$4.71 billion dollars in economic output in 2020:
• Agriculture (ranching & farming): $787.8 million dollar
• Food & Beverage manufacturing: $3.925 billion dollars.

The food and agriculture sector creates:
– 18,092 direct jobs
– Over $273.2 million in wages (Source: BLS, 2021).
Nevada Economic Output

2020 US Dollars ($)

2018 2019 2020

$4,040,049,992 $3,903,871,135 $3,925,630,531

Food and beverage manufacturing economic output
Agriculture economic output

Source: Implan Group, LLC. IMPLAN(2020). Huntersville, NC. Implan.com
Nevada Farm and Ranch Gross Income Trend

Source: USDA, ERS Farm Income and Wealth Statistics (2020)
Nevada’s Farms & Ranches

Farms & ranches broken down by size (acreage)

Most farms and ranches are relatively small operations.

Source: USDA, NASS
NDA Industry Survey, 2020
Agriculture Production in 2020

- **Total Farms:**
- **Animal Production:**
  - Beef Cattle: 336,376 head
  - Dairy Cattle: 36,188 head  Milk Production: 765,000,000 lbs.
  - Sheep: 93,812 head
  - Goats: 6,746 head
  - Pigs/Hogs: 3,857 head
  - Primarily chickens: 15,964 layers
- **Crop Production:**
  - Hay: 1,147,000 tons of hay (770,000 tons of Alfalfa)
  - Wheat: 1,890,000 bushels
  - Corn Silage: 214,316 tons
  - Vegetables/Melons: $18 million (>3,199 acres of production)
  - Aquaculture production: $2.9 million
  - Other major areas: potatoes, onions, garlic

Source: USDA, NASS
NDA Head Tax, 2020
Diversity of Production:

- Fruits - not including melons (apples, berries, grapes, etc.)
- Melons (cantaloupe, watermelons, etc.)
- Summer/Winter Squash (crookneck, zucchini, patty pan, acorn, etc.)
- Leafy greens (kale, spinach, arugula, collard, etc.)
- Tuber Crops (potatoes, sweet potatoes, yams, etc.)
- Herbs/Spices (mint, rosemary, sage, basil, etc.)
- Root vegetables (carrots, turnips, radish, etc.)
- Allium (onions, garlic, shallots, etc.)
- Pulses (dried: beans, lentils, peas, etc.)
- Legumes non-fodder (harvested green)
- Ancient grains (teff, einkorn, emmer, amaranth, etc.)
- Cereals - not ancient grain (wheat, rice, maize, millet, barley, etc.)
- Oil seeds (soybean, castor, linseed, sunflower, etc.)
Impacts of COVID-19:

- **Industry Survey: Impact of COVID-19 on business on a scale of 1-10 (1 being the lowest and 10 being the highest):**
  - Average of Crop Industry: **7.35**
  - Average of Livestock Industry: **5.16**
  - Average of Food, beverage, and specialty product manufacturing: **8.15**
  - Average Hemp industry: **7.70**

- **CARES Act: NV Agriculture received over $64.8 million in economic stimulus:**
  - $24.8 million from the first round of CFAP*
  - $22.5 million from CFAP 2
  - Over $16.4 million in loans through the paycheck protection program
  - $789,421 Inventory and Distribution System for NV Ag. Produce & Products
  - $351,253 NV Agriculture Adaptability and Recovery Program

Sources:
- NDA Industry Survey (2020)
- USDA, Farm Service Agency CFAP (2021)
- US Department of Treasury, SBA (2020)

*CFAP: Coronavirus Food Assistance Program*
Nevada’s food and beverage manufacturing

- **Total Economic Output in 2020:** $3.925 billion
  - 80 small to medium sized manufacturers generated:
    - $640,602,300 in revenue
    - $80,766,250 in expense
  - 89.79% of all production took place in Nevada.

