value the fulfillment of our statutory duties as a service-based agency with regulatory responsibilities.

Customer Service: We value the continual improvement of our services through processes and technologies that are innovative and practical, as well as employees who are committed resources for those we serve.

Guardianship: We value our role in consumer protection, safeguarding public health, and the development and effective distribution of a safe, abundant, and secure food supply.

Leadership: We value an organizational system with leaders who coach, motivate, and support a work environment where employees can develop and achieve their highest potential by setting clear expectations, supporting employees in accomplishing their objectives, and recognizing their unique strengths.

Professionalism: We value employees who maintain high professional and ethical standards and who are accountable for their actions.

Relationships: We value healthy working relationships with local, state, and federal government agencies, stakeholders, and all customers and industries we serve.

Stewardship: We value the conservation, protection, and enhancement of Utah's lands and natural resources.

UDAF
CENTENNIAL STRATEGIC PLAN

Executive Summary

The purpose of the Utah Department of Agriculture and Food Centennial Strategic Plan is to commemorate the Department's 100th anniversary with refined vision, mission, and values statements and to create strategic goals to drive the Department and Utah's agriculture and food industries forward into the century ahead.

Between May and September of 2021, the Utah Department of Agriculture (UDAF), along with the Utah Association of Counties (UAC) and Honey Communications, conducted a comprehensive review of iMpact Utah manufactured foods data and UDAF interdepartmental program data, held in-depth interviews with farmers and ranchers, UDAF directors, and conducted a listening tour and survey of stakeholders including regional Associations of Governments, agriculture and food industry representatives, Utah State University Cooperative Extension, and elected officials. Information gathered from these processes led to the creation of strategic department-wide goals and the development of vision, mission, and value statements.

Research indicated that Utah consumer purchases of value-added processed foods and beverages in 2020 totaled $4,157,404,276. With 58% or $2,991,541,730 of those products or processing inputs being purchased from out-of-state suppliers, the potential growth to Utah's economy through increased local food and beverage purchases is significant.

Other common challenges identified throughout the strategic planning process are related to production, processing, and consumers. Top concerns include addressing agristructure needs for processing and connecting Utah producers with local processors. Other concerns include developing the next generation of agricultural producers and workforce, preserving agricultural lands, educating and connecting Utah consumers with their food supply, and improving UDAF's customer service and efficiency.

