



IFAS EXTENSION

Economic Impacts of Agricultural and Natural Resource Industries in Florida, 2003¹

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Estimates of economic impacts were developed for the agricultural and natural resource industries in Florida in 2003, based on *Implan* data for Florida, which are derived from the National Income and Product Accounts of the United States and various regional data sources (MIG, 2005). Over 100 individual sectors were identified as related to agriculture and natural resources, including sectors for commodity production, processing and manufacturing, and associated input suppliers and supporting services. However, wholesale and retail distribution of food and kindred products, restaurants, and other food service establishments were excluded from the analysis, since these are not strictly related to agriculture or natural resources. Estimates of total regional economic impacts for each sector were computed using *Implan* SAM multipliers, including the indirect and induced effects of domestic and foreign export sales outside Florida. Indirect effects represent the impacts of allied businesses that supply inputs to the agricultural and natural resource industries, while induced effects represent the impacts of industry employee household spending. Values were expressed in 2005 U.S. dollars using the Gross Domestic Product (GDP) Implicit Price Deflator (U.S. Department of Commerce), which restated

values for 2003 approximately 5.7 percent higher. Results of the analysis are shown in the following tables: Table 1 summarizes the impact estimates by major industry groups; Table 2 provides detailed estimates for individual sectors within each group; Table 3 gives value added impacts in nine economic regions of Florida; Table 4 indicates the change in value added impacts over the period 2001-2003; and Table 5 shows the direct employment and value added by agriculture and natural resources in comparison to all other industry groups in Florida.

Total industry output or sales of the agricultural and natural resource industries in Florida in 2003 was \$50.8 billion (Bn), while total output impacts, including the indirect and induced multiplier effects, were \$87.6 Bn (Table 1). Total direct employment was 388,916 jobs, and total employment impacts were 756,993 jobs. Total value added was \$19.2 Bn, and total value added impacts were \$41.1 Bn, which represents the net value created by the industry, measured as the difference between industry revenues and input purchases from other sectors. It also represents personal and business net income, and capital consumption. The labor (earned) income impact of agriculture and natural resources was \$25.1

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Bn. Indirect business taxes paid to local, state, and federal governments were \$2.6 Bn. Total domestic and foreign export sales outside the state of Florida were \$27.6 Bn.

As shown in Table 1, the largest industry groups in terms of value added impacts were fruit and vegetable farming and processing (\$7.5 Bn), environmental horticulture (\$6.8 Bn), forestry and forest products (\$6.5 Bn), agricultural inputs and support services (\$6.5 Bn), other food product manufacturing (\$5.5 Bn), tobacco farming and manufacturing (\$3.0 Bn), sugarcane farming and refined sugar manufacturing (\$1.8 Bn), mining (\$1.6 Bn), and livestock and dairy farming and animal products manufacturing (\$1.2 Bn). Some other smaller industry groups with value added impacts less than \$1 billion were fishing and seafood products (\$413 Mn), grain and oilseed farming and processing (\$93 Mn), other crop farming, including cotton, nuts, and miscellaneous crops (\$239 Mn), and wildlife hunting and trapping (\$45 Mn).

As shown in Table 2, some of the largest individual industry sectors, all with over one billion dollars in value added impacts were landscape services (\$4.16 Bn), soft drink and ice manufacturing (\$2.92 Bn), other tobacco product manufacturing (\$2.79 Bn), greenhouse and nursery production (\$2.66 Bn), phosphatic fertilizer manufacturing (\$2.39 Bn), fruit and vegetable canning and drying (\$2.26 Bn), agriculture and forestry support activities (\$2.12 Bn), fruit farming (\$1.99 Bn), vegetable and melon farming (\$1.98 Bn), frozen food manufacturing (\$1.27 Bn), sugar manufacturing (\$1.26 Bn), paper and paperboard mills (\$1.23 Bn), and forest nurseries and timber tracts (\$1.05 Bn).

Regional value added impacts of agriculture and natural resource industries are shown in Table 3 for the nine economic regions of Florida, defined based on employee commuting patterns. A map of the counties included in these regions is shown in Figure 1. Total value added impacts were largest in the Miami-Ft. Lauderdale region (\$11.84 Bn), followed by Orlando (\$9.37 Bn), Tampa-St.Petersburg-Clearwater (\$6.71 Bn), Jacksonville (\$5.70 Bn), Sarasota-Bradenton (\$3.78 Bn), Gainesville (\$1.19 Bn), Tallahassee (\$1.21 Bn), Pensacola (\$688 Mn) and Panama City (\$381 Mn).

