DECISION INNOVATION SOLUTIONS

Prepared for:

MASBDA
MISSOURI AGRICULTURAL AND SMALL BUSINESS DEVELOPMENT AUTHORITY

2026 Economic Contribution Study of Missouri Agriculture and Forestry

November 2026



Supporting Partners

The 2026 Economic Contribution Study of Missouri Agriculture and Forestry was comprehensive not just from an analysis standpoint but also in the form of a very diverse set of partners, which includes the following fine Missouri organizations:

























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Contents

Supporting Partners i
Accessibility Statement ii
Contents iii
List of Figures v
List of Tables vii
1 Executive Summary 1
2 Background 3
2.1 Missouri Agriculture 3
2.2 Missouri Farm Demographics 4
2.3 Missouri Cash Receipts 5
2.4 Missouri Crop Background 7
2.5 Missouri Livestock and Poultry Background 9
2.5.1 Cattle 9
2.5.2 Dairy 15
2.5.3 Hogs 18
2.5.4 Poultry 20
2.5.5 Goats and Sheep 25
2.5.6 Horses 27
2.6 Missouri Livestock, Meat and Poultry Processing 28
2.7 Grain Elevators, Feedmills and Grain Processors 31
2.7.1 Missouri Soybean Crush Capacity 33
2.7.2 Missouri Ethanol and Biodiesel Production Capacity 34
2.7.3 Missouri Ethanol and Biodiesel Production 35
2.8 Missouri Breweries, Distilleries and Wineries 38
2.9 Missouri Forestry Background 44
2.9.1 Missouri Agroforestry Practices 2017 and 2022 45
3 Economic Contribution Methodology 49
3.1 Economic Contribution Methodology and Terms 49
3.2 Defining Agriculture and Forestry 50
3.3 Economic Impact Study versus Economic Contribution Study 50

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4 Economic Contribution Results 51
4.1 State Level Results 51
4.1.1 State Value Added 51
4.1.2 State Jobs 52
4.1.3 State Output 53
4.1.4 State Labor Income 54
4.2 Detailed State Results 55
4.2.1 Crops 55
4.2.2 Livestock 57
4.2.3 Other Agriculture 59
4.3 County Level Results 60
4.3.1 County Value Added 61
4.3.2 County Jobs 66
4.3.3 County Output 71
4.3.4 County Labor Income 76
4.4 Federal Congressional District Results 81
4.4.1 Congressional District Value Added 81
4.4.2 Congressional District Jobs 83
5 Agriculture in the Broader Missouri Economy 85
6 Looking Ahead 87
7 Appendix A, IMPLAN Aggregation Scheme 88
7.1 All Industries Aggregation Scheme 88
7.2 Detailed Agriculture and Forestry Aggregation Scheme 101
8 Appendix B, Detailed County and Congressional District Results 103
8.1 County Value Added 103
8.2 County Jobs 111
8.3 Congressional District Value Added 119
8.4 Congressional District Jobs 127

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List of Figures

Figure 1. Missouri Farms by Economic Class (2022) 5
Figure 2. Cash Receipts from Selected Missouri Commodities ($1,000 USD) 6
Figure 3. Cash Receipts Share of State Total (%) for Missouri Selected Commodities 6
Figure 4. 2025 Missouri Selected Agricultural Cash Receipts ($1,000 USD) 7
Figure 5. Missouri Crop Acres 7
Figure 6. Missouri Crop Yields 8
Figure 7. Missouri Crop Production (1,000 Bushels) 8
Figure 8. Missouri Crop Production, Value ($1,000) 9
Figure 9. Missouri Cattle Inventory and Value 10
Figure 10. Distribution of Missouri Cattle Inventory (Average: 2002-2026) 11
Figure 11. Missouri Beef Cow Inventory 11
Figure 12. Missouri Cattle on Feed Inventory 12
Figure 13. Missouri Calf Crop 13
Figure 14. Missouri Cattle Production 13
Figure 15. Missouri Beef Cow Inventory per County (2025) 14
Figure 16. Missouri Dairy Cow Inventory by County (2025) 15
Figure 17. Missouri Commercial Dairy Farms, Grade A and Manufacturing Grade 16
Figure 18. Missouri Dairy Cow Inventory 17
Figure 19. Missouri Milk Production 17
Figure 20. Missouri Hog Inventory by County (2025) 18
Figure 21. Missouri Hog Inventory 19
Figure 22. Missouri Hog Production 19
Figure 23. Missouri Broiler Production by County (2025) 20
Figure 24. Missouri Broiler Production 21
Figure 25. Missouri Turkey Production by County (2025) 22
Figure 26. Missouri Turkey Production 23
Figure 27. Missouri Layer Inventory by County (2025) 24
Figure 28. Missouri Goat Inventory by County (2025) 25
Figure 29. Missouri Sheep Inventory by County (2025) 26
Figure 30. Missouri Equine Farm Numbers and Inventory 27
Figure 31. Missouri Federally Inspected Meat and Poultry Processing Plants 28
Figure 32. Missouri State and Custom Exempt Meat and Poultry Slaughter and Meat Processing Facilities 29
Figure 33. Missouri Milk and Dairy Product Processors 30
Figure 34. Missouri Grain Elevators, Feedmills, and Grain Processors 31
Figure 35. Missouri Rail Network 32
Figure 36. Missouri Ethanol and Biodiesel Plants 34
Figure 37. Missouri Ethanol Production and Share of U.S. Production 35
Figure 38. Missouri Biodiesel Production and Share of U.S. Production 36
Figure 39. U.S. Number of Breweries 38

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Figure 40. Missouri Breweries, Distilleries, and Wineries 39
Figure 41. Missouri Number of Breweries 40
Figure 42. U.S. Bonded Wine Producers 41
Figure 43. Missouri Annual Wine Production 42
Figure 44. Missouri Revenue Collections: Liquor, Beer, and Wine (For Fiscal Year Ended in June) 43
Figure 45. Missouri Taxed Gallons: Liquor, Beer, and Wine (For Fiscal Year Ended in June) 43
Figure 46. Missouri Forest Land Area by County (2025) 44
Figure 47. Number of Missouri Farms Reporting an Agroforestry Practice in 2017 46
Figure 48. Number of Missouri Farms Reporting an Agroforestry Practice in 2022 47
Figure 49. Change in the Number of Farms Reporting at Least One Agroforestry Practice by County Between 2017 and 2022 48
Figure 50. Value Added Contribution of Missouri Agriculture and Forestry 51
Figure 51. Jobs Contribution of Missouri Agriculture and Forestry 52
Figure 52. Output Contribution of Missouri Agriculture and Forestry 53
Figure 53. Labor Income Contribution of Missouri Agriculture and Forestry 54
Figure 54. Missouri Total Value Added from Crop Industries 55
Figure 55. Missouri Total Jobs from Crop Industries 56
Figure 56. Missouri Total Value Added from Livestock Industries 57
Figure 57. Missouri Total Jobs from Livestock Industries 58
Figure 58. Missouri Total Value Added from Other Agriculture Industries 59
Figure 59. Missouri Total Jobs from Other Agriculture Industries 60
Figure 60. Top Counties, Value Added Derived from Agriculture and Forestry 61
Figure 61. Top Counties, Percent of Total Value Added Derived from Agriculture and Forestry 62
Figure 62. Counties by Percent of Value Added Derived from Agriculture and Forestry 63
Figure 63. Value Added Derived from Agriculture and Forestry by County 64
Figure 64. Percent of Total Value Added Derived from Agriculture and Forestry by County 65
Figure 65. Top Counties, Jobs Derived from Agriculture and Forestry 66
Figure 66. Top Counties, Percent of Total Jobs Derived from Agriculture and Forestry 67
Figure 67. Counties by Percent of Jobs Derived from Agriculture and Forestry 68
Figure 68. Jobs Derived from Agriculture and Forestry by County 69
Figure 69. Percent of Total Jobs Derived from Agriculture and Forestry by County 70
Figure 70. Top Counties, Output Derived from Agriculture and Forestry 71
Figure 71. Top Counties, Percent of Total Output Derived from Agriculture and Forestry 72
Figure 72. Counties by Percent of Output Derived from Agriculture and Forestry 73
Figure 73. Output Derived from Agriculture and Forestry by County 74
Figure 74. Percent of Total Output Derived from Agriculture and Forestry by County 75
Figure 75. Top Counties, Labor Income Derived from Agriculture and Forestry 76
Figure 76. Top Counties, Percent of Total Labor Income Derived from Agriculture and Forestry 77

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Figure 77. Counties by Percent of Labor Income Derived from Agriculture and Forestry 78
Figure 78. Labor Income Derived from Agriculture and Forestry by County 79
Figure 79. Percent of Total Labor Income Derived from Agriculture and Forestry by County 80
Figure 80. Value Added Derived from Agriculture and Forestry by Congressional District 81
Figure 81. Percent of Total Value Added Derived from Agriculture and Forestry by Congressional District 82
Figure 82. Jobs Derived from Agriculture and Forestry by Congressional District 83
Figure 83. Percent of Total Jobs Derived from Agriculture and Forestry by Congressional District 84
Figure 84. Value Added Derived from Agriculture and Other Sectors 85
Figure 85. Jobs Derived from Agriculture and Other Sectors 86
Figure 86. Output Derived from Agriculture and Other Sectors 86

List of Tables

Table 1. Acronyms viii
Table 2. Missouri Agricultural Rankings Among States (Top 5 Rankings) 3
Table 3. Missouri Agricultural Rankings Among States (Rankings 6-10) 3
Table 4. Ranking of Market Value of Agricultural Products Sold in Missouri (2022) 4
Table 5. Missouri Acres, Yield, Production, and Production Value of Selected Crops (2025) 9
Table 6. Missouri Soybean Crush Capacity 33
Table 7. Missouri Weekly Ethanol, DDGs and DCO Sales Values per Bushel of Corn, Corn Cost, and Gross Production Margin in June 2022-2026 37
Table 8. Missouri Forest Land 2020 and 2025 44

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Table 1. Acronyms

Acronym	Description
BEA	U.S. Bureau of Economic Analysis
BLS	U.S. Bureau of Labor Statistics
DCO	Distillers Corn Oil
DDGs	Distillers Dried Grains with Solubles
DIS	Decision Innovations Solutions, LLC
EIA	Energy Information Administration
GDP	Gross Domestic Product
GPM	Gross Production Margin
LMIC	Livestock Marketing Information Center
MPIP	Missouri Department of Agriculture Meat and Poultry Inspection Programs
NAICS	North American Industry Classification System
U.S.	United States
USDA	United States Department of Agriculture
USDA-NASS	United States Department of Agriculture – National Agricultural Statistics Service

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1 Executive Summary

The following economic contribution study shows that, despite challenges in recent years, Missouri agriculture and forestry remains strong and a significant part of the Missouri economy. Agriculture and forestry industries in Missouri contribute approximately 11% of the state's total value added and support more than 1 in 10 jobs across the state. For this study, "agriculture and forestry" is defined to include the following activities: farm-level production (such as crop and livestock farming and logging), relevant input industries (such as fertilizer manufacturing and veterinary services), and the first round of value-added processing (such as grain milling and livestock slaughter).

In 2026, the **total** (direct, indirect, and induced) economic contribution of agriculture and forestry to the Missouri economy is estimated to be **$121.0 billion** in total sales (output) in addition to following:

- **$45.2 billion** in value added (equivalent to GDP)
- **380,600** jobs
- **$24.7 billion** in labor income

For more information regarding methodology, scope, and definitions of terms used in this study, refer to Section 3. Of the **$45.2 billion** in total value added and **380,600 jobs** derived from agriculture, forestry, and related economic activity:

- Crop production and related industries contribute:
  - **$8.9 billion** in value added
  - **74,252** jobs
- Livestock production and related industries contribute:
  - **$11.9 billion** in value added
  - **123,420** jobs
- Other agriculture industries contribute:
  - **$18.5 billion** in value added
  - **136,412** jobs
- Forestry and related industries contribute:
  - **$5.9 billion** in value added
  - **46,516** jobs

Decision Innovation Solutions has completed two previous analyses of agriculture and forestry's economic contribution to Missouri, one in 2021 and one in 2016. Compared to the prior studies:

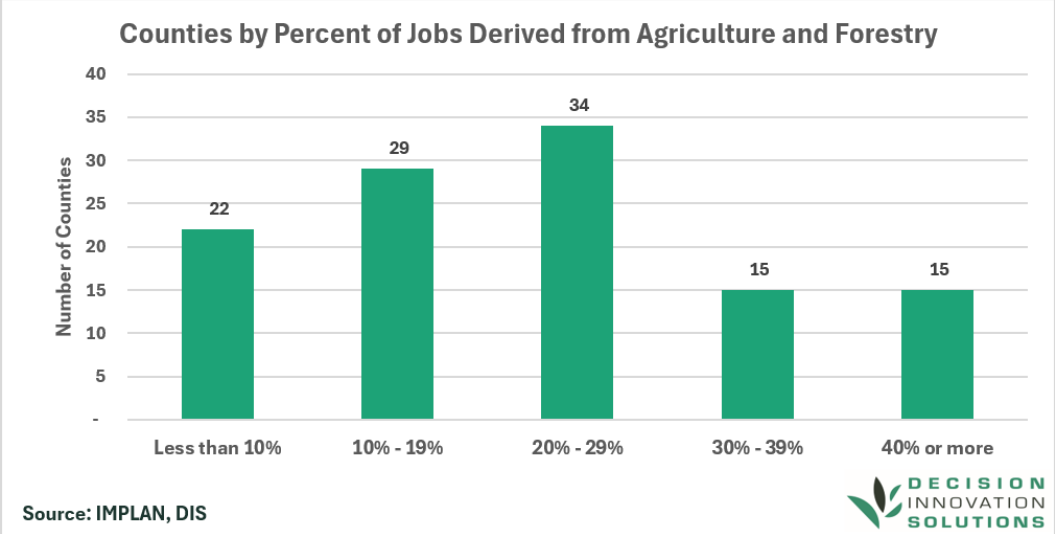
- Value added contribution increased by **$10.3 billion** compared to 2021 and **$12.2 billion** compared to 2016
- Jobs contribution decreased by **76,018** compared to 2021 and increased by **2,368** compared to 2016
- Output contribution increased by **$27.3 billion** compared to 2021 and **$32.6 billion** compared to 2016

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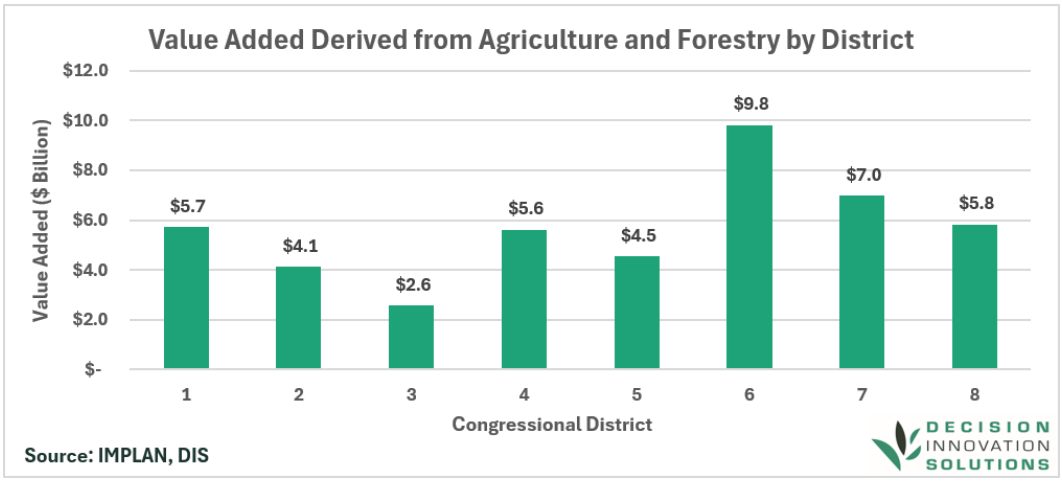
This study also estimates the economic contribution of agriculture and forestry for each county and federal congressional district in Missouri, the full results of which are shown in Sections 4.3 and 4.4.

Missouri's counties are varied in their reliance on agriculture. In terms of jobs,

- **22** counties (including St. Louis City) derive less than 10 percent from all agriculture and forestry
- **29** counties derive between 10 and 19 percent
- **34** counties derive between 20 and 29 percent
- **15** counties derive between 30 and 39 percent
- **15** counties derive more than 40 percent



Missouri's federal congressional districts are also varied in their reliance on agriculture and forestry. These industries are particularly important to the 6th congressional district in northern Missouri, as agriculture and forestry drives more economic activity there in terms of jobs and value added than in any other district in the state.



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2 Background

2.1 Missouri Agriculture

Table 2 and Table 3 show Missouri's ability to be a leading producer of various crops and livestock. These rankings establish the importance of Missouri to help feed, clothe, and fuel those beyond Missouri and the U.S.

USDA-NASS data indicates that as of 2025, Missouri ranked among the top five states in the nation for:

Table 2. Missouri Agricultural Rankings Among States (Top 5 Rankings)

Category	Quantity	Ranking
Number of Farms	85,500	3
Hay Production	6.7 million tons	3
Beef Cows	1.8 million head	3
Rice Production	15.9 million cwt	4
Cotton	768,000 bales	5
Source: USDA (Survey data)		

Based on the same 2025 USDA-NASS data, Missouri is among the top ten states for:

Table 3. Missouri Agricultural Rankings Among States (Rankings 6-10)

Category	Quantity	Ranking
Soybeans Production	276.5 million bushels	6
Goats Inventory	74,139 head	6
Cattle & Calves Inventory	3.9 million head	6
Hogs Inventory	3.4 million head	7
Turkey Production	14.7 million head	7
Egg Production	5.1 billion eggs	7
Peanut Production	135.2 million lbs	9
Corn Production	677.1 million bushels	10
Broilers	284.2 million head	10
Horses	75,250 head	10
Source: USDA (Survey and Census data)		

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As shown in Table 4, within the State of Missouri, crop production (grains and oilseeds) ranks number 1 in value of sales followed by (2) poultry and eggs, (3) cattle and calves, (4) hogs and pigs, and (5) cotton.

Table 4. Ranking of Market Value of Agricultural Products Sold in Missouri (2022)

Ranking of Market Value of Agricultural Products Sold in Missouri (2022)	
Item	**Rank bySales**
Grains and oilseeds	1
Poultry and eggs	2
Cattle and calves	3
Hogs and pigs	4
Cotton and cottonseed	5
Other crops and hay	6
Milk from cows	7
Nursery, greenhouse, floriculture, and sod	8
Vegetables, melons, potatoes, and sweet potatoes	9
Fruits, tree nuts, and berries	10
Sheep, goats, wool, mohair, and milk	11
Horses, ponies, mules, burros, and donkeys	12
Aquaculture	13
Other animals and other animal products	14
Cultivated Christmas trees and short rotation woody	15
Tobacco	16
Source: USDA (2022 Census of Agriculture	

2.2 Missouri Farm Demographics

The Census of Agriculture defines a 'farm' as any operation that produces for sale at least $1,000 worth of agricultural commodities or would produce $1,000 worth of primary agricultural commodities for sale in a normal year. The definition is based on expected sales rather than ownership or various operating characteristics. In Figure 1 the number of farms in Missouri are sorted by two groups that indicate small farms, two groups that are mid-sized farms, and two groups that are larger farms. Based on these groupings, or economic classes, which are defined by gross cash farm income (GCFI)—annual income before expenses, 84% of Missouri farms are small, 10% are midsized, and 7% are large.

The two groupings of small farms (84% of farms) account for 8% of the value of ag products sold in Missouri. The two groups of mid-sized farms (10% of farms) account for 13% of ag products sold in Missouri. The two groups of large farms (7% of farms) account for 79% of ag products sold in Missouri.

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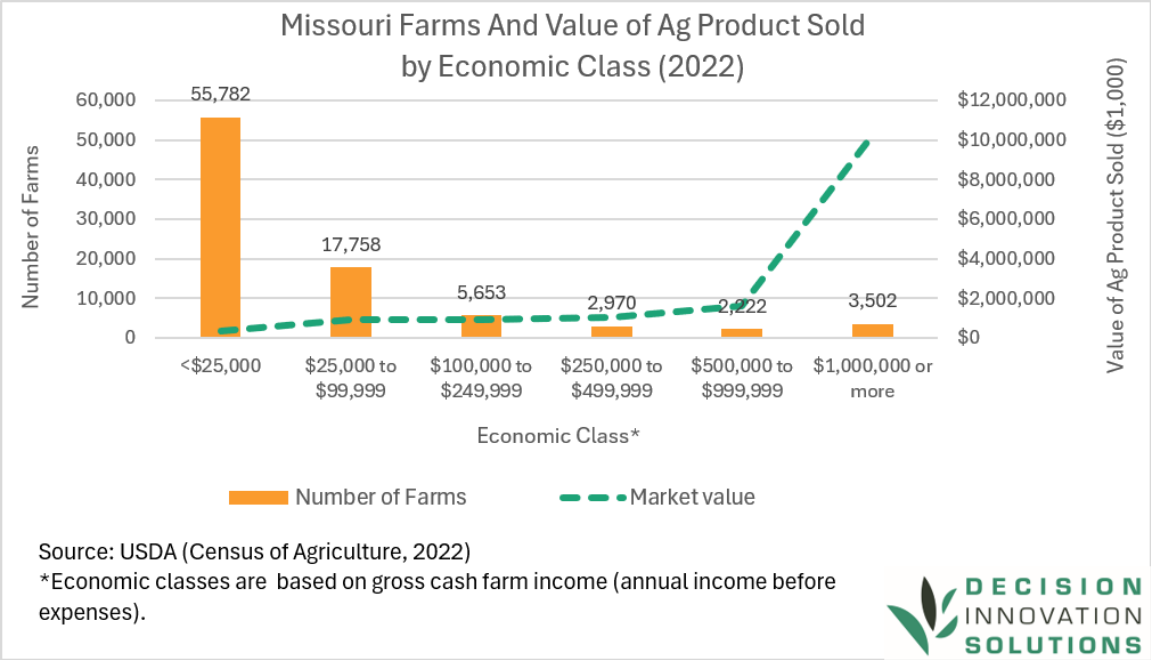


Figure 1. Missouri Farms by Economic Class (2022)

2.3 Missouri Cash Receipts

Missouri's cash receipts from agriculture averaged $9.5 billion from 2016 to 2020 and increased to an average of $14.36 billion during 2021-2025. The all-time high of 15.26 billion in 2025 was driven primarily by increases in receipts from cattle and calves, chicken eggs, and broilers, which rose 25.8%, 75.5%, and 4.5% from the previous year, respectively (Figure 2). In 2025, receipts from cattle and calves ($4.06 billion; 26.6%), soybeans ($ 2.90 billion;19.0%), corn ($2.47 billion; 16.2%), chicken eggs ($1.55 billion; 10.2%), hogs ($1.17 billion; 7.7%), and broilers ($1.12 billion; 7.3%) accounted for about 86.9% of total agricultural cash receipts. The remaining 13.1% ($2.00 billion) came from six commodities, led by turkey sales of about $287.77 million, followed by cotton lint ($261.75 million), hay ($221.86 million), and dairy products ($162.7 million). In addition, the "Other" category, which combines cash receipts from several commodities, accounted for $841.8 million. Within this category, rice generated $208.5 million in cash receipts and peanuts generated $29.5 million. Although receipts fluctuate from year to year with changes in prices and production, these commodities' overall contribution to Missouri agricultural revenue has remained relatively consistent (Figure 3 and Figure 4).

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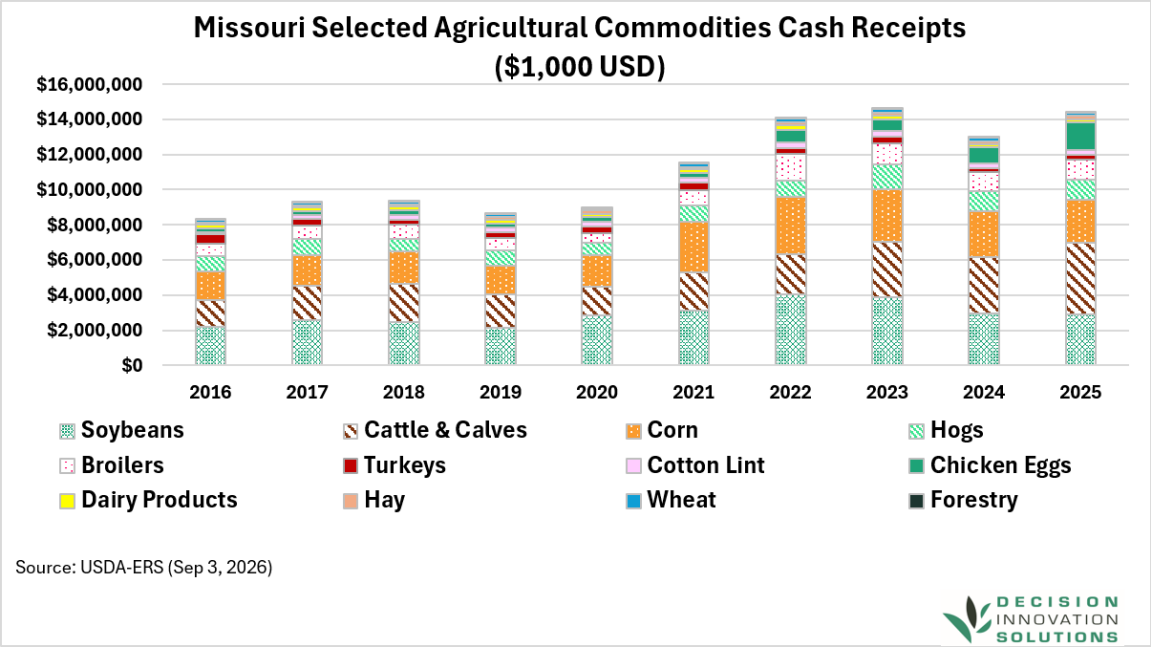


Figure 2. Cash Receipts from Selected Missouri Commodities ($1,000 USD)

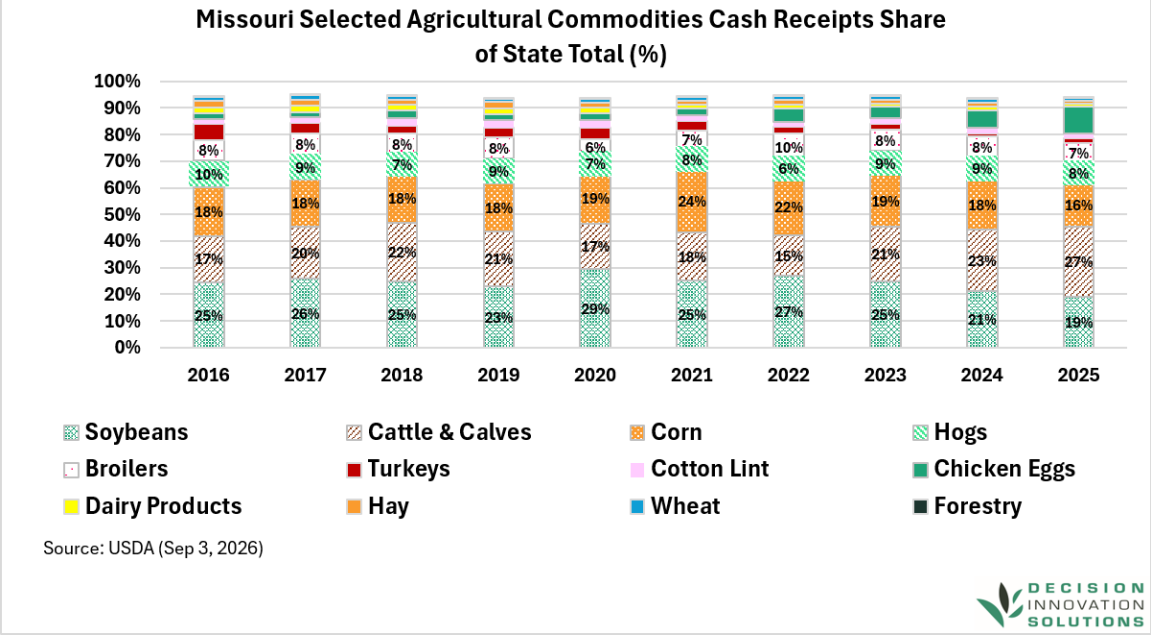


Figure 3. Cash Receipts Share of State Total (%) for Missouri Selected Commodities

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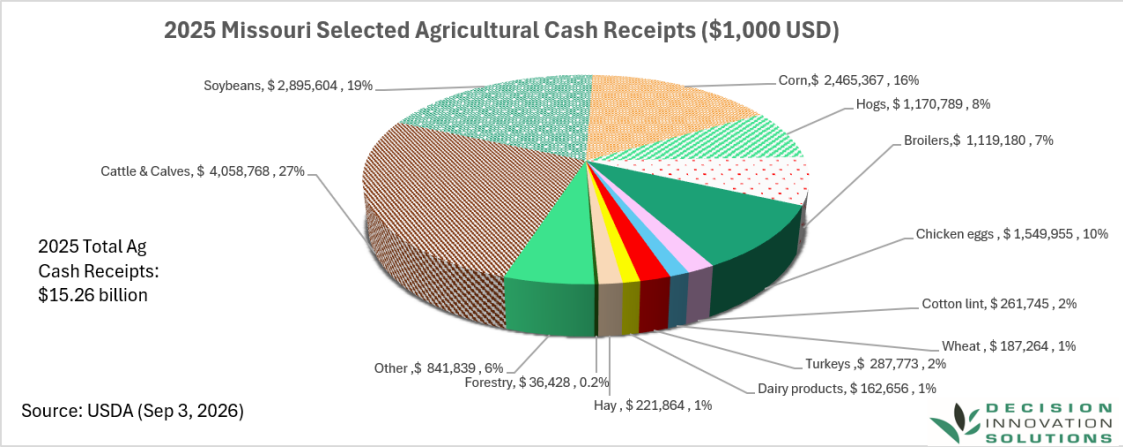


Figure 4. 2025 Missouri Selected Agricultural Cash Receipts ($1,000 USD)

2.4 Missouri Crop Background

Total acreage for the eight crops shown in Figure 5 varied between 12.0 million and 14.6 million acres. On average, soybeans and corn made up about 64% of the acreage. Hay accounted for about 26% of crop acreage, while wheat accounted for about 6%. The other four crops accounted for about 4% of the total planted acreage (Figure 5). Note that the USDA survey has not reported Missouri's harvested sorghum acreage since 2019; however, the 2022 USDA Census of Agriculture reported that 29,547 acres of sorghum were harvested in the state that year.

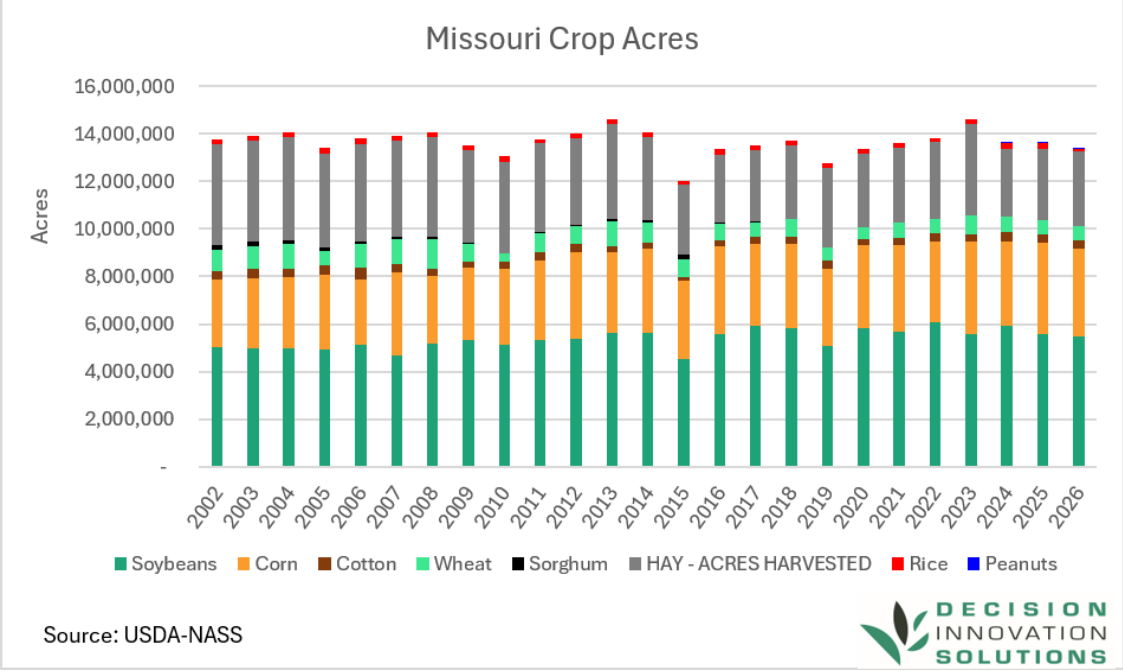


Figure 5. Missouri Crop Acres

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Despite variation, the overall crop yields trend in Missouri continue to trend upward. The largest yield gains have been seen in corn and soybeans (Figure 6). Corn yield is increasing 3.5 bushels per acre per year which is 5.3% per year, and soybean yield is increasing 0.7 bushels per acre per year which is 2.8% per year. Figure 7 shows annual production estimates for these same crops.

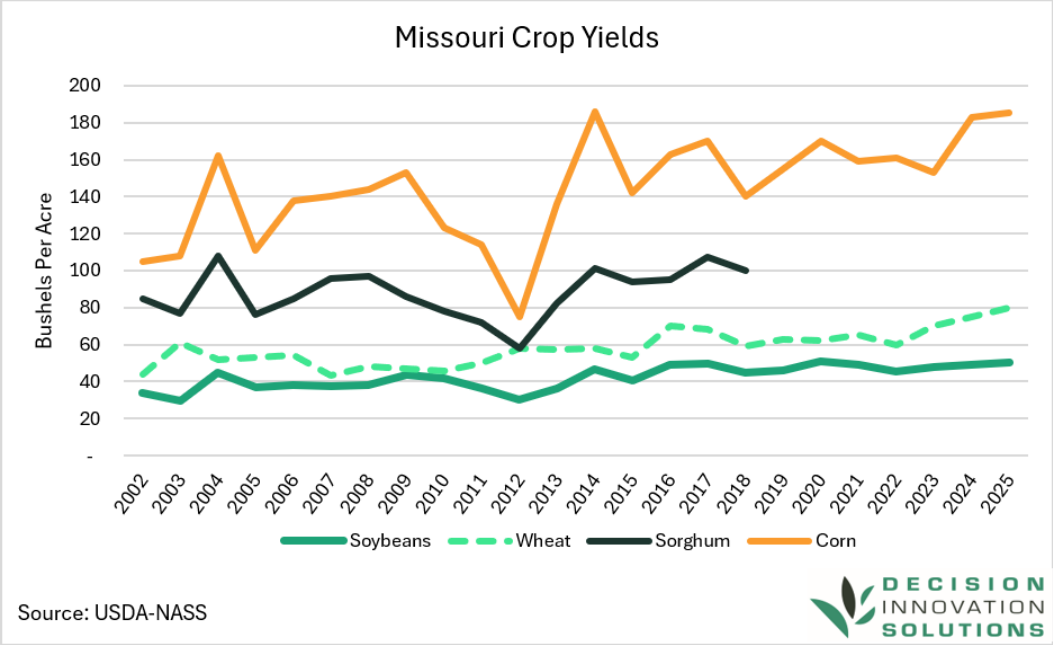


Figure 6. Missouri Crop Yields

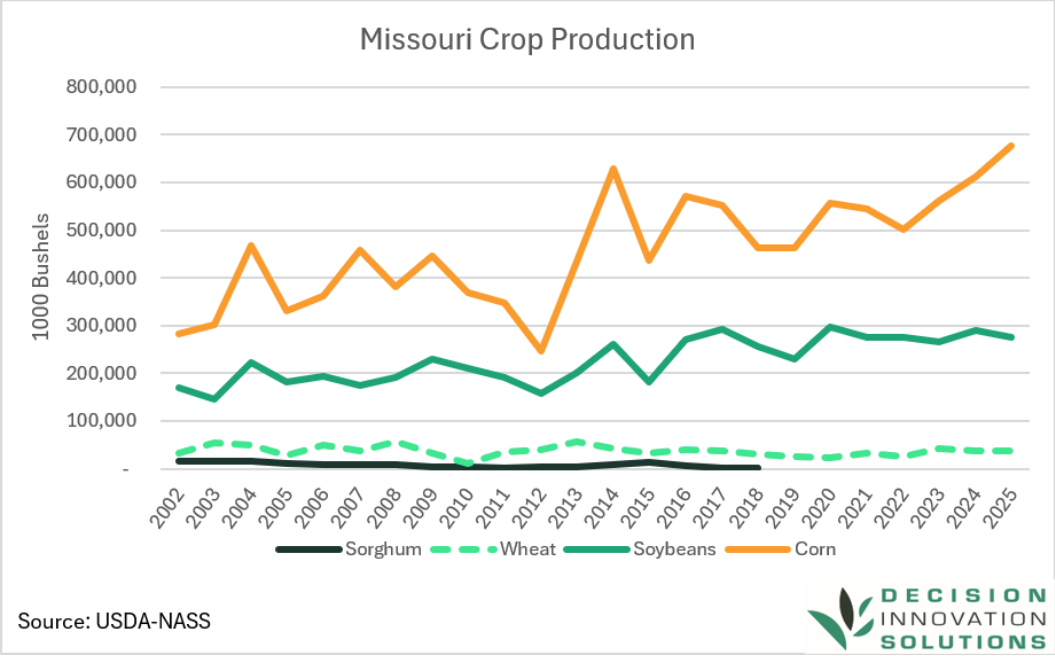


Figure 7. Missouri Crop Production (1,000 Bushels)

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The value of Missouri crop production originates from the value of soybeans and corn. These two crops accounted for approximately 83% of all Missouri crop value in 2025 (Figure 8). Crop production value data for peanuts started in 2024. Sorghum production measured in dollars is based on sales.

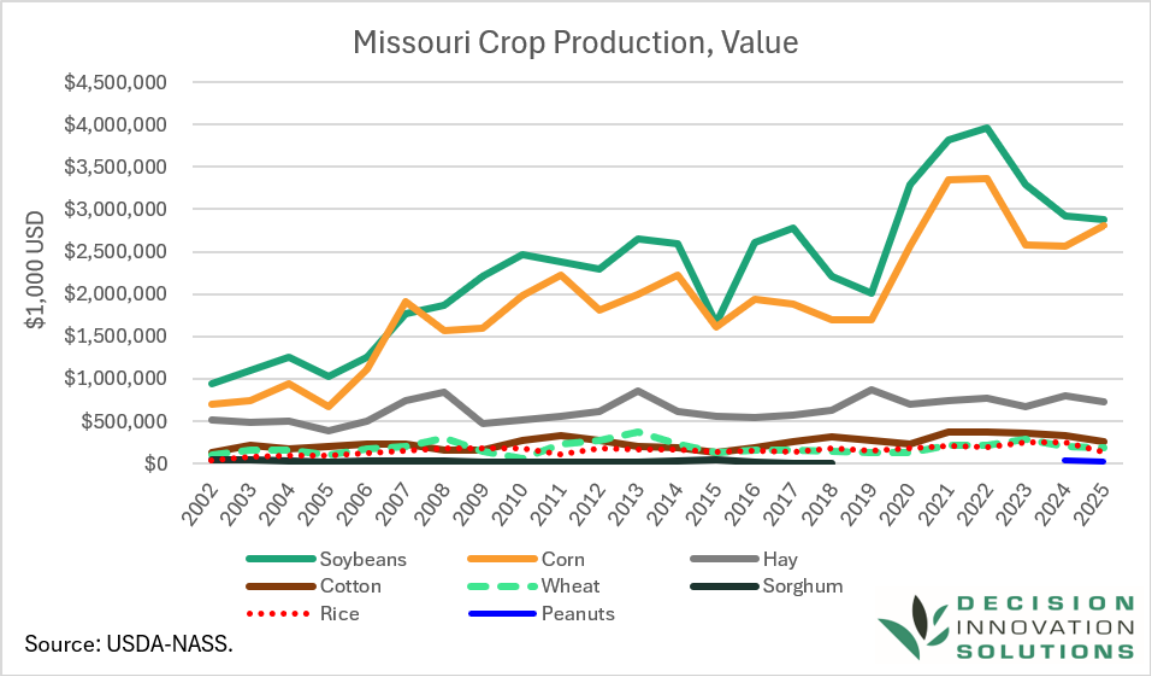


Figure 8. Missouri Crop Production, Value ($1,000)

Table 5 summarizes the acreage, yield, production, and production value of selected crops for 2025, except for sorghum, for which the data are from 2022.

Table 5. Missouri Acres, Yield, Production, and Production Value of Selected Crops (2025)

Item	Soybeans	Corn	Hay	Wheat	Cotton[3]	Rice	Peanuts	Sorghum[4]
Planted Acres	5,600,000	3,800,000	2,985,000	640,000	355,000	213,000	27,000	29,547
Yield[1]	50	185	2	80	1,214	7,630	5,230	84
Production[2]	276,500,000	677,100,000	6,070,000	36,800,000	860,000	15,867,000	135,980,000	2,480,309
Production measured in $	$2,875,600,000	$2,809,965,000	$728,830,000	$191,360,000	$257,587,200	$134,076,000	$29,879,000	$17,754,000

Source: USDA-NASS (2025 Survey and 2022 Census of Agriculture)
Note: Harvested acres were reported for hay and sorghum, instead of planted acres.
[1]Yield: Soybeans, corn, wheat, and sorghum (bushels/acre), hay (tons/acre), cotton, rice, and peanuts (lbs/acre)
[2]Production: Soybeans, corn, wheat, and sorghum (bushels), hay (tons), cotton (480 lb bales), rice (CWT), peanuts (lbs)
[3]Cotton value was estimated based on the U.S. price as the state price is not reported
[4]Sorghum data was based on 2022 Census of Agriculture because Survey data for this crop has not been reported since 2019. Sorghum production measured in $ is based on sales.

2.5 Missouri Livestock and Poultry Background

2.5.1 Cattle

Missouri's cattle inventory (cattle, including calves) varied from 2002 to 2026, fluctuating between 3.7 million head 2013 and 4.5 million head in 2003. On January 1, 2026, the inventory was estimated at 3.8

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million head, which was down 650,000 head from the 2003 record high (Figure 9). More than 1.86 million head were cows. Although the inventory has fluctuated, the shares represented by the different inventory categories have remained relatively steady over the last twenty-five years. On average, cows account for about 50% of total inventory, calves for 23%, and steers weighing 500 pounds or more for 10%, on average. Beef replacement heifers weighing 500 pounds or more and other heifers weighing 500 pounds or more (excluding replacements) account for 7% and 6%, respectively, on average. Bulls weighing 500 pounds or more and milk replacement heifers weighing 500 pounds or more account for 3% and 1%, respectively, on average (see Figure 10).