MAJOR FINDINGS

Infrastructure Needs in Utah Food Processing

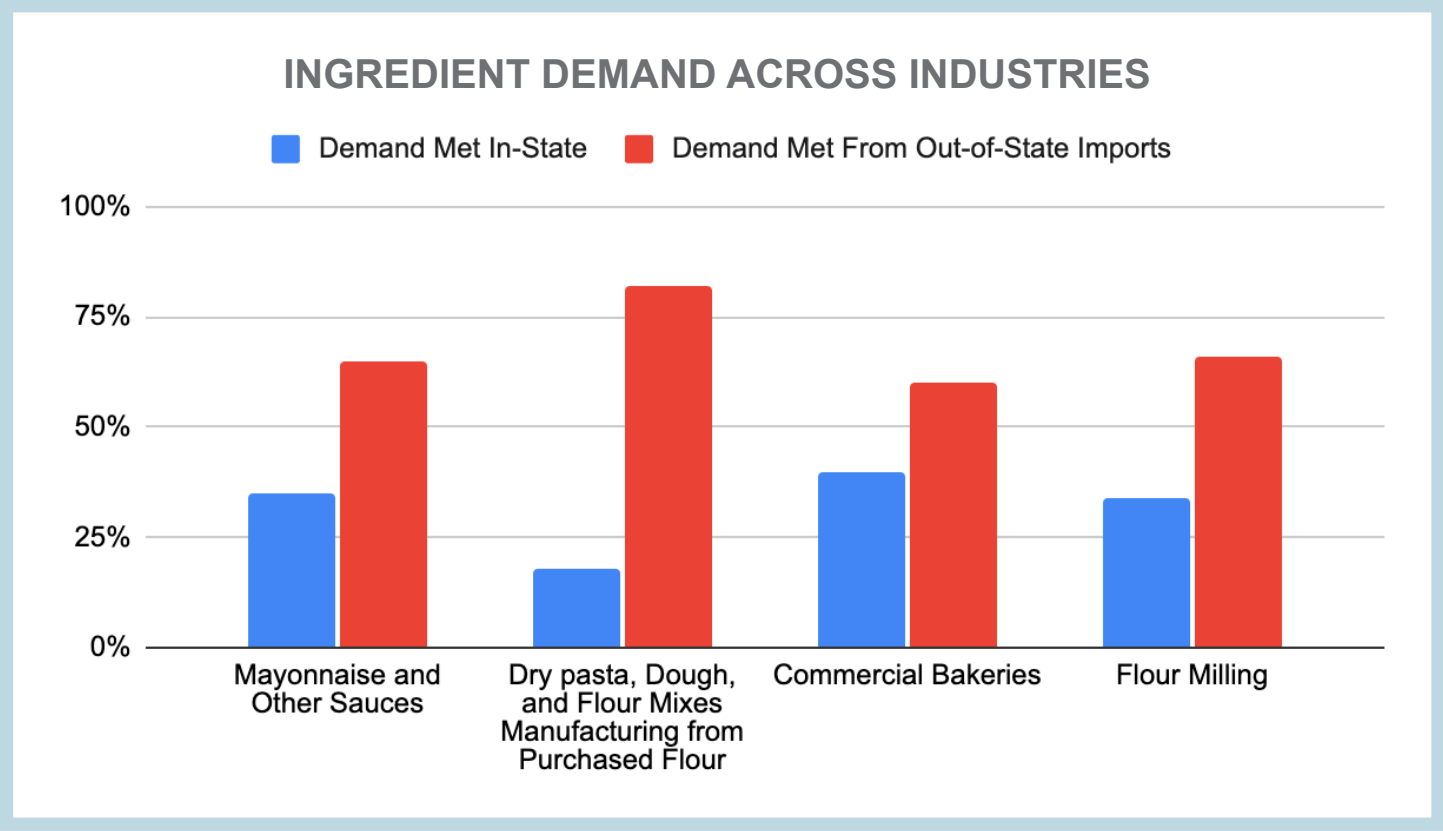
One constraint in getting locally raised food to the Utah consumers, producers and processors is insufficient local processing infrastructure. Utah's beef industry, the state's top agricultural sector, ships most of its production outside of the state for finishing and processing, resulting in Utahns purchasing the finished product back at a higher price. Other top agricultural consumer products raised in Utah with opportunities for adding value through processing include dairy, pork, poultry, lamb, wool, hay, grains, corn, oil seeds, fruit, vegetables, and other agriculture based products.

Connecting Local Processing with Local Agricultural Production

Many of Utah's food manufacturers import a significant percentage of needed processing inputs from out-of-state sources rather than meeting their needs locally.

Utah dairy is one example of an industry that capitalizes on opportunities for using in-state processing inputs with in-state production. This benefits local producers, manufacturers, and consumers. Creamery butter manufacturing was one of the fastest growing job sectors in 2020, growing by 115%. This industry also met 92% of their input demand in the region, resulting in an additional $17,662,659 which directly benefits Utah's economy.

Examples of Opportunities to Combine Agricultural Input Production and Processing for Economic Gain



For additional NIST data, see Appendix A, B, and C

Recommendations

- Increase opportunities for Utah producers to sell raw product directly to consumers or local food processors.
- Increase investments in processing infrastructure in order to add value to locally produced agricultural products.
- UDAF should work with stakeholders and Utah legislators to determine existing and future needs for agriculture and food infrastructure.
- UDAF should work with stakeholders and Utah legislators to provide funding to support the private sector as they develop needed agriculture and food infrastructure.

MAJOR FINDINGS

Rural & Shoulder County Stakeholder Meetings

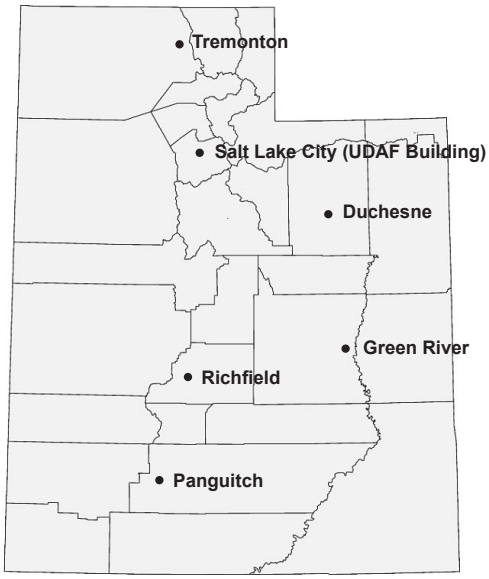
Utah Association of Counties in collaboration with UDAF, the Utah Farm Bureau Federation, and Associations of Governments conducted meetings with key rural and shoulder county agricultural stakeholders throughout the state in July and August of 2021 to identify strengths, weaknesses, opportunities, and threats within Utah's agriculture and food industries.