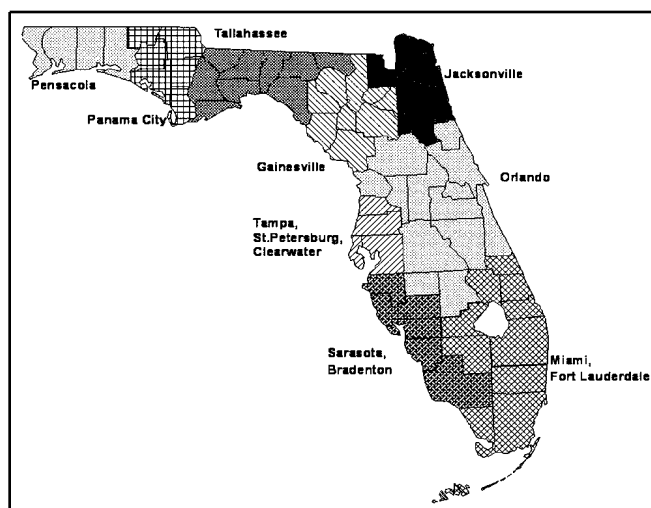


Figure 1. Economic regions of Florida.

The total value added impacts of agricultural and natural resource industries in Florida grew from \$33.77 Bn in 2001 to \$41.12 Bn in 2003, adjusted for inflation to express in 2005 U.S. dollars (Table 4). This represented an overall growth rate of 20 percent, or 10 percent per annum. Rapid growth occurred for tobacco products (104%), other crop farming (33%), and forest products (27%); moderate growth occurred for environmental horticulture (17%), fruits and vegetables (17%), agricultural inputs and supporting services (16%), and other food product manufacturing (15%); and negative growth occurred for grains and oilseeds (-93%), wildlife hunting and trapping (-55%), and livestock, dairy and animal products (-13%). Note that these trends in value added impacts reflect changes in the structure of the Florida economy as well as changes in industry activity and commodity prices.

The relative importance of agricultural and natural resource industries in Florida can be gauged by its share of overall economic activity in the state, as shown in Table 5. The Gross State Product (GSP), which is the sum of value added for all industries, was \$578.9 Bn in 2003 (expressed in 2005 U.S. dollars), and the total employment in the state was 9,391,709 jobs. The direct value added by agriculture and natural resource industries (\$19.2 Bn) comprised about 3.3 percent GSP, while direct employment (388,916 jobs) represented 4.1 percent of total state employment. However, the total value added impacts of agricultural and natural resource industries (\$41.1 Bn) represented 7.1 percent GSP, and the total employment impact (756,993 jobs) accounted for 8.1

percent of total state employment. By comparison, the largest industry group in Florida was real estate and financial services, whose direct value added represented 14.2 percent GSP, followed by professional and technical services (12.7%), retail trade (7.8%), government (7.2%), and health care (7.1%).

References

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Table 1. Economic impacts of agricultural and natural resource industry groups in Florida, 2003.

Industry Group	Output	Output Impacts	Value Added	Value Added Impacts	Exports	Labor Income Impacts	Indirect Business Tax Impacts	Employment	Employment Impacts
	(Mn\$)*	(Mn\$)*	(Mn\$)*	(Mn\$)*	(Mn\$)*	(Mn\$)*	(Mn\$)*	(Jobs)	(Jobs)
Agricultural Inputs & Services (fertilizers/pesticides/veterinary/support activities/equipment manufacturing)	8,344	14,678	2,843	6,505	4,936	5,055	368	109,409	166,714
Forestry, Wood & Paper Product Manufacturing	7,949	14,537	2,508	6,503	5,150	4,230	386	30,741	105,111
Other Food Product Manufacturing	8,567	13,903	2,447	5,499	4,392	3,086	515	22,751	68,273
Fruit & Vegetable Farming & Processing	6,442	13,217	3,311	7,491	5,159	4,006	429	40,720	110,222
Environmental Horticulture (nursery/greenhouse/landscape services)	6,730	10,851	4,243	6,821	2,722	4,359	320	110,281	152,820
Tobacco Farming & Manufacturing	2,824	5,736	1,184	2,949	1,910	1,262	170	2,636	28,411
Livestock & Dairy Farming & Animal Products Manufacturing	4,073	4,787	751	1,158	682	661	79	23,730	31,118
Sugarcane Farming, Refined Sugar & Confections	2,243	4,572	549	1,839	1,360	1,091	145	23,942	52,778
Mining	2,442	3,490	920	1,566	784	860	114	10,311	20,590
Fishing & Seafood Products	782	1,062	241	413	197	299	19	11,102	13,905
Other Crop Farming	191	386	118	239	156	108	14	1,317	3,533
Grain & Oilseed Farming & Processing	92	206	21	93	94	55	8	342	1,455
Wildlife (hunting)	118	139	32	45	12	28	9	1,634	2,062
Total (all industries)	50,799	87,565	19,169	41,123	27,551	25,102	2,576	388,916	756,993