Within the cow inventory, beef cows account for about 96% of that inventory, or about 47.4% of total cattle inventory. Milk cows account for the remaining 4% of cow inventory, or about 2.2% of total inventory (see Figure 10).

Figure 11 shows that Missouri's beef cow inventory exceeded 1.81 million head at the beginning of 2026. The milk cow inventory was estimated at 54,000 head on January 1, 2026.

Missouri cattle inventory was valued at $8.86 billion on January 1, 2026, an increase of 27%, or $1.86 billion year-over-year.

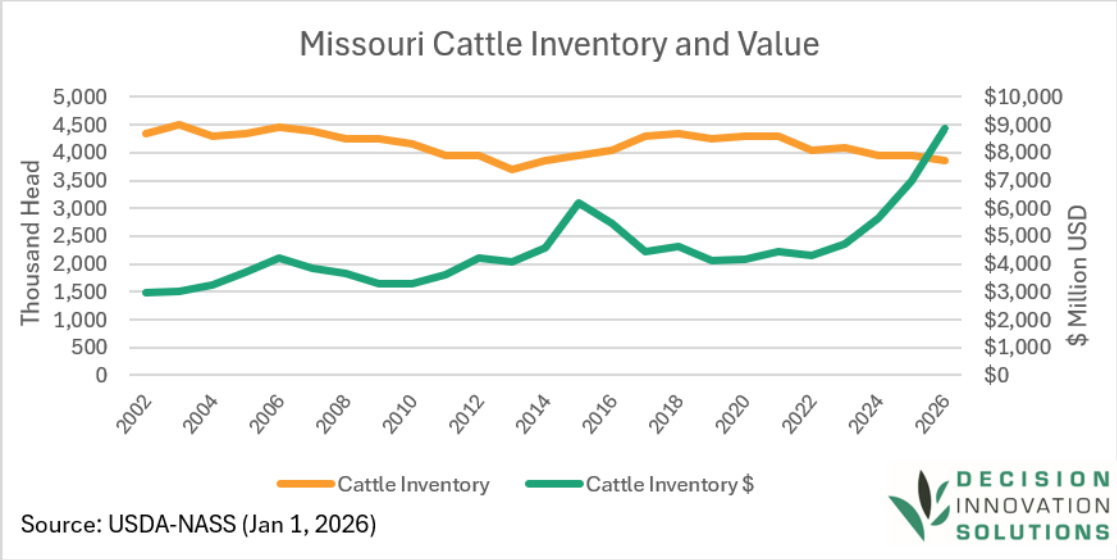


Figure 9. Missouri Cattle Inventory and Value

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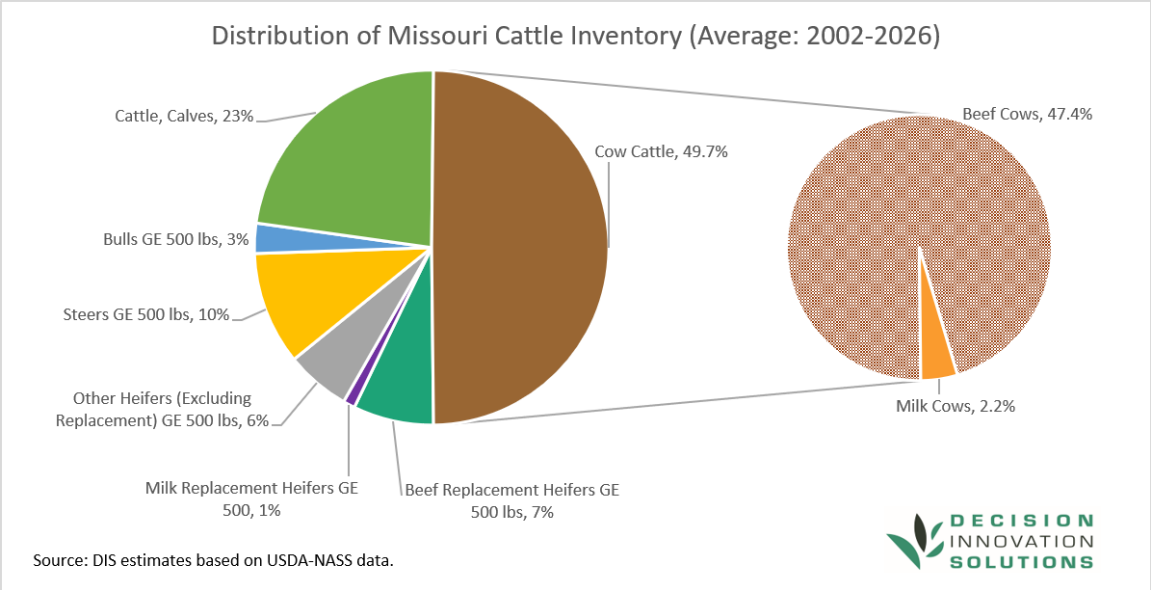


Figure 10. Distribution of Missouri Cattle Inventory (Average: 2002-2026)

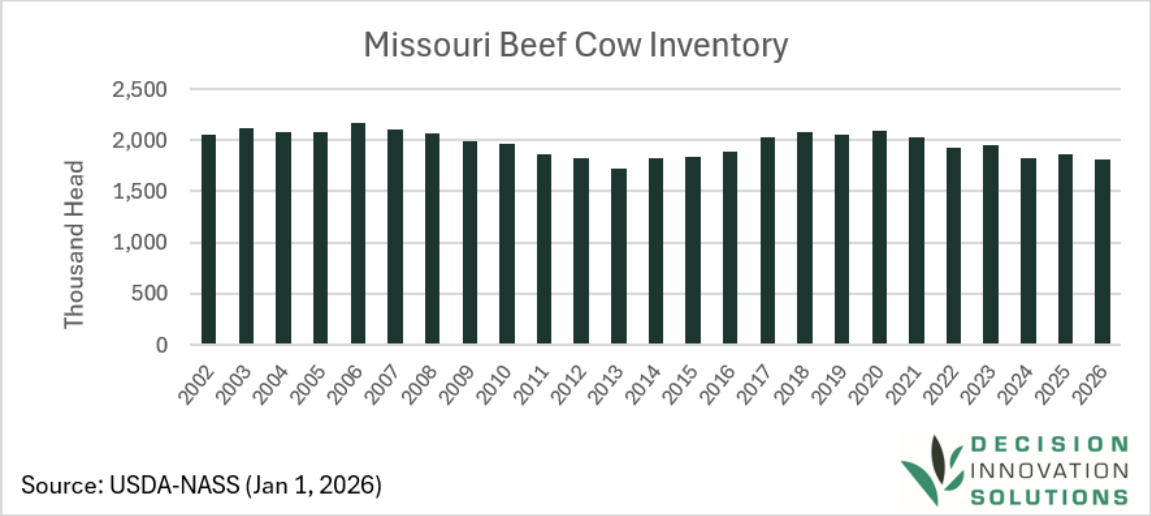


Figure 11. Missouri Beef Cow Inventory

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The state cattle on feed (COF)[1] inventory data have not been reported in the USDA Survey data since 2024. At that time, this inventory was estimated at 90,000 head, which was 10% lower than in 2021 (Figure 12). Based on DIS estimates, Missouri's cattle on feed inventory in 2025 was about 84,000 head. Missouri's calf crop in 2025 was 1.7 million head (Figure 13). In 2025, Missouri cattle production (measured in pounds) was estimated at 1.3 billion pounds, and it was valued at $3.6 billion (Figure 14). When compared with the previous year, the volume was down 2.0% while the value was up 21%, respectively, reflecting higher prices (up $0.51/lb. year-over-year).

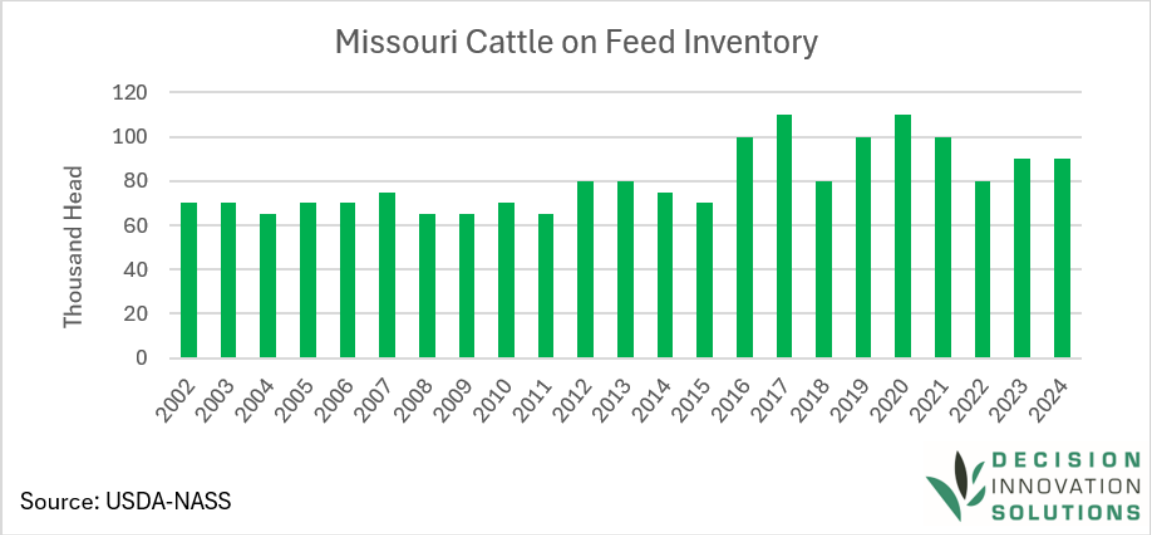


Figure 12. Missouri Cattle on Feed Inventory

[1] As indicated by USDA-NASS, the Cattle on Feed survey represents estimates of the number of cattle being fed a ration of grain, silage, hay and/or protein supplements for the slaughter market that are expected to produce a carcass that will grade select or better. This survey is conducted in the 16 largest cattle-feeding states, which represent 98% of U.S. cattle on feed in lots of 1,000 head + capacity. Data is used in conjunction with Cattle Inventory data from January and July to obtain a measure of cattle on feed not included in the survey.

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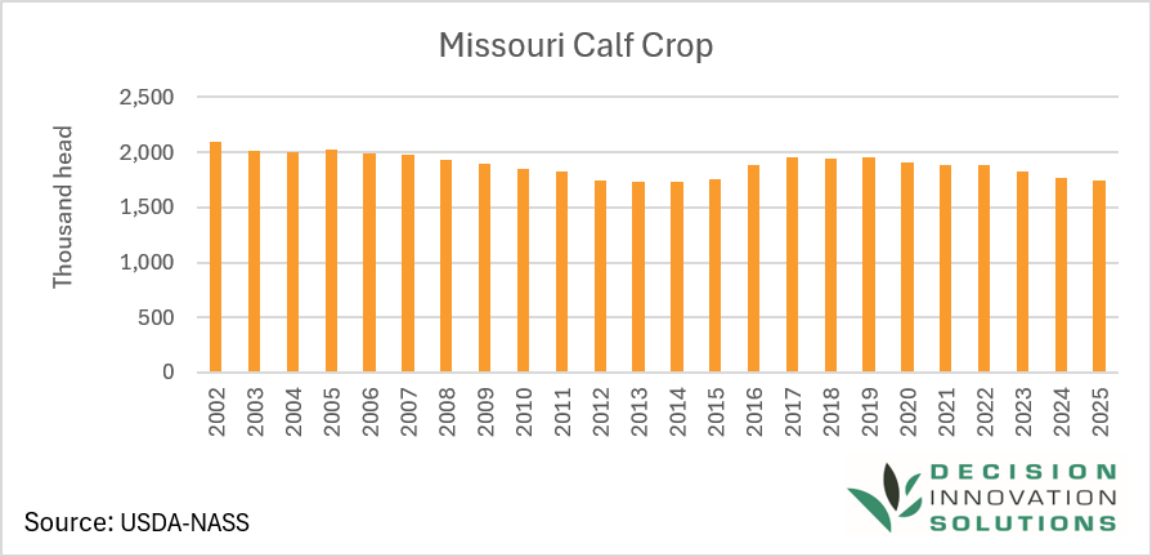


Figure 13. Missouri Calf Crop

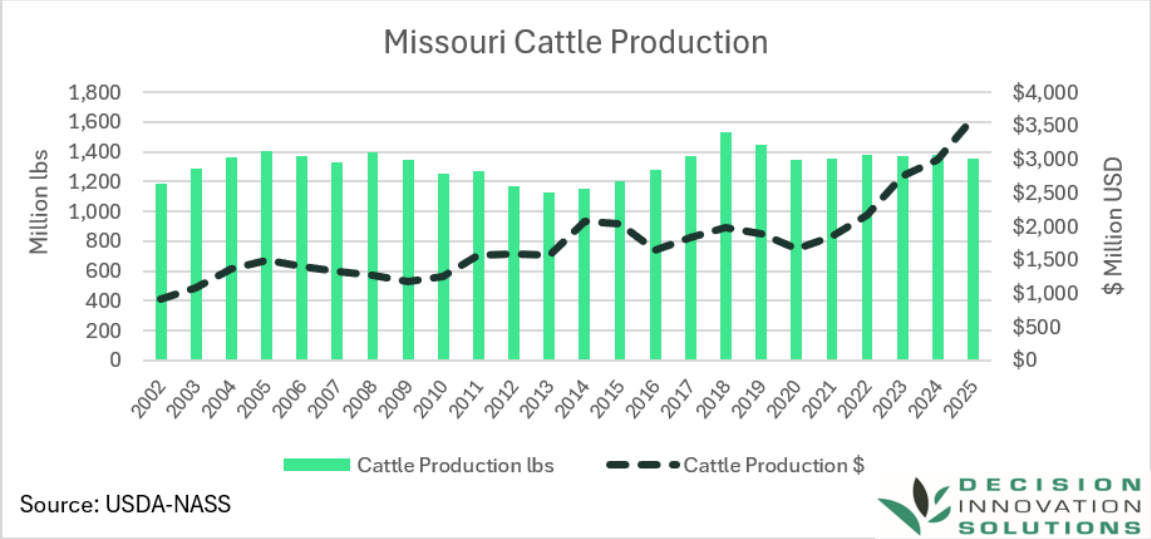


Figure 14. Missouri Cattle Production

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A Note About 2025 Missouri County Data: For cattle (beef cows and dairy cows), USDA's published 2025 county-level data were used. USDA aggregates inventory for counties without published data under "Other Counties." This inventory was distributed among counties without reported data according to each county's share of 2022 inventory in the Census of Agriculture. If a county had no published 2022 inventory data, "Operations by Size" data from the 2022 Census of Agriculture were used to help estimate the missing value.

As Figure 15 indicates in 2025 there were six counties in Missouri with more than 42,000 head of beef cows. The top three counties were Polk with 54,373 head, followed by Lawrence with 48,750 head and Texas with 48,560 head of beef cows.

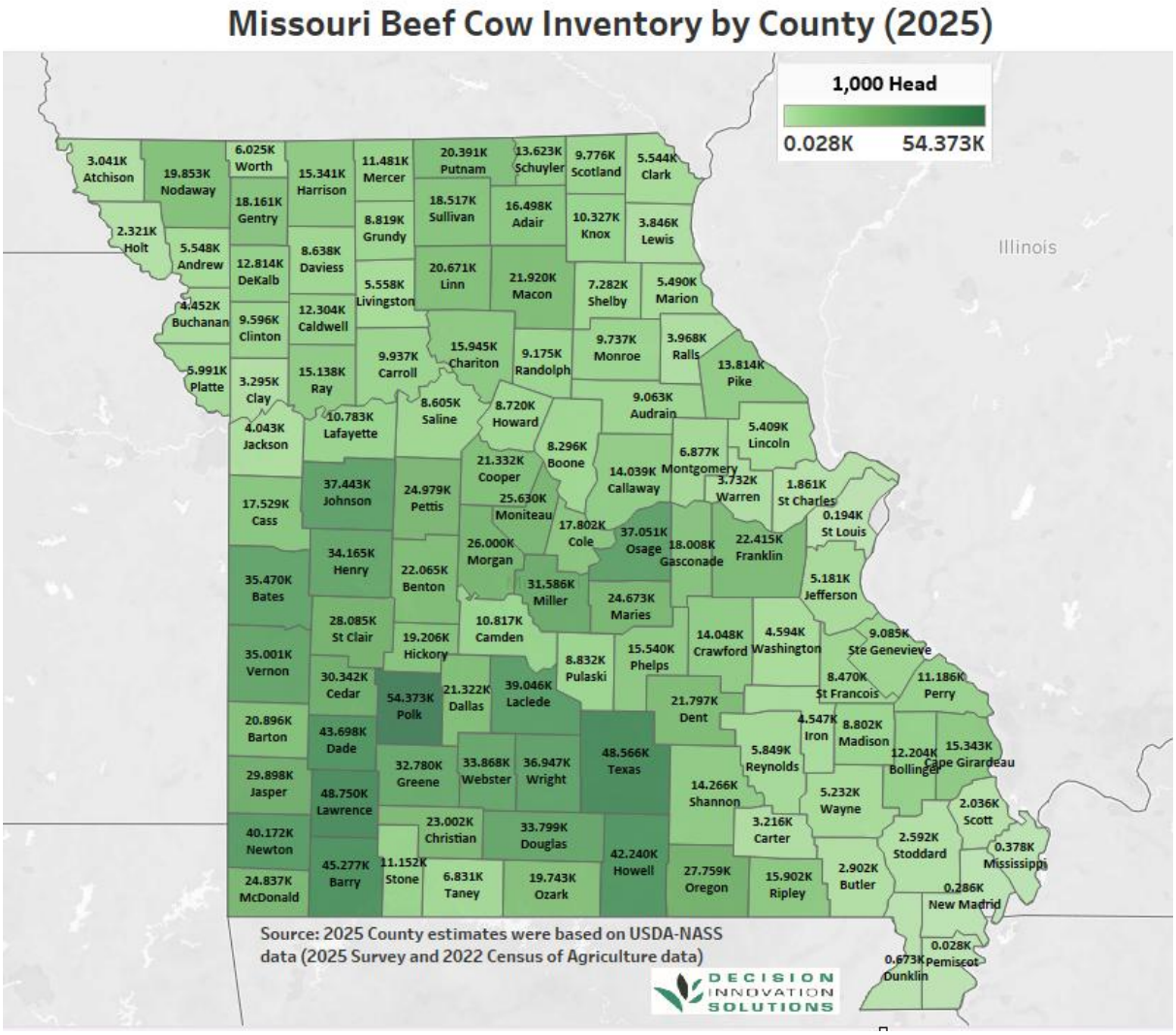


Figure 15. Missouri Beef Cow Inventory per County (2025)

2.5.2 Dairy

There were two counties with more than 3,000 dairy cows in Missouri in 2025 (Figure 16). The county with the most dairy cows in Missouri was Lewis County with 7,037 dairy cows followed by Barry and Wright counties with 6,928 and 3,241 dairy cows, respectively. State-wide there was an estimated decline of about 25% in dairy cow inventory from the 2017 census (84,977 dairy cows) to the 2022 census (63,882 dairy cows). Missouri's dairy cows were estimated at 56,000 head in 2025.

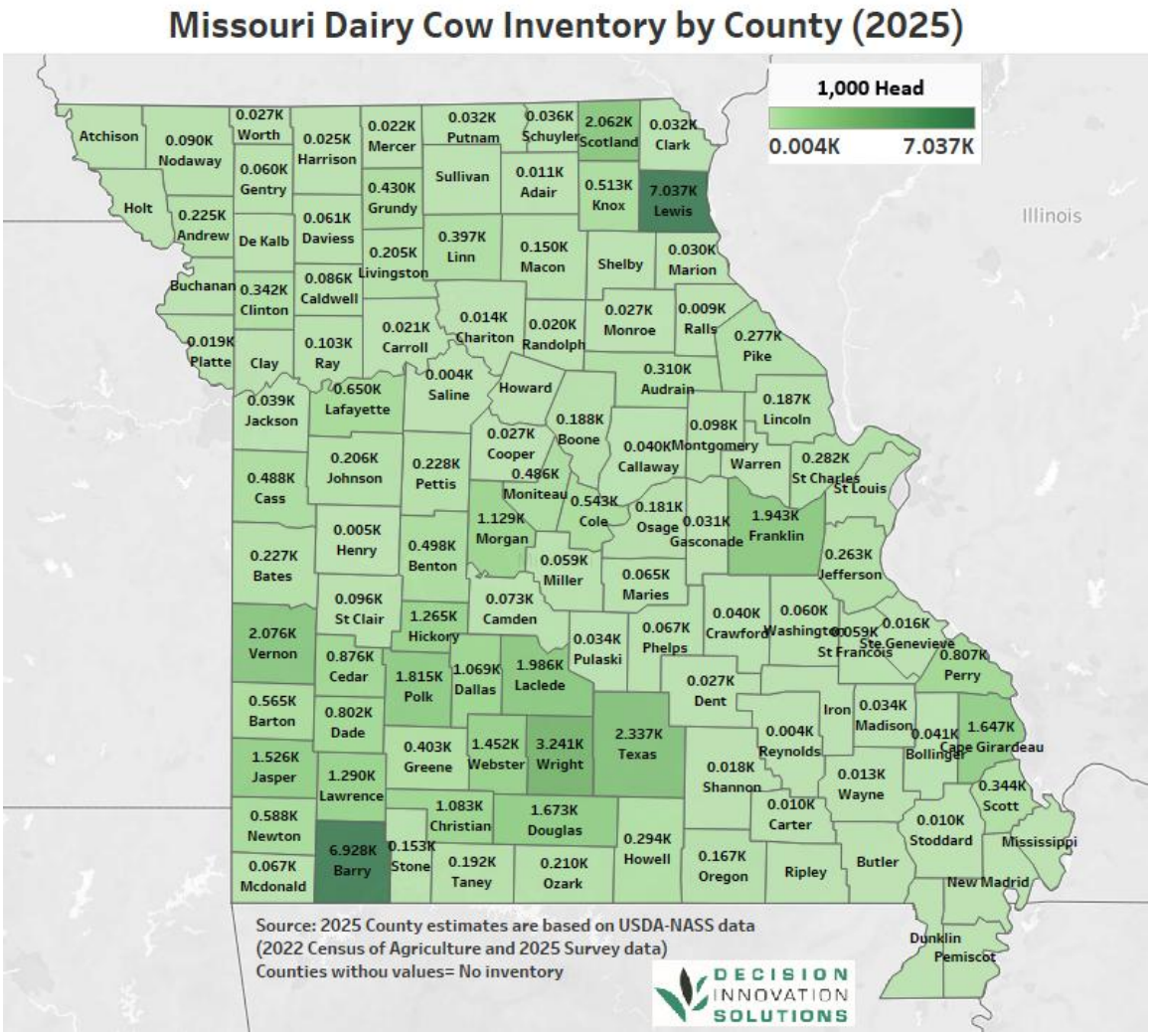


Figure 16. Missouri Dairy Cow Inventory by County (2025)

The number of grade A dairy farms in Missouri has declined since 2000 (Figure 17), from 1,796 farms in 2000 to 278[2] in 2026. At the same time, the number of Manufacturing Grade dairy farms fell from 495 farms to 42 in 2026. The 278 and 42 numbers include both cow and small ruminant dairies. There are about 15 grade A milk goat dairies in Missouri and an estimated 25 to 35 grade B small ruminant (goat and/or sheep) milk producers in Missouri[3].

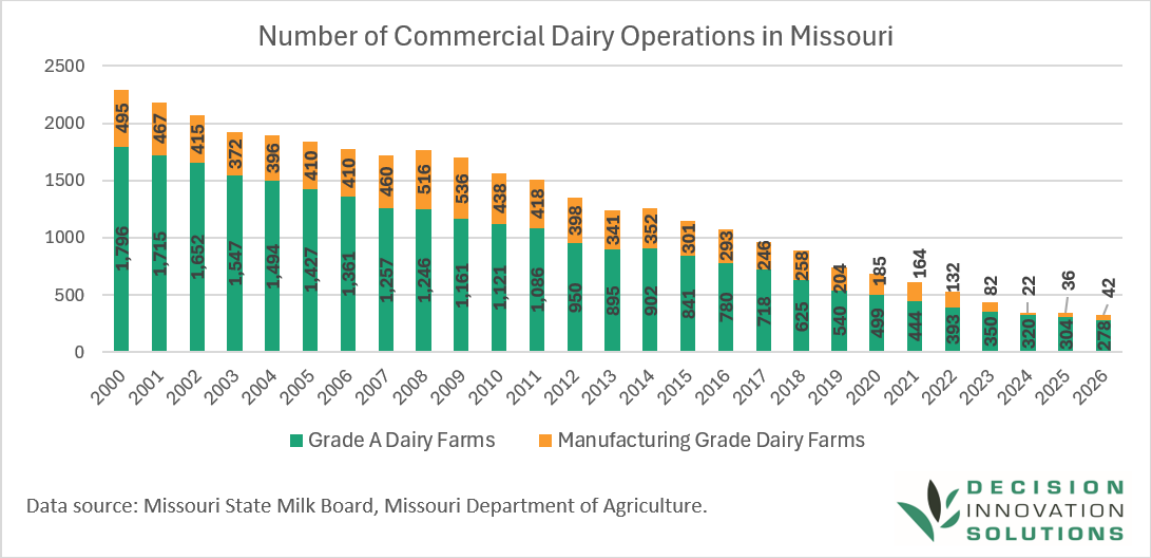


Figure 17. Missouri Commercial Dairy Farms, Grade A and Manufacturing Grade

[2] Missouri State Milk Board, Missouri Department of Agriculture https://agriculture.mo.gov/animals/milk/

[3] https://www.lincolnu.edu/publications/animal-science/missouri-small-ruminant-production-survey-report.html

Missouri's milk cow inventory has followed a downward trend since 2002 (see Figure 18). Inventories decreased from 140,000 head in 2002 to 56,000 head (down 61%) in 2026 (January 1). The share of Missouri dairy cow inventory to U.S. numbers fell from 1.5% in 2002 to 0.6% in 2026 (January 1).

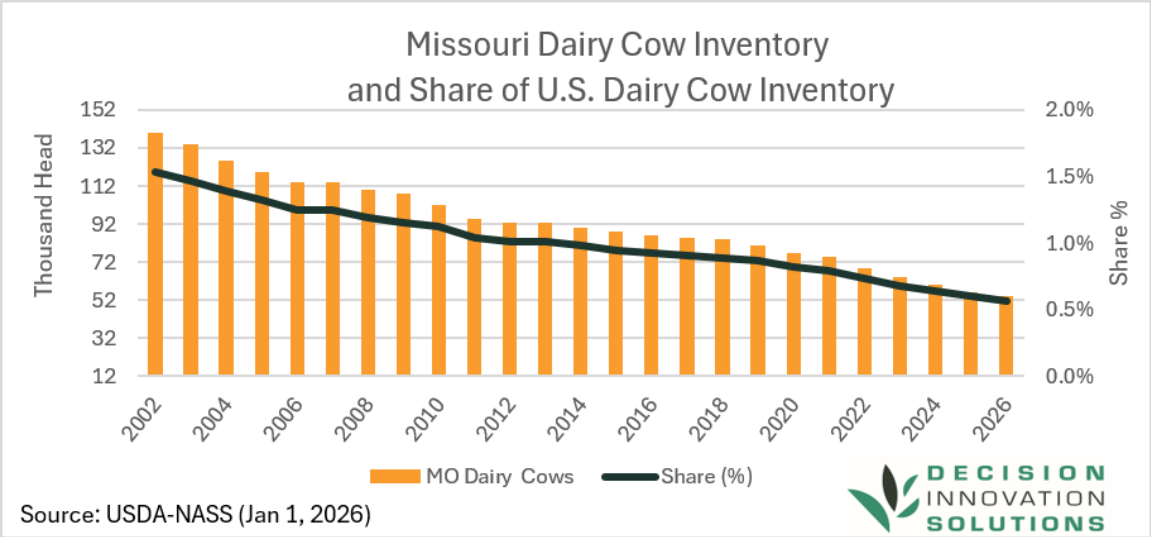


Figure 18. Missouri Dairy Cow Inventory

Missouri milk production has declined by about 61% from 2002 to 2025. The value of milk production has declined by approximately 31% since 2002 (see Figure 19).

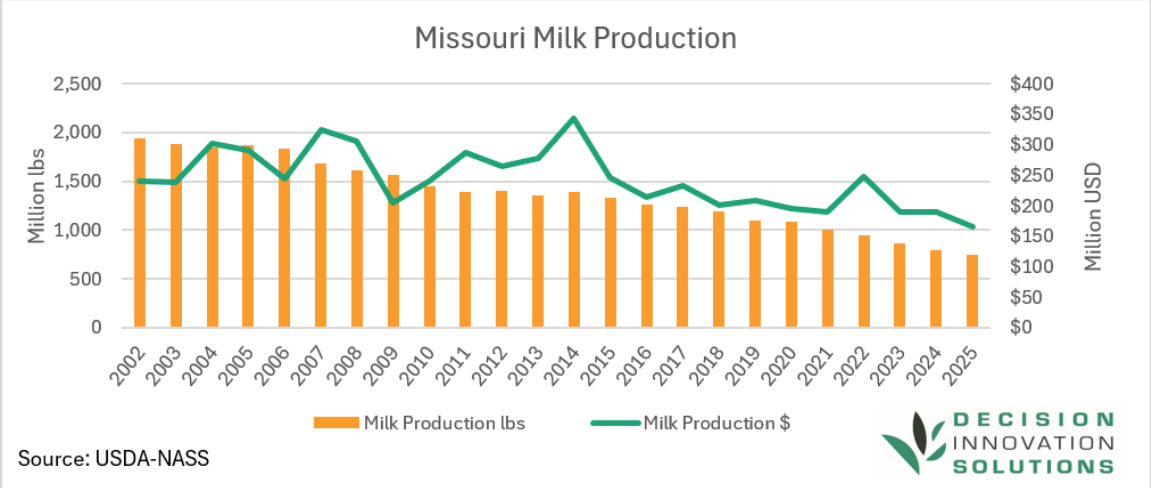


Figure 19. Missouri Milk Production

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2.5.3 Hogs

A Note About 2025 Missouri County Data: For hogs, each county's share of total hog inventory in the 2022 Census of Agriculture was used to allocate Missouri's 2025 state hog inventory across all counties.

Based on the 2022 Census of Agriculture, the county with largest number of hogs was Sullivan County with 231,284 head, followed by Callaway County with 208,868 head and Vernon County with 178,882 head. Applying each county's 2022 share to December 1, 2025, state inventory of 3.30 million head gives estimated 2025 inventories of 231,928 head in Sullivan County, 209,455 head in Callaway County and 179,392 head in Vernon County (Figure 20). County values for 2025 are estimates: USDA publishes county hog inventory only in the Census.

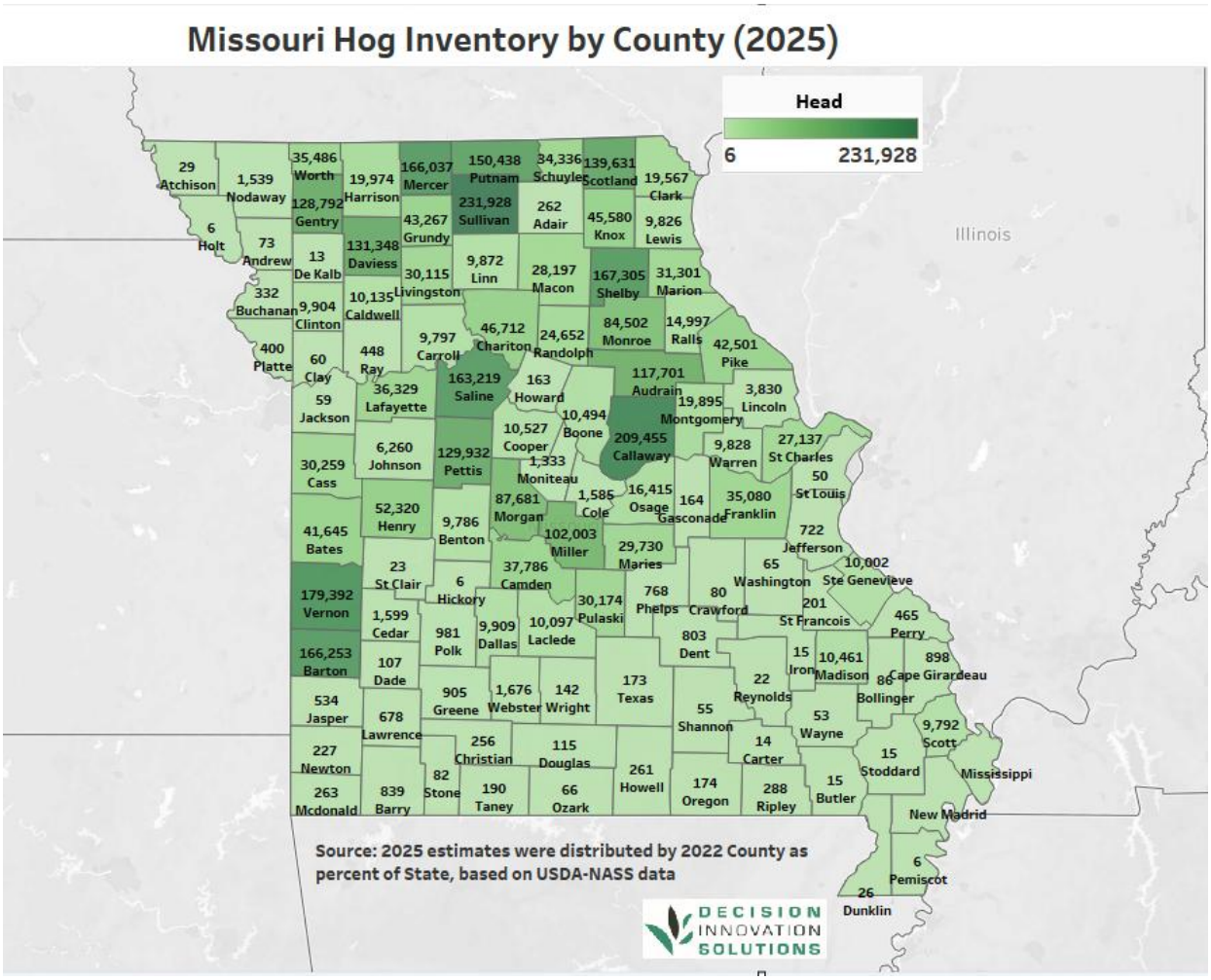


Figure 20. Missouri Hog Inventory by County (2025)

Missouri hog inventory has been stable to lower in recent years. Market hog inventory has fluctuated between 2.4 million head in 2005 and 3.3 million head in 2020. The December 1, 2025 market herd of 2.9 million head was 11% below 2020. Breeding stock declined 10% from 440,000 head in 2020 to 395,000 head in 2025, implying that breeding and market inventories have declined at similar rates (Figure 21). Higher productivity has offset the smaller sow herd: pigs saved per litter rose from 11.1 in 2020 to 12.0 in 2025 and the 2025 pig crop of 10.4 million head was within 7% of the 2020 record.

The value of hog production in Missouri peaked in 2023 at slightly more than $1.29 billion, supported by record high production of 2.31 billion pounds. The value declined to $1.17 billion in 2025 as production fell to 1.56 billion pounds (see Figure 22). Cash receipts from hogs were $1.17 billion in 2025, 7.7% of Missouri's agricultural cash receipts, and Missouri ranked eighth among states in cash receipts generated from hogs.

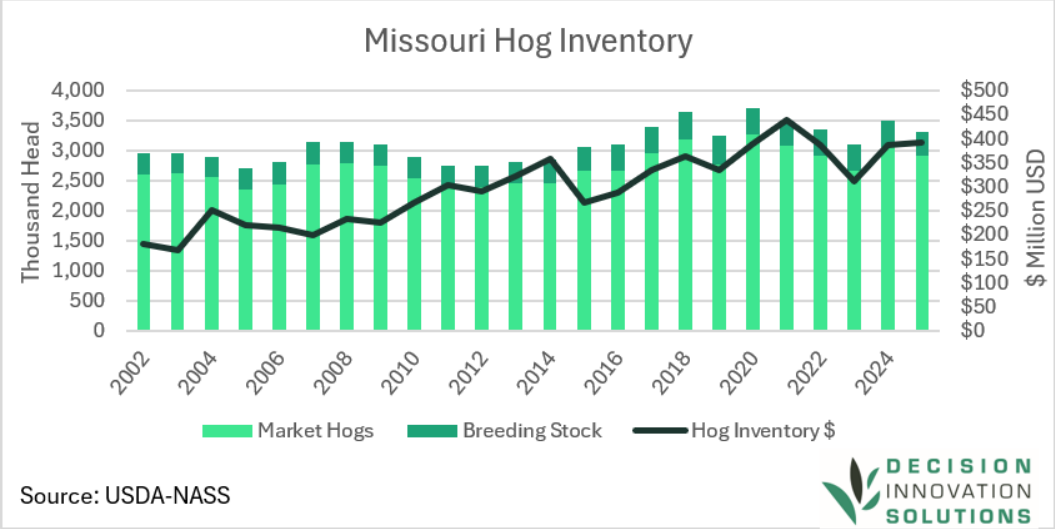


Figure 21. Missouri Hog Inventory

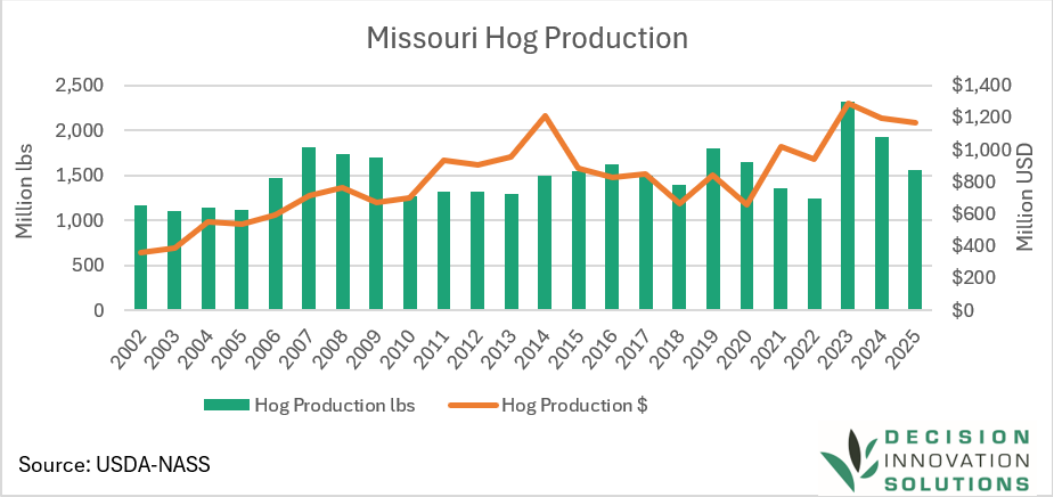


Figure 22. Missouri Hog Production

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2.5.4 Poultry

A Note About 2025 Missouri County Data: The USDA's Survey 2025 state-level turkey production data were distributed across counties based on each county's share of turkey inventory reported in the USDA's 2022 Census of Agriculture. For broilers and layers, 2025 state-level production for broilers and inventory for layers were distributed across counties based on each county's share of the corresponding inventory in the 2022 Census of Agriculture. For counties with undisclosed 2022 data, values reported in 2017 were used instead. For counties with undisclosed data in both 2017 and 2022, "Operations by Size" data published in the 2022 Census of Agriculture were used to estimate the missing values.

In 2025, Missouri had three counties with annual broiler production above 40.0 million head, with Barry County at the top with 62.6 million head, followed by Newton and Morgan and counties with 47.4 million head and 41.9 million head, respectively. The state also had three counties with inventories between 33.9 million head and 14.4 million head (see Figure 23).

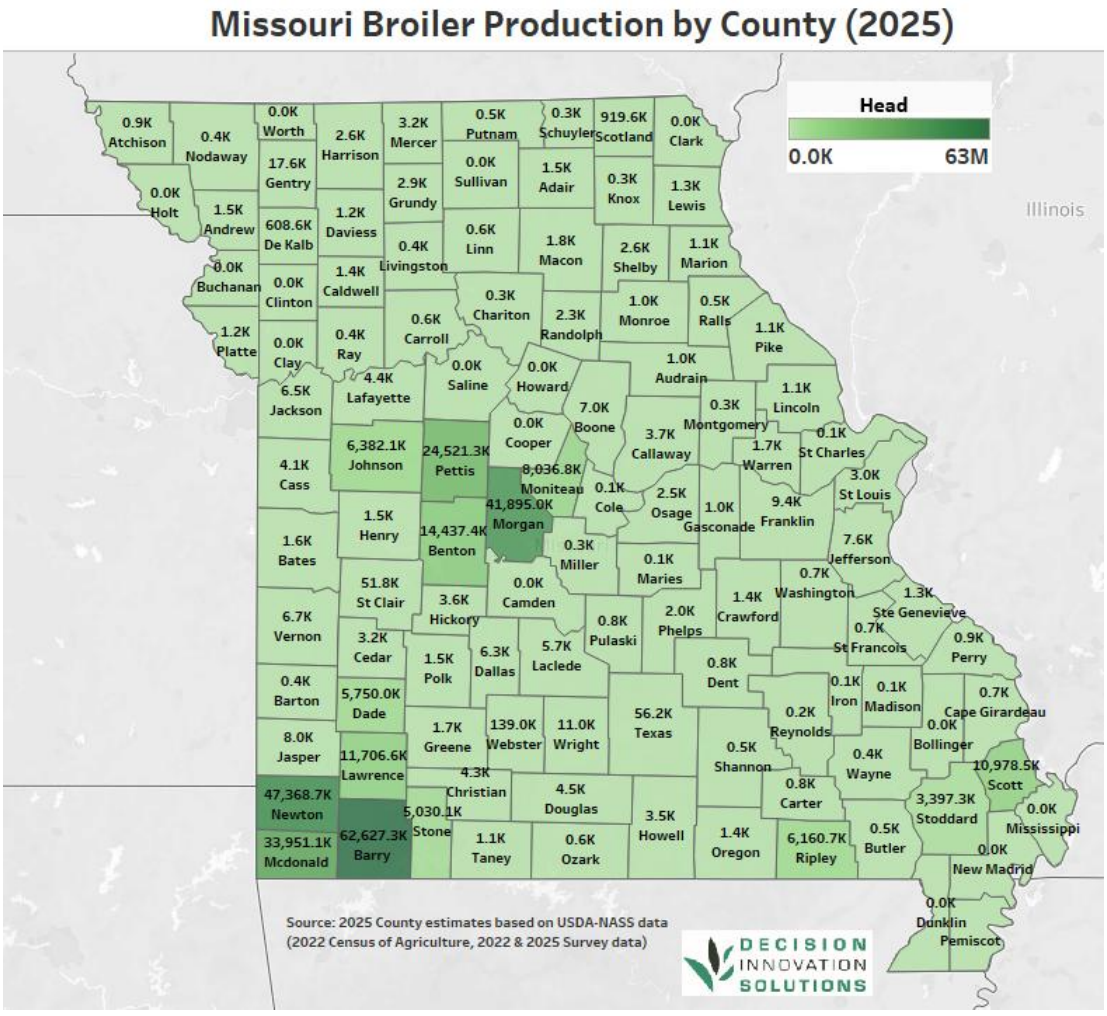


Figure 23. Missouri Broiler Production by County (2025)

Broiler production in Missouri has fluctuated over time. The volume and value peaked in 2022 at 1.75 billion pounds and $1.49 billion, respectively. In 2025, both volume and value increased year-over-year. However, compared with 2022, the volume was down 11% to 1.56 billion pounds while the value declined 25% to $1.12 billion. (see Figure 24).