Common strengths identified include the production of livestock including beef, lamb, goats, and poultry, dairy and dairy processing, high-quality hay, alfalfa, and grains for animal and human consumption, as well as opportunities for meat processing and agritourism. Common weaknesses identified include the availability of processing for proteins, fruits and vegetables, distribution, and agricultural water issues including availability, storage, and delivery.

Access and governance of public lands for food production is an ongoing concern. Urban sprawl and gentrification has greatly increased housing and land costs in most rural areas where agriculture takes place, threatening to eliminate productive agricultural lands and limiting opportunities for new and continuing agricultural producers.

For more information, see Appendix D

Rural and Shoulder County Stakeholder Meeting Locations



Utah State University Cooperative Extension Statewide Survey

UDAF, in collaboration with Utah State University Cooperative Extension, distributed a survey in July and August of 2021 to gather information on perspectives and perceptions of select urban and rural Utah State University (USU) Extension professionals. Over three fourths of the respondents represented counties outside the heavily populated Wasatch front. Both urban and rural respondents perceived alfalfa, grain, fruits and vegetables, and livestock to be the top agricultural commodities in the state. Survey respondents commonly identified the need for expanding meat packing plants and egg, feedlot, and small grain processing capacity. Both urban and rural respondents identified land prices, drought, and urbanization as the biggest challenges facing the state's agriculture industry. Untapped opportunities listed for the agriculture industry included grapes, fruit production and processing, and direct marketing opportunities including farmers markets, CSAs, and local produce sales to restaurants. Urban farming (one to five acre lots), agritourism, and water development in combination with better management of public grazing resources were also mentioned as opportunities by survey respondents.

Survey respondents expressed appreciation for what city and county governments are doing to support agriculture. Initiatives mentioned included community gardens, attempts to build meat packing plants, pesticide safety measures, pest control efforts, USU research, public education campaigns, and greenbelt status tax exemptions.

For more information, see Appendix E

Commonly Identified Rural Opportunities

UDAF
STRATEGIC GOALS

In response to the challenges and opportunities identified through the strategic planning process, the following goals for the Utah Department of Agriculture and Food were developed. To achieve these goals, each UDAF division will develop short and long-term plans.

Goal #1: Agristructure

Goal #2: Workforce

Goal #3: Land Use

Goal #4: Supply Chain

Goal #5: Education

Goal #6: Customer Service

Goal #1: Agristructure

Advocate for Rural Infrastructure Development Including Expanding Agricultural Water Optimization, Broadband Access, and Innovative Food Processing and Distribution Systems

Summary:
Rural Utah has a great need for development in the areas of agricultural water optimization, broadband expansion, and innovative food processing and distribution. Addressing these challenges and needs will provide tremendous growth opportunities for the communities and economies of rural Utah and the entire state.

Objectives:
Improve the efficiency and conservation of agricultural water by:
• Increase producer access to funding for water optimization projects
• Work with agricultural stakeholders and state and federal agencies to advocate for investments in water infrastructure development
• Support the expansion of broadband access to underserved agricultural communities to increase opportunities for economic development, communications, access to education and open opportunities for rural agricultural producers to sell products online
• Support the development of innovative food processing and distribution systems close to where agricultural production takes place to expand business opportunities for Utah agriculture and food businesses and provide access to farm fresh foods for consumers and processors throughout the state

Tactics:
• Work with the Utah Legislature, Governor's Office of Planning and Budget, and state and federal partners to expand funding for infrastructure development
• Work with agriculture and community stakeholders to support investments in the Inland Port as it connects food production, processing, and distribution
• Expand awareness of the need for and access to funding for the development of food hubs
• Continue the development of UDAF programs that support these objectives

Metrics:
• Measure dollars obtained by UDAF through state and federal sources to support agricultural water optimization, food processing, and meat and poultry processing infrastructure
• Monitor Inland Port, rail, and other distribution infrastructure as related to agricultural production and distribution
• Measure dollars obtained to support the creation of innovative food hub distribution systems
• Measure the effectiveness of UDAF's programs and services that support rural infrastructure development

Goal #2: Workforce

Engage the Next Generation of Workers to Attract New Entries Into the Agriculture and Food Industry Sectors

Summary:
There is a significant need for more young people to become involved in agriculture and food production. Several barriers to entry into agriculture and food production include the acquisition or intergenerational transfer of land, access to capital, access to labor and a lack of access to technical or other education and skill development opportunities.