Source: *Implan* data for Florida, MIG, Inc., 2005).

* Values expressed in 2005 U.S. dollars using GDP implicit price deflator, July 2003-July 2005 (U.S. Department of Commerce).

Table 2. Economic impacts of agricultural and natural resource industry sectors in Florida, 2003.

Industry Group	Industry Sector	Output	Output Impacts	Employment Impacts	Value Added Impacts
		(Mn\$)*	(Mn\$)*	(Jobs)	(Mn\$)*
Fruit & Vegetable Farming & Processing	Frozen food manufacturing	1,165.5	2,588.0	18,276	1,268.9
	Fruit & vegetable canning & drying	2,110.6	4,663.6	28,498	2,258.8
	Fruit farming	1,606.1	3,140.3	39,035	1,987.8
	Vegetable & melon farming	1,559.7	2,825.1	25,392	1,975.9
	Total	6,442.0	13,217.0	110,222	7,491.4
Environmental Horticulture (nursery/greenhouse/landscape services)	Greenhouse & nursery production	1,747.5	3,329.7	35,952	2,658.5
	Landscape services (70% services to bldgs sector)	4,982.8	7,521.8	116,868	4,162.2
	Total	6,730.3	10,851.4	152,820	6,820.8
Agricultural Inputs & Services (fertilizers/pesticides/veterinary/support activities/equipment manufacturing)	Agriculture & forestry support activities	1,505.9	3,035.3	95,204	2,118.2
	Farm machinery & equipment manufacturing	153.0	189.0	846	58.3
	Fertilizer, mixing only, manufacturing	285.5	285.5	790	67.2
	Food product machinery manufacturing	66.0	84.9	580	33.8
	Lawn & garden equipment manufacturing	15.0	16.7	54	3.3
	New farm housing units & additions & alterations	1,026.7	1,026.7	4,149	334.6
	Nitrogenous fertilizer manufacturing	595.4	1,077.4	4,492	356/8
	Paper industry machinery manufacturing	19.7	26.9	172	10.0
	Pesticide & other agricultural chemical manufacturing	421.3	859.9	4,359	388.9
	Phosphatic fertilizer manufacturing	3,088.5	6,587.8	34,594	2,393.4
	Sawmill & woodworking machinery	5.0	6.1	44	2.3
	Veterinary services	1,162.4	1,481.5	21,430	738.6
	Total	8,344.4	14,677.8	166,714	6,505.4

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Industry Group	Industry Sector	Output	Output Impacts	Employment Impacts	Value Added Impacts
		(Mn\$)*	(Mn\$)*	(Jobs)	(Mn\$)*
Forestry, Wood, & Paper Product Manufacturing	All other converted paper product manufacturing	43.2	101.2	730	50.3
	Coated & laminated paper & packaging materials	142.3	319.8	2,081	148.6
	Coated & uncoated paper bag manufacturing	132.9	264.8	1,718	112.6
	Cut stock, resawing lumber, & planing	18.9	29.3	238	10.5
	Engineered wood member & truss manufacturing	930.1	1,443.8	10,771	679.3
	Forest nurseries, forest products & timber	578.4	1,856.6	27,022	1,046.6
	Logging	605.8	678.7	3,695	299.8
	Miscellaneous wood product manufacturing	55.3	61.5	540	24.6
	Other millwork, including flooring	288.1	299.7	1,878	83.3
	Paper & paperboard mills	1,058.3	2,604.3	15,911	1,228.3
	Paperboard container manufacturing	1,136.1	2,023.3	12,379	815.1
	Pulp mills	723.6	1,882.6	11,573	818.0
	Reconstituted wood product manufacturing	3.0	3.8	17	1.6
	Sanitary paper product manufacturing	738.7	1,378.6	7,630	667.9
	Sawmills	465.4	518.5	2,444	147.1
	Surface-coated paperboard manufacturing	8.3	9.1	35	2.3
	Veneer & plywood manufacturing	193.5	218.7	1,356	71.7
	Wood container & pallet manufacturing	153.7	158.1	1,475	64.3
	Wood preservation	156.3	159.6	635	35.0
	Wood windows & door manufacturing	516.9	524.8	2,982	196.5
	Total	7,948.7	14,536.7	105,111	6,503.3

