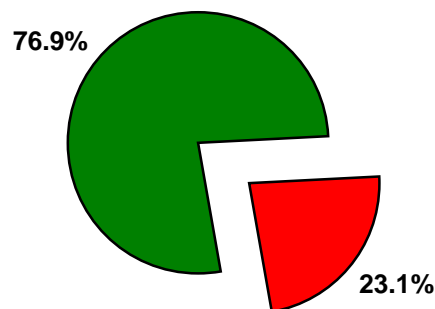




MIDWEST FOOD PROCESSING INDUSTRY STATE PROFILE

MINNESOTA

Minnesota Food Processing Share in Minnesota Manufacturing 2016



■ Manufacturing ■ Food Processing

The *2016 Annual Survey of Manufacturers* indicates the food processing subsector accounted for 23.1 percent of the total value of shipments by Minnesota manufacturers in 2015. This makes food manufacturing the leading manufacturing industry in Minnesota in terms of value of shipments, ahead of computer and electronic manufacturing and machinery manufacturing.

**Minnesota Food Manufacturing Industry Ranking
Among Minnesota Manufacturing Industries
By Value of Shipments, 2016
(\$1,000)**

Manufacturing Industry	Value of Shipments
1. Food Manufacturing	\$27,061,930
2. Computer & Electronic Manufacturing	\$11,522,585
3. Machinery Manufacturing	\$10,872,850
4. Fabricated Metal Product Manufacturing	\$9,715,048
5. Petroleum & Coal Products Manufacturing	\$8,673,174

Source: U.S. Census Bureau 2016 Annual Survey of Manufacturers

The total value of food product shipments in Minnesota totaled \$27.1 billion* placing the industry first among the top five manufacturing industries in the state in terms of value of shipments.

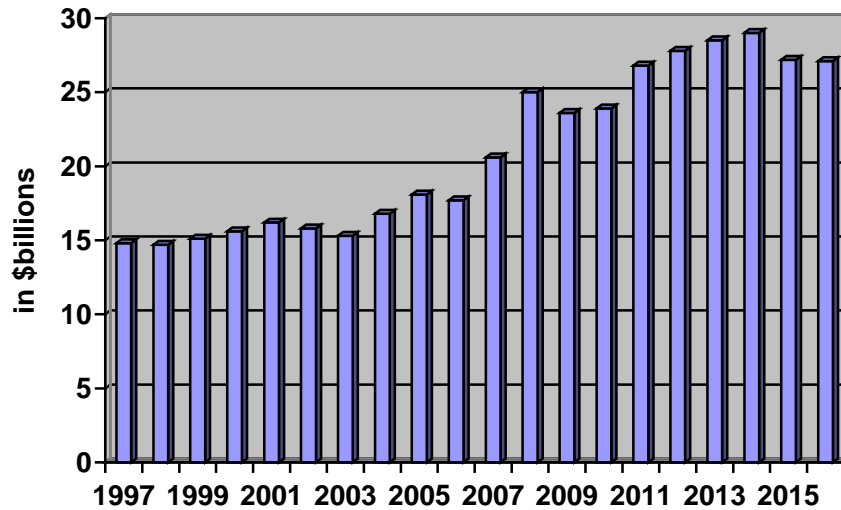
**Minnesota
Food Manufacturing Ranking Among States 2016**

State	Total Value of Shipments (\$1,000)
California	\$76,518,741
Illinois	\$45,171,609
Wisconsin	\$43,356,634
Texas	\$43,330,656
Iowa	\$36,930,164
10. Minnesota	\$27,061,930

Source: U.S. Census Bureau 2016 Annual Survey of Manufacturers

*All dollar values presented are expressed in current dollars; i.e., 2011 data are expressed in 2011 dollars. Consequently, when making comparisons with prior years, users of the data should consider the changes in prices that may have occurred. Source: U.S. Census bureau, Annual Survey of Manufacturers, 2016

Value of Minnesota Processed Food Industry Shipments, 1997-2016



Source: U.S. Bureau of Census, Census of Manufacturers, Geographic Series 2002, 2007, 2012; Annual Survey of Manufacturers 2001 and Earlier Years (Table 2); Annual Survey of Manufacturers 2003, 2004, 2006, 2008, 2009, 2010, 2011, 2013, 2014, 2015 and 2016

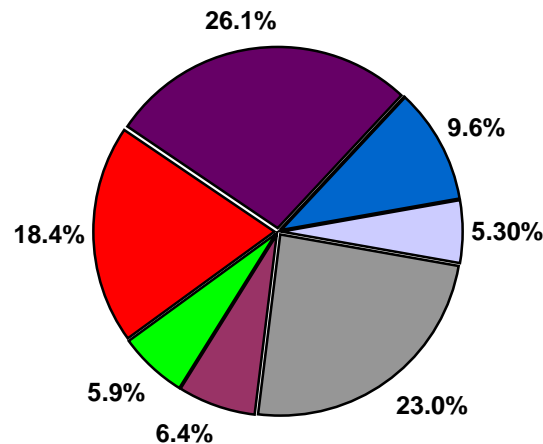
Minnesota food processors reported \$27.1 billion* in food shipments in 2016. Since 1997, the value of food manufacturing shipments has increased over 83 percent.

The stability of the Minnesota food manufacturing market is evidenced in the gradual growth trend in the value of shipments – even during economically difficult periods. The increases in the value of shipments demonstrate that Minnesota’s food manufacturing sector remains very competitive.

*All dollar values presented are expressed in current dollars; i.e., 2011 data are expressed in 2011 dollars. Consequently, when making comparisons with prior years, users of the data should consider the changes in prices that may have occurred.