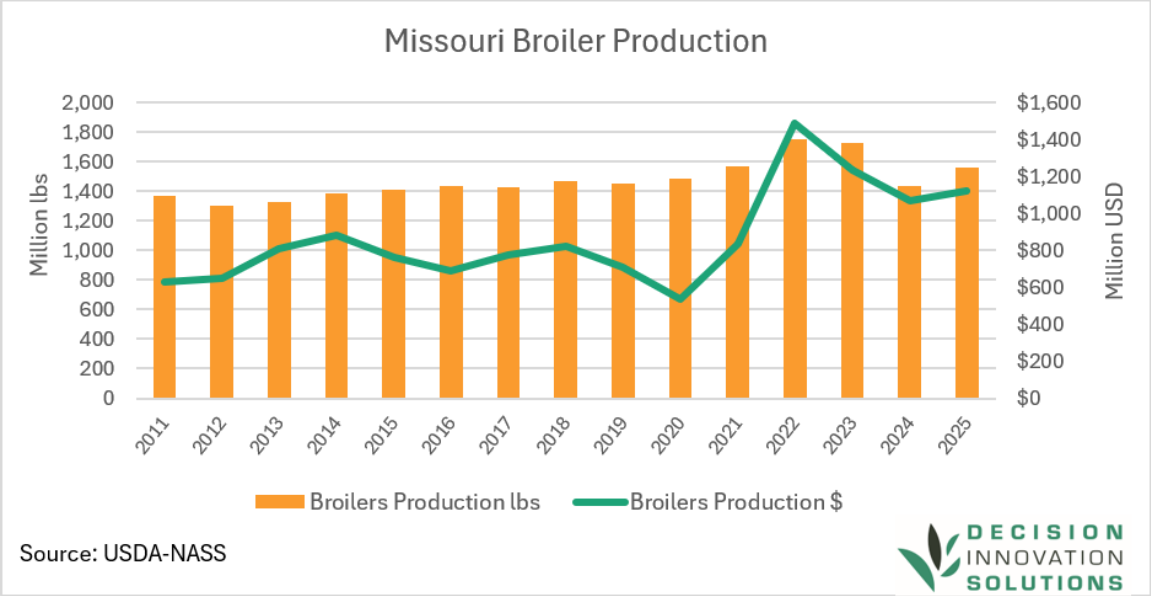


Figure 24. Missouri Broiler Production

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2025 Missouri turkey production was mostly concentrated in the southwest portion of the state and in the central area of Missouri. Lawrence County had the largest turkey production with 2.2 million head followed by Morgan County with 2.1 million head. Two counties had about 2.0 million head (Barry, and Newton), while three counties in Missouri had more than 1.0 million head (Osage, Miller, and Moniteau) (Figure 25).

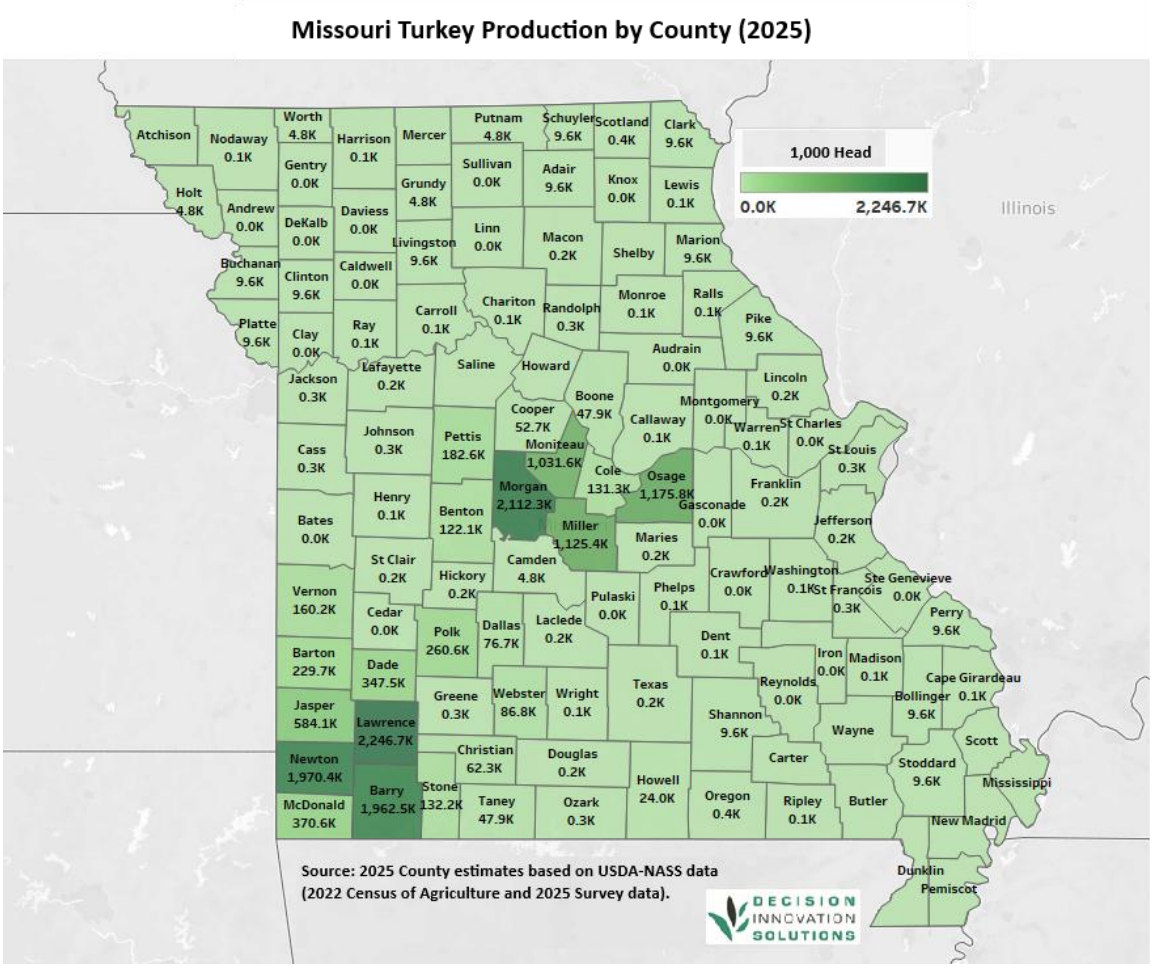


Figure 25. Missouri Turkey Production by County (2025)

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As shown in Figure 26, from 2022 through 2025 the volume of turkey production in Missouri averaged about 343.0 million pounds, down 40% from the previous four years (2018-2021). In terms of value, Missouri's turkey production from 2022 to 2025 averaged $298.5 million; which fell 20% compared with 2018-2021. However, in 2025 the value increased 53% year-over-year.

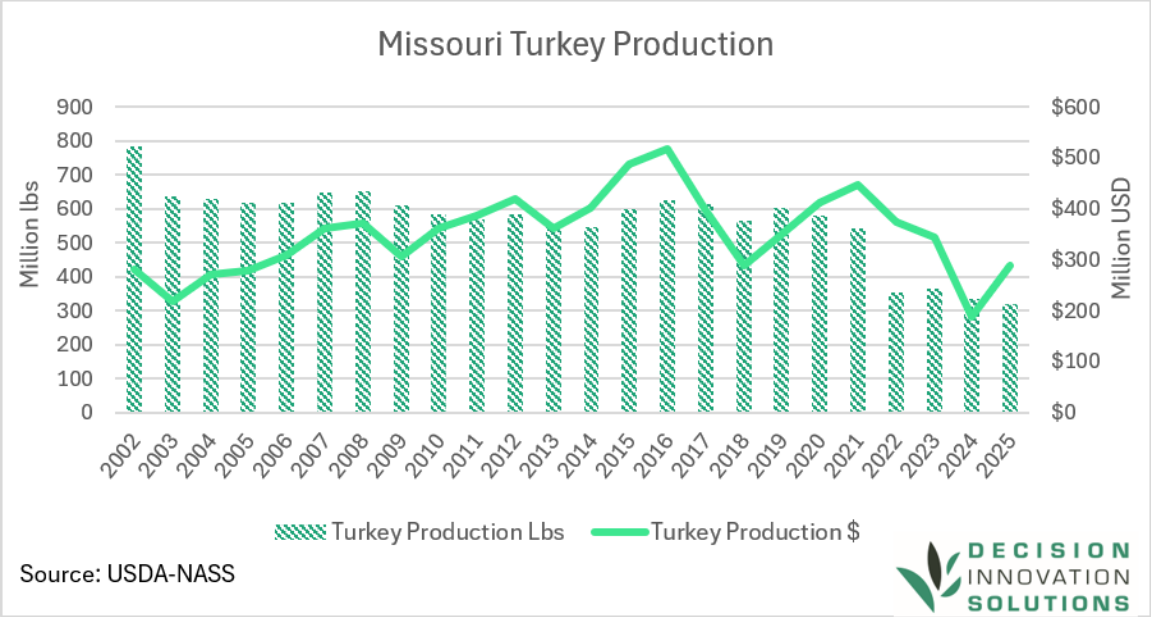


Figure 26. Missouri Turkey Production

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According to USDA-NASS Survey data Missouri's layer inventory was 18.197 million head on December 1, 2025. According to the 2025 county allocation the top counties were: Newton (3.42 million head), Johnson (3.18 million head), and Lincoln (3.13 million head) (see Figure 27).

Other counties with large number of layers were Pettis County with 992,900 head, followed by Dallas County with 913,600 head, and Polk County with 850,700 head.

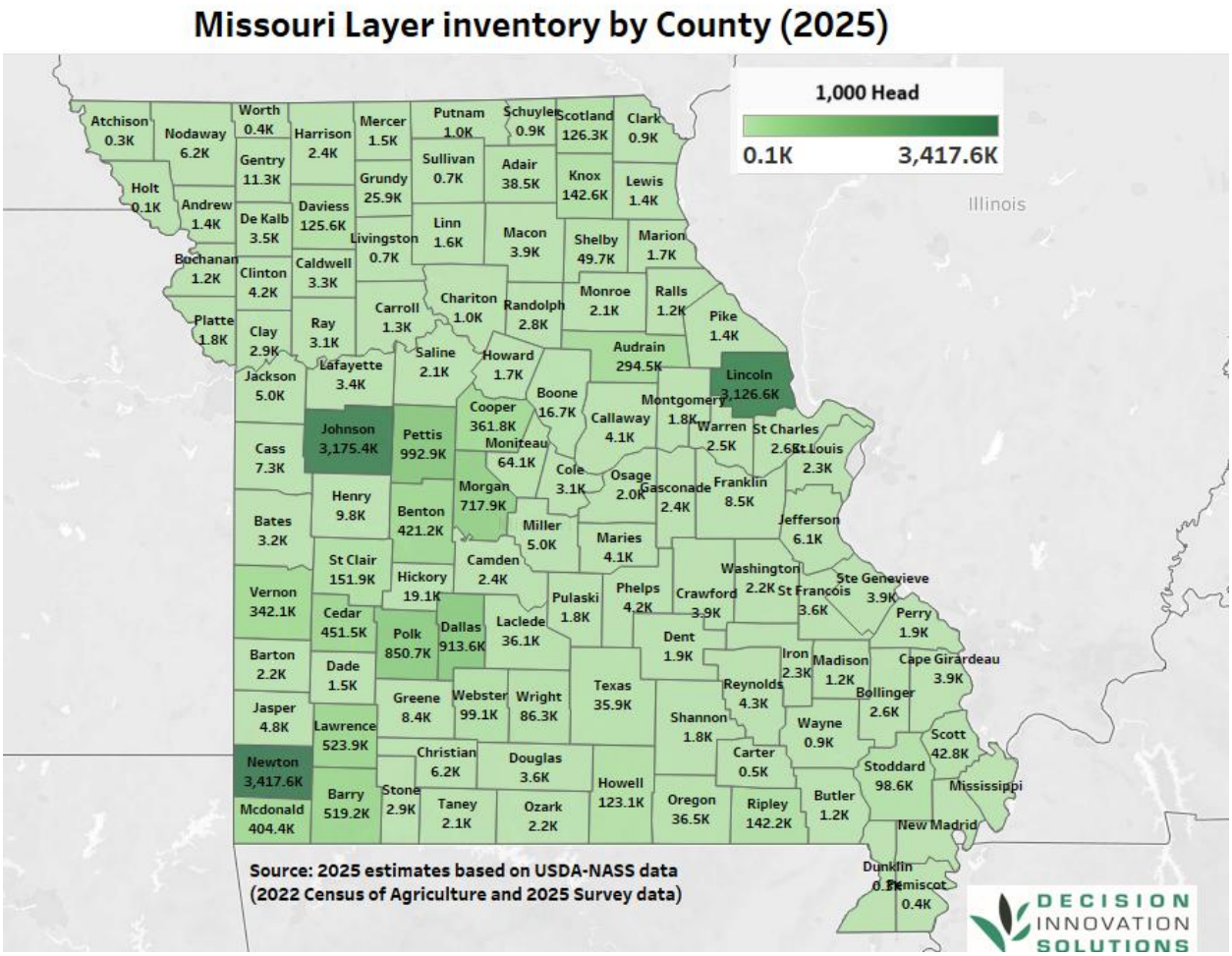


Figure 27. Missouri Layer Inventory by County (2025)

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2.5.5 Goats and Sheep

A Note About 2025 Missouri County Data: The 2025 state inventories of goats and sheep were allocated by county based on their 2022 distributions. For counties with undisclosed 2022 data, "Operations by Size" data were used in the allocation process.

Figure 28 shows Missouri goat inventories in 2025. The top three counties in the state included Texas (3,922 head), Dade (2,383 head), and Boone (2,349 head). In addition, the county with the highest sheep inventory was Vernon (3,497 head), followed by Laclede and Webster counties with 3,263 head and 2,867 head, respectively (Figure 29).



Figure 28. Missouri Goat Inventory by County (2025)

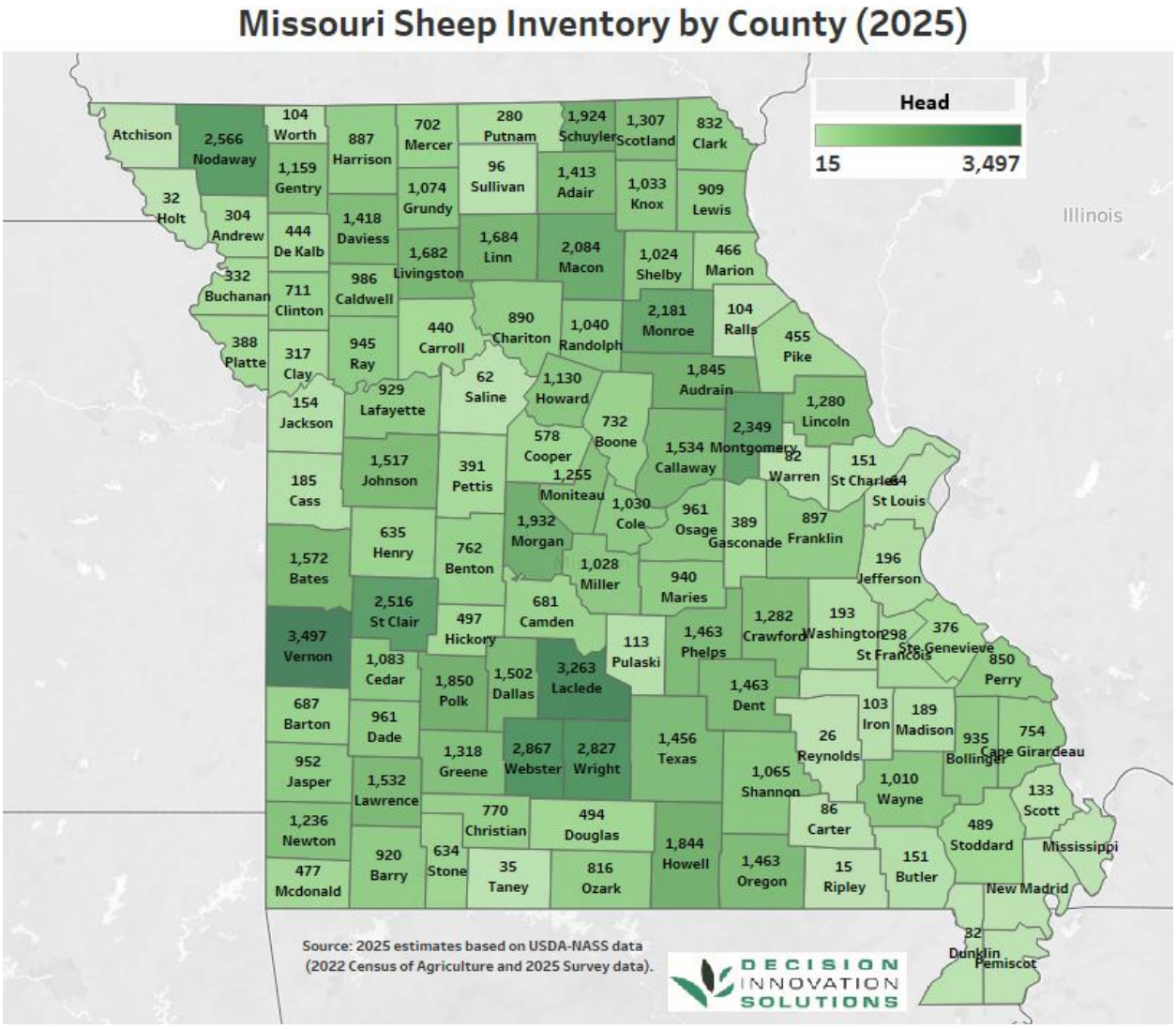


Figure 29. Missouri Sheep Inventory by County (2025)

2.5.6 Horses

The number of farms in Missouri that reported having equine inventory has been trending downward during the last two decades, declining from 23,632 farms in 2002 to 14,489 in 2022. The equine inventory in Missouri reported by USDA has declined from 149,165 head in 2007 to slightly more than 72,250 in 2022 (Figure 30).

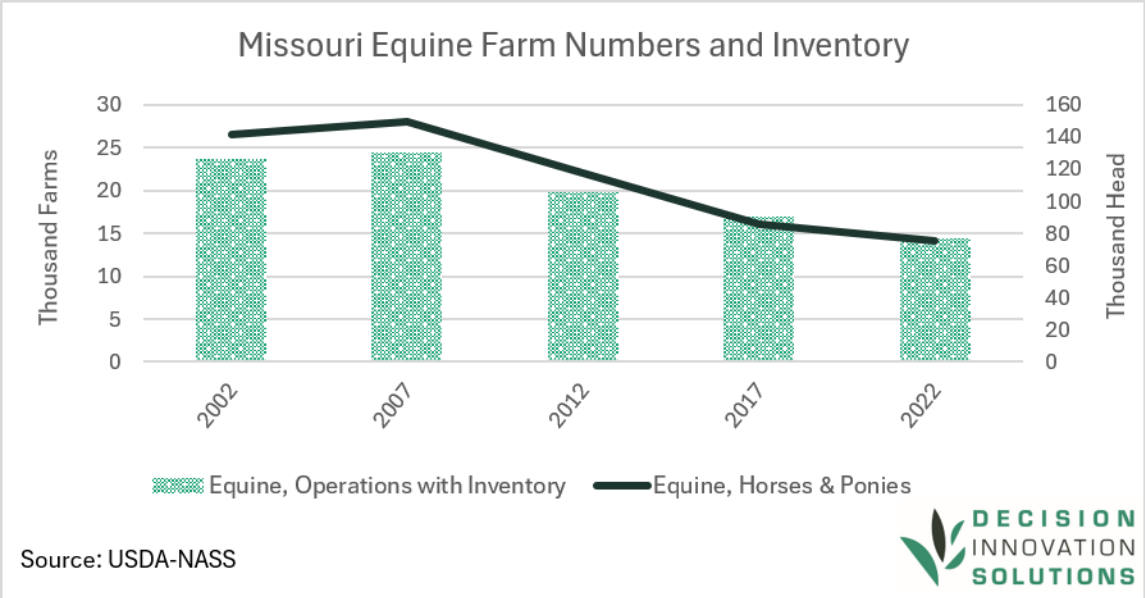


Figure 30. Missouri Equine Farm Numbers and Inventory

2.6 Missouri Livestock, Meat and Poultry Processing

Across the state of Missouri, there are 10 beef-only slaughter facilities, 2 pork-only slaughter facilities, 3 chicken-only slaughter facilities, 3 turkey-only slaughter facilities, 8 multi-species poultry slaughter facilities, 67 multi-species (mainly beef and hogs, but may include others such as lambs & sheep, and/or goats) slaughter facilities, and 83 facilities that do further processing of meat and/or poultry products (Figure 31).

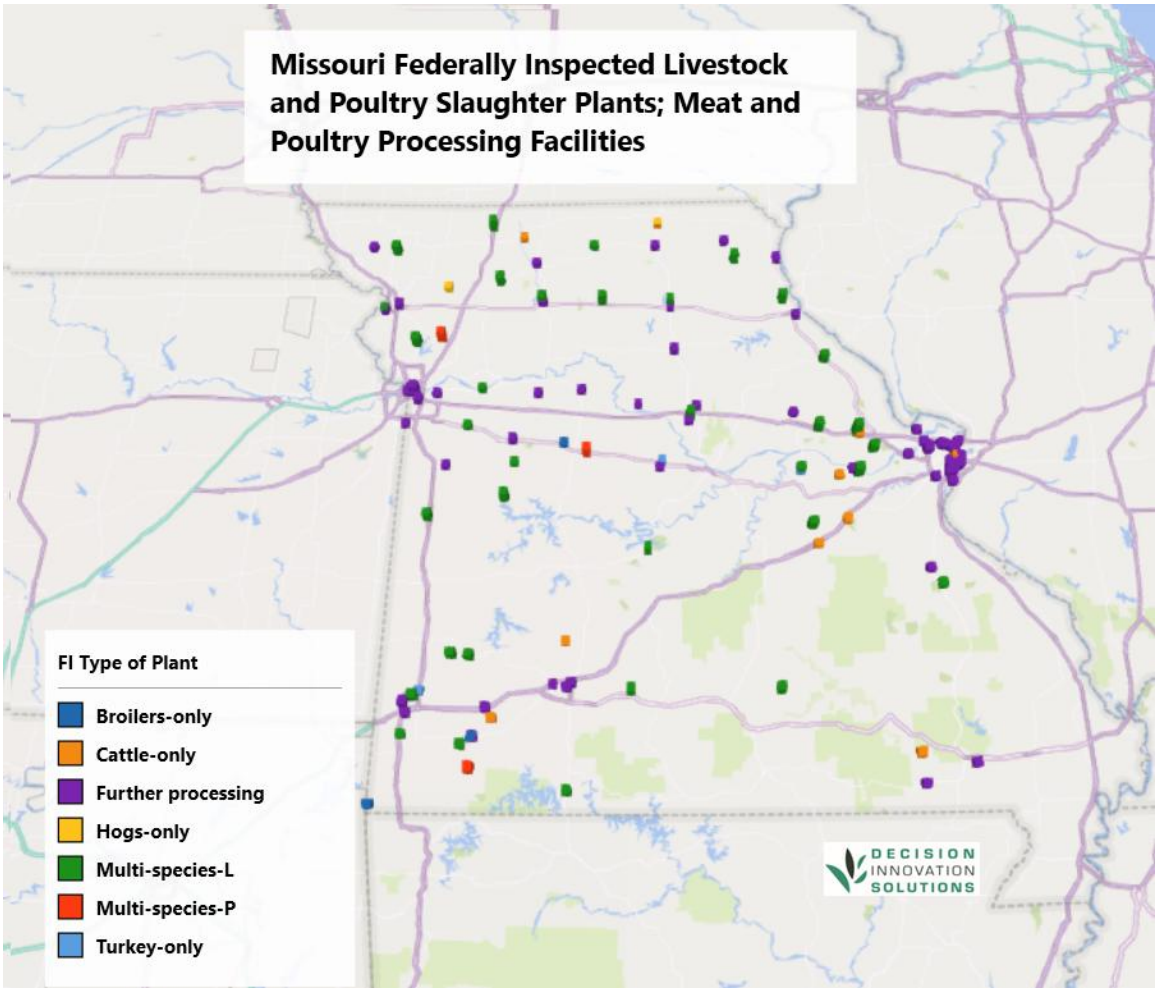


Figure 31. Missouri Federally Inspected Meat and Poultry Processing Plants

As shown in Figure 32, according to Missouri Department of Agriculture Meat and Poultry Inspection Programs (MPIP)[4], Missouri has 110 custom exempt plants, 30 state inspected red meat facilities, 8 state inspected red meat facility exclusively for slaughter, and 2 state inspected poultry facilities (slaughter and processing).

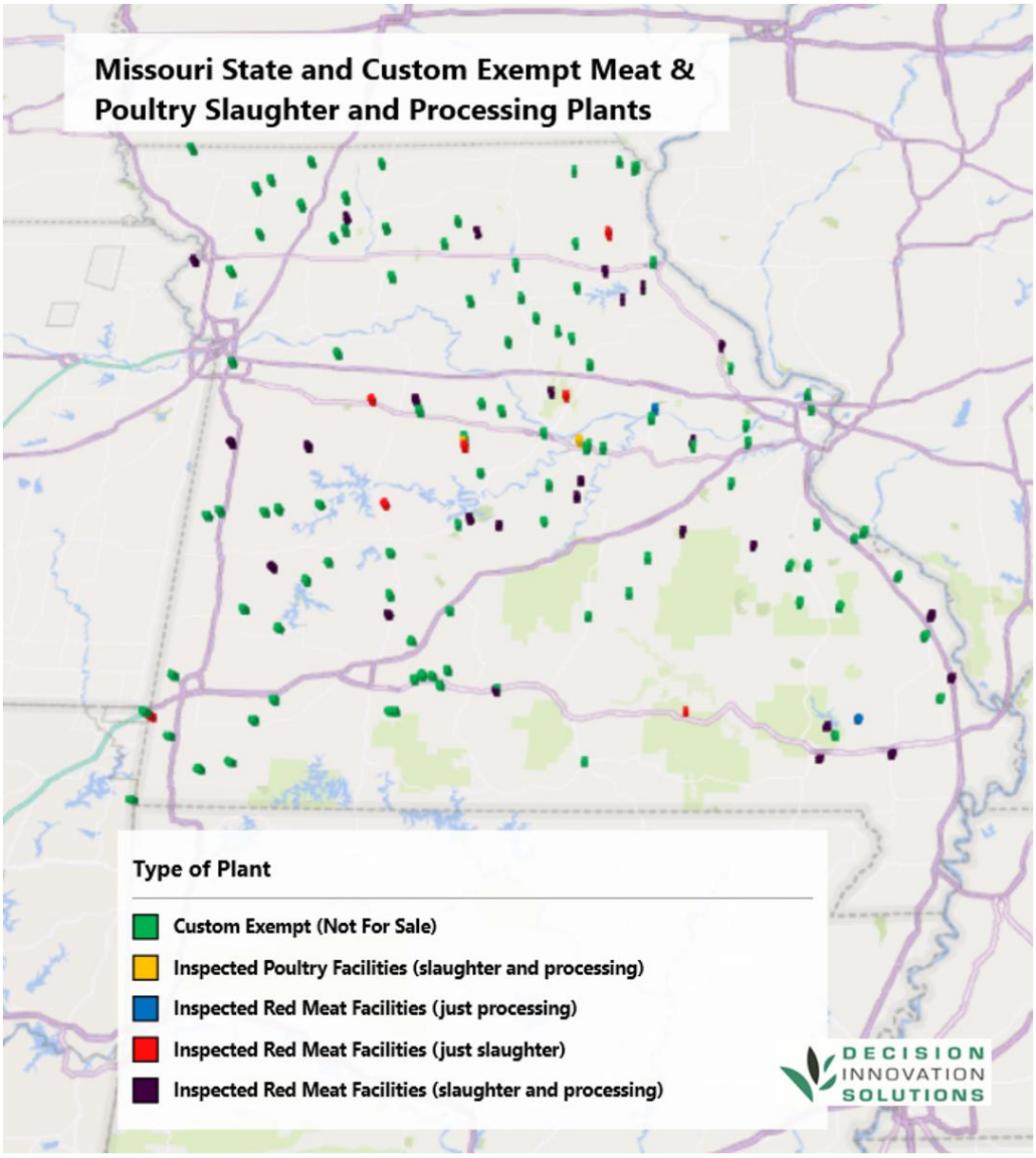


Figure 32. Missouri State and Custom Exempt Meat and Poultry Slaughter and Meat Processing Facilities

[4] https://agriculture.mo.gov/animals/health/inspections/

Missouri has 42 dairy product manufacturing plants (see Figure 33). For this data, DIS reviewed several publications from organizations such as University of Missouri Extension[5] and Dairy Food Magazine[6]. The Dairy Plants USA list provided by Dairy Food Magazine contains a Missouri list of processors supplying milk, cheese, yogurt, ice cream, and other dairy products.

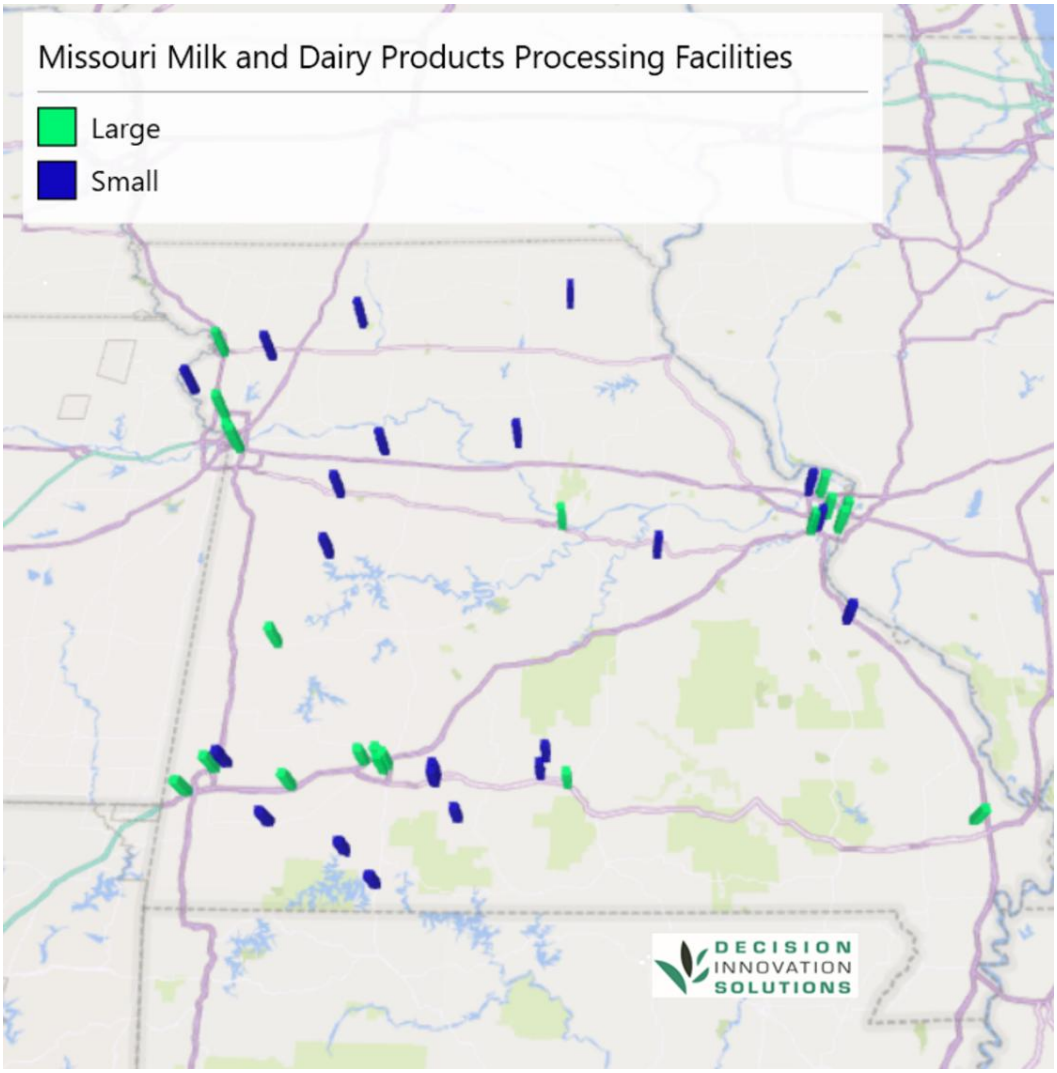


Figure 33. Missouri Milk and Dairy Product Processors

[5]University of Missouri Extension:
Economic Contribution of Missouri Dairy Product Manufacturing Industry
https://www.missouridairy.com/uploads/4/0/2/6/40260121/dairymfgeconimpact.pdf
Missouri Dairy Industry Revitalization Study. Section 4: Value Chain, Marketing and Processing
https://docslib.org/download/8221968/section-4-value-chain-marketing-and-processing-missouri-dairy-industry-revitalization-study-section-4-marketing-processing-and-value-chain

[6] Dairy Food Magazine, Directories – Dairy Plants USA
https://www.dairyfoods.com/directories/7376-dairy-plants-usa

2.7 Grain Elevators, Feedmills and Grain Processors

Missouri has 127 facilities with feedmill operations only, 146 grain elevators, and 87 facilities that have grain elevator and feedmill operations. Also, there are 22 licensed pet food manufacturers, and 5 grain elevators with soybean crushing operations. The state has 3 grain elevators combined with feedmills and ethanol facilities. In addition, Missouri has 3 grain elevators that are non-ethanol corn processors as well. There is one grain elevator combined with soybean crushing and feedmill operations. The state also has 1 grain elevator with durum wheat mill facilities, 1 grain elevator with durum wheat mill and feedmill operations; and 1 grain elevator with non-ethanol corn processing and feedmill capabilities (see Figure 34). Source: https://www.arcgis.com/home/item.html?id=96ec03e4fc8546bd8a864e39a2c3fc41#overview

Sources of data for the map below includes, Missouri Soybean Association (soybean crushers), Department of Health and Human Services (FDA BSE/Ruminant Feed Inspections Firms Inventory), U.S. Energy Information Administration (EIA, U.S. Fuel Ethanol Plant Production Capacity), Ethanol Magazine (Ethanol Plant List), Missouri Department of Agriculture (Licensed Grain Dealer/Warehouse Database Listings), and the 2025 North American Grain & Milling Annual book.

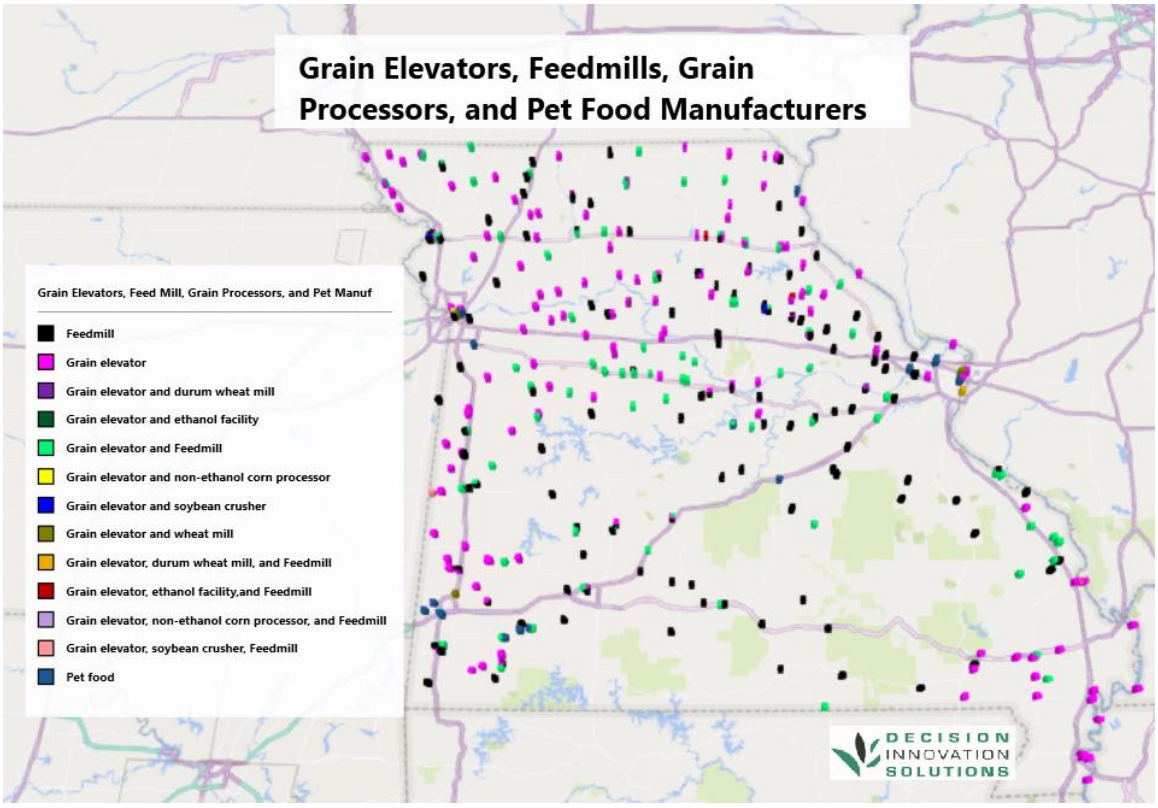


Figure 34. Missouri Grain Elevators, Feedmills, and Grain Processors

Figure 35 shows the rail network existing in Missouri.



Source: Missouri agriculture infrastructure map on ArcGIS

Figure 35. Missouri Rail Network

2.7.1 Missouri Soybean Crush Capacity

According to the Missouri Soybean Association, the state soybean crush capacity is estimated at 14,848 MT/day, which is distributed among six plants. There are four large plants with capacity ranging from 5,852 MT/day to 2,041 MT/day. Eighty-five percent of the crush capacity is in the western region of the state (Table 6).

Table 6. Missouri Soybean Crush Capacity

Missouri Soybean Crush Capacity			
Plant	**City**	**Capacity (Bu/day)**	**Soybean Capacity (MT/Day)**
ADM	Deerfield	100,000	2,722
ADM	Mexico	75,000	2,041
AGP	St. Joseph	150,000	4,083
Cargill	Kansas City	215,000	5,852
Moberly Natural Crush	Moberly	3,500	95
CGB/Tiger Soy	Mexico	2,000	55
Total		545,500	14,848

Source: Missouri Soybean Association (Sep 2026)

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2.7.2 Missouri Ethanol and Biodiesel Production Capacity

Missouri's current annual ethanol production capacity is estimated at 337.5 million gallons, distributed among 6 plants, with capacity ranging from 21 million gallons to 80 million gallons (Figure 36). Most of the plants are in the northern part of the state. Based on the annual capacity estimated, Missouri ethanol plants could process up to 116.4 million bushels of corn and produce an estimated 923,805 tons of distiller's grains.

Missouri annual biodiesel production capacity was estimated at 257 million gallons, distributed among 5 plants, with capacity ranging from 35 million gallons to 70 million gallons (Figure 36). The western side of the state has most of the biodiesel production in Missouri.

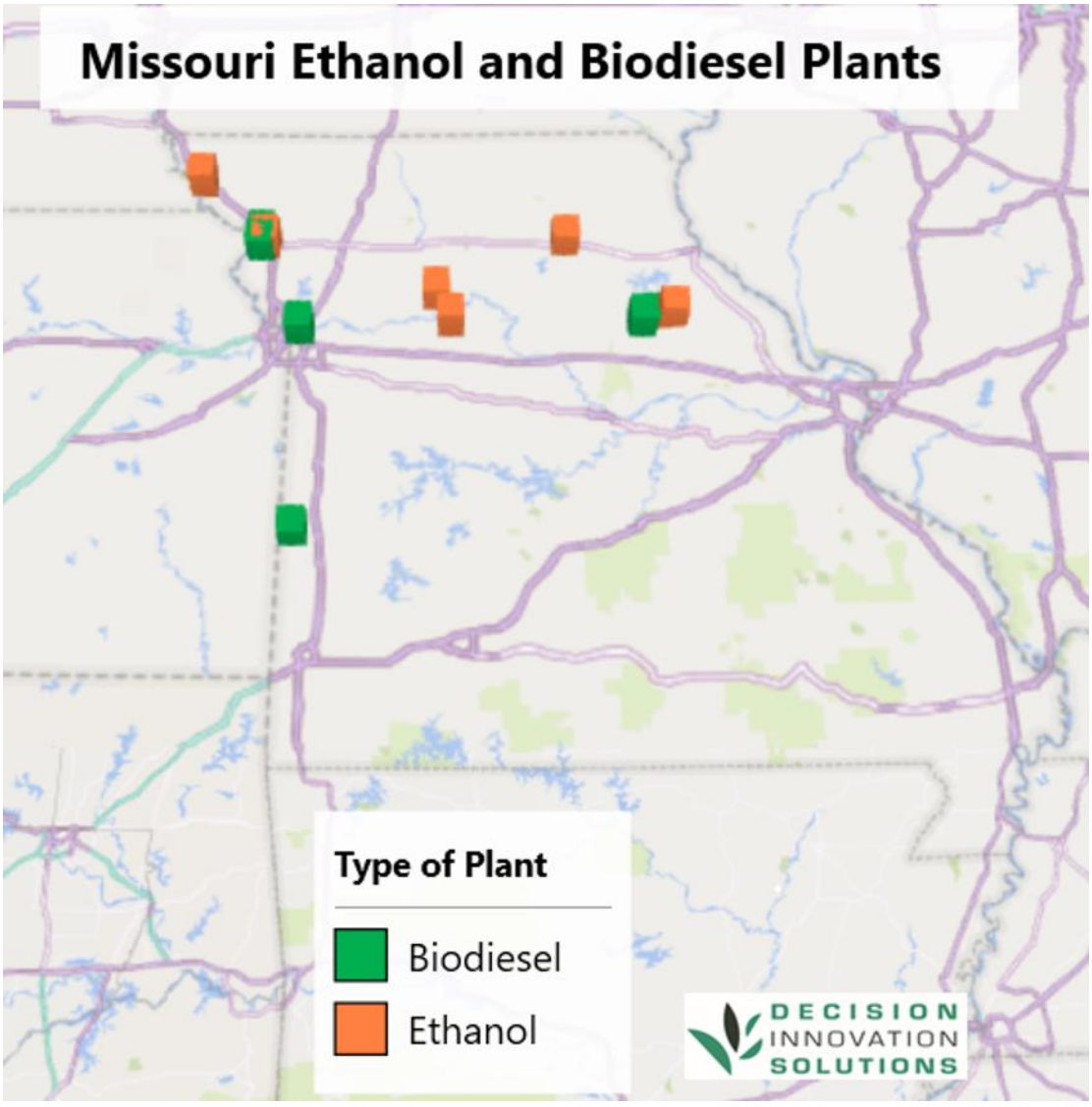


Figure 36. Missouri Ethanol and Biodiesel Plants

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2.7.3 Missouri Ethanol and Biodiesel Production

Based on data from the U.S. Energy Information Administration (EIA) and the U.S. Department of Agriculture (USDA), Missouri produced 289 million gallons of ethanol in 2024, which accounted for about 1.8% of the 16.2 billion gallons produced in the U.S., placing the state as the 13th largest ethanol producer in the country.