### Top 20: NV Food and Beverage Manufacturing

<table>
<thead>
<tr>
<th>Manufacturing Category</th>
<th>2020 Total Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bottled and canned soft drinks &amp; water</td>
<td>$402,403,800</td>
</tr>
<tr>
<td>Bread and bakery product, except frozen, manufacturing</td>
<td>$389,060,930</td>
</tr>
<tr>
<td>Fluid milk manufacturing</td>
<td>$245,871,951</td>
</tr>
<tr>
<td>All other food manufacturing</td>
<td>$213,215,133</td>
</tr>
<tr>
<td>Ice cream and frozen dessert manufacturing</td>
<td>$210,320,159</td>
</tr>
<tr>
<td>Spice and extract manufacturing</td>
<td>$208,216,263</td>
</tr>
<tr>
<td>Coffee and tea manufacturing</td>
<td>$179,496,601</td>
</tr>
<tr>
<td>Soybean and other oilseed processing</td>
<td>$175,953,468</td>
</tr>
<tr>
<td>Meat processed from carcasses</td>
<td>$174,928,388</td>
</tr>
<tr>
<td>Mayonnaise, dressing, and sauce manufacturing</td>
<td>$169,866,797</td>
</tr>
<tr>
<td>Dog and cat food manufacturing</td>
<td>$159,180,346</td>
</tr>
<tr>
<td>Frozen specialties manufacturing</td>
<td>$137,854,316</td>
</tr>
<tr>
<td>Other animal food manufacturing</td>
<td>$119,288,527</td>
</tr>
<tr>
<td>Frozen cakes and other pastries manufacturing</td>
<td>$117,154,065</td>
</tr>
<tr>
<td>Canned fruits and vegetables manufacturing</td>
<td>$106,906,716</td>
</tr>
<tr>
<td>Frozen fruits, juices and vegetables manufacturing</td>
<td>$104,751,992</td>
</tr>
<tr>
<td>Confectionery manufacturing from purchased chocolate</td>
<td>$100,412,518</td>
</tr>
<tr>
<td>Other snack food manufacturing</td>
<td>$99,046,423</td>
</tr>
<tr>
<td>Cookie and cracker manufacturing</td>
<td>$94,363,116</td>
</tr>
<tr>
<td>Breakfast cereal manufacturing</td>
<td>$94,104,222</td>
</tr>
</tbody>
</table>

Sources:
- IMPLAN Group, LLC. IMPLAN(2020). Huntersville, NC. Implan.com
- NDA Industry Survey (2020)
Food and Beverage Manufacturing

• Nevada has significant potential as a major west coast food manufacturing hub.
• Over the last 10 years there has been a rapid increase in the number of food and beverage manufacturing facilities locating to Nevada’s urban areas.
• From 2017-2018 Nevada’s food manufacturing sector grew from $3.6 billion to $4.4 billion in economic output.
• The same strengths that lead the area to growth in logistics and tech tend to lend themselves to expanded growth in food and beverage manufacturing. (primarily due to transportation and supply chain connectivity)
  – Southern Nevada to Southern California and Arizona
  – Western Nevada with Northern California
  – Eastern Nevada economically linked to the inland northwest and Salt Lake City.
NV Food and Ag Exports totaled over $344.6 million in 2020