Table 2. Economic impacts of agricultural and natural resource industry sectors in Florida, 2003.

Industry Group	Industry Sector	Output	Output Impacts	Employment Impacts	Value Added Impacts
		(Mn\$)*	(Mn\$)*	(Jobs)	(Mn\$)*
Other Food Product Manufacturing	All other food manufacturing	121.6	141.1	652	32.2
	Bread & bakery product, except frozen, manufacturing	1,166.1	1,180.0	9,786	535.4
	Breakfast cereal manufacturing	0.0	0.0	0	0.0
	Breweries	787.3	1,615.2	8,943	880.4
	Coffee & tea manufacturing	270.3	298.4	800	63.7
	Cookie & cracker manufacturing	290.3	290.3	914	89.2
	Distilleries	239.2	524.3	3,404	341.5
	Dog & cat food manufacturing	29.5	31.2	47	2.6
	Dry pasta manufacturing	11.9	12.4	49	3.2
	Fats & oils refining & blending	41.8	57.9	179	15.0
	Flavoring syrup & concentrate manufacturing	631.3	647.8	479	121.7
	Frozen cakes & other pastries manufacturing	6.8	7.4	65	2.1
	Mayonnaise, dressing, & sauce manufacturing	156.6	168.6	508	51.1
	Mixes & dough made from purchased flour	0.6	0.6	2	0.1
	Other animal food manufacturing	304.1	538.1	2,523	167.3
	Other snack food manufacturing	414.8	422.1	877	131.0
	Roasted uts & peanut butter manufacturing	4.6	5.9	23	1.9
	Soft drink & ice manufacturing	3,751.3	7,568.7	37,696	2,915.6
	Spice & extract manufacturing	284.9	293.3	703	103.7
	Tortilla manufacturing	0.1	0.1	1	0.0
Wineries	54.5	100.1	622	41.4	
	Total	8,567.5	13,903.3	68,273	5,499.0

Table 2. Economic impacts of agricultural and natural resource industry sectors in Florida, 2003.

Industry Group	Industry Sector	Output	Output Impacts	Employment Impacts	Value Added Impacts
		(Mn\$)*	(Mn\$)*	(Jobs)	(Mn\$)*
Tobacco Farming & Manufacturing	Cigarette manufacturing	236.1	248.8	229	119.8
	Other tobacco product manufacturing	2,545.0	5,408.1	27,306	2,793.2
	Tobacco farming	20.7	43.7	701	28.6
	Tobacco stemming & redrying	22.2	35.6	177	8.0
	Total	2,823.9	5,736.1	28,411	2,949.5
Sugarcane Farming, Refined Sugar & Confections	Confectionery manufacturing from cacao beans	10.1	12.4	44	3.7
	Confectionery manufacturing from purchased chocolate	114.8	159.8	878	51.4
	Nonchocolate confectionery manufacturing	138.8	198.9	1,120	83.9
	Sugar manufacturing	1,390.2	3,302.4	26,645	1,263.6
	Sugarcane & sugar beet farming	588.9	898.7	24,091	436.4
	Total	2,242.8	4,572.2	52,778	1,839.0
Mining	Coal mining	9.8	14.6	78	7.8
	Copper, nickel, lead, & zinc mining	0.4	0.5	4	0.3
	Drilling oil & gas wells	22.2	47.2	479	28.4
	Gold, silver, & other metal ore mining	88.9	168.3	1,117	113.5
	Iron ore mining	0.4	1.0	7	0.6
	Oil & gas extraction	1,456.0	1,485.4	5,193	276.1
	Other nonmetallic mineral mining	449.2	780.8	5,513	498.3
	Sand, gravel, clay, & refractory mining	145.7	373.9	3,198	247.8
	Stone mining & quarrying	253.1	580.9	4,597	367.9
	Support activities for oil & gas operations	11.3	23.3	288	17.2
	Support activities for other mining	5.4	13.8	115	8.6
Total	2,442.3	3,489.8	20,590	1,566.5	

Table 2. Economic impacts of agricultural and natural resource industry sectors in Florida, 2003.