Since 2007 Missouri's ethanol production has increased and has followed, for the most part, an upward trend. Missouri's production in 2024 was up 90% from 161 million gallons in 2007 (Figure 37). Despite the increase in ethanol production, Missouri's production share of U.S. ethanol production has declined (from about 2.5% in 2007 to about 1.8% in 2024) as other states have expanded their production as well.

The 2025 volume of Missouri's ethanol production was estimated by applying the 2025 U.S. ethanol production, as reported by EIA, to the state's previous 5-year average share of production relative to the U.S. ethanol production during those years.

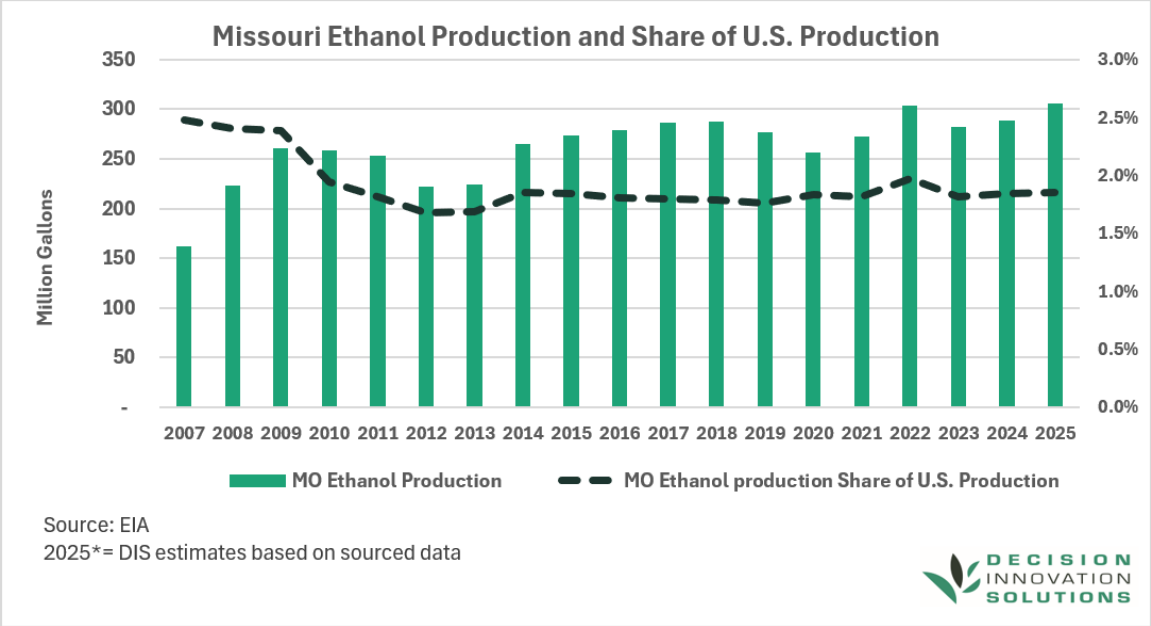


Figure 37. Missouri Ethanol Production and Share of U.S. Production

Based on data from EIA, Missouri was the second largest producer of biodiesel (in terms of production capacity) in the U.S. with 257 million gallons in 2025[7], which accounted for 13% of the 1.986 billion gallons produced in the U.S. Missouri biodiesel production capacity in 2025 was up 595% from 37 million gallons in 2007. The share of Missouri biodiesel production relative to the national production has increased from 7.6% in 2007 to 13% in 2025. In the figure below, the 2025 volume of Missouri's

[7] https://www.eia.gov/biofuels/biodiesel/capacity/

biodiesel production was estimated by applying the 2025 U.S. biodiesel production, as reported by EIA, to the state's previous 5-year average share of production relative to the U. S. biodiesel production during those years (Figure 38).

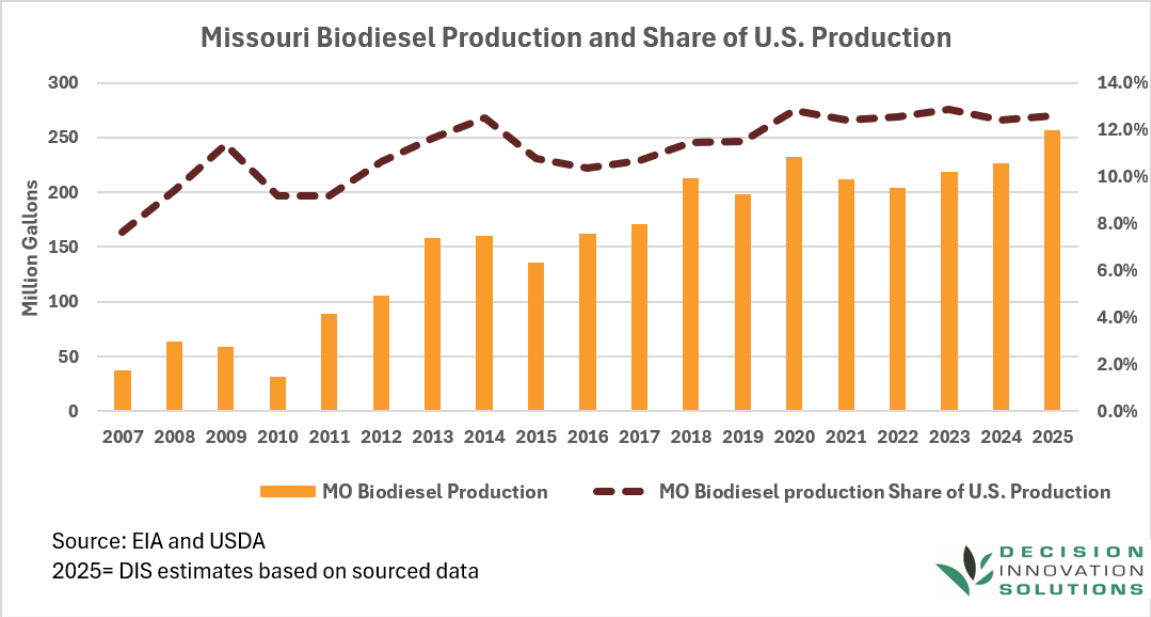


Figure 38. Missouri Biodiesel Production and Share of U.S. Production

The Gross Production Margin (GPM) is a dollar value estimated as the difference between the combined sales value of ethanol and co-products (distillers dried grains with solubles (DDGs) and distillers corn oil (DCO)) that can be extracted per bushel of corn and the cost of corn. GPM is an important decision-making metric, as ethanol producers often use it to hedge the purchase price of corn and the sales of ethanol and co-products. GPM highlights the contribution of ethanol co-products to ethanol plant profitability. DDGs and DCO are valuable inputs in the livestock and biodiesel industries, respectively. This measure presents opportunities for speculators because the spread relationship between corn, ethanol, and co-products changes over time.

Missouri dry-mill ethanol plants' gross margins were calculated assuming ethanol yield of 2.90 gallons per bushel, 17.5 pounds of DDGs per bushel and 0.9 pounds of DCO per bushel of corn. Missouri price data (yellow corn, ethanol, DDGs (10% moisture), and DCO)) was sourced from the Livestock Marketing Information Center (LMIC) (compiled from USDA).

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Table 7 shows Missouri's ethanol GPM estimated for June's third week of 2022 to 2026. The week of June 27, 2025, had the lowest Missouri's ethanol GPM among the periods compared, with the value of ethanol down 19.7% to $4.58/bushel compared with the previous year (during same week). Adding to the value of ethanol, the values of DDGs ($1.22/bushel) and DCO ($0.51/bushel) minus the cost of corn ($4.14/bushel) resulted in GPM of $2.16/bushel. This shows the importance of ethanol co-product market on ethanol plant profitability.

Note that Missouri's values per bushel and GPM were based on the average of Iowa and Nebraska prices for corn, ethanol, DDGs, and DCO.

Table 7. Missouri Weekly Ethanol, DDGs and DCO Sales Values per Bushel of Corn, Corn Cost, and Gross Production Margin in June 2022-2026

Item	06/24/22	06/30/23	06/28/24	06/27/25	06/26/26
MO Ethanol Price at the Plant ($/gal)	$2.68	$2.45	$1.97	$1.58	$1.79
Ethanol Yield (gal/bu)	$2.90	$2.90	$2.90	$2.90	$2.90
Ethanol Value ($/bu)	$7.76	$7.10	$5.71	$4.58	$5.19
MO DDGs (10% moisture) ($/ton)	$225.00	$204.57	$152.54	$139.32	$151.96
DDGs Yield (lbs./bu)	$17.50	$17.50	$17.50	$17.50	$17.50
DDGs Value ($/bu)	$1.97	$1.79	$1.33	$1.22	$1.33
MO DCO (*cents/lb*)	$75.75	$59.60	$44.32	$56.89	$79.74
DCO Yield (lbs/bu)	$0.90	$0.90	$0.90	$0.90	$0.90
DCO Value ($/bu)	$0.68	$0.54	$0.40	$0.51	$0.72
Combined Ethanol + DDGS+ DCO Values ($/bu)	$10.41	$9.42	$7.44	$6.31	$7.24
MO Yellow Corn Price at the Plant ($/bu)	$7.99	$6.16	$4.50	$4.15	$3.99
MO Ethanol Gross Production Margin (Corn Crush Value) ($/bu)	$2.41	$3.27	$2.95	$2.16	$3.25

Source: DIS estimates based USDA data compiled by LMIC
Ethanol Gross Margin ($/bu) = Combined Ethanol, DDGs, and DCO Sales Values per bushel of corn ($/bu) *minus* Corn Cost ($/bu)
DDGs= Distillers dried grains with solubles. DCO= Distillers corn oil
Missouri's values per bushel and GPM were based on the average of IA and NE prices for corn, ethanol, DDGs and DCO.

2.8 Missouri Breweries, Distilleries and Wineries

The brewery, distillery, vineyard and winery industries of Missouri provide opportunities for adding value to Missouri commodities. Consistent with the latest data from the U.S. Treasury, Missouri has 275 breweries in the state (Figure 39), 271 being considered microbreweries and/or brewpubs, 2 regional breweries, 1 large specialty brewery, and 1 international brewery (Figure 40).

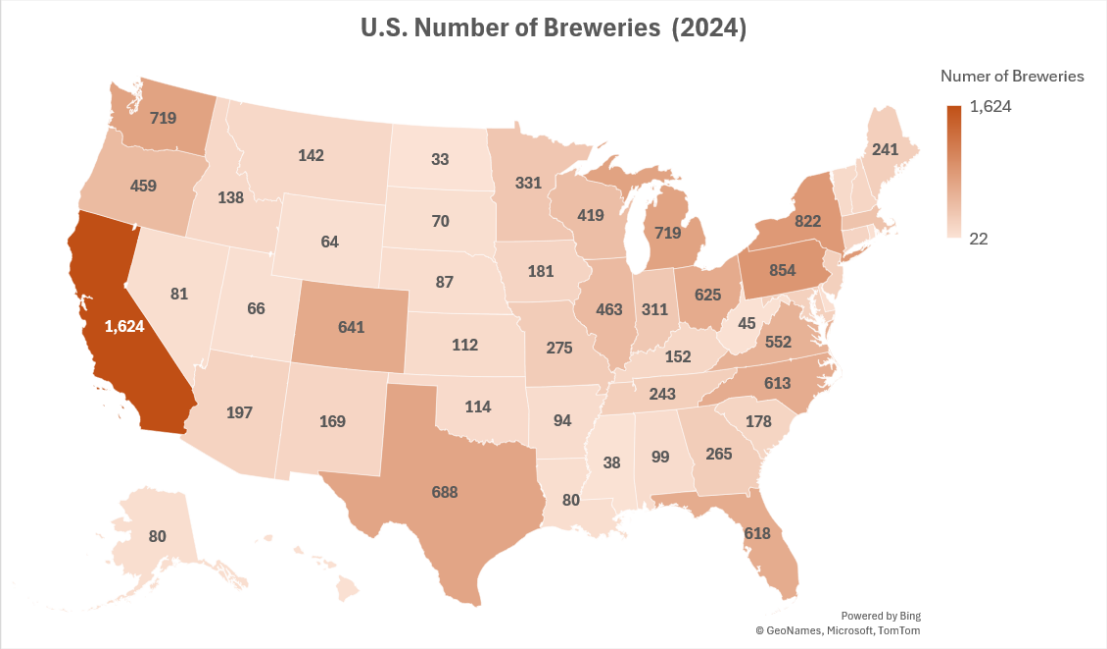


Figure 39. U.S. Number of Breweries

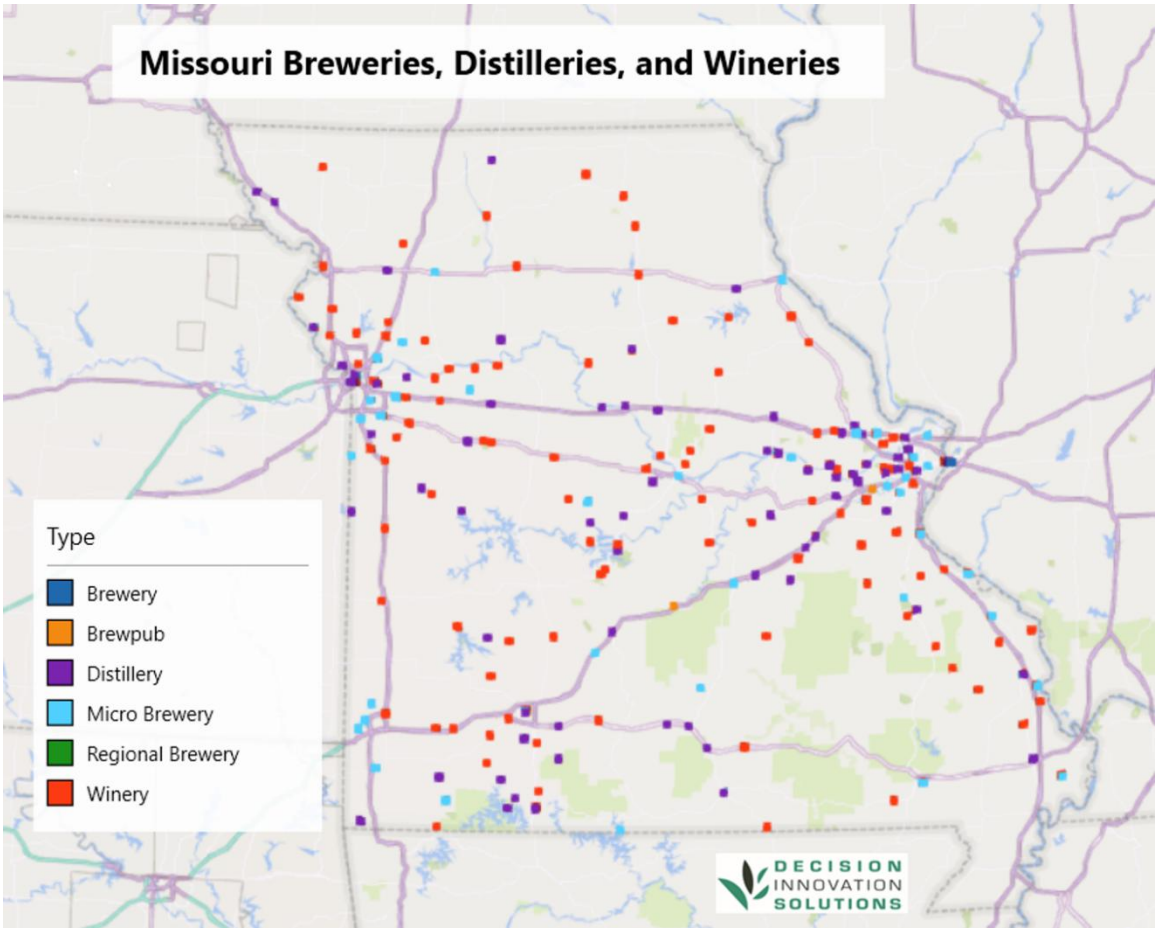


Figure 40. Missouri Breweries, Distilleries, and Wineries

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Missouri's Breweries increased substantially since 1991 and grew steadily after 2010, reaching 5.4 times the 2010 count by 2024 (Figure 41).

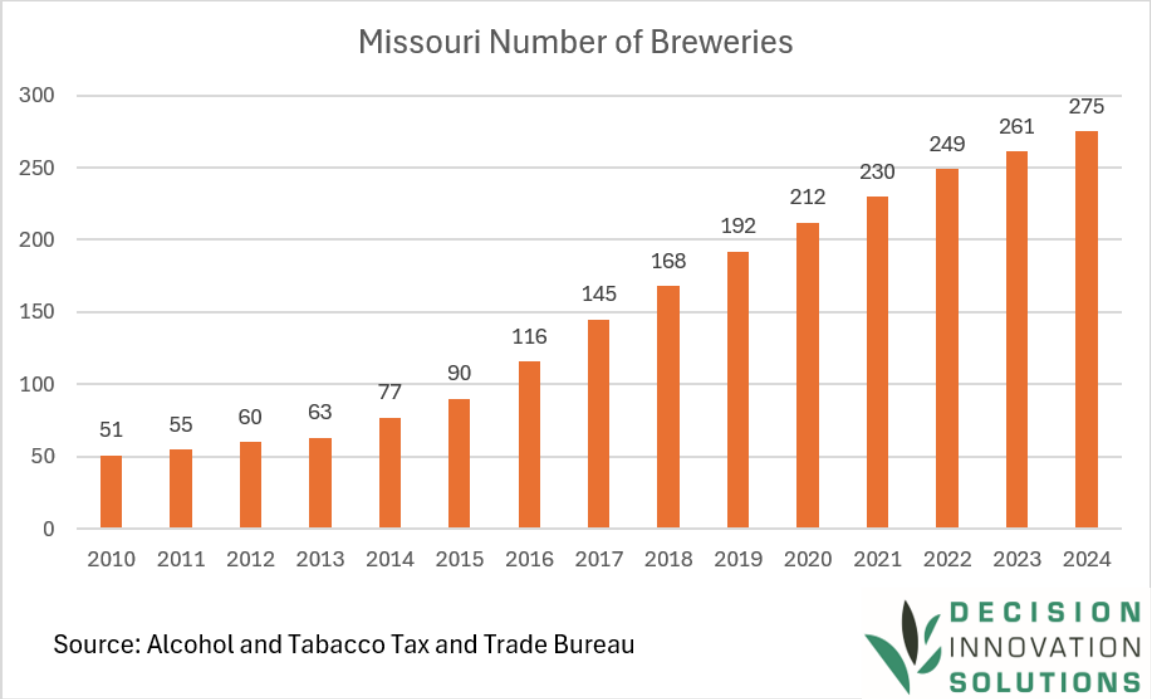


Figure 41. Missouri Number of Breweries

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As reported by the U.S. Department of the Treasury- Alcohol and Tobacco Tax and Trade Bureau, as of June 2026 there were 18,006 bonded wine producers in the U.S. California has the most bonded wine producers than any state at 3,399. At a distant second and third place, in terms of number of bonded wine producers, are the states of Washington and Texas with 1,423 and 1,009 producers, respectively (Figure 42).

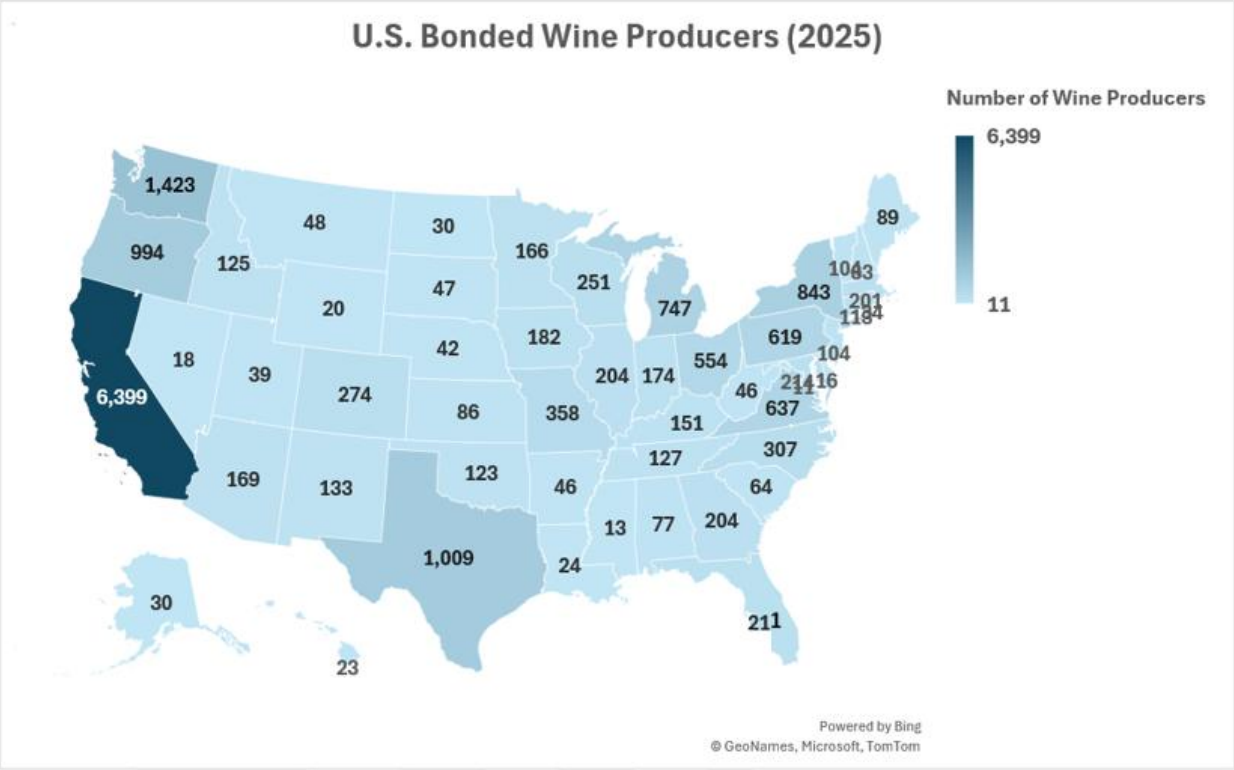


Figure 42. U.S. Bonded Wine Producers

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Although production varies across years, Missouri annual wine production has surpassed 1.08 million gallons each year, with 2025 wine production topping 2.4 million gallons (Figure 43).

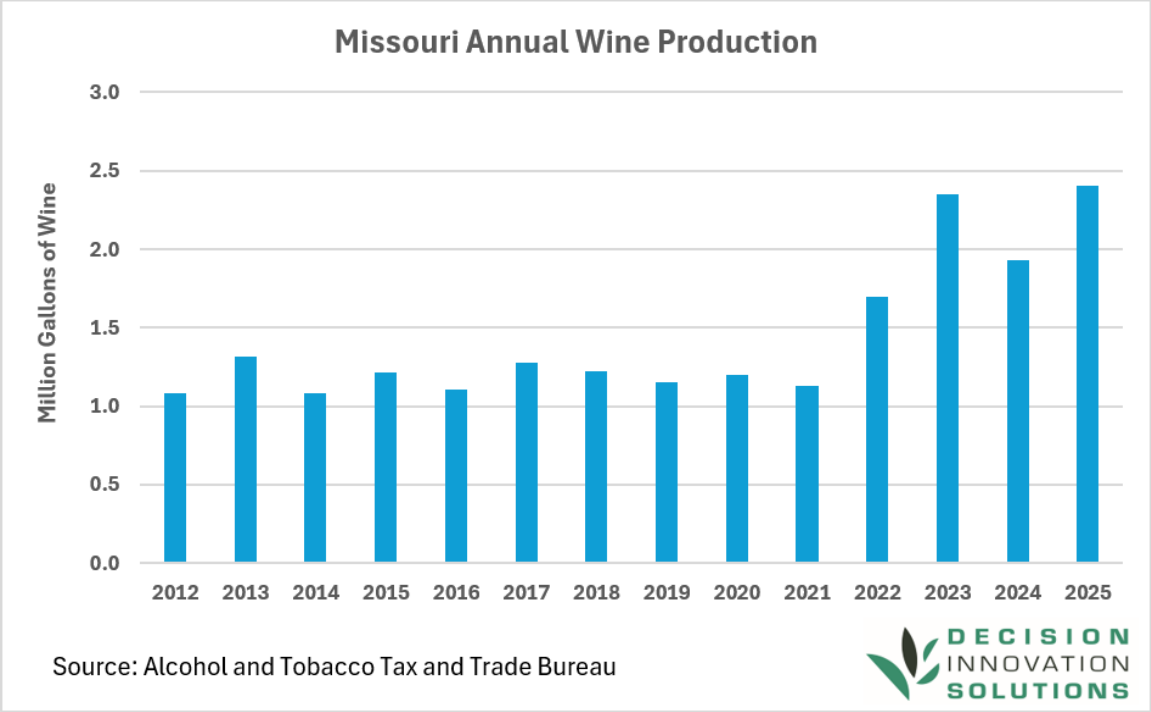


Figure 43. Missouri Annual Wine Production

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Missouri Department of Public Safety data show the excise tax collections from liquor, beer, and wine sales reached about $49 million in 2024, up 4% from $47 million the previous year (Figure 44). Missouri excise tax rates were $2.00 per gallon for liquor, $0.42 per gallon for wine, and $0.06 per gallon for beer products. Liquor accounted for about 75% of collections, followed by beer at 14% and wine at 11%. By volume, beer was the top-selling alcoholic beverage in Missouri, representing 78.4% of total gallons sold. From 2021 through 2024, annual beer sales averaged an estimated 120.4 million gallons, followed by 17.1 million gallons of liquor and 14.4 million gallons of wine (Figure 45). Gallonage was estimated by applying the corresponding excise tax rate to each type of alcoholic beverage.

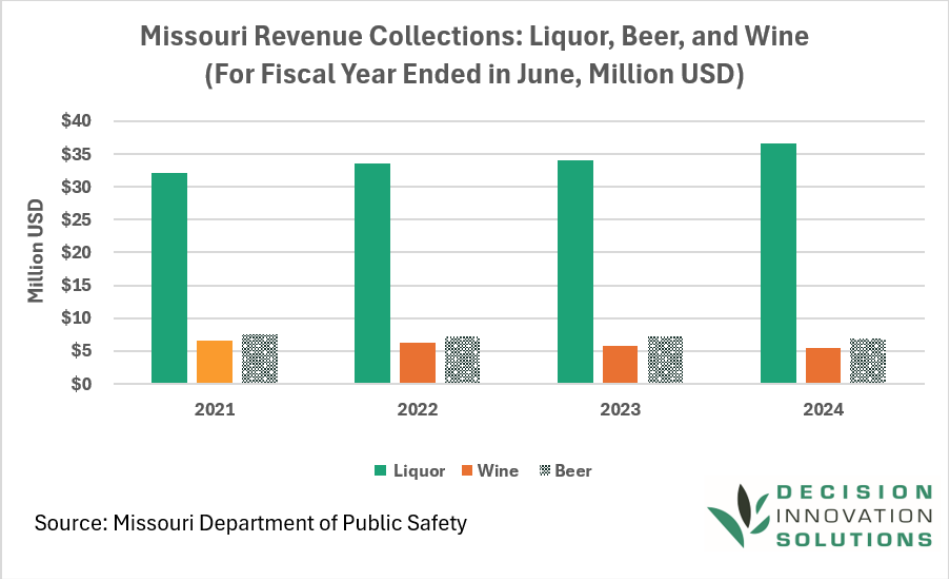


Figure 44. Missouri Revenue Collections: Liquor, Beer, and Wine (For Fiscal Year Ended in June)

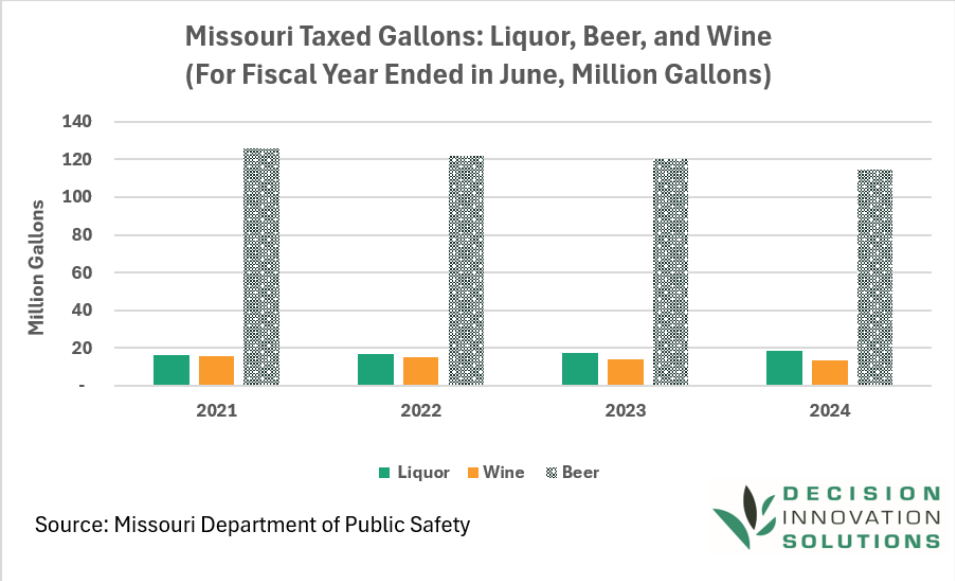


Figure 45. Missouri Taxed Gallons: Liquor, Beer, and Wine (For Fiscal Year Ended in June)

2.9 Missouri Forestry Background

Missouri forestry estimates are derived from field data collected across a systematic network of fixed-radius forest monitoring plots located on public and private lands. Forest area with a coverage of 76% to 100% of land is in the southeast region of the state (Figure 46).

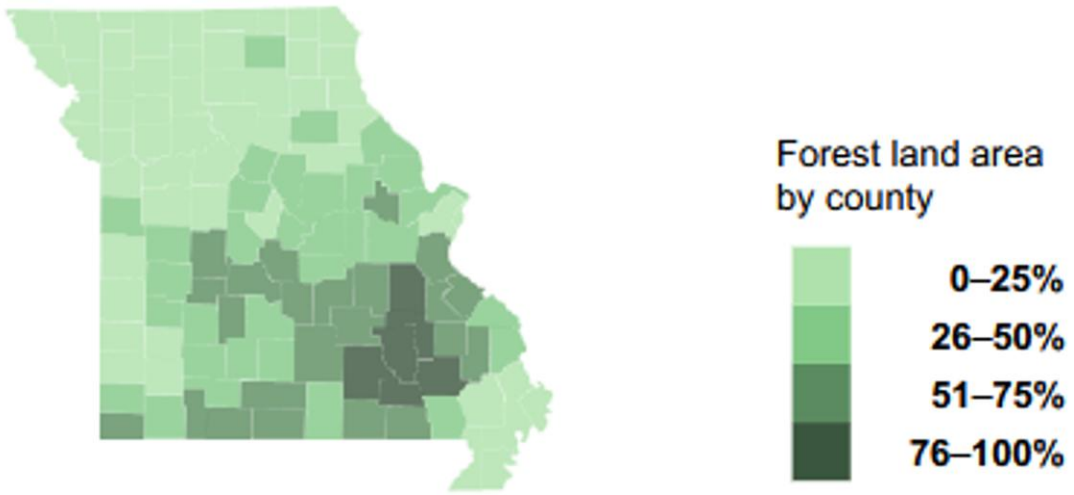


Figure 46. Missouri Forest Land Area by County (2025)

Missouri forest land area increased by 108,107 acres between 2020 and 2025, with the volume of forest land increasing 7% during that period. In contrast, the number of live trees on forest land declined by 2%. The total forest land carbon storage grew 3% (40.5 million metric tons) to 1.2 billion metric tons in 2025 relative to 2020 (Table 8).

Table 8. Missouri Forest Land 2020 and 2025

Year	Forest land area (acres)	Forest land volume (cubit feet)	Number of live trees on forest land (trees)	Total forest land carbon storage (metric tons)
2020	15,394,132	35,128,342,543	7,977,328,763	1,195,476,983
2025	15,502,239	37,628,421,235	7,846,791,732	1,236,024,663

Source: USDA Forest Service (Forests of Missouri, 2025 FIA Annual Snapshot)

2.9.1 Missouri Agroforestry Practices 2017 and 2022

The USDA's 2017 Census of Agriculture introduced a question regarding the implementation of the following agroforestry practices: alley cropping, silvopasture, forest farming, riparian forest buffers, and windbreaks[8]. The number of Missouri farms reporting at least one Agroforestry practice in 2017 and 2022 by county are shown in Figure 47 and Figure 48. The change in the number of farm operations reporting at least one agroforestry practice by county between 2017 and 2022 is shown in Figure 49.

In 2017, the number of farms reporting at least one agroforestry practice was equal to 1,311, or 1.38% of total number of farms in Missouri that year (95,320 farms). The top three counties reporting these practices were Texas County (43 farms), Webster County (40 farms), Franklin County (37 farms).

In 2022, the number of farms reporting at least one agroforestry practice increased to 1,383 operations, making up 1.57% of total number of farms in Missouri in 2022 (87,887)[9]. The top counties reporting this type of farm practices were Franklin (44 farms), Webster (41 farms), and Dallas (37 farms).

Figure 48 shows that some counties reported more farms using at least one agroforestry practice in 2022 than in the previous Census, while others reported fewer operations using these practices. The largest increase in the number of operations with agroforestry practices was reported by Lafayette County, whereas the largest decline occurred in Polk County. Forty-eight counties reported a decline, while 58 reported an increase. Overall, the number of operations reporting at least one agroforestry practice increased by 72 farms between the two Censuses.

Based on a literature review presented by T. Kellerman et.al (see footnote 9), Agroforestry happens mainly on private land and there are multiple factors affecting the decision to use these practices, including technical and financial assistance and knowledge of the system as it relates to products, yields, environmental benefits, risks and costs. Expanded federal program assistance for agroforestry and increased assistance from other organizations (e.g., nonprofits, agencies, and institutions for agroforestry implementation and training) may also influence the decision.

[8] Todd Kellerman, Samuel Feibel, Matthew M. Smith, Gary Bentrup, Market Batcheler, and Katherine MacFarland. Agroforestry across the United States: Results of the 2022 Census of Agriculture. Agroforestry across the United States: Results of the 2022 Census of Agriculture | Agroforestry Systems | Springer Nature Link

[9] Note that the number of operations in Missouri fell from 95,320 in 2017 to 87,887 in 2022, if the number of operations would have stayed unchanged the number of farms reporting at least one agroforestry would have represented 1.45% of total farms.

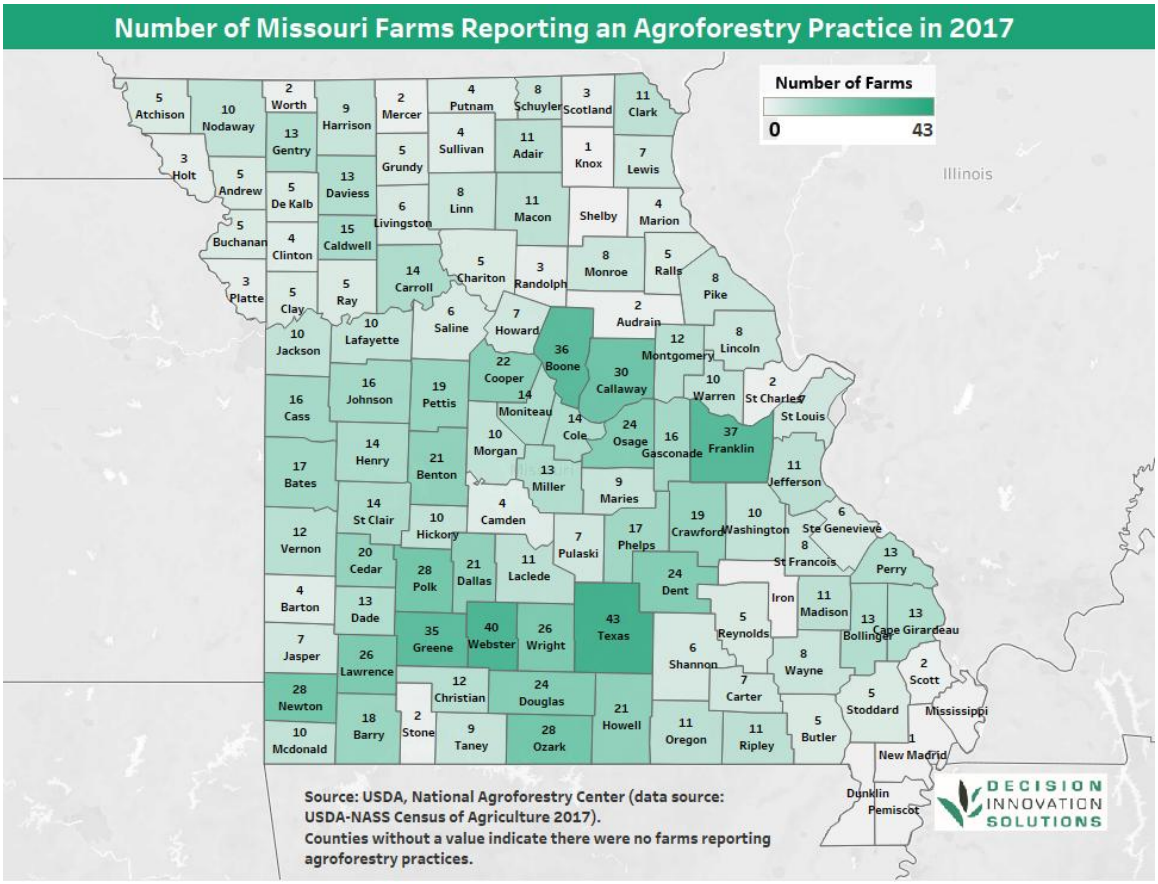


Figure 47. Number of Missouri Farms Reporting an Agroforestry Practice in 2017

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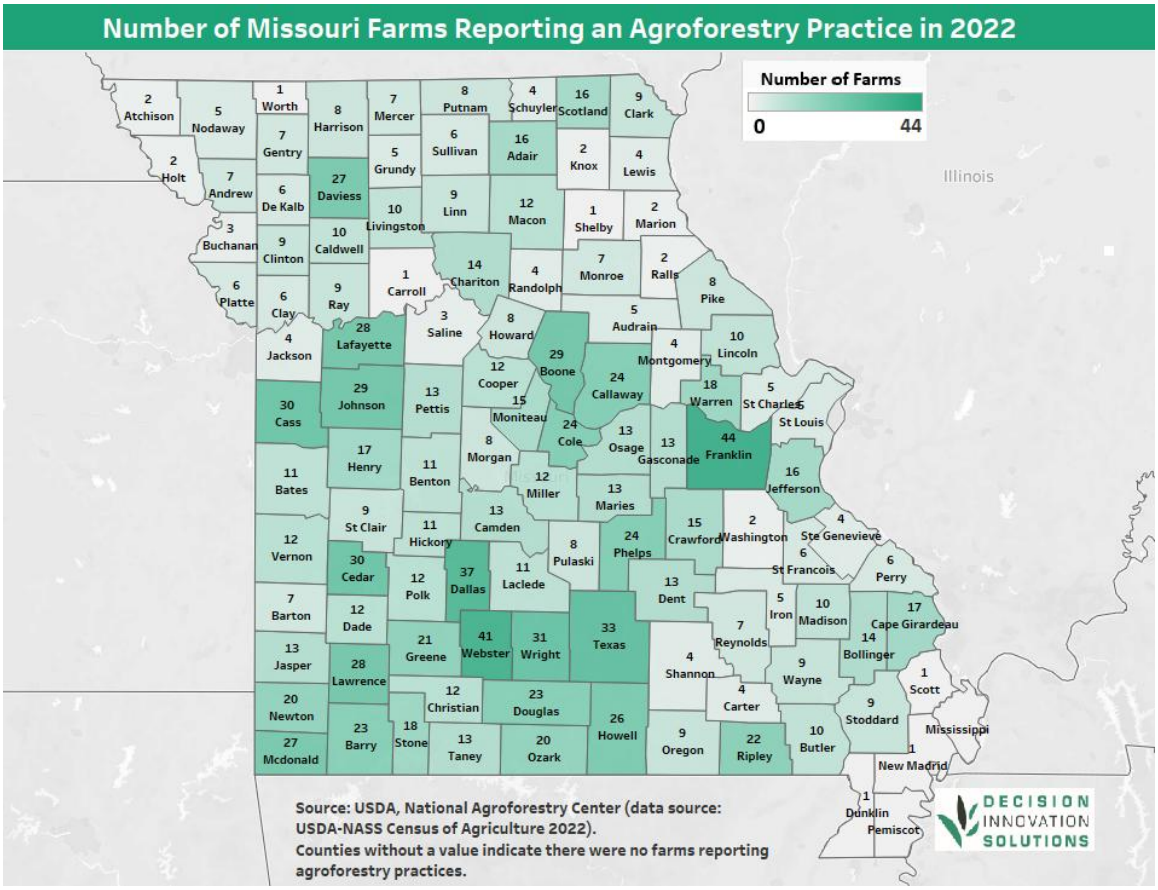


Figure 48. Number of Missouri Farms Reporting an Agroforestry Practice in 2022

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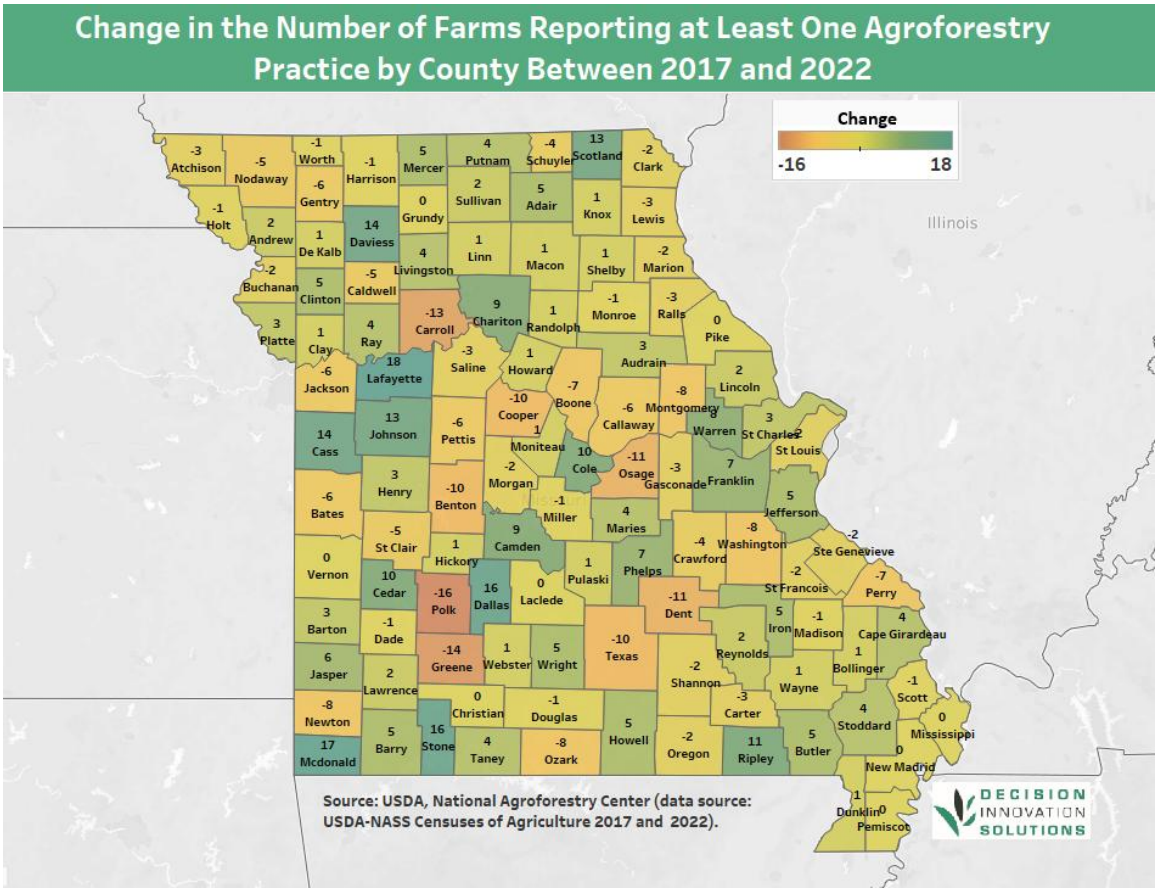


Figure 49. Change in the Number of Farms Reporting at Least One Agroforestry Practice by County Between 2017 and 2022

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3 Economic Contribution Methodology

3.1 Economic Contribution Methodology and Terms

The following economic contribution study was conducted using a combination of IMPLAN and Microsoft Excel. IMPLAN is an input-output model used to understand industry relationships and conduct economic assessments for specified local economies. IMPLAN datasets are constructed annually and are derived from many different sources, including the U.S. Bureau of Labor Statistics (BLS), the U.S. Bureau of Economic Analysis (BEA), the U.S. Bureau of Economic Analysis Benchmark Input-Output Account of the U.S., the BEA output estimates, the U.S. Census Bureau's economic censuses and surveys, the U.S. Department of Agriculture's census, and more.