Source: US Census Bureau, 2021
NV Exports by Fiscal Quarter

Figure 2: NV Ag quarterly export totals
## Nevada Direct Agricultural Exports

<table>
<thead>
<tr>
<th></th>
<th>2019 Exports</th>
<th>2020* Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Korea</td>
<td>$53,394,891</td>
<td>$57,160,279</td>
</tr>
<tr>
<td>Canada</td>
<td>$60,086,779</td>
<td>$57,081,188</td>
</tr>
<tr>
<td>Peru</td>
<td>$9,655,974</td>
<td>$35,847,970</td>
</tr>
<tr>
<td>Japan</td>
<td>$32,486,817</td>
<td>$33,659,285</td>
</tr>
<tr>
<td>China</td>
<td>$27,055,412</td>
<td>$27,859,314</td>
</tr>
<tr>
<td>Mexico</td>
<td>$44,633,450</td>
<td>$26,022,155</td>
</tr>
<tr>
<td>Indonesia</td>
<td>$4,521,194</td>
<td>$8,964,175</td>
</tr>
<tr>
<td>Singapore</td>
<td>$10,339,236</td>
<td>$12,319,721</td>
</tr>
<tr>
<td>Taiwan</td>
<td>$4,943,500</td>
<td>$4,424,707</td>
</tr>
<tr>
<td>Columbia</td>
<td>$18,452,933</td>
<td>$10,594,509</td>
</tr>
<tr>
<td>Australia</td>
<td>$13,250,475</td>
<td>$13,613,526</td>
</tr>
<tr>
<td>Chile</td>
<td>$4,950,248</td>
<td>$90,647</td>
</tr>
</tbody>
</table>

- 2019 Trade disputes had a significant impact on NV’s agriculture exports.
- In 2019 alone imports totaled $539 million. These imports led to an agriculture trade deficit of $215.9 million. (even with continued growth in exports)
- In 2020 with closures of gaming and restaurants there was a rapid decline in institutional purchasing (and major consumer increases in local food system purchasing in some areas by as much as 300%) this likely played a major roll in Nevada’s 2020 agriculture deficit declining to $36.2 million.
- NV had an Ag Trade Surplus from Apr. to Aug. (again in Nov). This was attributable to health policy and COVID-19's effects on consumer spending.
- Typically in Nevada for every $1 invested in agriculture we see around $1.40 in regional economic activity. Similar purchasing networks in Nevada could have a positive outcome: (1) with less food miles (2) increased economic support for small/medium sized producers.

Source: Euromonitor, 2021
USA Trade, 2021
agri.nv.gov
Wide range of products being exported:

Coffee, Tea, Mate & Spices: $98,938,258
Dairy Prods; Birds Eggs; Honey; Ed Animal Pr Nesoi: $78,523,736
Miscellaneous Edible Preparations: $49,310,276
Prep Cereal, Flour, Starch Or Milk; Bakers Wares: $34,427,155
Oil Seeds Etc.; Misc Grain, Seed, Fruit, Plant Etc: $21,257,090
Beverages, Spirits And Vinegar: $13,074,407
Edible Vegetables & Certain Roots & Tubers: $13,051,715
Prep Vegetables, Fruit, Nuts Or Other Plant Parts: $9,175,643
Live Trees, Plants, Bulbs Etc.; Cut Flowers Etc.: $6,287,766
Food Industry Residues & Waste; Prep Animal Feed: $5,844,744
Sugars And Sugar Confectionary: $3,994,067
Cocoa And Cocoa Preparations: $2,753,606
Edible Preparations Of Meat, Fish, Crustaceans Etc: $1,609,133
Live Animals: $1,316,175
Meat And Edible Meat Offal: $1,242,146
Tobacco And Manufactured Tobacco Substitutes: $1,219,328
Lac; Gums, Resins & Other Vegetable Sap & Extract: $814,526
Animal Or Vegetable Fats, Oils Etc. & Waxes: $686,167
Fish, Crustaceans & Aquatic Invertebrates: $308,882
Edible Fruit & Nuts; Citrus Fruit Or Melon Peel: $297,838
Milling Products; Malt; Starch; Inulin; Wht Gluten: $255,276
Products Of Animal Origin, Nesoi: $227,886
Cereals: $8,805
Vegetable Plaiting Materials & Products Nesoi: $3,088
Economic Development and the Agriculture Sector

• Nevada’s food and agriculture sector has significant growth potential both in our urban and rural areas.

• In addition to helping food and agriculture businesses grow, the NDA is dedicated to accurately measuring the economic output and production of our industry. This will help to improve the food and agriculture sector in Nevada.

• Starting in 2020 we launched an industry survey program. This helps us better measure our sector in real-time. It also helps to supplemental federal data (which suffers from accuracy and omission issues).
Thank you

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