Industry Group	Industry Sector	Output	Output Impacts	Employment Impacts	Value Added Impacts
		(Mn\$)*	(Mn\$)*	(Jobs)	(Mn\$)*
Livestock & Dairy Farming & Animal Products Manufacturing	Animal production, except cattle & poultry	267.3	318.5	8,176	77.2
	Animal, except poultry, slaughtering	415.7	480.3	1,863	81.0
	Cattle ranching & farming	715.5	1,044.9	10,871	266.0
	Cheese manufacturing	69.8	70.3	110	5.6
	Creamery butter manufacturing	2.7	2.8	6	0.2
	Dry, condensed, & evaporated dairy products	93.8	105.1	232	27.5
	Fluid milk manufacturing	694.1	696.1	1,229	88.4
	Ice cream & frozen dessert manufacturing	275.3	277.7	677	62.4
	Meat processed from carcasses	550.4	567.8	1,691	78.6
	Poultry & egg production	376.1	551.7	2,710	284.0
	Poultry processing	527.6	552.1	3,104	147.1
	Rendering & meat by-product processing	84.4	119.8	448	40.3
	Total	4,072.9	4,787.1	31,118	1,158.4
Fishing & Seafood Products	Fishing	142.2	320.3	10,263	209.6
	Seafood product preparation & packaging	639.6	742.1	3,642	203.6
	Total	781.8	1,062.4	13,905	413.2
Other Crop Farming	All other crop farming	147.4	287.3	2,499	180.2
	Cotton farming	42.2	95.4	998	56.7
	Tree nut farming	1.6	3.3	36	2.1
	Total	191.2	386.0	3,533	239.0

Table 2. Economic impacts of agricultural and natural resource industry sectors in Florida, 2003.

Industry Group	Industry Sector	Output	Output Impacts	Employment Impacts	Value Added Impacts
		(Mn\$)*	(Mn\$)*	(Jobs)	(Mn\$)*
Grain & Oilseed Farming & Processing	Flour milling	62.2	116.5	584	46.2
	Grain farming	9.1	18.9	304	10.7
	Oilseed farming	2.3	34.7	375	21.4
	Rice milling	18.8	36.3	192	14.4
	Total	92.5	206.4	1,455	92.8
Wildlife (hunting)	Total	118.2	138.9	2,062	45.1
Total (all industries)		50,798.5	87,565.1	756,993	41,123.3

Table 3. Value added impacts of agricultural and natural resource industry groups in economic regions of Florida, 2003.

Industry Group	Miami-Ft. Lauderdale (Mn\$)*	Orlando (Mn\$)*	Sarasota-Bradenton (Mn\$)*	Tampa-St. Petersburg-Clearwater (Mn\$)*	Jacksonville (Mn\$)*	Gainesville (Mn\$)*	Tallahassee (Mn\$)*	Panama City (Mn\$)*	Pensacola (Mn\$)*	Total All Regions (Mn\$)*
Agricultural Inputs & Support Services	1,316.6	2,530.7	491.7	992.8	249.5	56.4	297.6	18.7	48.4	6,002.3
Environmental Horticulture	2,504.2	1,773.5	723.0	804.1	423.0	109.8	101.5	43.8	70.4	6,553.4
Fishing & Seafood Products	131.6	66.2	22.9	218.7	19.8	2.6	17.3	10.1	8.2	497.4
Forestry, Wood, & Paper Products	1,226.8	1,117.0	139.9	504.9	1,298.4	400.4	529.8	194.2	366.0	5,877.6
Fruit & Vegetable Products	2,174.2	1,794.7	2,084.3	775.8	150.6	102.4	27.2	14.7	5.3	7,129.4
Grain & Oilseed Products	42.1	4.7	1.2	21.6	1.8	2.2	6.5	3.7	2.8	86.7
Livestock, Dairy, & Animal Products	209.0	204.3	48.1	307.5	76.9	404.5	70.9	40.6	50.3	1,412.0
Mining	265.7	514.2	157.6	970.0	108.0	27.4	26.1	2.9	79.2	2,151.0
Other Crop Farming	14.5	33.4	3.6	10.7	1.5	39.4	6.0	47.3	45.7	202.2
Other Food Product Manufacturing	1,569.7	1,267.3	84.0	1,129.9	1,723.0	11.8	15.5	4.1	11.0	5,816.3
Sugarcane & Refined Sugar	1,828.4	59.5	16.5	72.2	13.3	1.0	0.0	0.3	0.4	1,991.5
Tobacco Products	545.8	0.0	3.5	886.6	1,629.8	17.9	7.2	0.0	0.0	3,091.0
Wildlife (hunting)	15.2	6.3	1.7	14.9	2.3	12.0	6.9	0.0	0.0	59.3
Total All Industries	11,844	9,372	3,778	6,710	5,698	1,188	1,213	381	688	40,870