Objectives:
- Increase the understanding that agriculture is a viable industry and career path to attract and maintain a younger workforce
- Support an increase in and the awareness of educational opportunities so that agriculture and food businesses have a broader pool of qualified, skilled workers available
- Work with state and federal partners to increase access to workforce

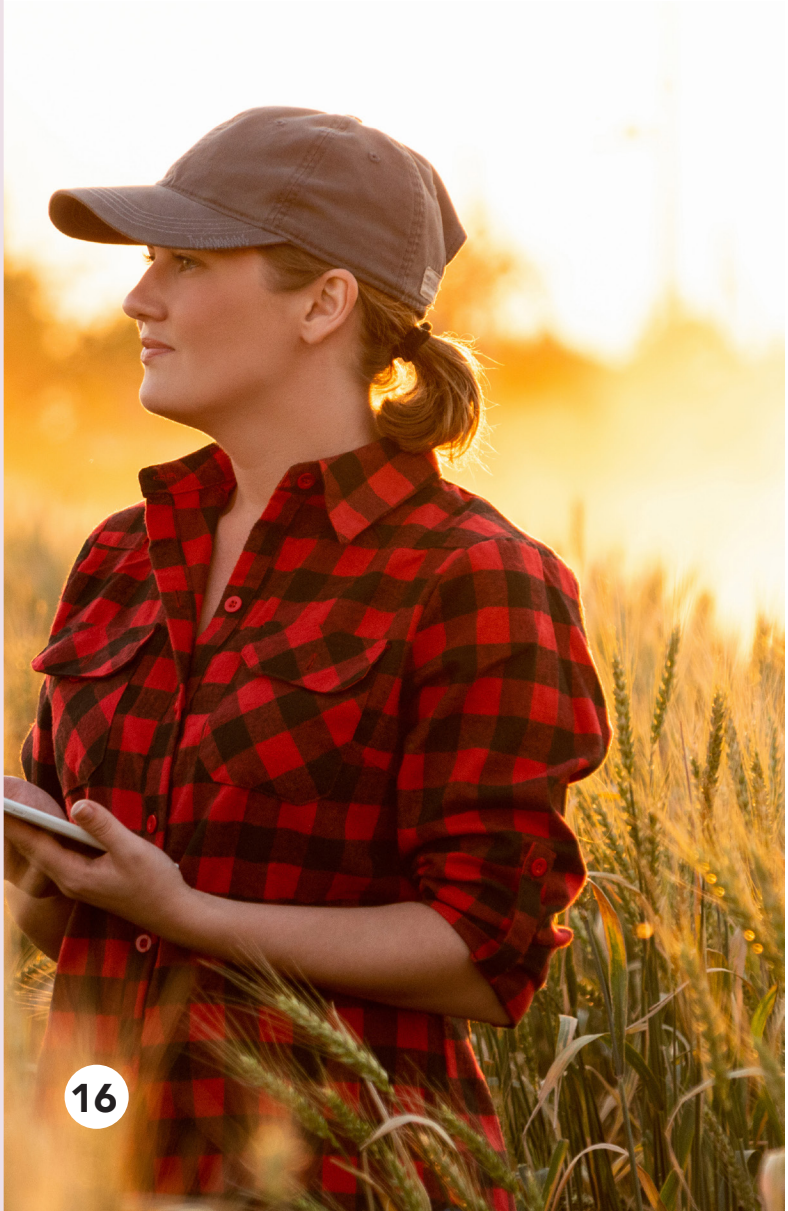
Tactics:
- Identify, support, and increase awareness of educational opportunities and trade certifications related to agriculture and food which are available through universities and technical colleges
- Support the development of mentorship, internship, and training programs that allow established agricultural professionals to work with younger generations
- Educate the general public about the diversity of jobs available in agriculture