Within IMPLAN, the effects of an economic impact or contribution event are expressed in terms of direct, indirect, and induced effects. These different effect types are defined as follows:

- **Direct Effects –** The economic activity directly attributable to the industry under analysis
- **Indirect Effects –** The effects of local inter-industry spending throughout the supply chain, for example, the seed, equipment, fertilizer, and other inputs used by a farmer to produce corn for a feed mill
- **Induced Effects –** The results of employees of the directly and indirectly affected industries spending their income throughout the local economy
- **Total Effect –** The sum of direct, indirect, and induced effects

The 2024 IMPLAN data package, which is the most recent data available, was used for this analysis. Using inflation factors inherent in the IMPLAN modeling system, all numbers within these sectors were brought forward from 2024 to 2026. The results of this analysis are presented using the following common economic modeling terms:

- **Output:** The broadest measure of economic activity – also commonly referred to as "sales." Output refers to the total value of all sales of an industry within a study area without any deductions for the cost or origination of inputs that were used in the production process.
- **Value Added:** A component of output, this measure includes the total sales minus the costs of inputs. Alternatively, value added is calculated as the sum of labor income (further defined below), taxes on production and imports, and other property-type income. An industry's value added is equivalent to its contribution to GDP.
- **Labor Income:** A subset of value added, includes the sum of employee compensation (i.e., wages and benefits) and proprietor income (i.e., income of self-employed workers).
- **Employment (Jobs):** A measure of part- and full-time job positions, including contract workers, without regard to their full-time equivalence. Since it is not representative solely of full-time positions or full-time equivalents, care must be made when drawing comparisons to other measures of employment.

3.2 Defining Agriculture and Forestry

When completing an economic contribution study, there are generally questions as to what economic activity up and down the value chain should be included. Outlined below is the process used in this study for defining agriculture; the same guidelines have been applied to the forestry industry.

There is usually considerable discussion regarding the blurred lines between production agriculture, processing, and retail, and how agriculture should be defined. Agriculture can be defined as: 1) including only farm-level production, 2) including farm-level production, input manufacturing, and food processing, or 3) from the "farm to fork" perspective, which would also include distribution, restaurants, and retail.

To strike middle (and defensible) ground between including more than just farm level production and seeking to attribute excess economic activity to the agriculture industry, this analysis includes production agriculture plus the first round of value added to the process. For example, in addition to the production of livestock and poultry, we have also included the industries that process them (i.e., production, processing, slaughtering, and rendering).

Using the above rationale as a guide, the IMPLAN models were created and analyzed using the recommended methodology for a Multi-Industry Contribution Analysis. The IMPLAN modeling system uses more than 20,000 industries and classifies them according to the North American Industry Classification System (NAICS) and groups them into 546 industries. There were 98 IMPLAN sectors identified for this analysis to represent agricultural economic activities in the State of Missouri. Note that additional industries were identified as agriculture but excluded from this analysis due to not existing in Missouri. A list of the identified industries and their aggregation as used throughout the report is available in Appendix A, IMPLAN Aggregation Scheme

3.3 Economic Impact Study versus Economic Contribution Study

The term "Economic Impact Study" implies a change has taken place within a local economy. The change in a local economy typically comes from one of the following sources:

- Entrance/departure of a new business or industry
- Expansion/contraction of an existing business or industry

While estimating a change (economic impact study) such as the entrance or departure of industry activity is a worthwhile endeavor in many instances, this is not how the contribution of the agriculture sectors in this analysis were estimated. This analysis is an effort to evaluate the structure of existing industries within an existing economy. As a result, shocking the economy to create or eliminate parts of the industry is not appropriate. For that reason, this study is called an "economic contribution analysis"; in other words, we are interested in understanding what Missouri agriculture currently contributes to the overall economy. This is a key difference from what is traditionally termed an "economic impact study". With a contribution analysis, the sum of individual industry estimates will never differ from the total of what actually exists in a given study area.

4 Economic Contribution Results

4.1 State Level Results

The 98 IMPLAN industries identified for this study as pertaining to economic activities of agriculture and forest with a presence in Missouri were aggregated into four primary categories to provide an overview of the economic contribution of these industries. These categories are the following:

- Crops
- Livestock
- Forestry
- Other Agriculture

A more detailed breakdown of each of these categories is shown in Section 0 of this report. A list of all IMPLAN industries included in each category is available in Appendix A.

4.1.1 State Value Added

Value added refers to an industry's total sales minus its total cost of inputs and is analogous to Gross Domestic Product (GDP). Agriculture and Forestry in Missouri contributes an estimated $45.2 billion in value added to the state economy. By category, crops contribute $8.9 billion, or 20% of the agriculture and forestry total. Livestock and poultry contribute $11.9 billion (26%), other agriculture contributes $18.5 billion (41%), and forestry contributes $5.9 billion (13%) (Figure 50).

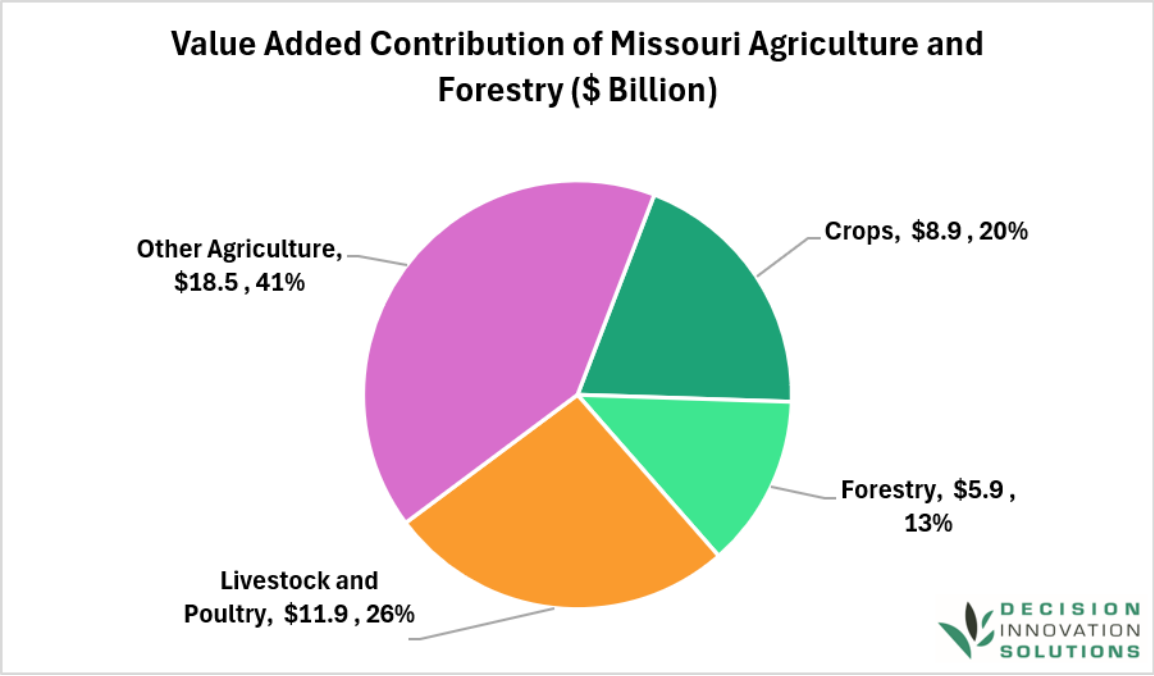


Figure 50. Value Added Contribution of Missouri Agriculture and Forestry

4.1.2 State Jobs

Job numbers represent an estimate of the number of positions (jobs) currently filled in an area or industry. Jobs include positions whether they are full or part-time, so care must be used in making comparisons. Agriculture and forestry in Missouri contribute an estimated 380,600 jobs to the state. This value represents a decrease of roughly 76,000 jobs compared to the previous 2021 study of Missouri Agriculture and Forestry completed by DIS. Decreases in jobs contributions in a given industry or sector can happen over time due to productivity increases resulting in fewer workers required for the same level of production. Additionally, a significant portion of the reduced contribution comes from the contribution of indirectly affected industries that supply goods and services to agricultural businesses. This loss in overall agricultural jobs contribution is consistent with other studies conducted by DIS over a similar timeframe in Iowa and Illinois with 14,000 and 57,000 fewer jobs in 2024 compared to 2019, respectively.

Of the total 380,600 jobs contributed by Missouri agriculture and forestry, other agriculture industries contribute the largest share (36%) with around 136,000, followed by livestock and poultry with more than 123,000 (32%), crops with more than 74,000 (20%), and forestry with around 46,500 (12%) (Figure 51).

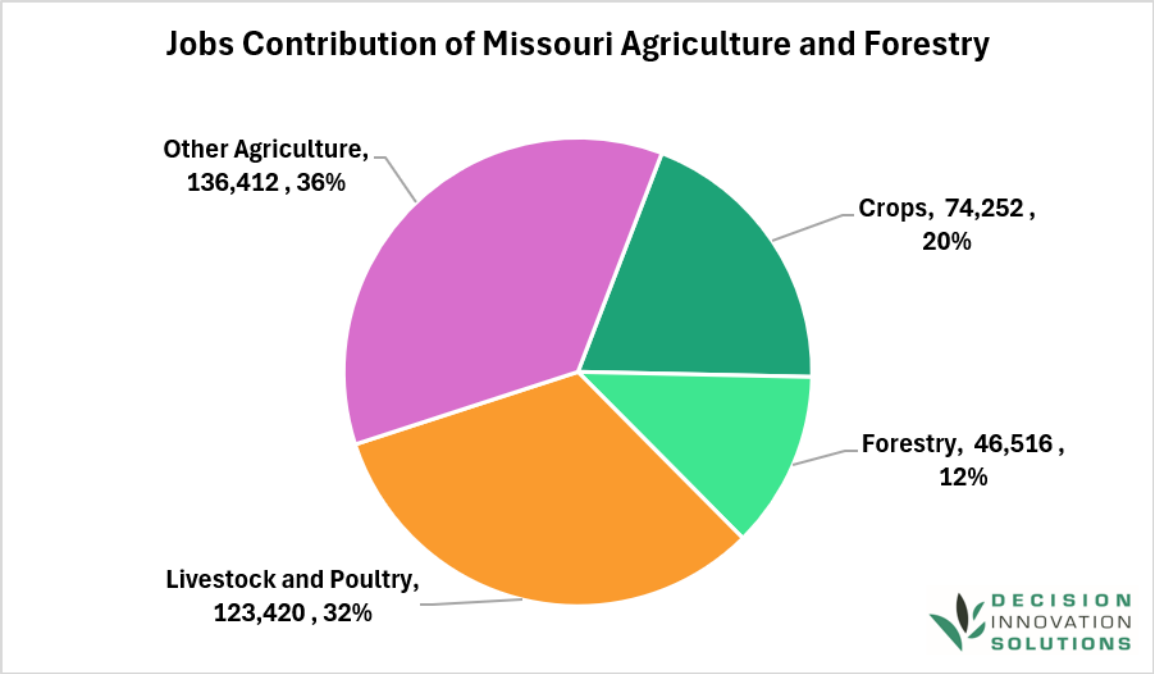


Figure 51. Jobs Contribution of Missouri Agriculture and Forestry

4.1.3 State Output

Total output (sales) refers to the total value of all production or sales of the identified industries within a study area. This is a total number that does not make deductions for the cost of inputs that were used in the production process, which means that there is some double counting that occurs with this measure of economic activity. Agriculture and forestry in Missouri have a significant output contribution of $121.0 billion. The estimated output contribution of crops is $26.3 billion (22% of all agriculture and forestry), livestock and poultry contribute $35.1 billion (29%), other agriculture contributes $45.0 billion (37%), and forestry contributes $14.7 billion (12%) (Figure 52).

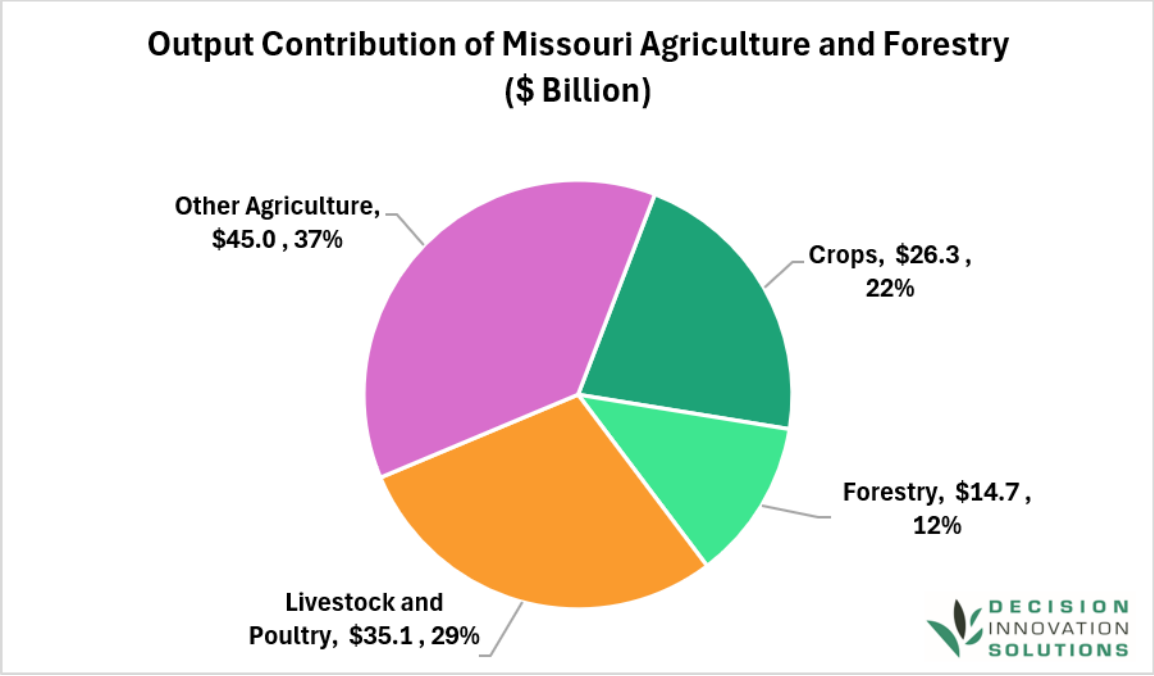


Figure 52. Output Contribution of Missouri Agriculture and Forestry

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4.1.4 State Labor Income

Labor income is the sum of all earnings from employment. Within IMPLAN, it is the sum of employee compensation and proprietor income. The estimated total labor income generated by agriculture and forestry in Missouri is $24.7 billion. Of this total, other agriculture industries contribute the largest share (40%) with $9.9 billion, followed by livestock and poultry with $6.4 billion (26%), crops with $4.7 billion (19%), and forestry with $3.6 billion (15%) (Figure 53).

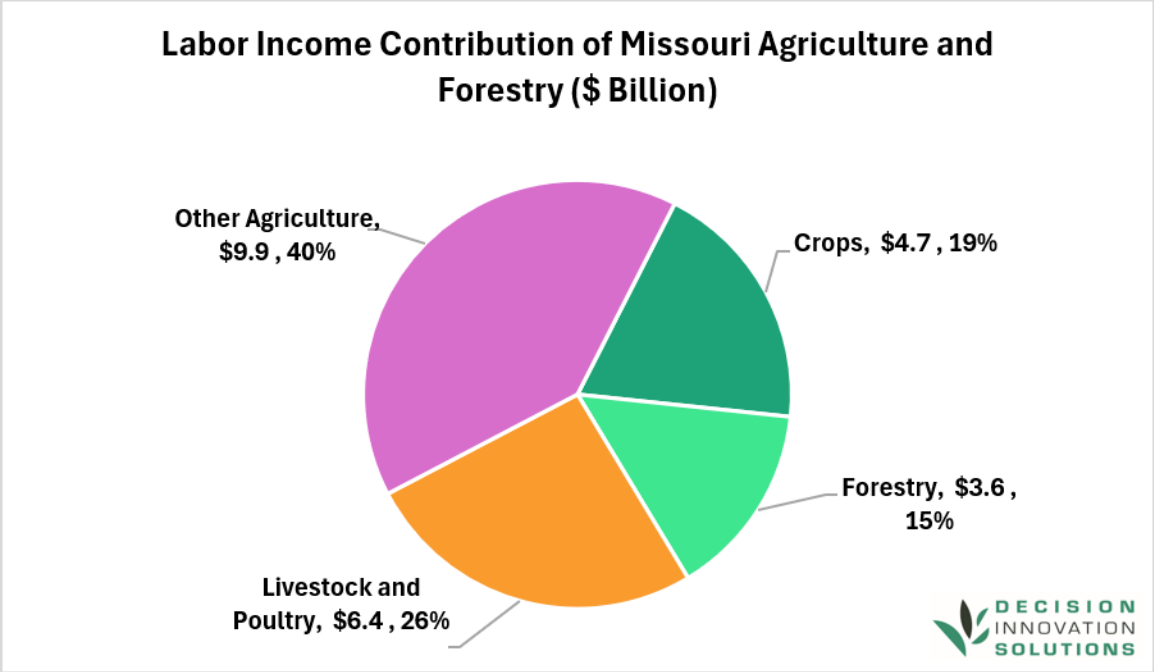


Figure 53. Labor Income Contribution of Missouri Agriculture and Forestry

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4.2 Detailed State Results

4.2.1 Crops

Crop industries in Missouri produced an estimated $8.9 billion in value added to the state economy in 2026. The crops category includes all crop production as well as crop food processing industries such as flour milling, soybean processing, and breakfast cereal manufacturing. Crop production generated $5.1 billion in value added, primarily from oilseed farming ($2.2 billion) and grain farming ($2.0 billion), with the remainder coming from production of all other crops ($0.9 billion) (Figure 54).

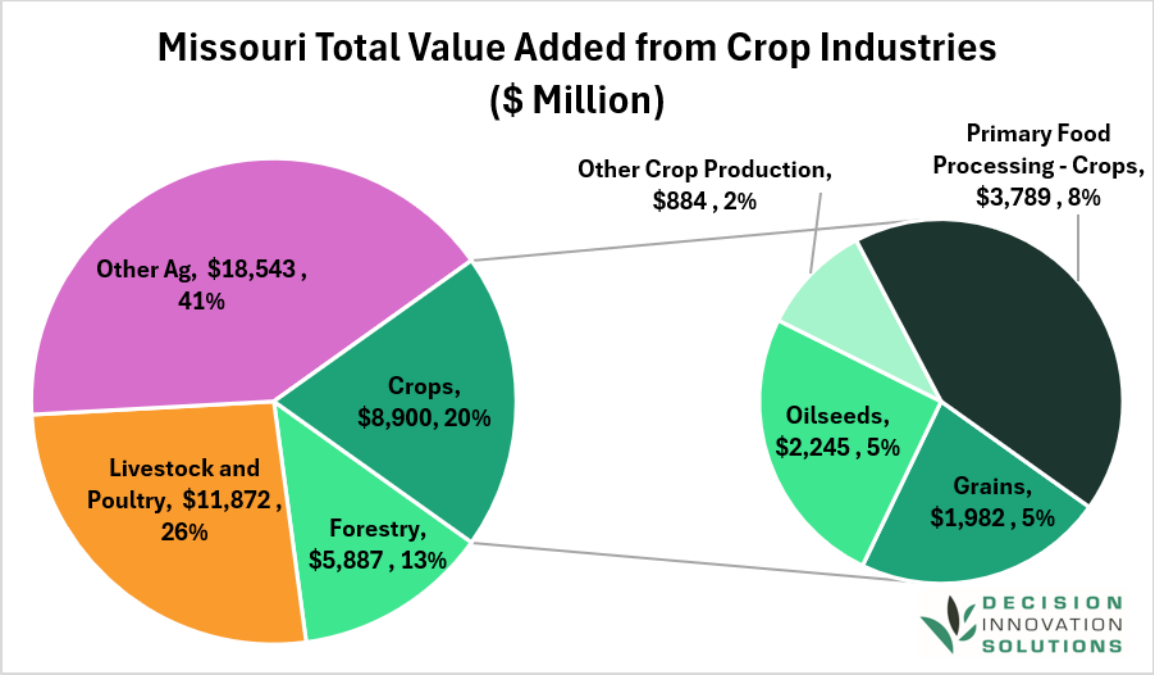


Figure 54. Missouri Total Value Added from Crop Industries

Industries in the crops category are responsible for an estimated 74,252 jobs in Missouri. Of this total, around 19,593 jobs are derived from grain farming, which is roughly 5% of all jobs generated by Missouri agriculture and forestry. Likewise, 18,012 (5%) are derived from oilseed farming, 14,283 (4%) are from other crop farming, and 22,365 (6%) are from crop food processing (Figure 55).

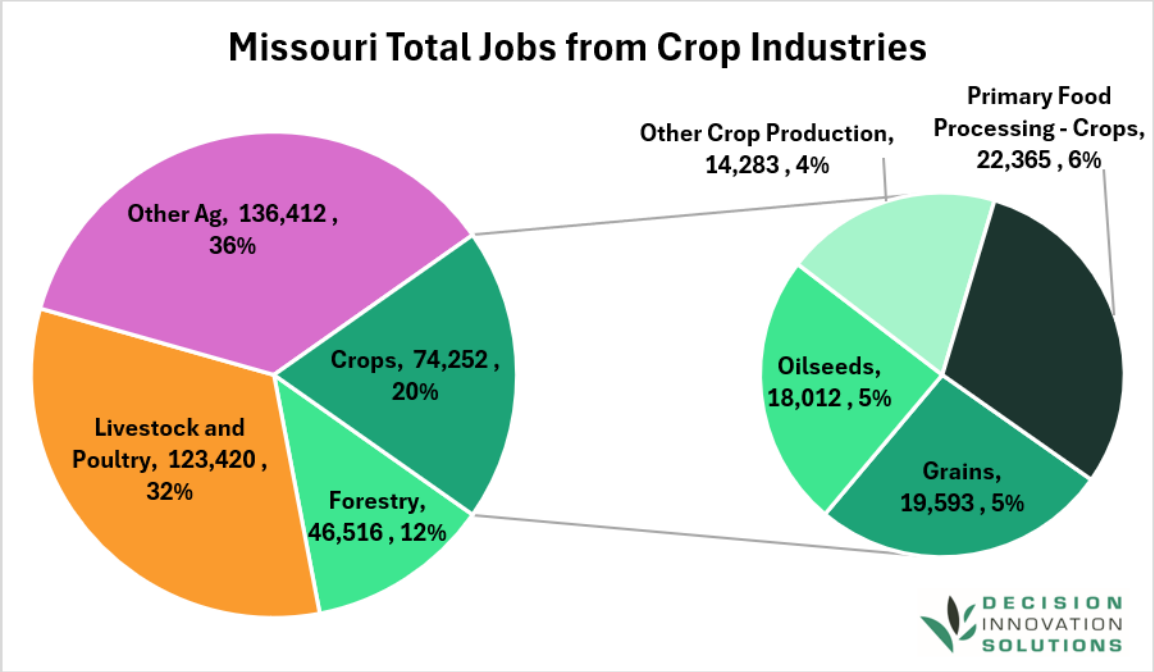


Figure 55. Missouri Total Jobs from Crop Industries

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4.2.2 Livestock

The livestock category includes industries such as beef cattle production, dairy cattle and milk production, poultry production (which includes broilers, turkeys, and egg production), production of hogs and other livestock, and meat and dairy processing. Livestock industries in Missouri contributed an estimated $11.9 billion in total value added to the state economy. Meat processing has the largest contribution in terms of value added with nearly $4.0 billion, followed by dairy processing with $2.7 billion. In terms of livestock and poultry production, cattle contributes $2.6 billion, hog and other livestock production contributes $1.8 billion, poultry contributes nearly $700 million, and dairy contributes an estimated $134 million (Figure 56).

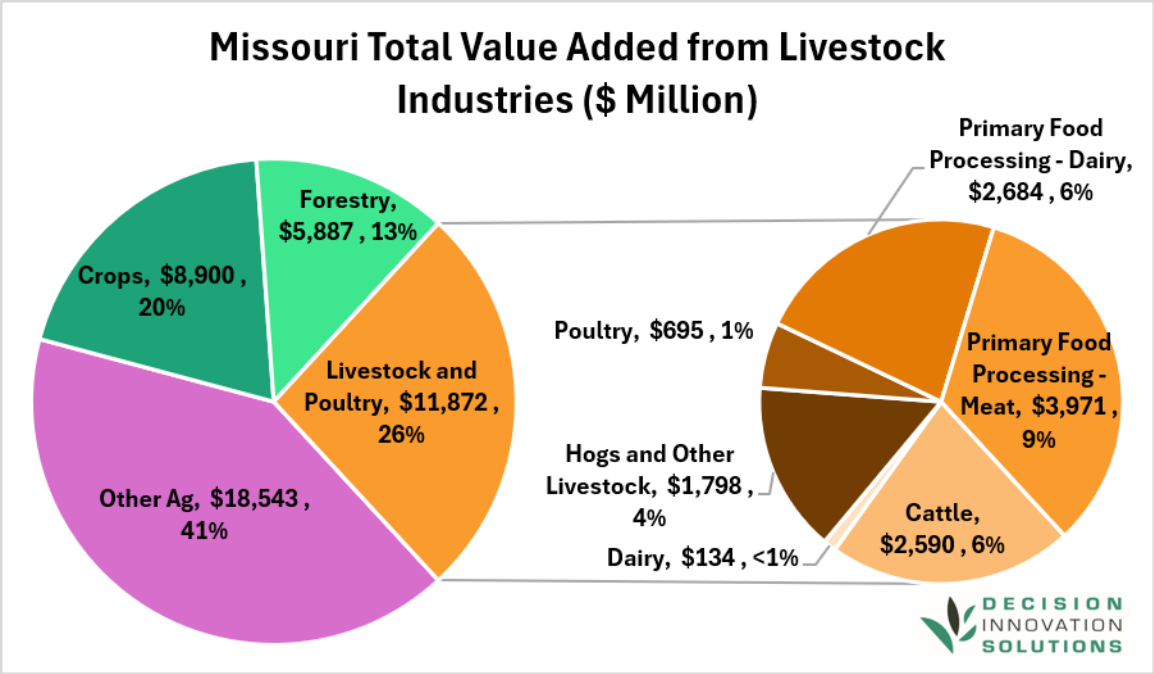


Figure 56. Missouri Total Value Added from Livestock Industries

Livestock and poultry production and processing accounted for an estimated 123,420 jobs in Missouri. Of this total, nearly 35,000 jobs are derived from meat processing while around 18,000 are from dairy processing. Cattle production leads the livestock category overall with a jobs contribution of more than 40,000, while the remaining livestock, poultry, and dairy industries contribute around 30,000 jobs (Figure 57)

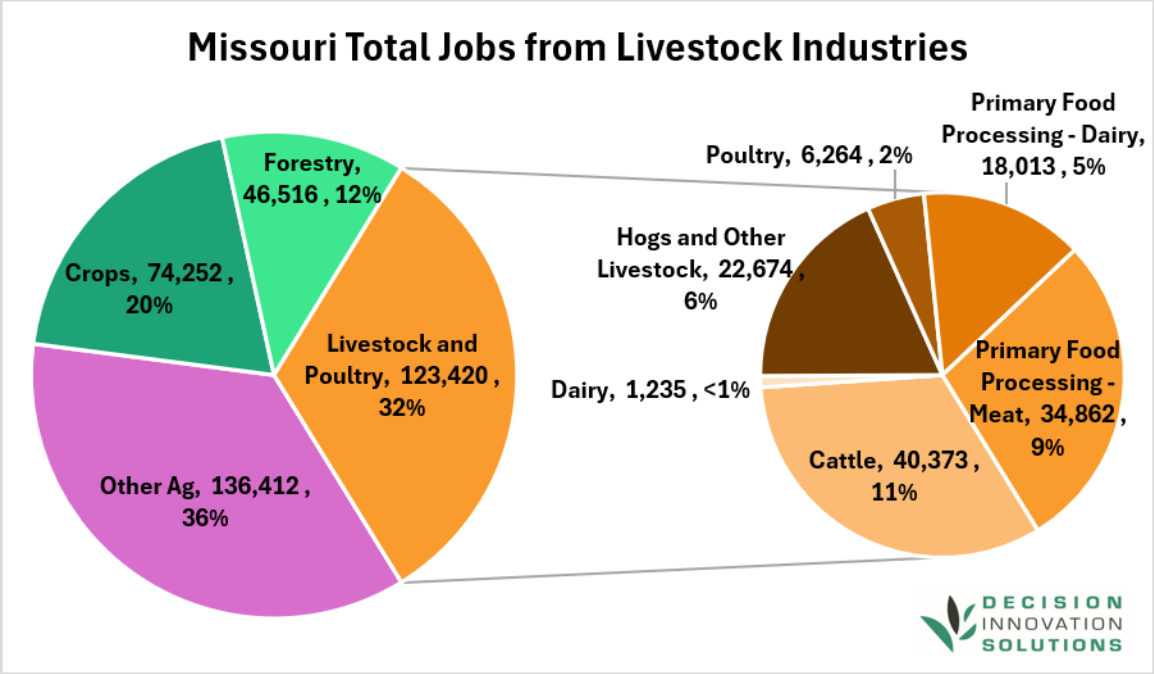


Figure 57. Missouri Total Jobs from Livestock Industries

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4.2.3 Other Agriculture

Industries in the other agriculture category include farm machinery and equipment manufacturing, veterinary services, ethanol production, animal feed and pet food manufacturing, and many others. Combined, these industries contribute $18.5 billion in value added to Missouri. In terms of value added, other food processing (which includes activities such as breweries, wineries, pasta and dough manufacturing, and frozen fruits and vegetables manufacturing) contributes the most to the state with nearly $6.9 billion. Agricultural support industries (which includes veterinary services, agricultural machinery manufacturing, custom farming services, and forestry services including fire prevention) contribute $5.1 billion, while animal feed and pet food manufacturing contributes $3.9 billion. Agricultural chemical and fertilizer, which includes ethanol production, contributes $2.6 billion (Figure 58).

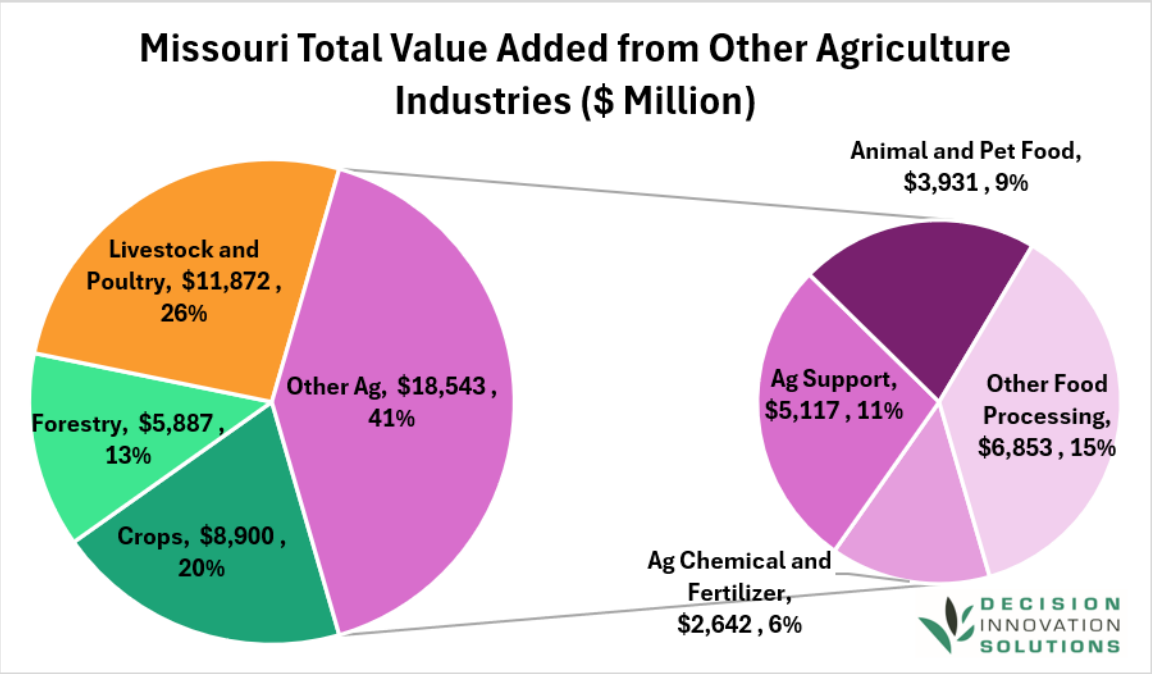


Figure 58. Missouri Total Value Added from Other Agriculture Industries

Industries in the other agriculture category are estimated to support more than 136,000 jobs in Missouri. Agriculture support industries contribute 59,136 jobs, followed by other food processing with 47,576, animal feed and pet food manufacturing with 19,421, and agricultural chemical and fertilizer with 10,279 (Figure 59).

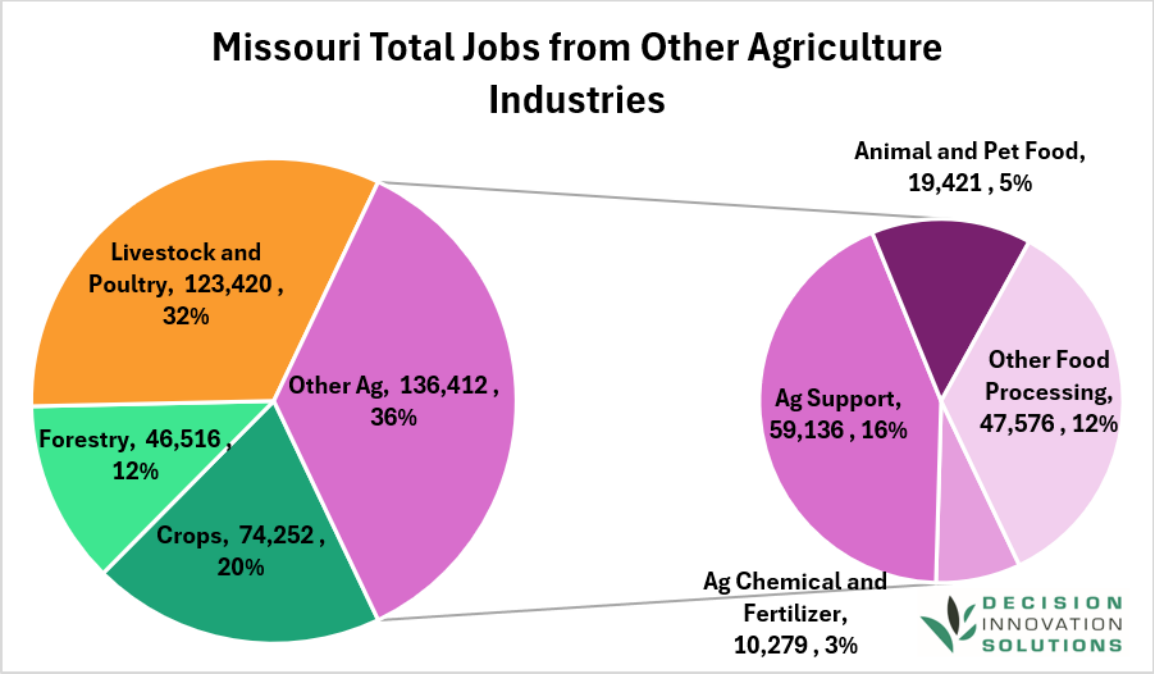


Figure 59. Missouri Total Jobs from Other Agriculture Industries

4.3 County Level Results

The results presented above focused on the economic contribution of agriculture and forestry at the state level. Similar analyses have been conducted for all of Missouri's 114 counties and the city of St. Louis. As one may expect, the total contribution in each county as well as the extent to which each county's economy relies on agriculture can vary significantly.

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4.3.1 County Value Added

Figure 60 shows the counties with the greatest total value added derived from agriculture and forestry. St. Louis County has the largest value added contribution with $4.1 billion, while St. Louis City and Jackson County also have a value added contribution of more than $4.0 billion. Buchanan, Greene, Jasper, Clay, and Boone counties all have a value added contribution of more than $1.0 billion.

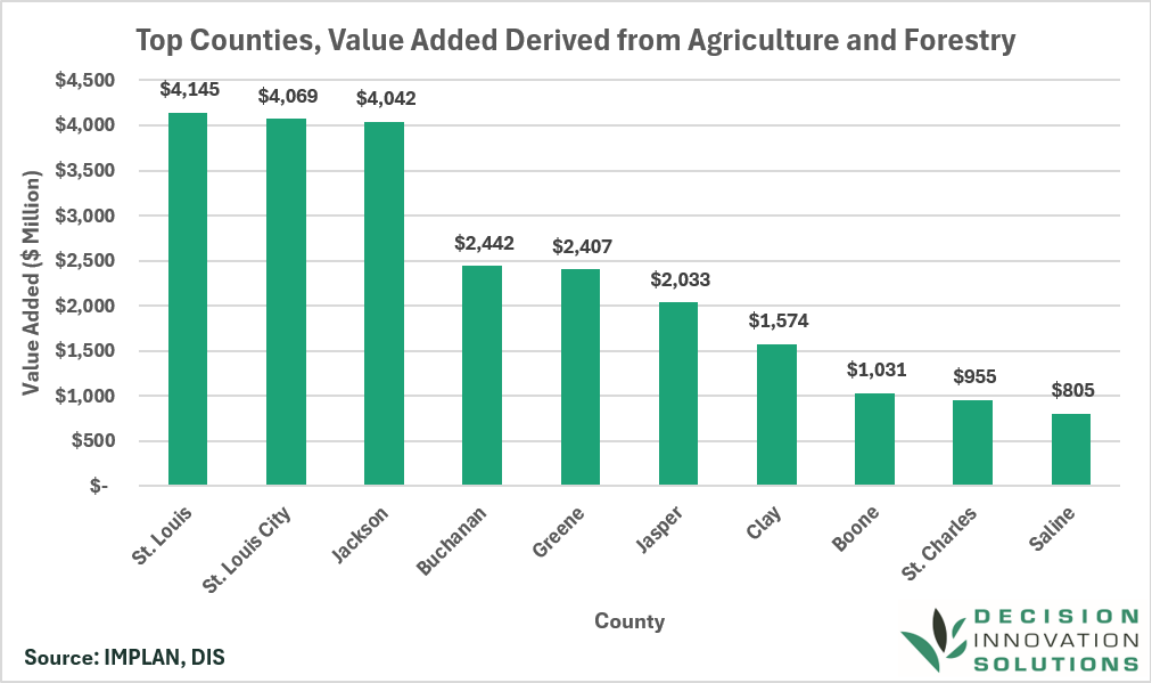


Figure 60. Top Counties, Value Added Derived from Agriculture and Forestry

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Figure 61 shows the counties that derive the largest share of their total value added from agriculture and forestry. Ralls County leads this category with 68% of its value added coming from agriculture and forestry-related economic activity, followed by Knox County (67%), Sullivan County (64%), and Saline County (61%).