Source: *Implan* data for Florida (MIG, Inc. 2005).

* Values expressed in 2005 U.S. dollars using GDP implicit price deflator, July 2003-July 2005 (U.S. Department of Commerce).

Table 4. Trend in value added impacts of agricultural and natural resource industry groups in Florida, 2001-2003.

Industry Group	2001	2002	2003	Percent Change
	(Mn\$)*	(Mn\$)*	(Mn\$)*	2001-03 (%)
Agricultural Inputs & Services (fertilizers/pesticides/veterinary/support activities/equipment manufacturing)	5,559	5,631	6,503	16%
Environmental Horticulture (nursery/greenhouse/landscape services)	5,763	6,391	6,821	17%
Fishing & Seafood Products	394	436	413	5%
Forestry, Wood, & Paper Product Manufacturing	4,930	5,847	6,503	27%
Fruit & Vegetable Farming & Processing	6,294	7,634	7,491	17%
Grain & Oilseed Farming & Processing	221	103	93	-93%
Livestock & Dairy Farming & Animal Products Manufacturing	1,315	1,110	1,158	-13%
Mining	1,445	1,533	1,566	8%
Other Crop Farming	173	190	239	33%
Other Food Product Manufacturing	4,752	4,850	5,499	15%
Sugarcane Farming, Refined Sugar & Confections	1,678	1,688	1,839	9%
Tobacco Farming & Manufacturing	1,172	995	2,949	104%
Wildlife (hunting)	78	54	45	-55%
Grand Total	33,774	36,462	41,120	20%

Source: *Implan* data for Florida (MIG, Inc., 2005).
* Values expressed in 2005 U.S. dollars using GDP implicit price deflator (U.S. Department of Commerce).

Table 5. Employment and value added of all industry groups in Florida, 2003.

Industry Group (NAICS Basis)	Direct Employment		Direct Value Added	
	Jobs	Share (%)	Mn\$*	Share (%)
Real Estate & Financial Services	804,949	8.6%	82,459	14.2%
Professional & Technical Services	1,492,494	15.9%	73,327	12.7%
Retail Trade	990,428	10.5%	45,251	7.8%
Government	609,769	6.5%	41,781	7.2%
Health Care	749,381	8.0%	40,868	7.1%
Private Households	143,454	1.5%	39,196	6.8%
Wholesale Trade	355,109	3.8%	36,490	6.3%
Construction	701,544	7.5%	35,273	6.1%
Travel, Food, & Entertainment Services	950,313	10.1%	31,565	5.5%
Manufacturing	317,640	3.4%	26,681	4.6%
Information & Communications	256,251	2.7%	25,131	4.3%
Education	593,548	6.3%	25,064	4.3%
Consumer Services	459,300	4.9%	20,616	3.6%
Agriculture, Natural Resources, Related Manufacturing & Services**	388,916	4.1%	19,169	3.3%
Transportation	300,857	3.2%	18,481	3.2%
Utilities	28,330	0.3%	10,463	1.8%
Social Services & Organizations	249,426	2.7%	7,230	1.2%
Miscellaneous Residual Accounts	0	0.0%	-135	0.0%
Grand Total	9,391,709	100.0%	578,910	100.0%

Source: *Implan* data for Florida (MIG, Inc., 2005).

* Values expressed in 2005 U.S. dollars using GDP implicit price deflator (U.S. Department of Commerce).

** Agriculture, natural, resources, related manufacturing & services amounts netted-out of other industry groups.