Metrics:
- Measure changes in number of existing and new agriculture and food-related training programs
- Measure changes in the number of jobs in agriculture and food production as tracked by the Department of Workforce Services
- Track metrics related to UDAF promotion of agriculture and food production jobs

Goal #3: Land Use

Protect and Enhance Land Used for the Agricultural Industry

Summary:
Agricultural land loss due to urbanization, land price increases, and issues related to state and federal land ownership and governance has been an ongoing issue in agriculture. The preservation of agricultural lands is critical for the continuance of a safe and abundant local food supply. As Utah's population continues to grow, the need for the conservation and enhancement of Utah's private and public lands has been and will continue to be a top priority of the Department's work.



Objectives:
- Preserve Utah's agricultural lands
- Protect, conserve and enhance Utah's public and private lands used for agricultural production

Tactics:
- Develop and support partnerships that advocate for agricultural land preservation, and identify priorities for farmland preservation
- Work with partners to secure funding for programs that support the preservation of Utah's critical agricultural lands
- Educate the public on the importance of agricultural land preservation for open spaces, food production, and wildlife habitat
- Continue the development of conservation initiatives and work with federal, state, and local partnerships to protect and enhance Utah's public and private lands

Metrics:
- Identify critical farmlands in need of preservation
- Measure year-over-year changes in land used for agriculture
- Measure funding for agricultural land preservation programs
- Measure the number of agricultural land conservation easements that UDAF holds

Goal #4: Supply Chain

Support a Robust Food Supply Chain by Connecting Producers, Processors, and Consumers

Summary:
Securing the local food supply chain requires connections between agricultural production, processing, and distribution. Many of Utah's raw agricultural products are shipped out of state or country before adding value through processing. Opportunities exist to add value to raw products through partnerships with existing processed plants. UDAF is in a unique position working with producers, food processors, and consumers to identify ways to encourage connections to increase the industry's economic impact.

Objectives:
• Support the growth of Utah's agricultural producers and food processors by connecting them to consumers through the Utah's Own program
• Encourage the local processing of agricultural products for preservation, direct sales to Utah consumers, and exportation
• Increase public awareness of the importance of purchasing locally grown and produced agricultural and food products

Tactics:
• Collaborate with partners to identify existing food processors, co-packers, and raw agricultural products that could be processed in-state
• Educate producers on opportunities for local processing to increase the profitability of their operations
• Educate processors on the availability of local agricultural commodities
Increase the purchase of local agriculture and food products through the Utah's Own program
• Collaborate with public and private partners to promote the purchase of locally grown and processed foods by institutions such as schools, hospitals and restaurants
• Support the development of local innovative food hubs as they aggregate, distribute, and/or process locally produced agricultural goods to meet local demand

Metrics:
• Track data related to food production inputs sourced within the state
• Measure the number of farmers, ranchers, and food processors who are Utah's Own members
• Measure the amount of locally produced foods purchased by local schools as a part of the Utah State Board of Education's Farm to Fork program
• Measure the amount of locally produced foods purchased and/or processed by local innovative food hubs funded by UDAF

Goal #5: Education

Educate the Public on the Importance of a Strong Local Agriculture and Food Industry

Summary:
Utah has a long and rich agricultural heritage, but as Utah's population continues to grow, it is imperative that citizens gain a greater understanding of the importance of local agriculture and food to our economy, and the critical role local producers and processors play in providing a safe, secure, and abundant food supply for years to come.

Objectives:
- Increase the public's understanding of and improve the favorability of public perception of agriculture and food production
- Educate the public on the importance of agriculture and food production as it relates to the state's economy
- Deepen the public's understanding of the ancillary benefits of agricultural production, such as clean water, wildfire prevention, open space preservation, etc.
- Promote and clarify UDAF's supporting role in driving the agriculture and food industries forward

Tactics:
- Work with partners including agricultural stakeholders, farm to school programs, universities, nonprofits, etc. to educate the public on the importance of agriculture
- Develop and distribute positive stories of current agricultural practices and benefits through social media, newsletters, media pitches, etc.
- Issue press releases to engage the media in sharing positive agriculture and food related news
- Produce and maintain user-friendly websites, accessible print materials, and engaging video to improve customer experience and access to UDAF services, programs, and educational materials

Metrics:
- Develop partnerships with marketing and educational programs dedicated to promoting Utah agriculture
- Monitor the media for pro-agriculture stories and articles that highlight the economic impact of the industry
- Measure UDAF-specific metrics such as website page views, newsletter stories published, social media analytics, etc.