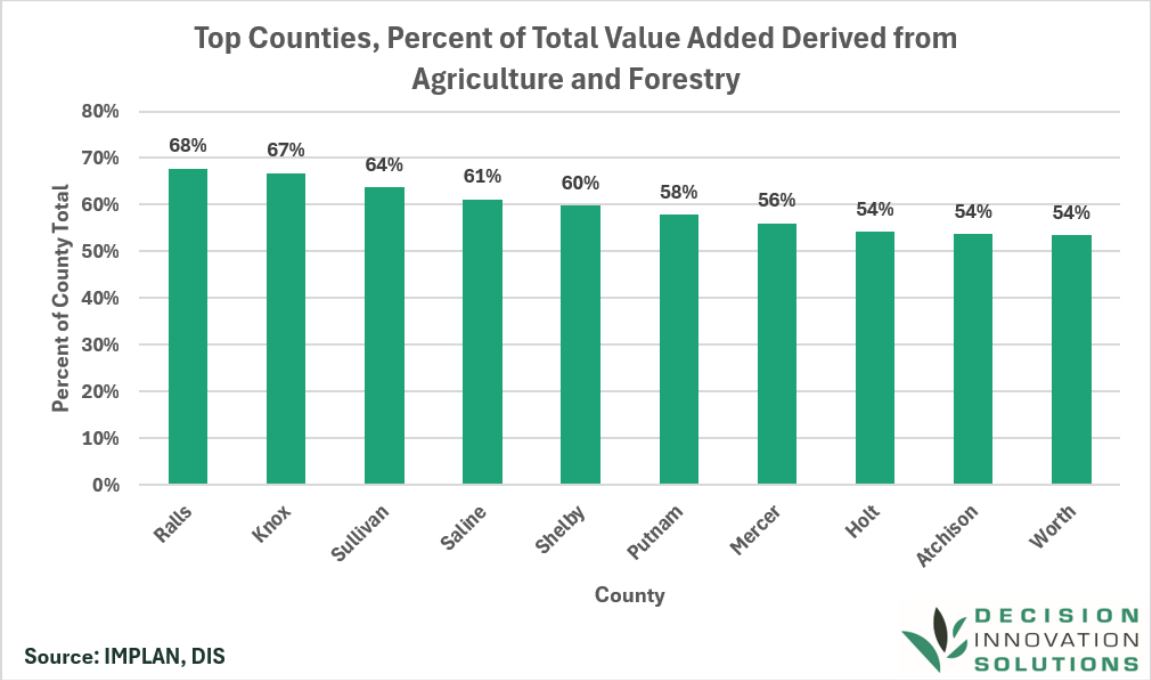


Figure 61. Top Counties, Percent of Total Value Added Derived from Agriculture and Forestry

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Figure 62 shows the number of counties that derive certain shares of value added from agriculture and forestry. As shown, 22 counties derive less than 10% of their value added from agriculture and forestry, while 15 counties derive 40% or more from agriculture and forestry. A majority of counties (64) derive at least 20% of their total value added from agriculture and forestry.

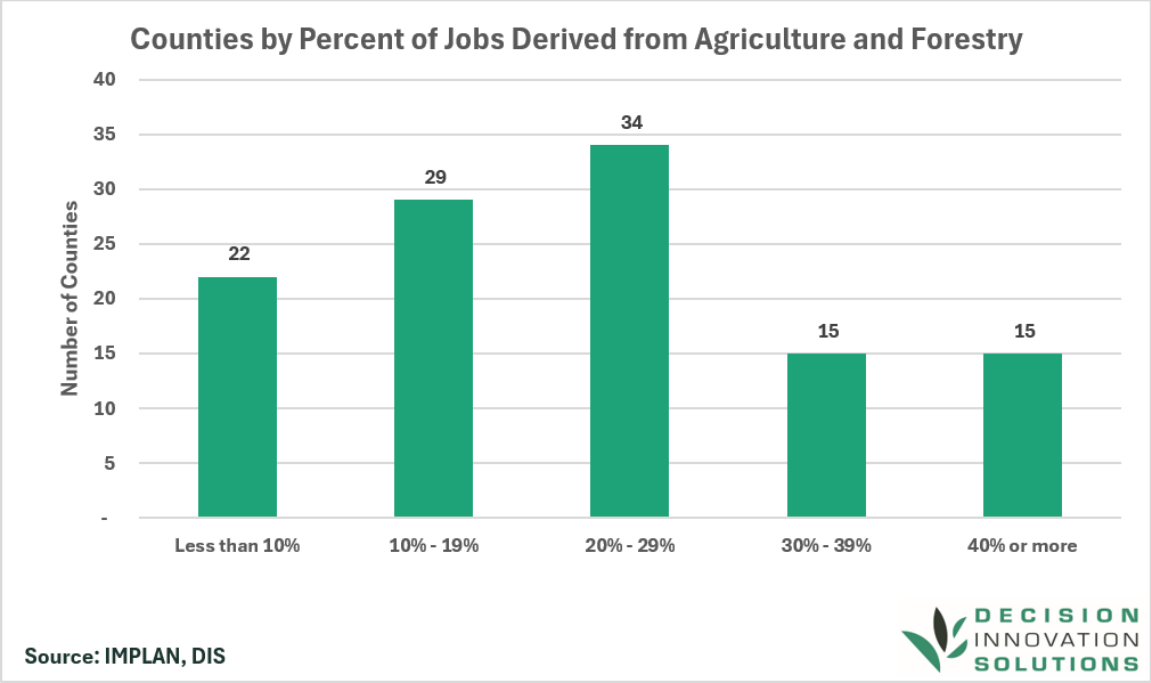


Figure 62. Counties by Percent of Value Added Derived from Agriculture and Forestry

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The value added contribution of agriculture and forestry for each county in Missouri is shown in Figure 63. Each county's share of its total value added that comes from agriculture and forestry-related economic activity is shown in Figure 64. Detailed maps of value added for the four major categories (crops, livestock and poultry, forestry, and other agriculture) are available in Section 8.1.

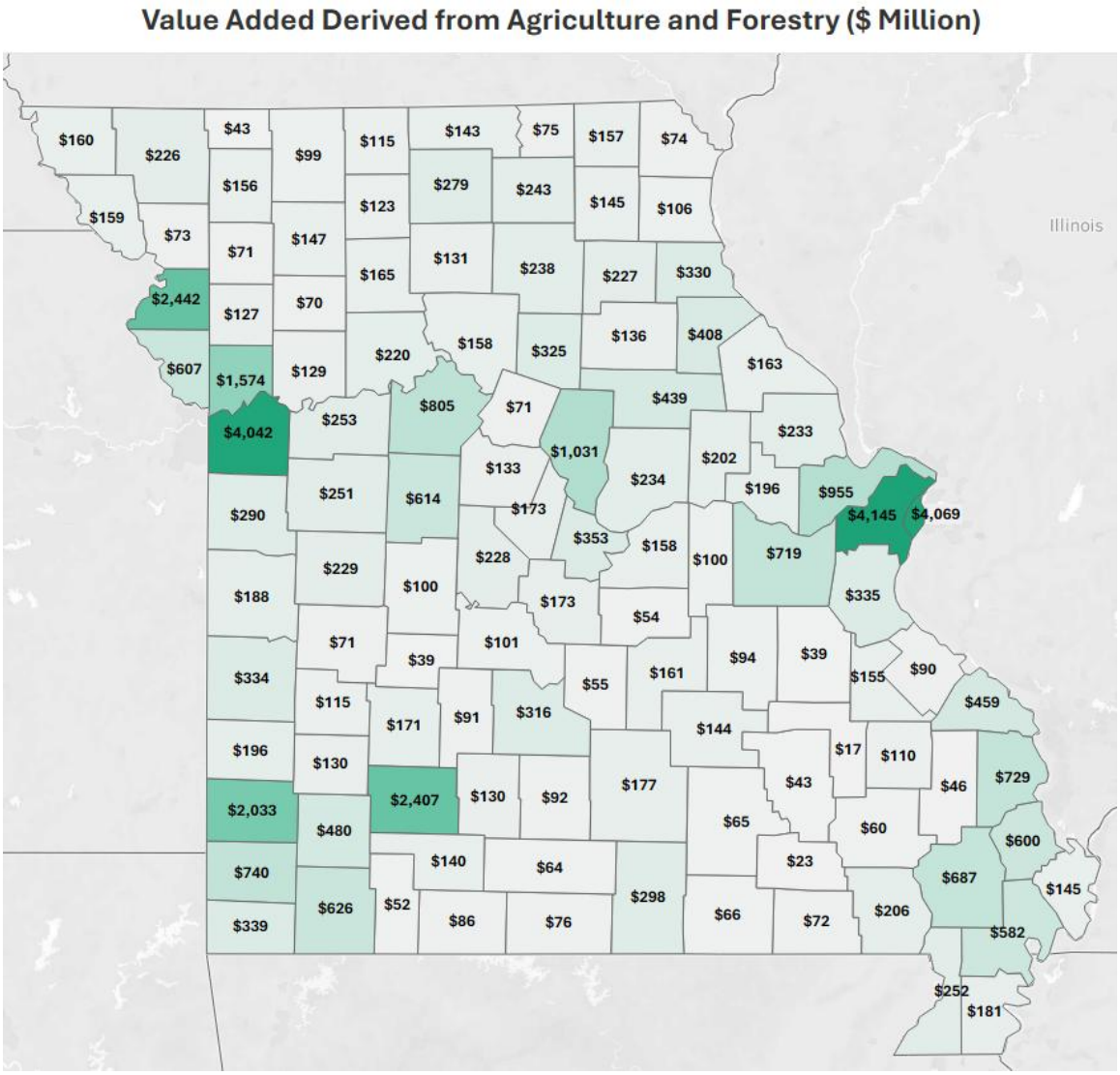


Figure 63. Value Added Derived from Agriculture and Forestry by County

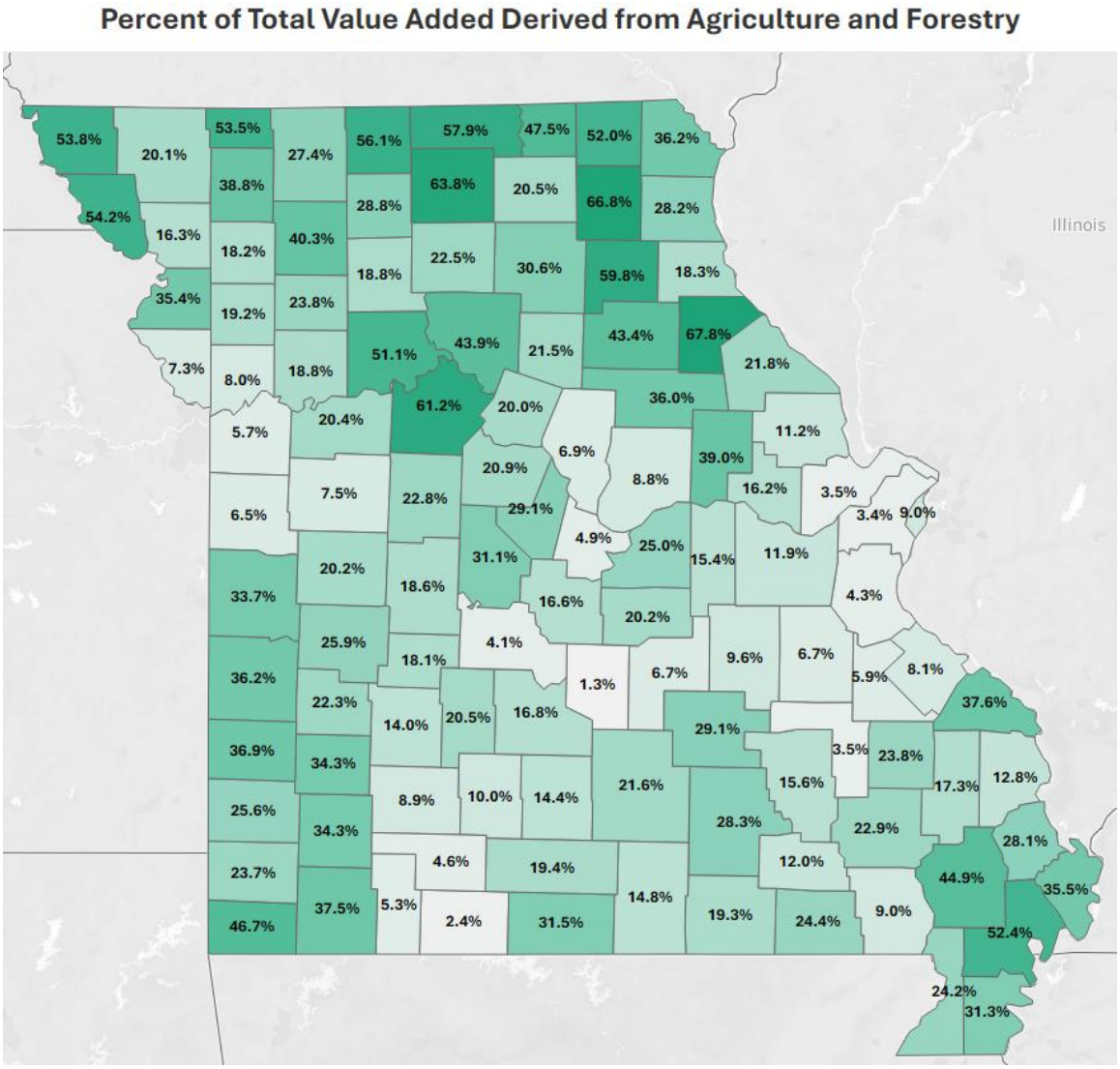


Figure 64. Percent of Total Value Added Derived from Agriculture and Forestry by County

4.3.2 County Jobs

Jackson County derives the most jobs from agriculture and forestry with more than 28,000, followed by St. Louis County (27,601), Greene County (18,339), St. Louis City (18,166), and Buchanan County (16,676) (Figure 65).

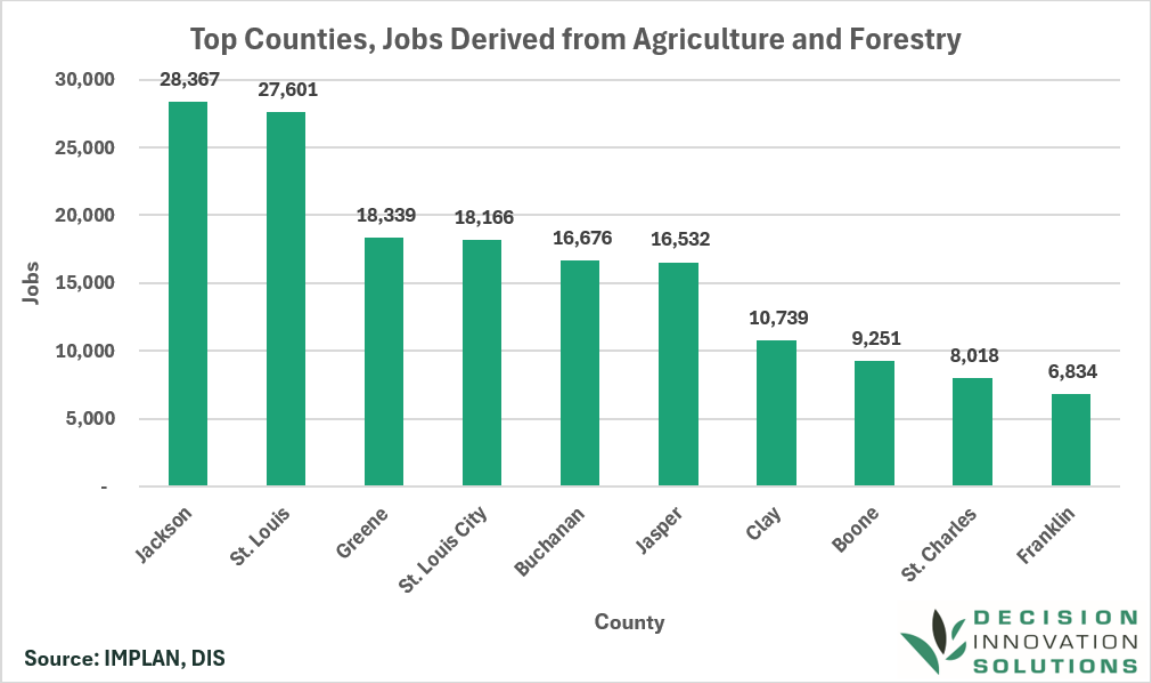


Figure 65. Top Counties, Jobs Derived from Agriculture and Forestry

Sullivan County derived the greatest share of its total jobs from agriculture and forestry with 60%, while Ralls and Knox counties each derive more than 50%. The remaining counties in the top ten all derive at least 40% of their jobs from agriculture and forestry (Figure 66).

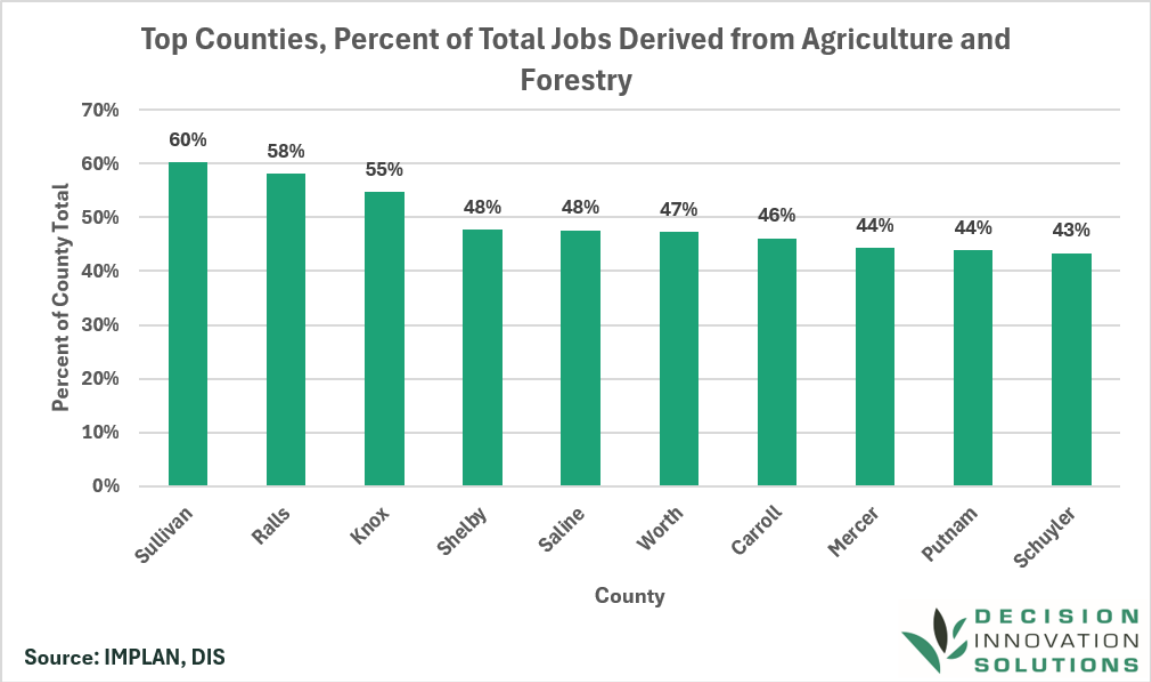


Figure 66. Top Counties, Percent of Total Jobs Derived from Agriculture and Forestry

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Just 22 counties derive less than 10% of their total jobs from agriculture and forestry, 29 counties derive between 10% and 19%, 34 counties derive between 20% and 29%, 15 counties derive between 30% and 39%, and an additional 15 counties derive 40% or more of their jobs from agriculture and forestry (Figure 67).

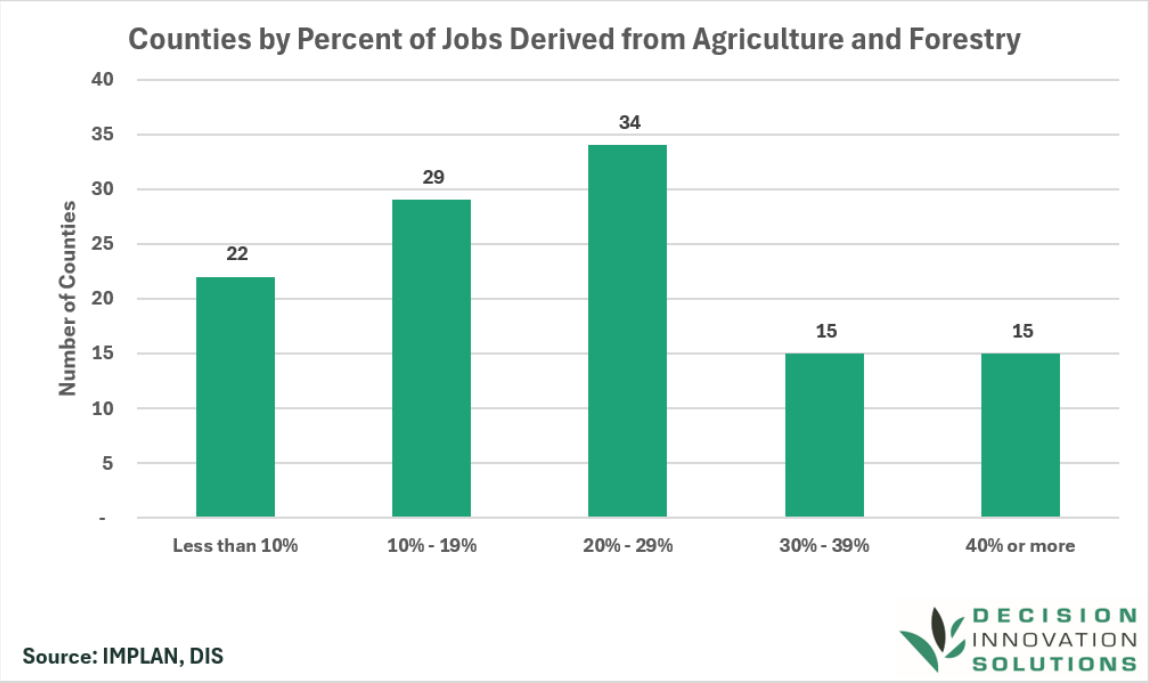


Figure 67. Counties by Percent of Jobs Derived from Agriculture and Forestry

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The jobs contribution of agriculture and forestry for each county in Missouri is shown in Figure 68. Each county's share of its total jobs that comes from agriculture and forestry-related economic activity is shown in Figure 69. Detailed maps of each county's jobs contribution and share of total for the four major categories (crops, livestock and poultry, forestry, and other agriculture) are available in Section 8.2.

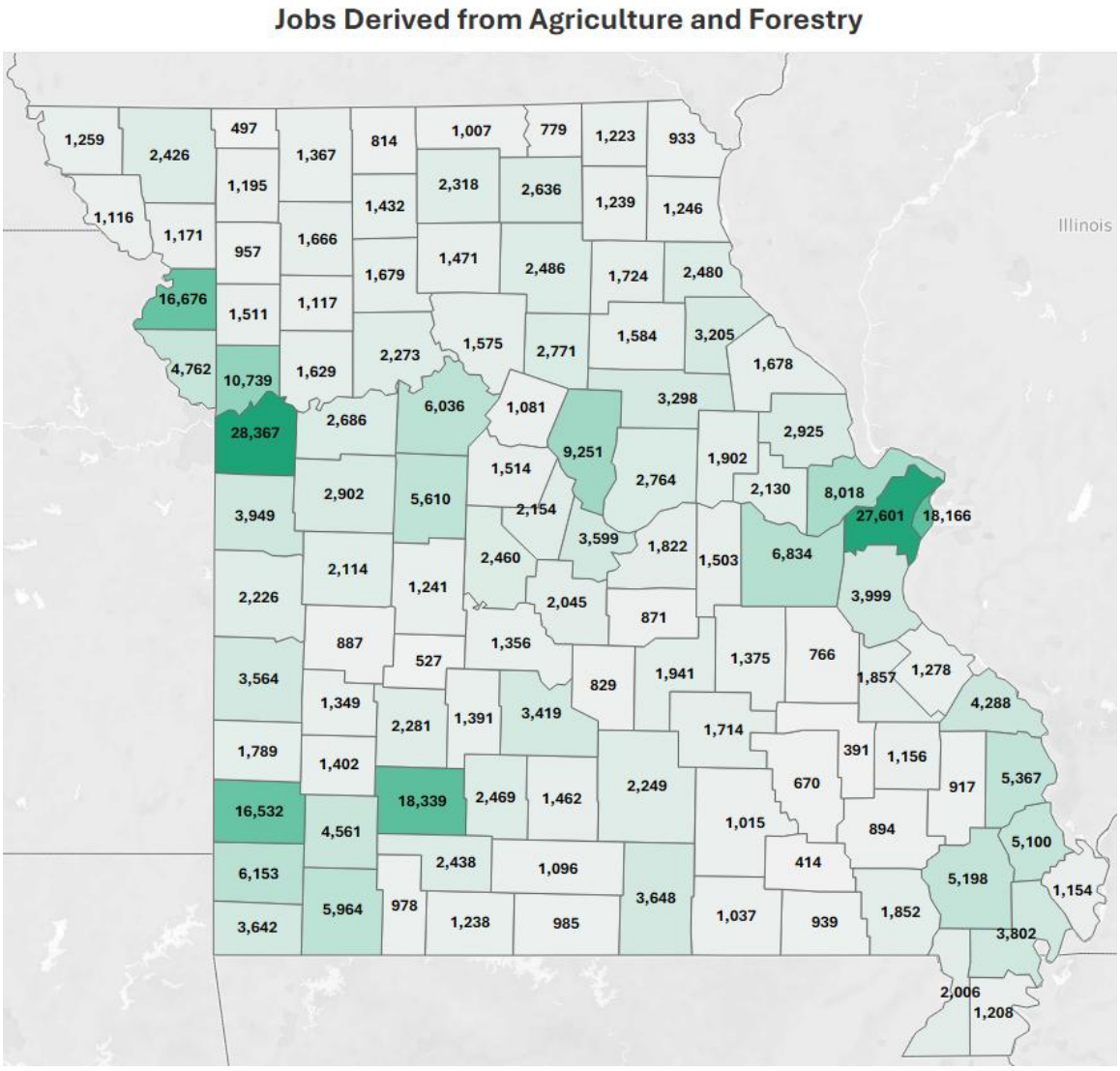


Figure 68. Jobs Derived from Agriculture and Forestry by County

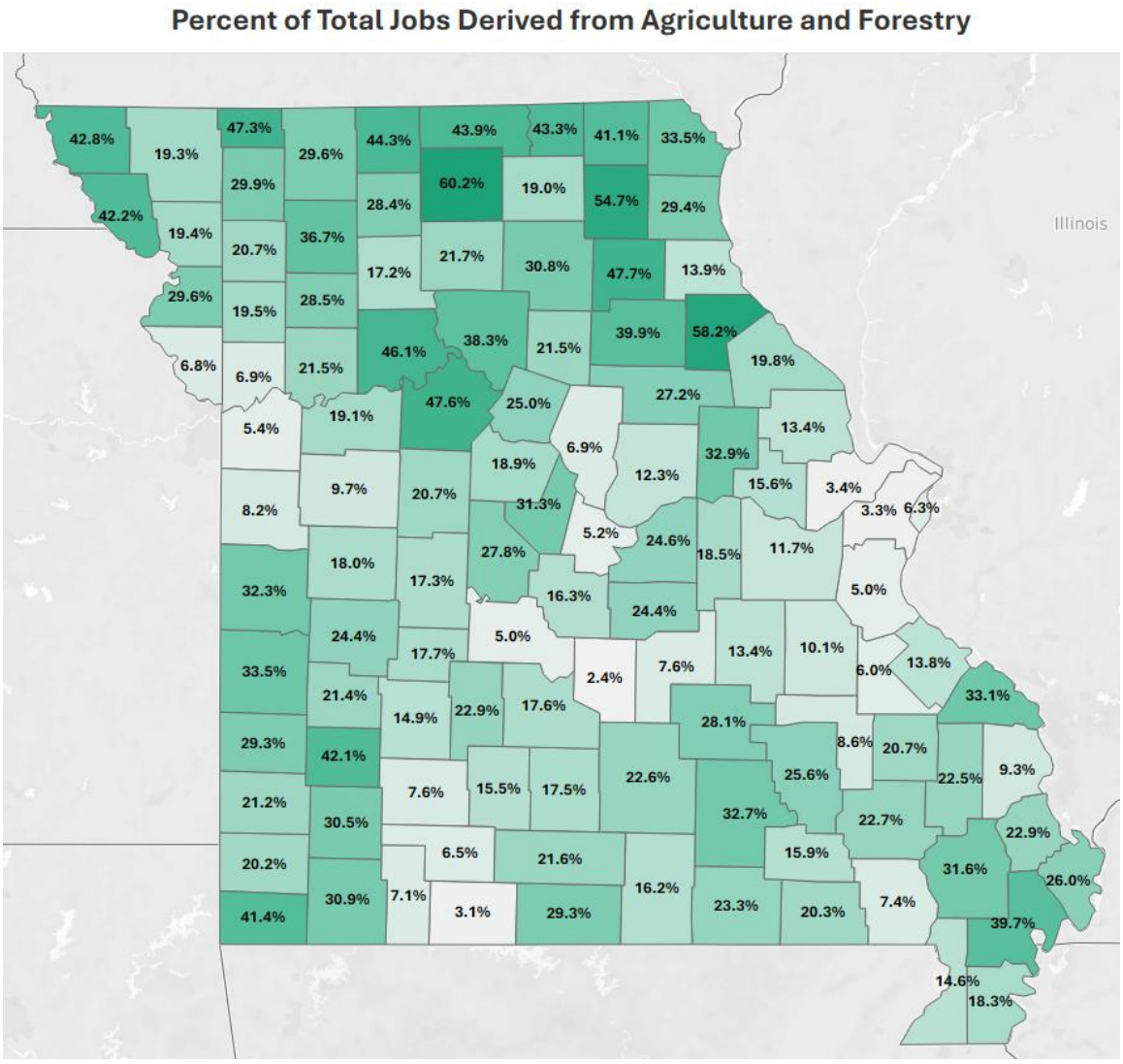


Figure 69. Percent of Total Jobs Derived from Agriculture and Forestry by County

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4.3.3 County Output

Agriculture and forestry contribute more than $8 billion in total sales (output) to four Missouri counties: Jackson ($9.9 billion), St. Louis City ($8.8 billion), St. Louis ($8.8 billion), and Buchanan ($8.3 billion). Greene and Jasper counties each have an output contribution of more than $6 billion, while Clay County has an estimated output contribution of nearly $4.2 billion (Figure 70).

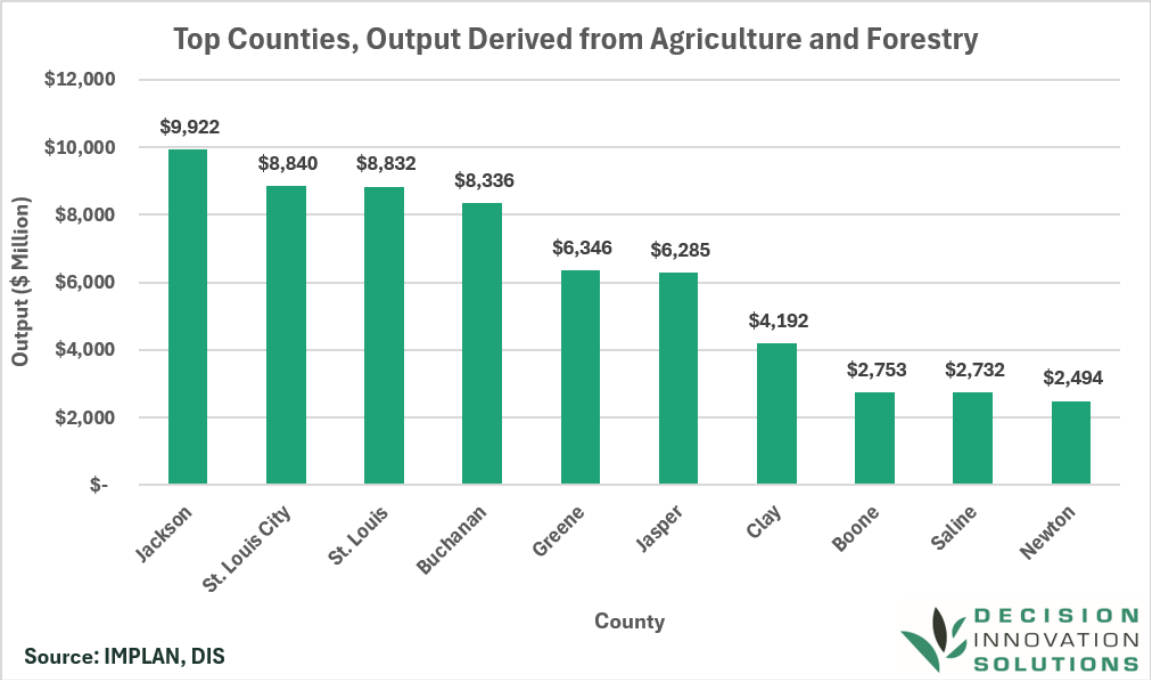


Figure 70. Top Counties, Output Derived from Agriculture and Forestry

Five counties derive between 60% and 70% of their total output from agriculture and forestry, and four counties derive more than 70%: Ralls (83%), Knox (81%), Saline (74%), and Sullivan (72%) (Figure 71).

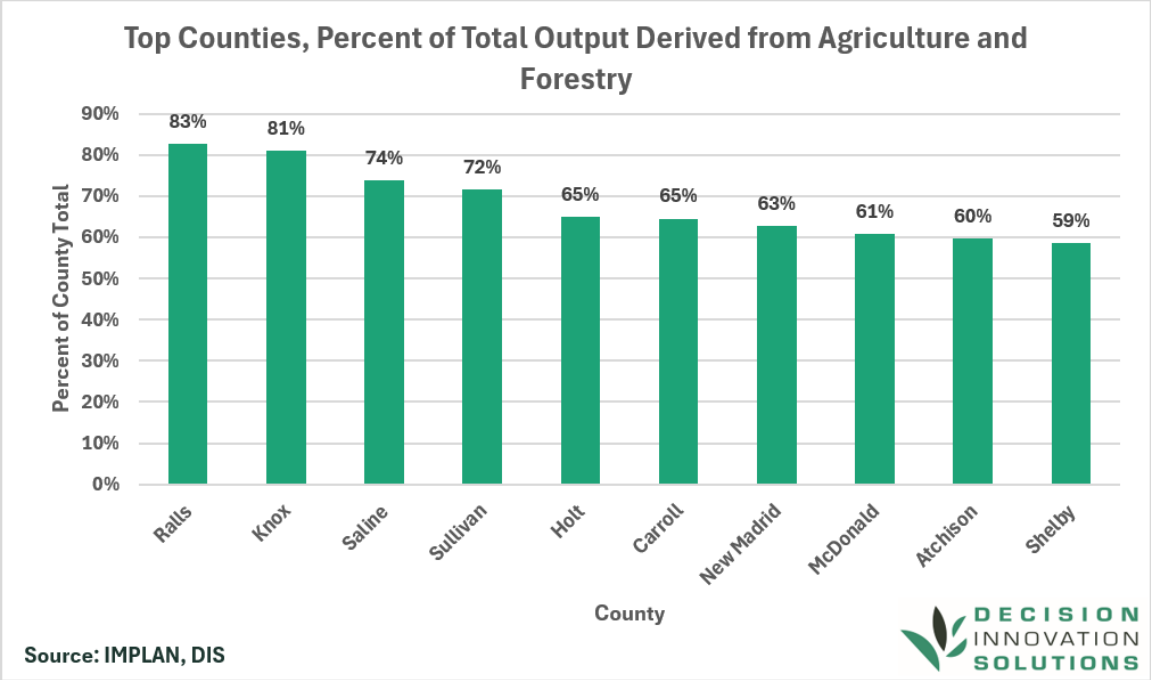


Figure 71. Top Counties, Percent of Total Output Derived from Agriculture and Forestry

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Agriculture and forestry tend to make up a greater share of a county's output than any other indicator, in part due to the vertically integrated nature of agriculture in Missouri. As shown in Figure 72, 30 counties derive more than 40% of their total output from agriculture and forestry, while just 16 counties derive less than 10%.

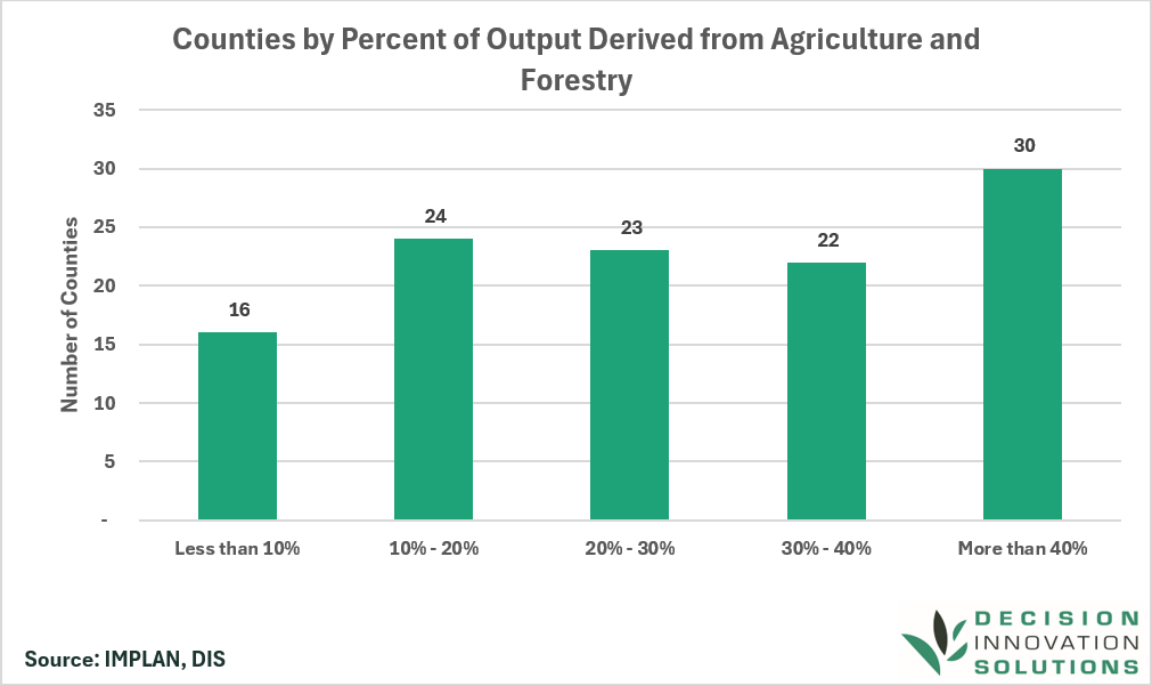


Figure 72. Counties by Percent of Output Derived from Agriculture and Forestry

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The output contribution of agriculture and forestry for each county in Missouri is shown in Figure 73. Each county's portion of its total output that comes from agriculture and forestry-related economic activity is shown in Figure 74.