Source: U.S. Census bureau, Annual Survey of Manufacturers, 2016

**Value of Shipments by Industry Subgroup,
Minnesota Food Manufacturing (NAICS 311), 2016**



■ Grain & oilseed milling	■ Animal Food	■ Fruit & vegetable preserving
■ Dairy product mfg	■ Meat products	■ Bakeries & Tortillas-NA
■ Other food	■ Sugar & Con	

Total Industry 2016 Shipments = \$27,061,930 (\$1,000)*

The largest food processing sector in Minnesota, as measured by value of shipments, is meat products manufacturing. In 2016, meat products manufacturing reported \$7 billion in shipments (26 percent of food manufacturing shipments). This was followed by grain and oilseed milling at \$6.2 billion in shipments, accounting for 23 percent of the state's food manufacturing shipments. Dairy product manufacturing ranked third among Minnesota's food manufacturing shipments at \$5 billion comprising 18.4 percent of all food manufacturing shipments.

* The U.S. Census Bureau did not provide information relative to bakeries and tortilla manufacturing and seafood product preparation and packaging in the 2016 Annual Survey of Manufacturers to avoid disclosing data for individual companies; data are included in higher level totals.

**Minnesota Food Manufacturing Subsector,
Value of Shipments by Industry Group, 2007, 2013 and 2016**

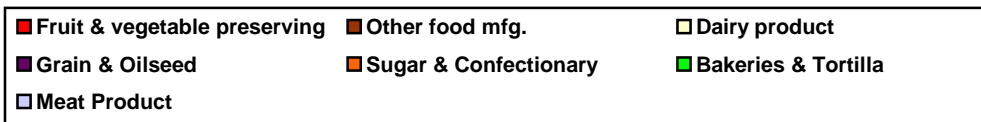
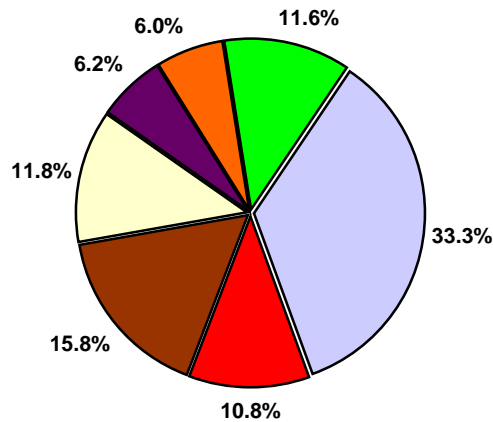
NAICS	Industry Subgroup	Value of Shipments (\$1,000)			% Change 2007-2016	% of Total 2016
		2007	2013	2016		
311	Food Manufacturing	20,617,004	28,455,665	27,061,930	31.3	100
3111	Animal Food Mfg.	941,763	1,935,693	1,743,790	85.2	6.4
3112	Grain & Oilseed Milling	4,228,409	6,890,146	6,231,812	47.4	23.0
3113	Sugar & Confectionery Product Mfg.	1,110,576	1,491,690	1,425,524	28.4	N/A
3114	Fruit & Vegetable Preserving & Specialty Food Mfg.	1,423,829	1,532,954	1,586,812	11.4	5.9
3115	Diary Product Mfg.	4,899,170	5,109,602	4,983,286	1.7	18.4
3116	Meat product mfg.	5,266,055	7,332,402	7,058,573	34.0	26.1
3117	Seafood Product Prep & Pack	N/A	N/A	N/A	N/A	N/A
3118	Bakeries & Tortilla Mfg.	N/A	N/A	N/A	N/A	N/A
3119	Other Food Mfg.	1,673,729	2,796,224	2,588,871	54.7	9.6

The fastest growing industry group between 2007 and 2016 was animal food manufacturing, for which industry shipments grew 85.2 percent. The second fastest growing industry group was “other” food manufacturing (which comprises establishments primarily engaged in manufacturing food including industries with different productive processes, such as snack food manufacturing; coffee and tea manufacturing; concentrate, syrup, condiment, and spice manufacturing; and, in general, an entire range of other miscellaneous food product manufacturing) at 54.7 percent.

Grain and oilseed milling grew by 47.4 percent during the same period. This was followed by meat product manufacturing which increased 34 percent.

Food processing groups experiencing relatively faster growth between 2007 and 2016 were fruit and vegetable processing, growing at 11.4 percent and dairy product manufacturing, growing at 1.7 percent.

**Employment by Industry Subgroup,
Minnesota Food Manufacturing (NAICS 311), 2016**



Total Employment in Minnesota Food Manufacturing = 45,881

Industry Subgroup	Employment 2016
Meat Product Manufacturing	15,265
Other Food Manufacturing	7,249
Dairy Product Manufacturing	5,397
Bakeries and Tortilla Manufacturing	5,310
Fruit & Vegetable preserving & Specialty Food Manufacturing	4,750
Grain and Oil See Milling	2,858
Sugar & Confectionary Product Mfg.	2,757
Animal Food Manufacturing	N/A
Seafood Produce Preparation & Packaging	N/A

The Minnesota meat products industry employs the largest number of workers accounting for 33.3 percent of all food manufacturing employment.

Other food manufacturing (comprising establishments primarily engaged in manufacturing food including industries with different productive processes, such as snack food manufacturing; coffee and tea manufacturing; concentrate, syrup, condiment, and spice manufacturing; and, in general, an entire range of other miscellaneous food product manufacturing) comes in second place with 15.8 percent, followed by dairy manufacturing at 11.8 percent of all food manufacturing employment.

Bakery and tortilla manufacturing comes in fourth with 11.6 percent of the food manufacturing workforce.

In 2016, food manufacturing establishments in Minnesota employed over 45,000 people, representing 15.4 percent of the state's manufacturing employment, and provided over \$2.1 billion in annual payroll.