Goal #6: Customer Service

Improve UDAF's Customer Service and Efficiency

Summary:
The Utah Department of Agriculture and Food is committed to providing high-quality customer service and efficiency. The UDAF Centennial Strategic Plan will set an ongoing course of action for continuous improvement of our programs and customer service.

Objectives:
• Support new and existing agriculture and food businesses regulated by UDAF Improve customer service based on timely feedback
• Implement innovative and practical processes and technologies to improve the efficiency and effectiveness of UDAF's programs and services

Tactics:
• Develop a regulatory mapping system to clarify regulatory requirements for businesses
• Create an online tool to gather customer service feedback

Metrics:
• Track customer service survey responses
• Monitor changes implemented in response to customer feedback

APPENDICES

Attachments

Appendix A: Utah Agriculture and Food Industries That Meet 48% or More of Their Processing Input Demand From Out-of-State Imports in 2020

NAICS	Description	2019 Payrolled Business Locations	2020 Payrolled Business Locations	2019 Jobs	2020 Jobs	2019 - 2020 Change	2019 - 2020 % Change	2020 Demand met by Imports	2020 % Demand met by Imports	2020 Total Demand
312130	Wineries	5	5	26	26	(0)	(1%)	$166,470,600	97%	$170,758,720
311710	Seafood Product Preparation and Packaging	2	2	<10	<10	Insf. Data	Insf. Data	$83,674,764	97%	$86,158,413
311813	Frozen Cakes, Pies, and Other Pastries Manufacturing	0	0	0	0	0	0%	$17,712,426	94%	$18,836,118
311422	Specialty Canning	1	1	<10	<10	Insf. Data	Insf. Data	$33,769,570	91%	$37,109,719
312230	Tobacco Manufacturing	2	1	15	13	(1)	(9%)	$266,592,457	91%	$293,999,208
311421	Fruit and Vegetable Canning	13	13	120	146	26	22%	$145,140,558	86%	$169,557,829
311830	Tortilla Manufacturing	4	4	28	34	6	20%	$45,192,233	85%	$53,236,127
311411	Frozen Fruit, Juice, and Vegetable Manufacturing	1	1	101	93	(8)	(8%)	$86,239,244	84%	$102,644,346
311930	Flavoring Syrup and Concentrate Manufacturing	2	2	<10	12	Insf. Data	Insf. Data	$20,984,128	82%	$25,491,374
311824	Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	5	5	83	75	(8)	(10%)	$58,494,393	82%	$71,555,048
311351	Chocolate and Confectionery Manufacturing from Cacao Beans	9	10	36	41	5	14%	$34,364,860	82%	$42,043,645
311225	Fats and Oils Refining and Blending	2	2	21	30	8	40%	$109,881,344	78%	$141,112,352
311613	Rendering and Meat Byproduct Processing	3	3	53	38	(16)	(29%)	$35,757,910	77%	$46,172,174
311991	Perishable Prepared Food Manufacturing	17	16	175	173	(2)	(1%)	$103,175,998	77%	$134,810,947
311119	Other Animal Food Manufacturing	19	19	385	408	23	6%	$252,070,797	74%	$342,439,191
311352	Confectionery Manufacturing from Purchased Chocolate	23	22	285	278	(7)	(2%)	$69,239,624	72%	$95,592,556
311615	Poultry Processing	7	7	1,170	1,149	(21)	(2%)	$392,012,635	71%	$552,178,789
311920	Coffee and Tea Manufacturing	8	9	108	118	9	8%	$89,867,953	70%	$127,498,280
312113	Ice Manufacturing	9	10	76	85	9	12%	$13,667,697	70%	$19,418,744
311942	Spice and Extract Manufacturing	8	9	330	341	11	3%	$81,396,447	70%	$116,889,682
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	4	5	364	332	(32)	(9%)	$46,566,608	66%	$70,929,955
312120	Breweries	27	29	395	395	(0)	(0%)	$281,638,981	66%	$429,093,868
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	2	2	200	95	(104)	(52%)	$147,773,250	65%	$226,661,464
312140	Distilleries	12	15	74	80	6	8%	$126,520,747	63%	$201,659,192
311812	Commercial Bakeries	62	67	1,192	1,178	(14)	(1%)	$124,922,668	59%	$210,313,715
312112	Bottled Water Manufacturing	11	11	101	98	(4)	(4%)	$39,104,354	59%	$66,460,282
311911	Roasted Nuts and Peanut Butter Manufacturing	1	1	20	77	57	292%	$45,094,521	58%	$77,325,203
312111	Soft Drink Manufacturing	12	9	401	448	46	12%	$167,975,400	55%	$303,857,903
311811	Retail Bakeries	67	63	1,164	1,011	(154)	(13%)	$42,773,055	54%	$78,851,892
311511	Fluid Milk Manufacturing	12	13	769	700	(69)	(9%)	$174,651,292	52%	$338,095,460
311919	Other Snack Food Manufacturing	6	5	506	541	35	7%	$98,876,421	49%	$200,489,303
311612	Meat Processed from Carcasses	12	12	1,278	1,318	40	3%	$334,893,456	49%	$681,167,689
								$3,736,496,390		$5,532,409,189