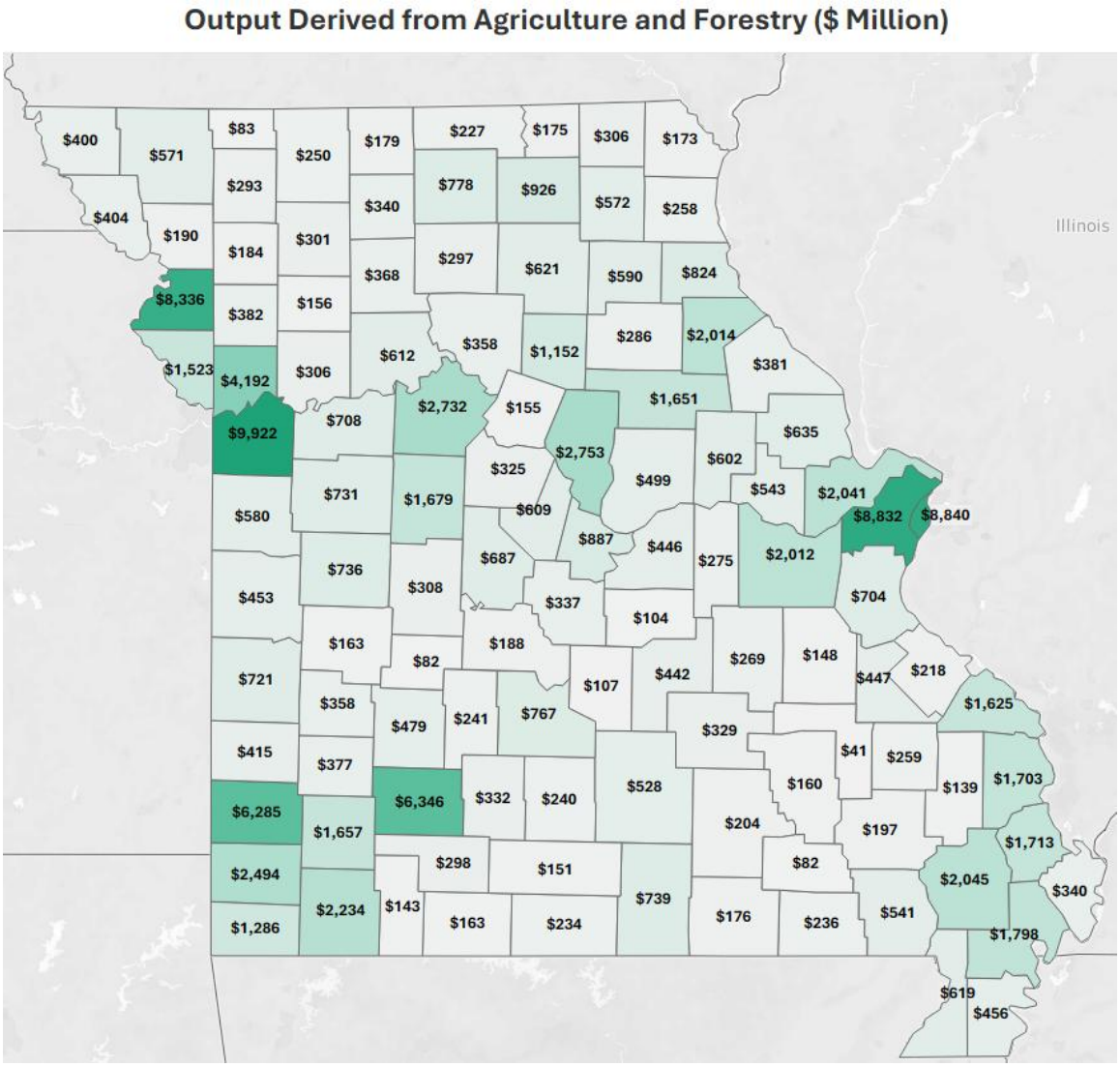


Figure 73. Output Derived from Agriculture and Forestry by County

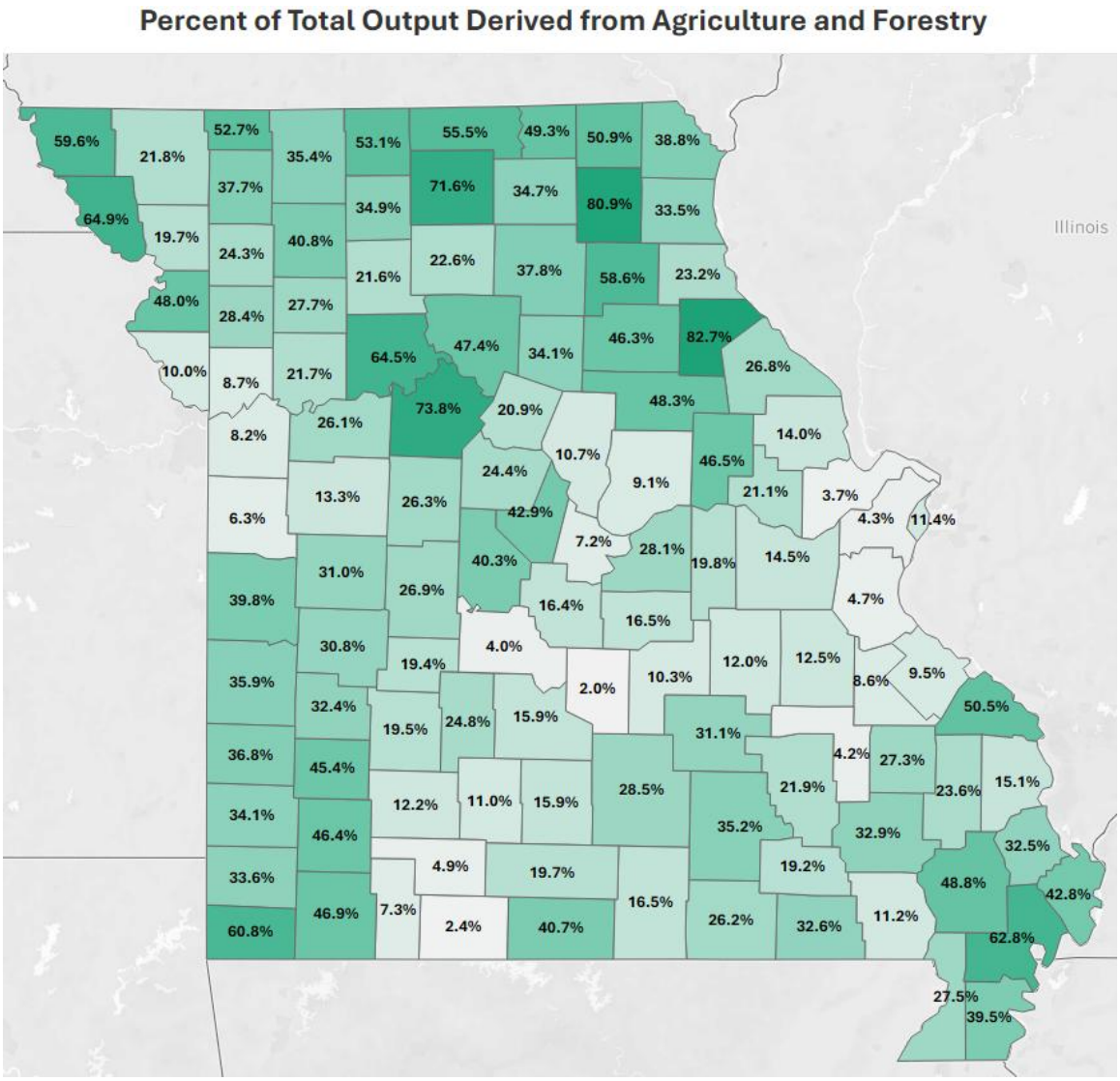


Figure 74. Percent of Total Output Derived from Agriculture and Forestry by County

4.3.4 County Labor Income

The estimated labor income derived from agriculture and forestry exceeds $2 billion in three counties: St. Louis, Jackson, and St. Louis City. Additionally, Greene, Buchanan, and Jasper counties each have a labor income contribution of more than $1 billion (Figure 75).

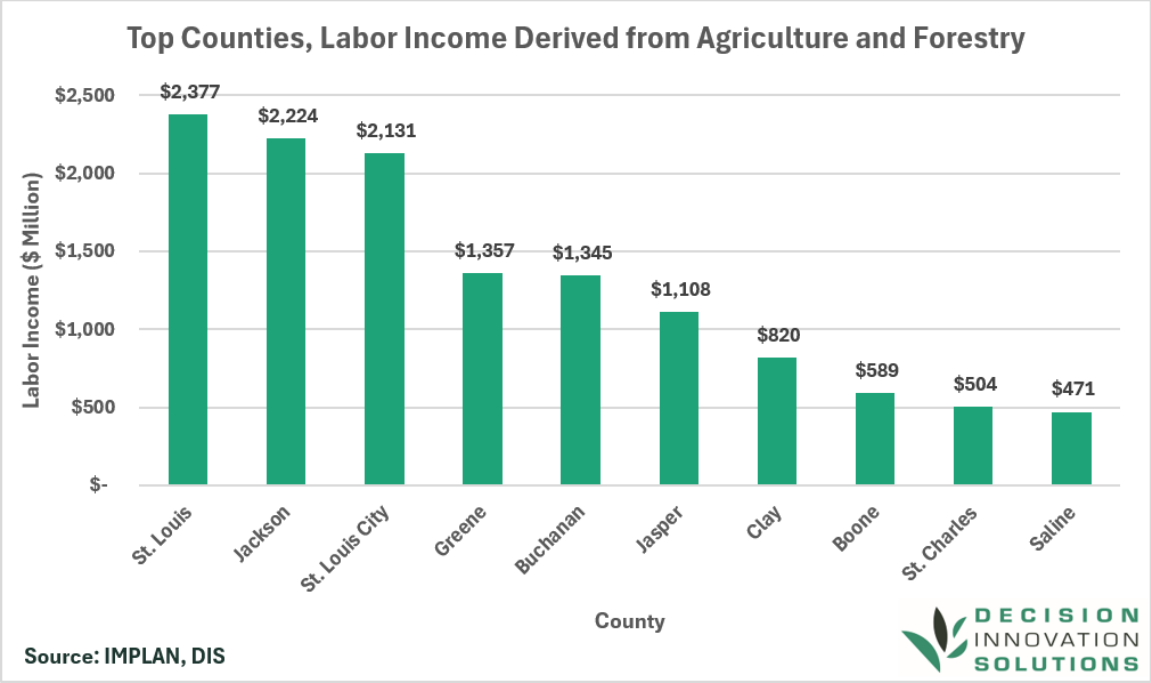


Figure 75. Top Counties, Labor Income Derived from Agriculture and Forestry

Nine counties derive more than 50% of their labor income from agriculture and forestry, including McDonald (50%), Holt (52%), Carroll (54%), New Madrid (54%), and Knox (56%). Ralls County derives the greatest share of its labor income from agriculture and forestry with 66% (Figure 76).

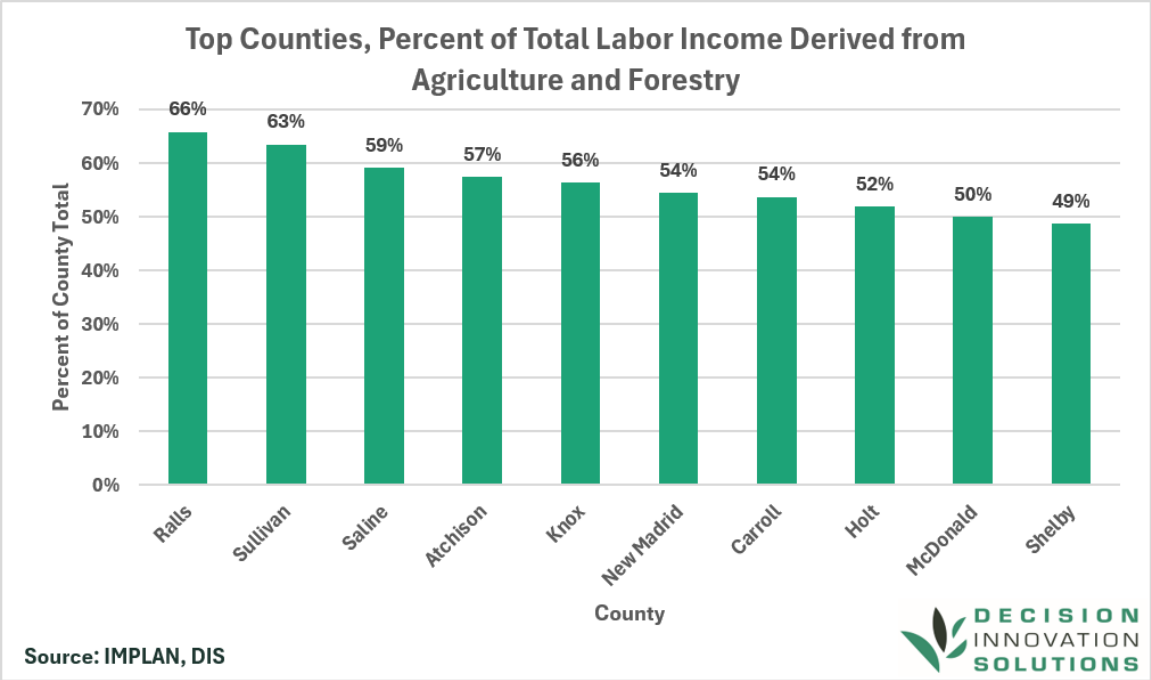


Figure 76. Top Counties, Percent of Total Labor Income Derived from Agriculture and Forestry

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A total of 55 Missouri counties derive less than 20% of their labor income from agriculture and forestry, while 60 counties derive 20% or more, including 17 counties that derive 40% or more from agriculture and forestry (Figure 77).

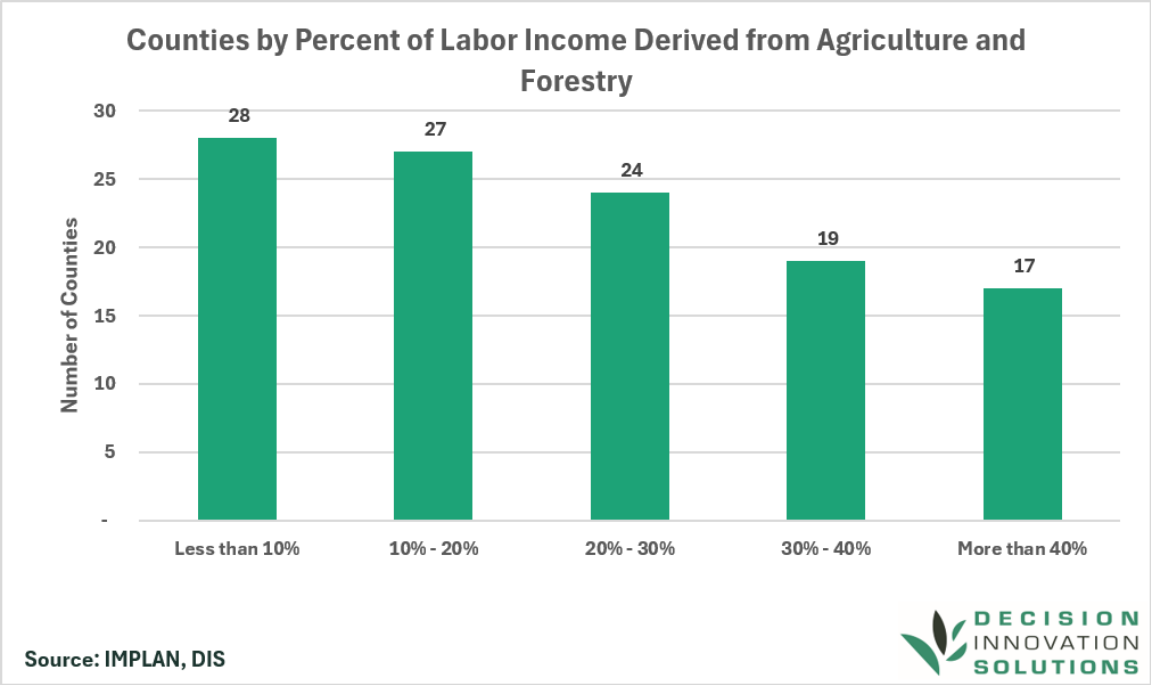


Figure 77. Counties by Percent of Labor Income Derived from Agriculture and Forestry

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Each county's labor income contribution from agriculture and forestry is shown in Figure 78. The share of each county's total labor income that comes from agriculture and forestry-related economic activity is shown in Figure 79.

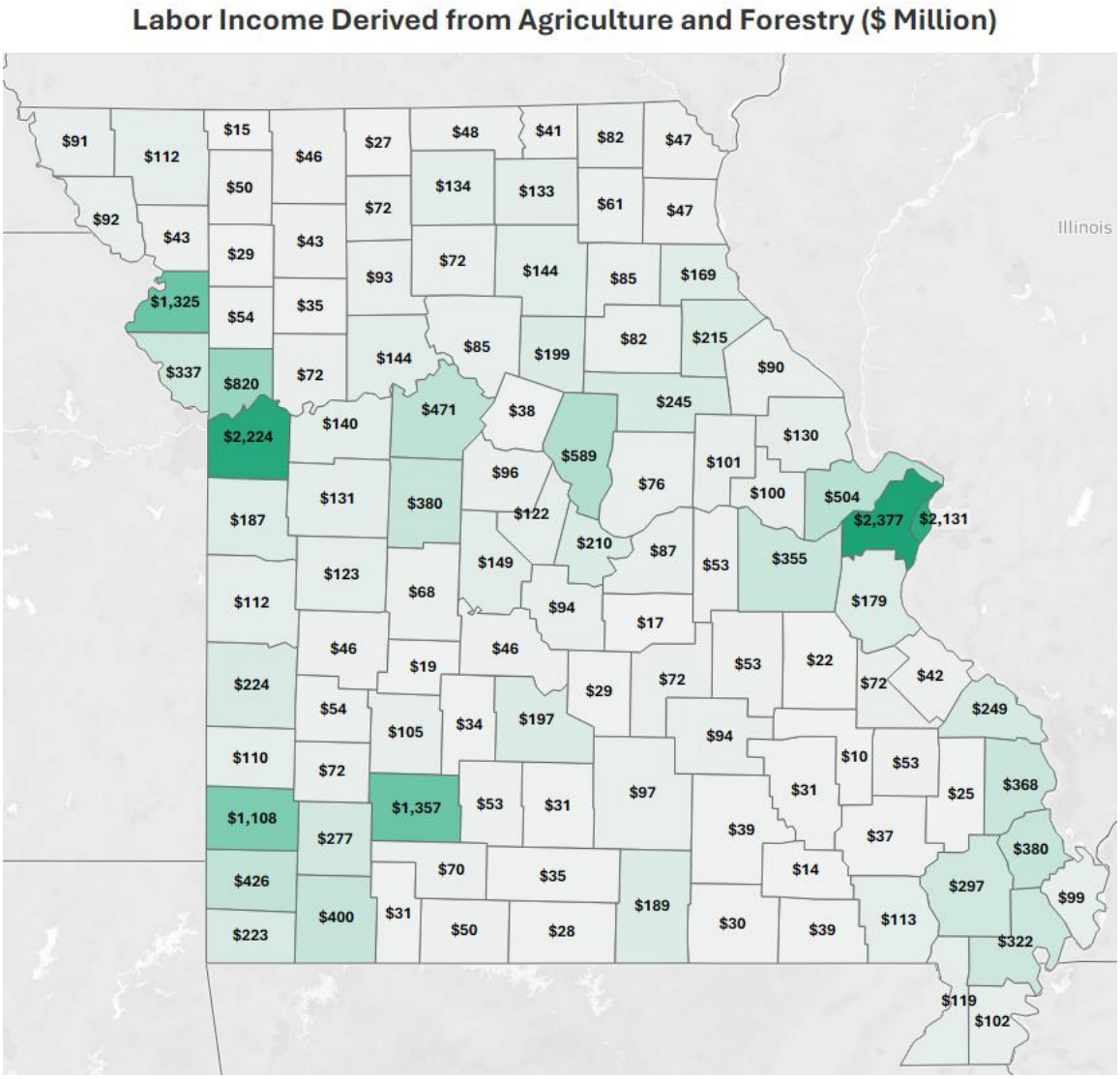


Figure 78. Labor Income Derived from Agriculture and Forestry by County

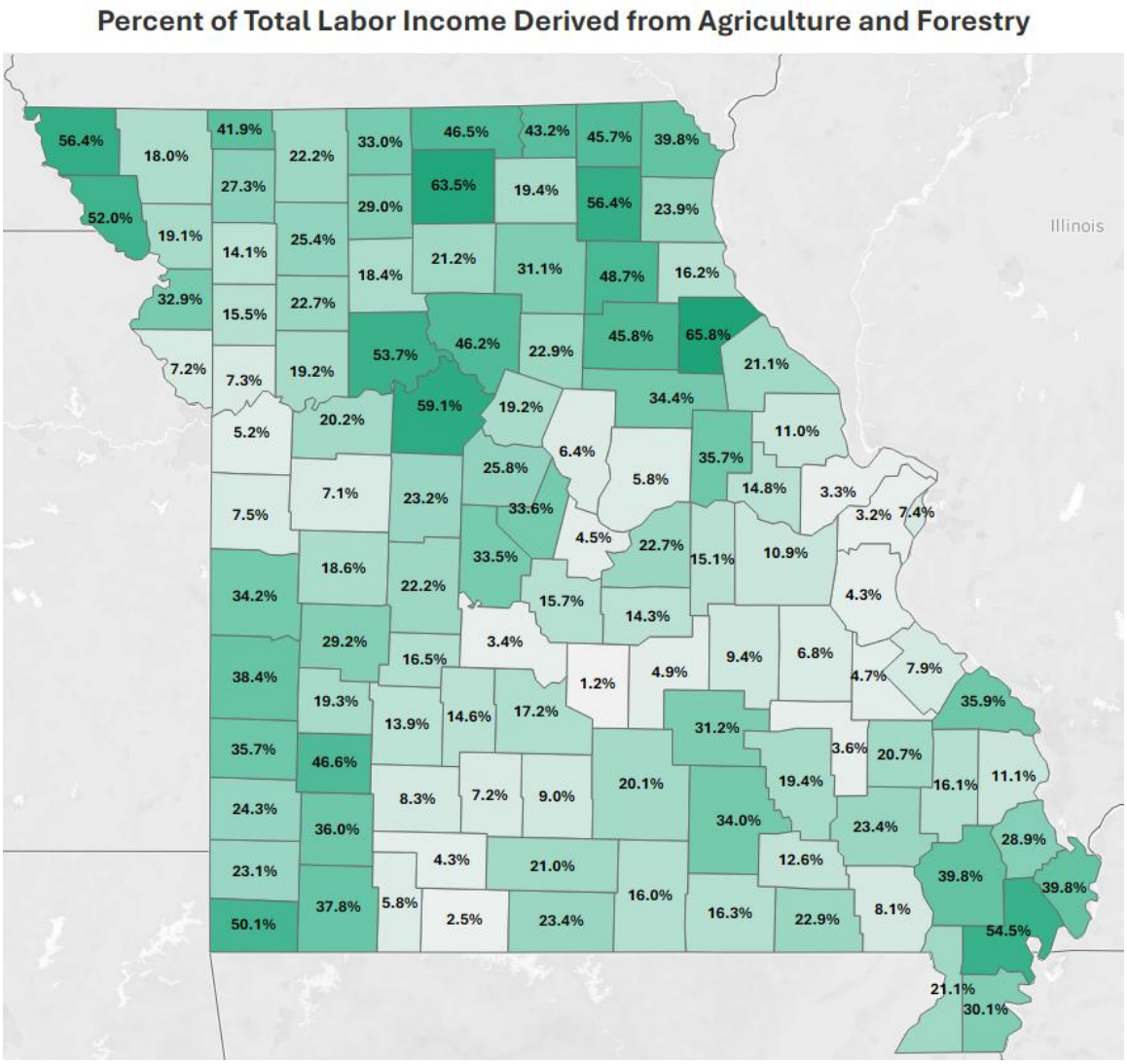


Figure 79. Percent of Total Labor Income Derived from Agriculture and Forestry by County

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4.4 Federal Congressional District Results

While agriculture has a significant presence in all eight of Missouri's federal congressional districts, agriculture's economic contribution varies from one district to another. Results for total agriculture and forestry are shown in this section. For maps breaking out the four major categories at the congressional district level, see Sections 8.3 and 8.4 in Appendix B.

4.4.1 Congressional District Value Added

Total value added derived from agriculture and forestry ranges from nearly $2.6 billion in the 3rd district to $9.8 billion in in the 6th district. Agriculture and forestry also contribute more than $5 billion to the 1st, 4th, 7th, and 8th districts (Figure 80).

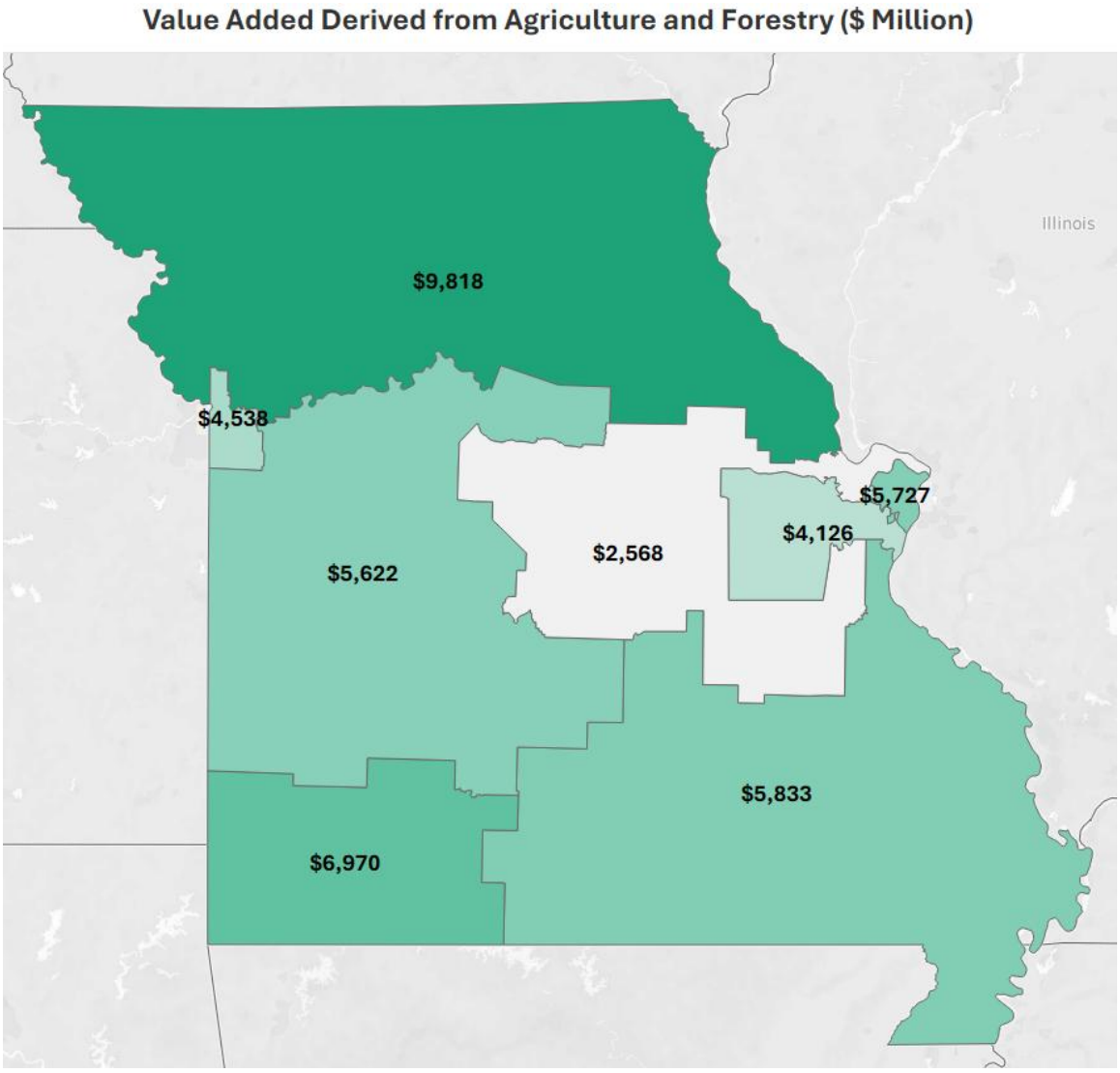


Figure 80. Value Added Derived from Agriculture and Forestry by Congressional District

The share of each district's total value added that comes from agriculture and forestry is shown in Figure 81. This share ranges from 5.3% in the 1st district to 23.4% in the 6th district. Four of Missouri's congressional districts derive more than 10% of their value added from agriculture and forestry.

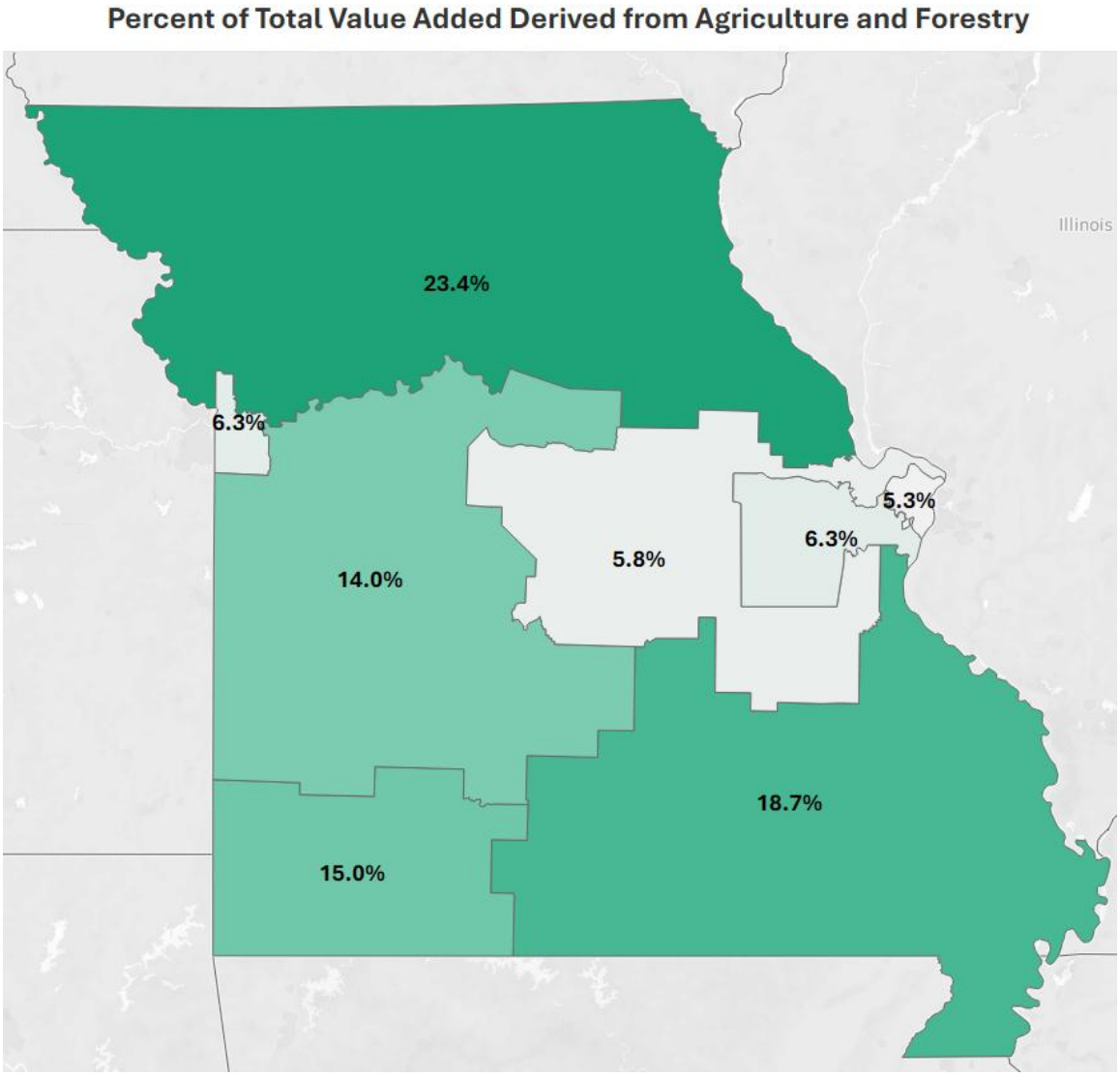


Figure 81. Percent of Total Value Added Derived from Agriculture and Forestry by Congressional District

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4.4.2 Congressional District Jobs

Agriculture and forestry is estimated to contribute more than 28,000 jobs in every congressional district, with half of Missouri's districts deriving more than 55,000 jobs from agriculture and forestry: the 4th (57,662 jobs), 6th (84,766 jobs), 7th (61,078 jobs), and 8th (56,438 jobs) (Figure 82).

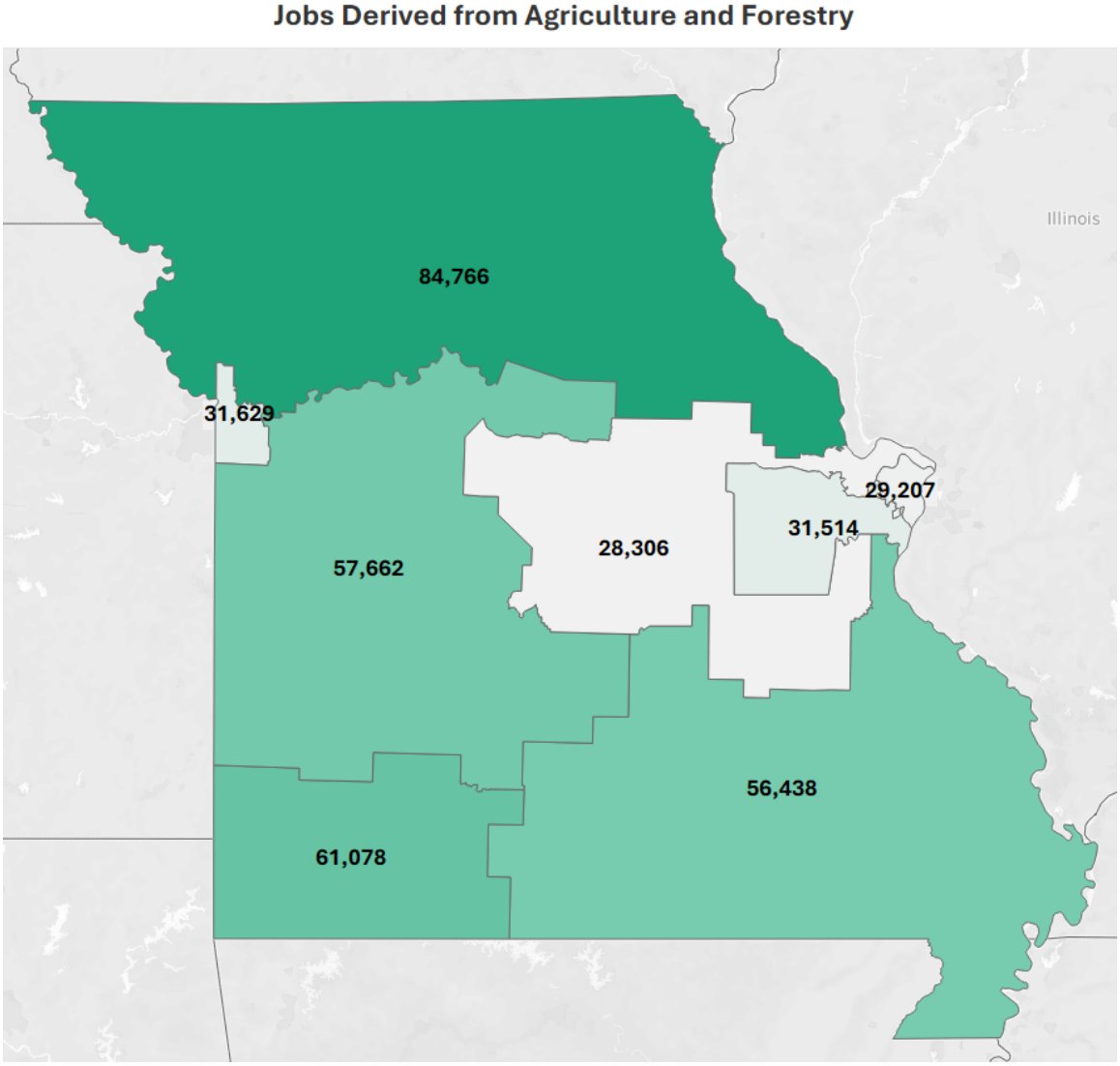


Figure 82. Jobs Derived from Agriculture and Forestry by Congressional District

The share of all jobs that are derived from agriculture and forestry is more than 5% in all but one district (the 1st) and more than 10% in four districts: the 4th, 6th, 7th, and 8th. The 6th district derives the highest share of jobs from agriculture and forestry with an estimated 20.2% (Figure 83).

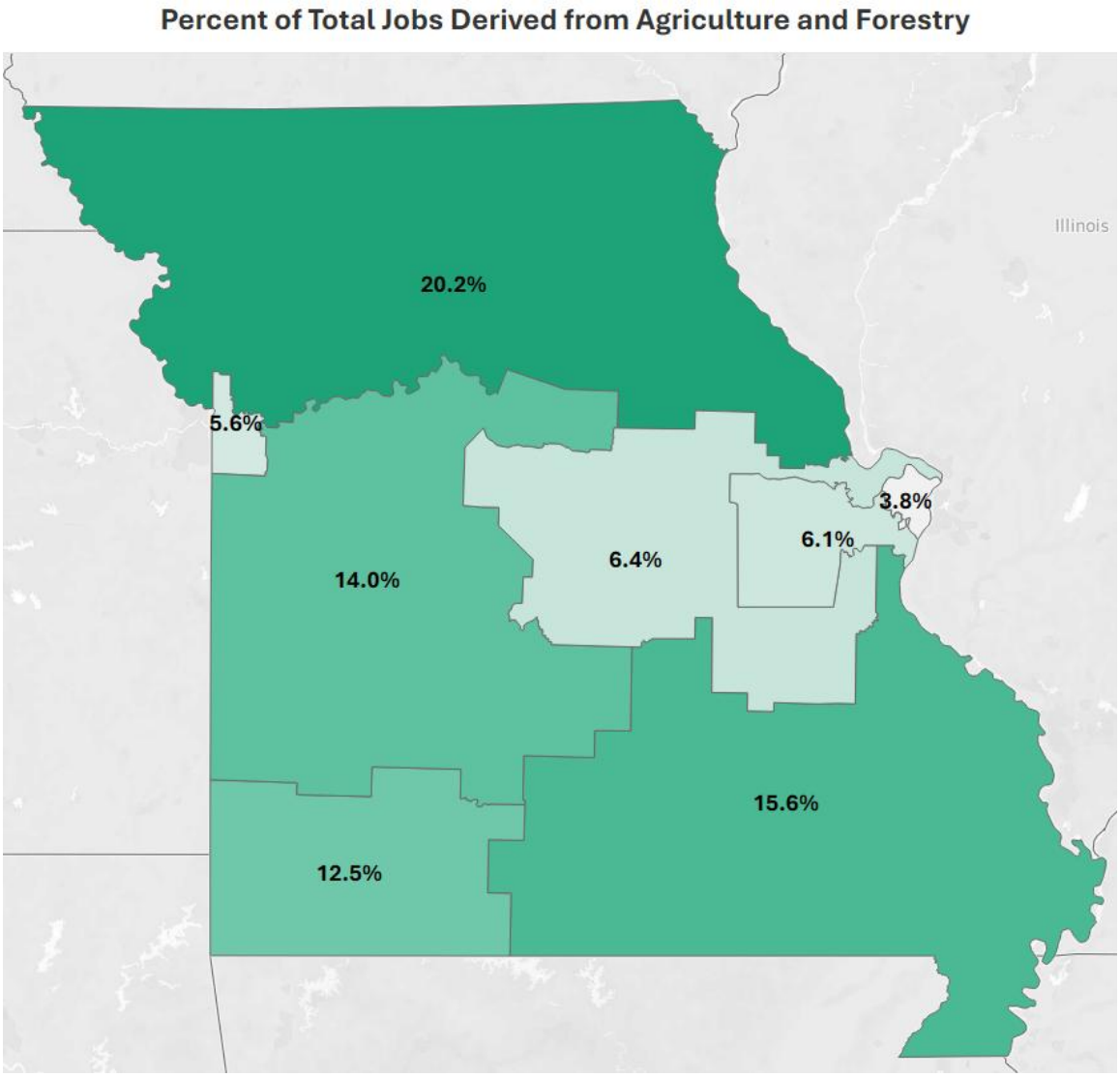


Figure 83. Percent of Total Jobs Derived from Agriculture and Forestry by Congressional District

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5 Agriculture in the Broader Missouri Economy

The total value added contribution of agriculture and forestry in Missouri is estimated at $45.2 billion. However, only $23.8 billion of this total occurs within agriculture and forestry industries (the direct contribution). The remaining $21.4 billion in value added is due to activity in other sectors that occurs because of agriculture and forestry – either due to purchases of inputs from other sectors (indirect effects) or the spending of employees in the agriculture and forestry sector (induced effects). As shown in Figure 84, agriculture and forestry generates significant economic activity in sectors such as services, transportation, wholesale and retail providers, and finance.

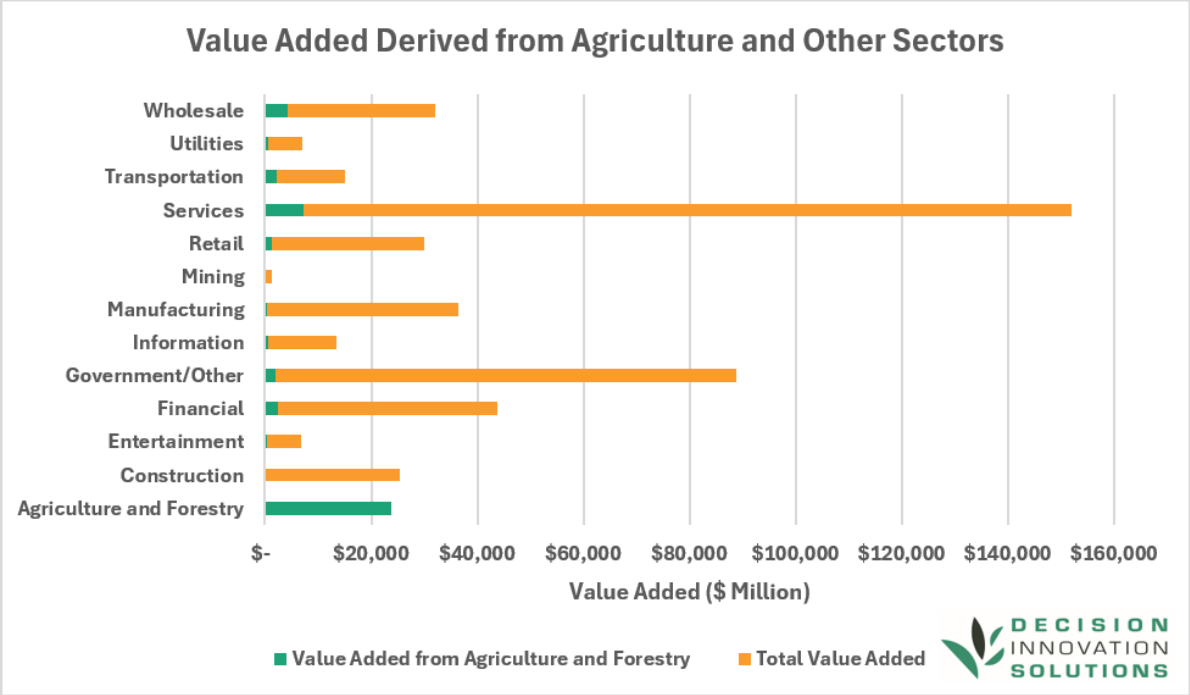


Figure 84. Value Added Derived from Agriculture and Other Sectors

A full list of the IMPLAN industries comprising each sector is available in Section 7.1. A few industries with significant activity in Missouri for selected sectors are:

- **Services:** legal services, accounting and related services, scientific research and development services, and various healthcare industries
- **Manufacturing:** soap and other detergent manufacturing, plastic product manufacturing, ready-mix concrete manufacturing, and metal foundries
- **Information:** newspaper publishers, software publishers, and telecommunications carriers
- **Financial:** various banking, investment, and insurance industries
- **Entertainment:** radio and television broadcasting, commercial sports, amusement parks and arcades, gambling industries, and fitness and recreational sports centers

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A similar relationship is present for jobs (Figure 85) and output (Figure 86). Activity in agriculture and forestry industries supports jobs across the entire Missouri economy, particularly in the services sector. Agriculture and forestry is the fifth largest sector in the state by output even before accounting for indirect and induced effects driving sales in other sectors.