Appendix B: Fastest Growing Food Manufacturing Industries in 2020

NAICS	Description	2019 Payrolled Business Locations	2020 Payrolled Business Locations	2019 Jobs	2020 Jobs	2019 - 2020 Change	2019 - 2020 % Change	2020 Demand met by Imports	2020 % Demand met by Imports	2020 Total Demand
311911	Roasted Nuts and Peanut Butter Manufact	1	1	20	77	57	292%	$45,094,521	58%	$77,325,203
311512	Creamery Butter Manufacturing	2	2	87	188	100	115%	$1,438,188	8%	$19,100,846
311423	Dried and Dehydrated Food Manufacturing	4	4	57	112	55	98%	$15,260,945	45%	$33,882,511
311225	Fats and Oils Refining and Blending	2	2	21	30	8	40%	$109,881,344	78%	$141,112,352
311421	Fruit and Vegetable Canning	13	13	120	146	26	22%	$145,140,558	86%	$169,557,829
311830	Tortilla Manufacturing	4	4	28	34	6	20%	$45,192,233	85%	$53,236,127
311351	Chocolate and Confectionery Manufacturin	9	10	36	41	5	14%	$34,364,860	82%	$42,043,645
312111	Soft Drink Manufacturing	12	9	401	448	46	12%	$167,975,400	55%	$303,857,903

Appendix C: Largest Food Manufacturing Job Producers in 2020

NAICS	Description	2019 Payrolled Business Locations	2020 Payrolled Business Locations	2019 Jobs	2020 Jobs	2019 - 2020 Change	2019 - 2020 % Change	2020 Demand met by Imports	2020 % Demand met by Imports	2020 Total Demand
311513	Cheese Manufacturing	10	11	1,806	1,849	43	2%	$203,581,462	26%	$788,945,270
311821	Cookie and Cracker Manufacturing	13	13	1,816	1,781	(36)	(2%)	$16,548,517	15%	$111,607,492
311611	Animal (except Poultry) Slaughtering	27	27	1,667	1,746	80	5%	$273,589,661	37%	$739,394,880
311612	Meat Processed from Carcasses	12	12	1,278	1,318	40	3%	$334,893,456	49%	$681,167,689
311412	Frozen Specialty Food Manufacturing	8	8	1,212	1,283	71	6%	$67,233,467	34%	$196,217,972
311812	Commercial Bakeries	62	67	1,192	1,178	(14)	(1%)	$124,922,668	59%	$210,313,715
311615	Poultry Processing	7	7	1,170	1,149	(21)	(2%)	$392,012,635	71%	$552,178,789
311811	Retail Bakeries	67	63	1,164	1,011	(154)	(13%)	$42,773,055	54%	$78,851,892
311999	All Other Miscellaneous Food Manufacturing	31	32	648	834	186	29%	$48,982,838	39%	$126,516,716
311111	Dog and Cat Food Manufacturing	4	5	785	775	(10)	(1%)	$55,244,149	27%	$206,587,805

National Institute of Standards and Technology (2001) 360 Manufacturing in Utah. (Department of Commerce, Washington, D.C.), Emsi Q2 2021 Data Set, April 2021.

Appendix D: Rural and Shoulder County Stakeholder 2021 Outreach Data

STRENGTHS Category	Frequency
Sheep	11
Alfalfa	10
Corn	9
Beef	8
Meat	8
Cattle	7
Grain	7
Farms	7
Hay	7
Wool	6

WEAKNESSES Category	Frequency
Water	15
Processing (Lack of)	9
Labor (Shortage)	6
Land (Cost)	5
Storage	4
Exporting	4
Transportation	3
Government Regulation	3
Wildlife	2
Urbanization	2

OPPORTUNTIES Category	Frequency
Meat Processing	8
Water Storage and Infrastructure	7
General Infrastructure	6
Miland - Inland Port	5
Agritourism	5
Local Products	5
New Technologies	5
Direct Sales	5
Innovation Center	4
Land Outside of Pivot Corners	3

THREATS Category	Frequency
Land (Cost, Regulation, and Control)	13
Water	9
Development	8
Housing	5
Land and Housing Prices	5
Wildlife	5
Urbanization	4
Labor (Lack of)	4
Regulation	4
Public Land Management	4

Appendix E: USU Extension 2021 Survey Data
(Primary Service Area Located Within Weber, Davis, Salt Lake, or Utah Counties)

What challenges are ag producers and food processors facing in your region?	Frequency
• Land	8
• Lack of Water	3
• Housing	2
• Housing Prices	2
What internal or external threats have the potential to limit growth in agriculture and food production?	
• Cost/Availability of Land	9
• Water Availability	7
• Labor Shortages	3
• Housing	2
• Growth	2
What are the top agricultural commodities in this region?	
• Fruit	6
• Vegetables	5
What unique efforts are currently being made in your region to strengthen the agricultural industry sector?	
• Processing	4
• Leasing Land	2
What untapped opportunities exist in your region for agriculture and food production?	
• Farmers Markets	4
• Grapes and Other Speciality Crops	3
• Community Supported Agriculture (CSA's)	3
Are there any value-added processors for ag and/or food products?	
• Yes	4
• Meat	3
• Processing	3

Appendix E: USU Extension 2021 Survey Data Cont'd
(Primary Service Area Located Outside of Weber, Davis, Salt Lake, or Utah Counties)

Top Commodities	Frequency
• Livestock	19
• Alfalfa	9
• Grain	9
• Fruit	7
• Hay	6
Value Added Processors	**Frequency**
• Meat Plants	13
• Candy/Chocolate Makers	6
• Feedlots	4
• Grain Processors	2
• Cheese Manufacturers	2
Challenges	**Frequency**
• Land Availability	23
• Water Rights/Availability/Drought	21
• Access to Meat Processing	7
• Cost of Feed and Supplies	5
• Overbearing Regulation	2
Opportunities	**Frequency**
• Various Production Opportunities	13
• Fruit Growth	6
• Irrigation Improvement	4
• Meat Processing	2
• Farmers Markets	2
Unique Efforts	**Frequency**
• Farmer's Groups and Markets	6
• Irrigation Improvement Efforts	4
• Education of Young Farmers and Ag Efforts	3
• Research Efforts From USU and Other Institutions	2
• Encouraging Gardners	2
Threats	**Frequency**
• Cost of Land	24
• Water Availability/Drought	23
• Irrigation Issues	4
• Overregulation	3
• Public Land Access	2

PARTICIPANTS

Rural and Shoulder County Stakeholder Meeting Attendees:

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Bess Andrews
Dorrell Barison
Scott Barney
Trevor Barnson
Scott Bartholomew
Bjorn Carlson
Dustin Christensen
Kevin Christensen
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Paul Cozzens
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Dustin Huntington
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Consultants:

Utah Association of Counties
Honey Communications

UDAF Participants:

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Kelly Pehrson, Deputy Commissioner
Jim Bowcutt, Director, Conservation
Troy Forrest, Director, Grazing Improvement Program
Dr. Brandon Forsyth, State Chemist and Director, Laboratory Services
Linda Gillmor, Director, Marketing and Economic Development
Caroline Hargraves, Communications Specialist
Melanie Henderson, Director, Administrative Services
Robert Hougaard, Director, Plant industry
Leann Hunting, Director, Animal Industry
Cody James, Manager, Industrial Hemp and Medical Cannabis Program
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Partners:

iMpact Utah — Utah Manufacturing Extension Partnership
Utah Association of Governments
Utah Farm Bureau Federation
Utah State University Cooperative Extension

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