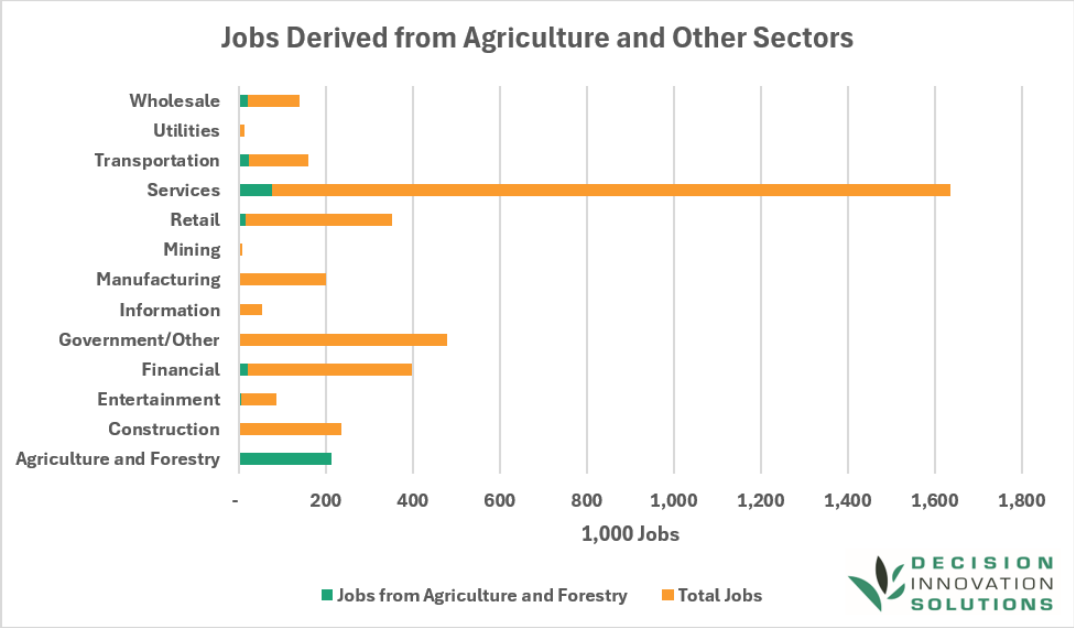


Figure 85. Jobs Derived from Agriculture and Other Sectors

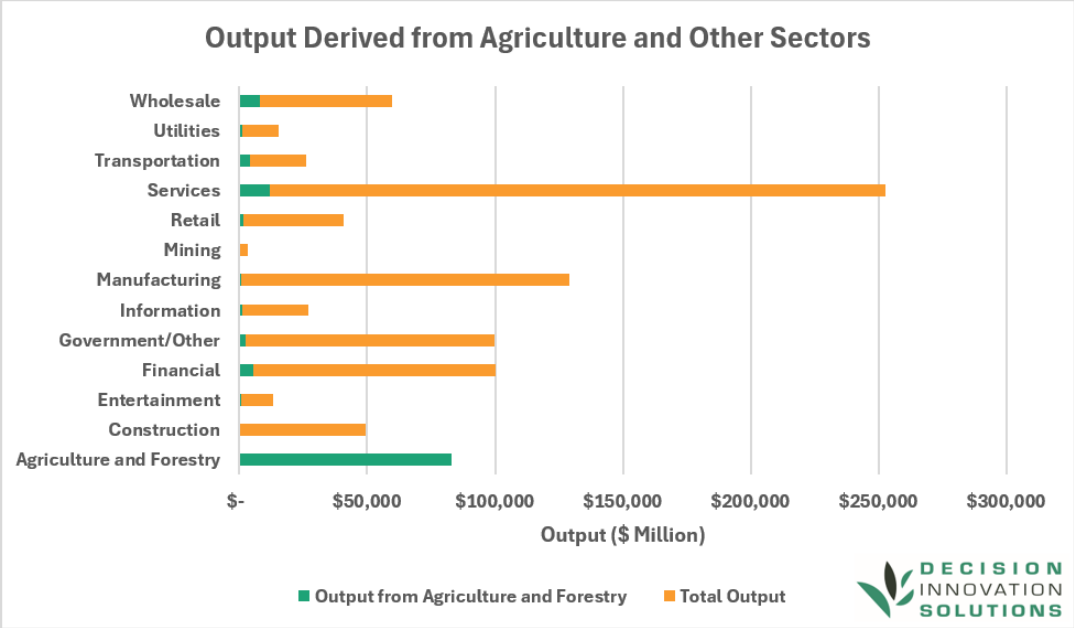


Figure 86. Output Derived from Agriculture and Other Sectors

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6 Looking Ahead

Long-term projections published by the USDA[10] expect net farm income to peak in 2026 at $183 billion nationally and decline in the coming years. Annual gross income is projected to hold roughly steady at slightly over $600 billion, while expenses are expected to increase from $467 billion in 2025 to nearly $495 billion in 2030. If these projections are accurate and Missouri follows the national trend, this suggests that farmers could face additional challenges over the next few years.

The America's Heartland beef packing plant near Wright City has recently commenced operations and began ramping up production. This comes at a time when major packing operations in other states are announcing closures, such as the Tyson Foods facility in Lexington, Nebraska. This provides Missouri cattle producers an opportunity to minimize transportation expenses and maximize value during a tumultuous period in the broader livestock industry.

Biofuels are also experiencing a turbulent and uncertain period due to a variety of factors including changes in tax policy. Despite this, many new soybean processing plants and expansions to existing plants have been announced over the past several years. Some of these projects have been completed, with others currently in progress and expected to finish in 2026 or 2027. There could be potential for Missouri to develop additional soybean processing capacity and generate additional value from soybeans grown in the state. A new soybean processor in Pemiscot County was announced in 2022 but has subsequently had its development put on hold[11].

[10] https://www.ers.usda.gov/media/20856/oce-2026-1.pdf?v=58240

[11] https://advancedbiofuelsusa.info/cargill-puts-missouri-bootheel-soy-crush-project-on-hold

7 Appendix A, IMPLAN Aggregation Scheme

7.1 All Industries Aggregation Scheme

IMPLAN Industry	Sector
Oilseed farming	Agriculture and Forestry
Grain farming	Agriculture and Forestry
Vegetable and melon farming	Agriculture and Forestry
Fruit farming	Agriculture and Forestry
Tree nut farming	Agriculture and Forestry
Greenhouse, nursery, and floriculture production	Agriculture and Forestry
Tobacco farming	Agriculture and Forestry
Cotton farming	Agriculture and Forestry
Sugarcane and sugar beet farming	Agriculture and Forestry
All other crop farming	Agriculture and Forestry
Beef cattle ranching and farming, including feedlots and dual-purpose ranching and farming	Agriculture and Forestry
Dairy cattle and milk production	Agriculture and Forestry
Poultry and egg production	Agriculture and Forestry
Animal production, except cattle and poultry and eggs	Agriculture and Forestry
Forestry, forest products, and timber tract production	Agriculture and Forestry
Commercial logging	Agriculture and Forestry
Commercial fishing	Agriculture and Forestry
Commercial hunting and trapping	Agriculture and Forestry
Support activities for agriculture and forestry	Agriculture and Forestry
Oil and gas extraction	Mining
Coal mining	Mining
Copper, nickel, lead, and zinc mining	Mining
Iron ore mining	Mining
Gold ore and silver ore mining	Mining
Other metal ore mining	Mining
Stone mining and quarrying	Mining
Sand and gravel mining	Mining
Other clay, ceramic, refractory minerals mining	Mining
Other nonmetallic mineral mining and quarrying	Agriculture and Forestry
Drilling oil and gas wells	Mining
Support activities for oil and gas operations	Mining
Metal mining services	Mining
Other nonmetallic minerals services	Mining
Electric power generation - Hydroelectric	Utilities
Electric power generation - Fossil fuel	Utilities

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IMPLAN Industry	Sector
Electric power generation - Nuclear	Utilities
Electric power generation - Solar	Utilities
Electric power generation - Wind	Utilities
Electric power generation - Geothermal	Utilities
Electric power generation - Biomass	Utilities
Electric power generation - All other	Utilities
Electric power transmission and distribution	Utilities
Natural gas distribution	Utilities
Water, sewage and other systems	Utilities
Construction of new health care structures	Construction
Construction of new manufacturing structures	Construction
Construction of new power and communication structures	Construction
Construction of new educational and vocational structures	Construction
Construction of new highways and streets	Construction
Construction of new commercial structures, including farm structures	Construction
Construction of other new nonresidential structures	Construction
Construction of new single-family residential structures	Construction
Construction of new multifamily residential structures	Construction
Construction of other new residential structures	Construction
Maintenance and repair construction of nonresidential structures	Construction
Maintenance and repair construction of residential structures	Construction
Maintenance and repair construction of highways, streets, bridges, and tunnels	Construction
Dog and cat food manufacturing	Agriculture and Forestry
Other animal food manufacturing	Agriculture and Forestry
Flour milling	Agriculture and Forestry
Rice milling	Agriculture and Forestry
Malt manufacturing	Agriculture and Forestry
Wet corn milling	Agriculture and Forestry
Soybean and other oilseed processing	Agriculture and Forestry
Fats and oils refining and blending	Agriculture and Forestry
Breakfast cereal manufacturing	Agriculture and Forestry
Beet sugar manufacturing	Agriculture and Forestry
Sugar cane mills and refining	Agriculture and Forestry
Nonchocolate confectionery manufacturing	Agriculture and Forestry
Chocolate and confectionery manufacturing from cacao beans	Agriculture and Forestry
Confectionery manufacturing from purchased chocolate	Agriculture and Forestry
Frozen fruits, juices and vegetables manufacturing	Agriculture and Forestry
Frozen specialties manufacturing	Agriculture and Forestry
Canned fruits and vegetables manufacturing	Agriculture and Forestry
Canned specialties	Agriculture and Forestry
Dehydrated food products manufacturing	Agriculture and Forestry
Cheese manufacturing	Agriculture and Forestry

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IMPLAN Industry	Sector
Dry, condensed, and evaporated dairy product manufacturing	Agriculture and Forestry
Fluid milk manufacturing	Agriculture and Forestry
Creamery butter manufacturing	Agriculture and Forestry
Ice cream and frozen dessert manufacturing	Agriculture and Forestry
Frozen cakes and other pastries manufacturing	Agriculture and Forestry
Poultry processing	Agriculture and Forestry
Animal, except poultry, slaughtering	Agriculture and Forestry
Meat processed from carcasses	Agriculture and Forestry
Rendering and meat byproduct processing	Agriculture and Forestry
Seafood product preparation and packaging	Agriculture and Forestry
Bread and bakery product, except frozen, manufacturing	Agriculture and Forestry
Cookie and cracker manufacturing	Agriculture and Forestry
Dry pasta, mixes, and dough manufacturing	Agriculture and Forestry
Tortilla manufacturing	Agriculture and Forestry
Roasted nuts and peanut butter manufacturing	Agriculture and Forestry
Other snack food manufacturing	Agriculture and Forestry
Coffee and tea manufacturing	Agriculture and Forestry
Flavoring syrup and concentrate manufacturing	Agriculture and Forestry
Mayonnaise, dressing, and sauce manufacturing	Agriculture and Forestry
Spice and extract manufacturing	Agriculture and Forestry
All other food manufacturing	Agriculture and Forestry
Bottled and canned soft drinks & water	Agriculture and Forestry
Manufactured ice	Agriculture and Forestry
Breweries	Agriculture and Forestry
Wineries	Agriculture and Forestry
Distilleries	Agriculture and Forestry
Tobacco manufacturing	Agriculture and Forestry
Fiber, yarn, and thread mills	Manufacturing
Broadwoven fabric mills	Manufacturing
Narrow fabric mills and schiffli machine embroidery	Manufacturing
Nonwoven fabric mills	Manufacturing
Knit fabric mills	Manufacturing
Textile and fabric finishing mills	Manufacturing
Fabric coating mills	Manufacturing
Carpet and rug mills	Manufacturing
Curtain and linen mills	Manufacturing
Textile bag and canvas mills	Manufacturing
Rope, cordage, twine, tire cord and tire fabric mills	Manufacturing
Other textile product mills	Manufacturing
Apparel knitting mills	Manufacturing
Cut and sew apparel contractors	Manufacturing
Cut and sew apparel manufacturing (except contractors)	Manufacturing

IMPLAN Industry	Sector
Apparel accessories and other apparel manufacturing	Manufacturing
Leather and hide tanning and finishing	Manufacturing
Footwear manufacturing	Manufacturing
Other leather and allied product manufacturing	Manufacturing
Sawmills	Agriculture and Forestry
Wood preservation	Agriculture and Forestry
Veneer and plywood manufacturing	Agriculture and Forestry
Engineered wood member and truss manufacturing	Agriculture and Forestry
Reconstituted wood product manufacturing	Agriculture and Forestry
Wood windows and door manufacturing	Agriculture and Forestry
Cut stock, resawing lumber, and planing	Agriculture and Forestry
Other millwork, including flooring	Agriculture and Forestry
Wood container and pallet manufacturing	Agriculture and Forestry
Manufactured home (mobile home) manufacturing	Manufacturing
Prefabricated wood building manufacturing	Agriculture and Forestry
All other miscellaneous wood product manufacturing	Agriculture and Forestry
Pulp mills	Agriculture and Forestry
Paper mills	Agriculture and Forestry
Paperboard mills	Agriculture and Forestry
Paperboard container manufacturing	Agriculture and Forestry
Paper bag and coated and treated paper manufacturing	Agriculture and Forestry
Stationery product manufacturing	Agriculture and Forestry
Sanitary paper product manufacturing	Agriculture and Forestry
All other converted paper product manufacturing	Agriculture and Forestry
Printing	Services
Support activities for printing	Services
Petroleum refineries	Manufacturing
Asphalt paving mixture and block manufacturing	Manufacturing
Asphalt shingle and coating materials manufacturing	Manufacturing
Petroleum lubricating oil and grease manufacturing	Manufacturing
All other petroleum and coal products manufacturing	Manufacturing
Petrochemical manufacturing	Manufacturing
Industrial gas manufacturing	Manufacturing
Synthetic dye and pigment manufacturing	Manufacturing
Other basic inorganic chemical manufacturing	Manufacturing
Other basic organic chemical manufacturing	Agriculture and Forestry
Plastics material and resin manufacturing	Manufacturing
Synthetic rubber manufacturing	Manufacturing
Artificial and synthetic fibers and filaments manufacturing	Manufacturing
Nitrogenous fertilizer manufacturing	Agriculture and Forestry
Phosphatic fertilizer manufacturing	Agriculture and Forestry
Fertilizer mixing	Agriculture and Forestry

IMPLAN Industry	Sector
Pesticide and other agricultural chemical manufacturing	Agriculture and Forestry
Medicinal and botanical manufacturing	Manufacturing
Pharmaceutical preparation manufacturing	Manufacturing
In-vitro diagnostic substance manufacturing	Manufacturing
Biological product (except diagnostic) manufacturing	Manufacturing
Paint and coating manufacturing	Manufacturing
Adhesive manufacturing	Manufacturing
Soap and other detergent manufacturing	Manufacturing
Polish and other sanitation good manufacturing	Manufacturing
Surface active agent manufacturing	Manufacturing
Toilet preparation manufacturing	Manufacturing
Printing ink manufacturing	Manufacturing
Explosives manufacturing	Manufacturing
Custom compounding of purchased resins	Manufacturing
Photographic film and chemical manufacturing	Manufacturing
Other miscellaneous chemical product manufacturing	Manufacturing
Plastics packaging materials and unlaminated film and sheet manufacturing	Manufacturing
Unlaminated plastics profile shape manufacturing	Manufacturing
Plastics pipe and pipe fitting manufacturing	Manufacturing
Laminated plastics plate, sheet (except packaging), and shape manufacturing	Manufacturing
Polystyrene foam product manufacturing	Manufacturing
Urethane and other foam product (except polystyrene) manufacturing	Manufacturing
Plastics bottle manufacturing	Manufacturing
Other plastics product manufacturing	Manufacturing
Tire manufacturing	Manufacturing
Rubber and plastics hoses and belting manufacturing	Manufacturing
Other rubber product manufacturing	Manufacturing
Pottery, ceramics, and plumbing fixture manufacturing	Manufacturing
Brick, tile, and other structural clay product manufacturing	Manufacturing
Flat glass manufacturing	Manufacturing
Other pressed and blown glass and glassware manufacturing	Manufacturing
Glass container manufacturing	Manufacturing
Glass product manufacturing made of purchased glass	Manufacturing
Cement manufacturing	Manufacturing
Ready-mix concrete manufacturing	Manufacturing
Concrete block and brick manufacturing	Manufacturing
Concrete pipe manufacturing	Manufacturing
Other concrete product manufacturing	Manufacturing
Lime manufacturing	Manufacturing
Gypsum product manufacturing	Manufacturing
Abrasive product manufacturing	Manufacturing
Cut stone and stone product manufacturing	Manufacturing

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IMPLAN Industry	Sector
Ground or treated mineral and earth manufacturing	Manufacturing
Mineral wool manufacturing	Manufacturing
Miscellaneous nonmetallic mineral products manufacturing	Manufacturing
Iron and steel mills and ferroalloy manufacturing	Manufacturing
Iron, steel pipe and tube manufacturing from purchased steel	Manufacturing
Rolled steel shape manufacturing	Manufacturing
Steel wire drawing	Manufacturing
Alumina refining and primary aluminum production	Manufacturing
Secondary smelting and alloying of aluminum	Manufacturing
Aluminum sheet, plate, and foil manufacturing	Manufacturing
Other aluminum rolling, drawing and extruding	Manufacturing
Nonferrous metal (exc aluminum) smelting and refining	Manufacturing
Copper rolling, drawing, extruding and alloying	Manufacturing
Nonferrous metal, except copper and aluminum, shaping	Manufacturing
Secondary processing of other nonferrous metals	Manufacturing
Ferrous metal foundries	Manufacturing
Nonferrous metal foundries	Manufacturing
Custom roll forming	Manufacturing
Metal crown, closure, and other metal stamping (except automotive)	Manufacturing
Iron and steel forging	Manufacturing
Nonferrous forging	Manufacturing
Cutlery, utensil, pot, and pan manufacturing	Manufacturing
Handtool manufacturing	Manufacturing
Prefabricated metal buildings and components manufacturing	Manufacturing
Fabricated structural metal manufacturing	Manufacturing
Plate work manufacturing	Manufacturing
Metal window and door manufacturing	Manufacturing
Sheet metal work manufacturing	Manufacturing
Ornamental and architectural metal work manufacturing	Manufacturing
Power boiler and heat exchanger manufacturing	Manufacturing
Metal tank (heavy gauge) manufacturing	Manufacturing
Metal cans manufacturing	Manufacturing
Metal barrels, drums and pails manufacturing	Manufacturing
Hardware manufacturing	Manufacturing
Spring and wire product manufacturing	Manufacturing
Machine shops	Manufacturing
Turned product and screw, nut, and bolt manufacturing	Manufacturing
Metal heat treating	Manufacturing
Metal coating and nonprecious engraving	Manufacturing
Electroplating, anodizing, and coloring metal	Manufacturing
Valve and fittings, other than plumbing, manufacturing	Manufacturing
Plumbing fixture fitting and trim manufacturing	Manufacturing

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IMPLAN Industry	Sector
Ball and roller bearing manufacturing	Manufacturing
Small arms ammunition manufacturing	Manufacturing
Ammunition, except for small arms, manufacturing	Manufacturing
Small arms, ordnance, and accessories manufacturing	Manufacturing
Fabricated pipe and pipe fitting manufacturing	Manufacturing
Other fabricated metal manufacturing	Manufacturing
Farm machinery and equipment manufacturing	Agriculture and Forestry
Lawn and garden equipment manufacturing	Agriculture and Forestry
Construction machinery manufacturing	Manufacturing
Mining machinery and equipment manufacturing	Manufacturing
Oil and gas field machinery and equipment manufacturing	Manufacturing
Semiconductor machinery manufacturing	Manufacturing
Food product machinery manufacturing	Agriculture and Forestry
Sawmill, woodworking, and paper machinery	Agriculture and Forestry
All other industrial machinery manufacturing	Manufacturing
Commercial and service industry machinery manufacturing	Manufacturing
Industrial and commercial fan and blower equipment manufacturing	Manufacturing
Heating equipment (except warm air furnaces) manufacturing	Manufacturing
Air conditioning, refrigeration, and warm air heating equipment manufacturing	Manufacturing
Industrial mold manufacturing	Manufacturing
Special tool, die, jig, and fixture manufacturing	Manufacturing
Cutting tool and machine tool accessory manufacturing	Manufacturing
Machine tool manufacturing	Manufacturing
Rolling mill and other metalworking machinery manufacturing	Manufacturing
Turbine and turbine generator set units manufacturing	Manufacturing
Speed changer, industrial high-speed drive, and gear manufacturing	Manufacturing
Mechanical power transmission equipment manufacturing	Manufacturing
Other engine equipment manufacturing	Manufacturing
Measuring, dispensing, and other pumping equipment manufacturing	Manufacturing
Air and gas compressor manufacturing	Manufacturing
Elevator and moving stairway manufacturing	Manufacturing
Conveyor and conveying equipment manufacturing	Manufacturing
Overhead cranes, hoists, and monorail systems manufacturing	Manufacturing
Industrial truck, trailer, and stacker manufacturing	Manufacturing
Power-driven handtool manufacturing	Manufacturing
Welding and soldering equipment manufacturing	Manufacturing
Packaging machinery manufacturing	Manufacturing
Industrial process furnace and oven manufacturing	Manufacturing
Fluid power cylinder and actuator manufacturing	Manufacturing
Fluid power pump and motor manufacturing	Manufacturing
Scales, balances, and miscellaneous general purpose machinery manufacturing	Manufacturing
Electronic computer manufacturing	Manufacturing

IMPLAN Industry	Sector
Computer storage device manufacturing	Manufacturing
Computer terminals and other computer peripheral equipment manufacturing	Manufacturing
Telephone apparatus manufacturing	Manufacturing
Broadcast and wireless communications equipment manufacturing	Manufacturing
Other communications equipment manufacturing	Manufacturing
Audio and video equipment manufacturing	Manufacturing
Printed circuit assembly (electronic assembly) manufacturing	Manufacturing
Bare printed circuit board manufacturing	Manufacturing
Semiconductor and related device manufacturing	Manufacturing
Capacitor, resistor, coil, transformer, and other inductor manufacturing	Manufacturing
Electronic connector manufacturing	Manufacturing
Other electronic component manufacturing	Manufacturing
Electromedical and electrotherapeutic apparatus manufacturing	Manufacturing
Search, detection, and navigation instruments manufacturing	Manufacturing
Automatic environmental control manufacturing	Manufacturing
Industrial process variable instruments manufacturing	Manufacturing
Totalizing fluid meter and counting device manufacturing	Manufacturing
Electricity and signal testing instruments manufacturing	Manufacturing
Analytical laboratory instrument manufacturing	Manufacturing
Irradiation apparatus manufacturing	Manufacturing
Watch, clock, and other measuring and controlling device manufacturing	Manufacturing
Manufacturing and reproducing magnetic and optical media	Manufacturing
Electric lamp bulb and part manufacturing	Manufacturing
Lighting fixture manufacturing	Manufacturing
Small electrical appliance manufacturing	Manufacturing
Major household appliance manufacturing	Manufacturing
Power, distribution, and specialty transformer manufacturing	Manufacturing
Motor and generator manufacturing	Manufacturing
Switchgear and switchboard apparatus manufacturing	Manufacturing
Relay and industrial control manufacturing	Manufacturing
Battery manufacturing	Manufacturing
Fiber optic cable manufacturing	Manufacturing
Other communication and energy wire manufacturing	Manufacturing
Wiring device manufacturing	Manufacturing
Carbon and graphite product manufacturing	Manufacturing
All other miscellaneous electrical equipment and component manufacturing	Manufacturing
Automobile and light duty motor vehicle manufacturing	Manufacturing
Heavy duty truck manufacturing	Manufacturing
Motor vehicle body manufacturing	Manufacturing
Truck trailer manufacturing	Manufacturing
Motor home manufacturing	Manufacturing
Travel trailer and camper manufacturing	Manufacturing

IMPLAN Industry	Sector
Motor vehicle gasoline engine and engine parts manufacturing	Manufacturing
Motor vehicle electrical and electronic equipment manufacturing	Manufacturing
Motor vehicle transmission and power train parts manufacturing	Manufacturing
Motor vehicle seating and interior trim manufacturing	Manufacturing
Motor vehicle metal stamping	Manufacturing
Other motor vehicle parts manufacturing	Manufacturing
Motor vehicle steering, suspension component, and brake systems manufacturing	Manufacturing
Aircraft manufacturing	Manufacturing
Aircraft engine and engine parts manufacturing	Manufacturing
Other aircraft parts and auxiliary equipment manufacturing	Manufacturing
Guided missile and space vehicle manufacturing	Manufacturing
Propulsion units and parts for space vehicles and guided missiles manufacturing	Manufacturing
Railroad rolling stock manufacturing	Manufacturing
Ship building and repairing	Manufacturing
Boat building	Manufacturing
Motorcycle, bicycle, and parts manufacturing	Manufacturing
Military armored vehicle, tank, and tank component manufacturing	Manufacturing
All other transportation equipment manufacturing	Manufacturing
Wood kitchen cabinet and countertop manufacturing	Agriculture and Forestry
Upholstered household furniture manufacturing	Manufacturing
Nonupholstered wood household furniture manufacturing	Agriculture and Forestry
Other household nonupholstered furniture manufacturing	Manufacturing
Institutional furniture manufacturing	Manufacturing
Wood office furniture manufacturing	Agriculture and Forestry
Custom architectural woodwork and millwork	Agriculture and Forestry
Office furniture, except wood, manufacturing	Manufacturing
Showcase, partition, shelving, and locker manufacturing	Manufacturing
Mattress manufacturing	Manufacturing
Blind and shade manufacturing	Manufacturing
Surgical and medical instrument manufacturing	Manufacturing
Surgical appliance and supplies manufacturing	Manufacturing
Dental equipment and supplies manufacturing	Manufacturing
Ophthalmic goods manufacturing	Manufacturing
Dental laboratories	Manufacturing
Jewelry and silverware manufacturing	Manufacturing
Sporting and athletic goods manufacturing	Manufacturing
Doll, toy, and game manufacturing	Manufacturing
Office supplies (except paper) manufacturing	Manufacturing
Sign manufacturing	Manufacturing
Gasket, packing, and sealing device manufacturing	Manufacturing
Musical instrument manufacturing	Manufacturing
Fasteners, buttons, needles, and pins manufacturing	Manufacturing

IMPLAN Industry	Sector
Broom, brush, and mop manufacturing	Manufacturing
Burial casket manufacturing	Manufacturing
All other miscellaneous manufacturing	Manufacturing
Wholesale - Motor vehicle and motor vehicle parts and supplies	Wholesale
Wholesale - Professional and commercial equipment and supplies	Wholesale
Wholesale - Household appliances and electrical and electronic goods	Wholesale
Wholesale - Machinery, equipment, and supplies	Wholesale
Wholesale - Other durable goods merchant wholesalers	Wholesale
Wholesale - Drugs and druggists' sundries	Wholesale
Wholesale - Grocery and related product wholesalers	Wholesale
Wholesale - Petroleum and petroleum products	Wholesale
Wholesale - Other nondurable goods merchant wholesalers	Wholesale
Wholesale - Wholesale electronic markets and agents and brokers	Wholesale
Retail - Motor vehicle and parts dealers	Retail
Retail - Furniture and home furnishings stores	Retail
Retail - Electronics and appliance stores	Retail
Retail - Building material and garden equipment and supplies stores	Retail
Retail - Food and beverage stores	Retail
Retail - Health and personal care stores	Retail
Retail - Gasoline stores	Retail
Retail - Clothing and clothing accessories stores	Retail
Retail - Sporting goods, hobby, musical instrument and book stores	Retail
Retail - General merchandise stores	Retail
Retail - Miscellaneous store retailers	Retail
Air transportation	Transportation
Rail transportation	Transportation
Water transportation	Transportation
Truck transportation	Transportation
Transit and ground passenger transportation	Transportation
Pipeline transportation	Transportation
Scenic and sightseeing transportation and support activities for transportation	Transportation
Couriers and messengers	Transportation
Warehousing and storage	Services
Newspaper publishers	Information
Periodical publishers	Information
Book publishers	Information
Directory, mailing list, and other publishers	Information
Greeting card publishing	Information
Software publishers	Information
Motion picture and video industries	Entertainment
Sound recording industries	Entertainment
Radio and television broadcasting	Entertainment

IMPLAN Industry	Sector
Cable and other subscription programming	Entertainment
Wired telecommunications carriers	Information
Wireless telecommunications carriers (except satellite)	Information
Satellite, telecommunications resellers, and all other telecommunications	Information
Data processing, hosting, and related services	Information
News syndicates, libraries, archives and all other information services	Information
Internet publishing and broadcasting and web search portals	Information
Nondepository credit intermediation and related activities	Financial
Securities and commodity contracts intermediation and brokerage	Financial
Monetary authorities and depository credit intermediation	Financial
Other financial investment activities	Financial
Direct life insurance carriers	Financial
Insurance carriers, except direct life	Financial
Insurance agencies, brokerages, and related activities	Financial
Funds, trusts, and other financial vehicles	Financial
Other real estate	Financial
Tenant-occupied housing	Government/Other
Owner-occupied housing	Government/Other
Automotive equipment rental and leasing	Services
General and consumer goods rental except video tapes and discs	Services
Video tape and disc rental	Entertainment
Commercial and industrial machinery and equipment rental and leasing	Services
Lessors of nonfinancial intangible assets	Services
Legal services	Services
Accounting, tax preparation, bookkeeping, and payroll services	Services
Architectural, engineering, and related services	Services
Specialized design services	Services
Custom computer programming services	Services
Computer systems design services	Services
Other computer related services, including facilities management	Services
Management consulting services	Services
Environmental and other technical consulting services	Services
Scientific research and development services	Services
Advertising, public relations, and related services	Services
Photographic services	Services
Veterinary services	Agriculture and Forestry
All other miscellaneous professional, scientific, and technical services	Services
Management of companies and enterprises	Services
Office administrative services	Services
Facilities support services	Services
Employment services	Services
Business support services	Services

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IMPLAN Industry	Sector
Travel arrangement and reservation services	Services
Investigation and security services	Services
Services to buildings	Services
Landscape and horticultural services	Agriculture and Forestry
Other support services	Services
Waste management and remediation services	Services
Elementary and secondary schools	Services
Junior colleges, colleges, universities, and professional schools	Services
Other educational services	Services
Offices of physicians	Services
Offices of dentists	Services
Offices of other health practitioners	Services
Outpatient care centers	Services
Medical and diagnostic laboratories	Services
Home health care services	Services
Other ambulatory health care services	Services
Hospitals	Services
Nursing and community care facilities	Services
Residential mental health, substance abuse, and other residential care facilities	Services
Individual and family services	Services
Child day care services	Services
Community food, housing, and other relief services	Services
Performing arts companies	Entertainment
Commercial Sports Except Racing	Entertainment
Racing and Track Operation	Entertainment
Independent artists, writers, and performers	Entertainment
Promoters of performing arts and sports and agents for public figures	Entertainment
Museums, historical sites, zoos, and parks	Entertainment
Amusement parks and arcades	Entertainment
Gambling industries (except casino hotels)	Entertainment
Other amusement and recreation industries	Entertainment
Fitness and recreational sports centers	Entertainment
Bowling centers	Entertainment
Hotels and motels, including casino hotels	Services
Other accommodations	Services
Full-service restaurants	Services
Limited-service restaurants	Services
All other food and drinking places	Services
Automotive repair and maintenance, except car washes	Services
Car washes	Services
Electronic and precision equipment repair and maintenance	Services
Commercial and industrial machinery and equipment repair and maintenance	Services

IMPLAN Industry	Sector
Personal and household goods repair and maintenance	Services
Personal care services	Services
Death care services	Services
Dry-cleaning and laundry services	Services
Other personal services	Services
Religious organizations	Services
Grantmaking, giving, and social advocacy organizations	Services
Business and professional associations	Services
Labor and civic organizations	Services
Private households	Services
Postal service	Government/Other
Federal electric utilities	Government/Other
Other federal government enterprises	Government/Other
State government passenger transit	Government/Other
State government electric utilities	Government/Other
Other state government enterprises	Government/Other
Local government passenger transit	Government/Other
Local government electric utilities	Government/Other
Other local government enterprises	Government/Other
* Not an industry (Used and secondhand goods)	Government/Other
* Not an industry (Scrap)	Government/Other
* Not an industry (Rest of world adjustment)	Government/Other
* Not an industry (Noncomparable foreign imports)	Government/Other
* Employment and payroll of state govt, education	Government/Other
* Employment and payroll of state govt, hospitals and health services	Government/Other
* Employment and payroll of state govt, other services	Government/Other
* Employment and payroll of local govt, education	Government/Other
* Employment and payroll of local govt, hospitals and health services	Government/Other
* Employment and payroll of local govt, other services	Government/Other
* Employment and payroll of federal govt, military	Government/Other
* Employment and payroll of federal govt, non-military	Government/Other

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7.2 Detailed Agriculture and Forestry Aggregation Scheme

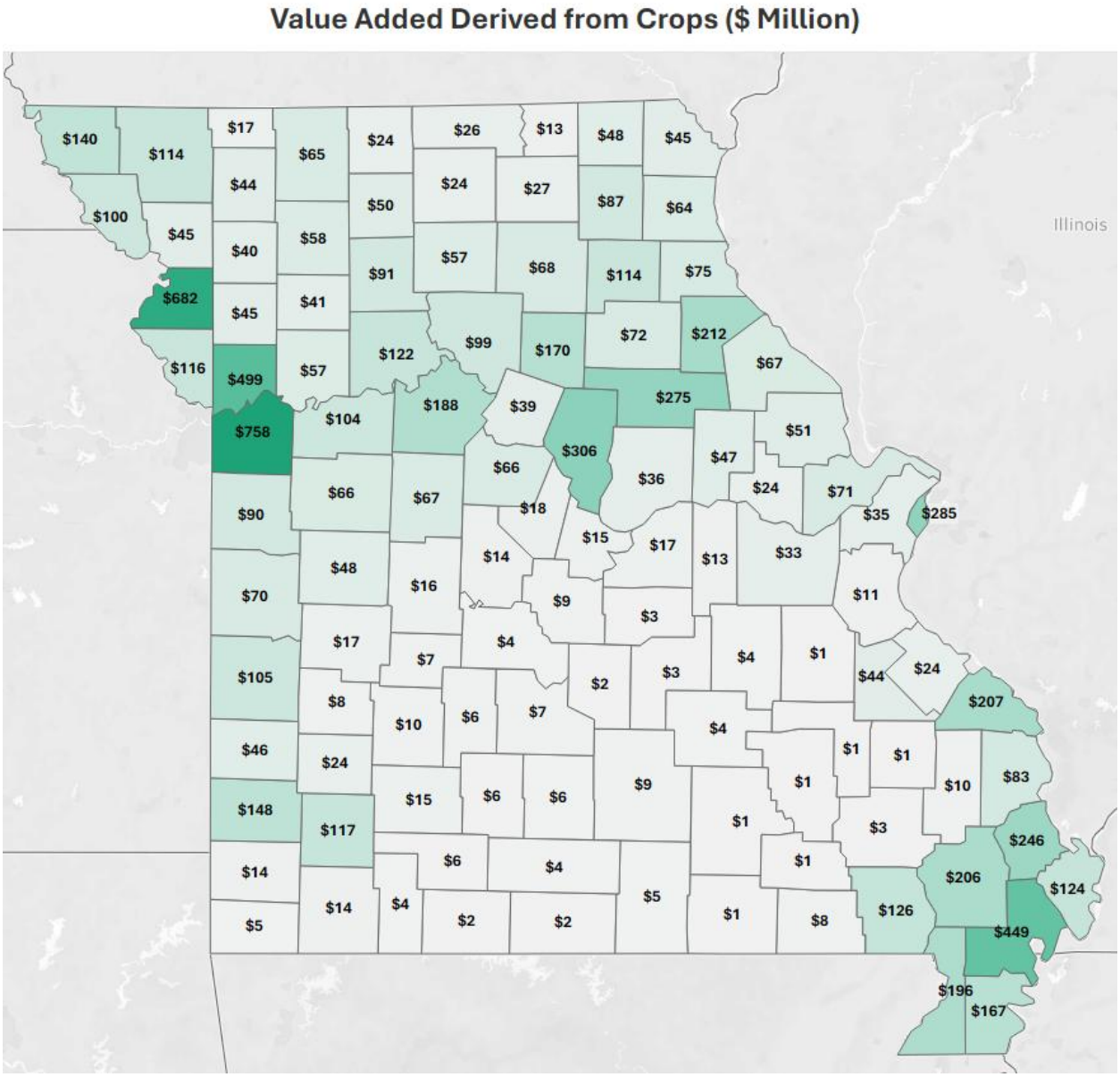
IMPLAN Industry	Aggregated Industry	Category
Oilseed farming	Oilseeds	Crops
Grain farming	Grains	Crops
Vegetable and melon farming	Other Crop Production	Crops
Fruit farming	Other Crop Production	Crops
Tree nut farming	Other Crop Production	Crops
Greenhouse, nursery, and floriculture production	Other Crop Production	Crops
Tobacco farming	Other Crop Production	Crops
Cotton farming	Other Crop Production	Crops
Sugarcane and sugar beet farming	Other Crop Production	Crops
All other crop farming	Other Crop Production	Crops
Beef cattle ranching and farming, including feedlots and dual purpose ranching and farming	Cattle	Livestock and Poultry
Dairy cattle and milk production	Dairy	Livestock and Poultry
Poultry and egg production	Poultry	Livestock and Poultry
Animal production, except cattle and poultry and eggs	Hogs and Other Livestock	Livestock and Poultry
Forestry, forest products, and timber tract production	Forestry	Forestry
Commercial logging	Forestry	Forestry
Commercial fishing	Hogs and Other Livestock	Livestock and Poultry
Commercial hunting and trapping	Hogs and Other Livestock	Livestock and Poultry
Support activities for agriculture and forestry	Ag Support	Other
Other nonmetallic mineral mining and quarrying	Ag Chemical and Fertilizer	Other
Dog and cat food manufacturing	Animal and Pet Food	Other
Other animal food manufacturing	Animal and Pet Food	Other
Flour milling	Primary Food Processing - Crops	Crops
Rice milling	Primary Food Processing - Crops	Crops
Malt manufacturing	Primary Food Processing - Crops	Crops
Wet corn milling	Primary Food Processing - Crops	Crops
Soybean and other oilseed processing	Primary Food Processing - Crops	Crops
Fats and oils refining and blending	Other Food Processing	Other
Breakfast cereal manufacturing	Primary Food Processing - Crops	Crops
Beet sugar manufacturing	Primary Food Processing - Crops	Crops
Sugar cane mills and refining	Primary Food Processing - Crops	Crops
Nonchocolate confectionery manufacturing	Other Food Processing	Other
Chocolate and confectionery manufacturing from cacao beans	Other Food Processing	Other
Confectionery manufacturing from purchased chocolate	Other Food Processing	Other
Frozen fruits, juices and vegetables manufacturing	Other Food Processing	Other
Frozen specialties manufacturing	Other Food Processing	Other
Canned fruits and vegetables manufacturing	Primary Food Processing - Crops	Crops
Canned specialties	Primary Food Processing - Crops	Crops
Dehydrated food products manufacturing	Other Food Processing	Other
Cheese manufacturing	Primary Food Processing - Dairy	Livestock and Poultry
Dry, condensed, and evaporated dairy product manufacturing	Primary Food Processing - Dairy	Livestock and Poultry
Fluid milk manufacturing	Primary Food Processing - Dairy	Livestock and Poultry
Creamery butter manufacturing	Primary Food Processing - Dairy	Livestock and Poultry
Ice cream and frozen dessert manufacturing	Primary Food Processing - Dairy	Livestock and Poultry
Frozen cakes and other pastries manufacturing	Other Food Processing	Other
Poultry processing	Primary Food Processing - Meat	Livestock and Poultry
Animal, except poultry, slaughtering	Primary Food Processing - Meat	Livestock and Poultry

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IMPLAN Industry	Aggregated Industry	Category
Meat processed from carcasses	Primary Food Processing - Meat	Livestock and Poultry
Rendering and meat byproduct processing	Primary Food Processing - Meat	Livestock and Poultry
Seafood product preparation and packaging	Primary Food Processing - Meat	Livestock and Poultry
Bread and bakery product, except frozen, manufacturing	Other Food Processing	Other
Cookie and cracker manufacturing	Other Food Processing	Other
Dry pasta, mixes, and dough manufacturing	Other Food Processing	Other
Tortilla manufacturing	Other Food Processing	Other
Roasted nuts and peanut butter manufacturing	Other Food Processing	Other
Other snack food manufacturing	Other Food Processing	Other
Coffee and tea manufacturing	Other Food Processing	Other
Flavoring syrup and concentrate manufacturing	Other Food Processing	Other
Mayonnaise, dressing, and sauce manufacturing	Other Food Processing	Other
Spice and extract manufacturing	Other Food Processing	Other
All other food manufacturing	Other Food Processing	Other
Bottled and canned soft drinks and water	Other Food Processing	Other
Manufactured ice	Other Food Processing	Other
Breweries	Other Food Processing	Other
Wineries	Other Food Processing	Other
Distilleries	Other Food Processing	Other
Tobacco manufacturing	Other Food Processing	Other
Sawmills	Forestry	Forestry
Wood preservation	Forestry	Forestry
Veneer and plywood manufacturing	Forestry	Forestry
Engineered wood member and truss manufacturing	Forestry	Forestry
Reconstituted wood product manufacturing	Forestry	Forestry
Wood windows and door manufacturing	Forestry	Forestry
Cut stock, resawing lumber, and planing	Forestry	Forestry
Other millwork, including flooring	Forestry	Forestry
Wood container and pallet manufacturing	Forestry	Forestry
Prefabricated wood building manufacturing	Forestry	Forestry
All other miscellaneous wood product manufacturing	Forestry	Forestry
Pulp mills	Forestry	Forestry
Paper mills	Forestry	Forestry
Paperboard mills	Forestry	Forestry
Paperboard container manufacturing	Forestry	Forestry
Paper bag and coated and treated paper manufacturing	Forestry	Forestry
Stationery product manufacturing	Forestry	Forestry
Sanitary paper product manufacturing	Forestry	Forestry
All other converted paper product manufacturing	Forestry	Forestry
Other basic organic chemical manufacturing	Ag Chemical and Fertilizer	Other
Nitrogenous fertilizer manufacturing	Ag Chemical and Fertilizer	Other
Phosphatic fertilizer manufacturing	Ag Chemical and Fertilizer	Other
Fertilizer mixing	Ag Chemical and Fertilizer	Other
Pesticide and other agricultural chemical manufacturing	Ag Chemical and Fertilizer	Other
Farm machinery and equipment manufacturing	Ag Support	Other
Lawn and garden equipment manufacturing	Ag Support	Other
Food product machinery manufacturing	Ag Support	Other
Sawmill, woodworking, and paper machinery	Forestry	Forestry
Wood kitchen cabinet and countertop manufacturing	Forestry	Forestry
Nonupholstered wood household furniture manufacturing	Forestry	Forestry
Wood office furniture manufacturing	Forestry	Forestry
Custom architectural woodwork and millwork	Forestry	Forestry
Veterinary services	Ag Support	Other
Landscape and horticultural services	Ag Support	Other

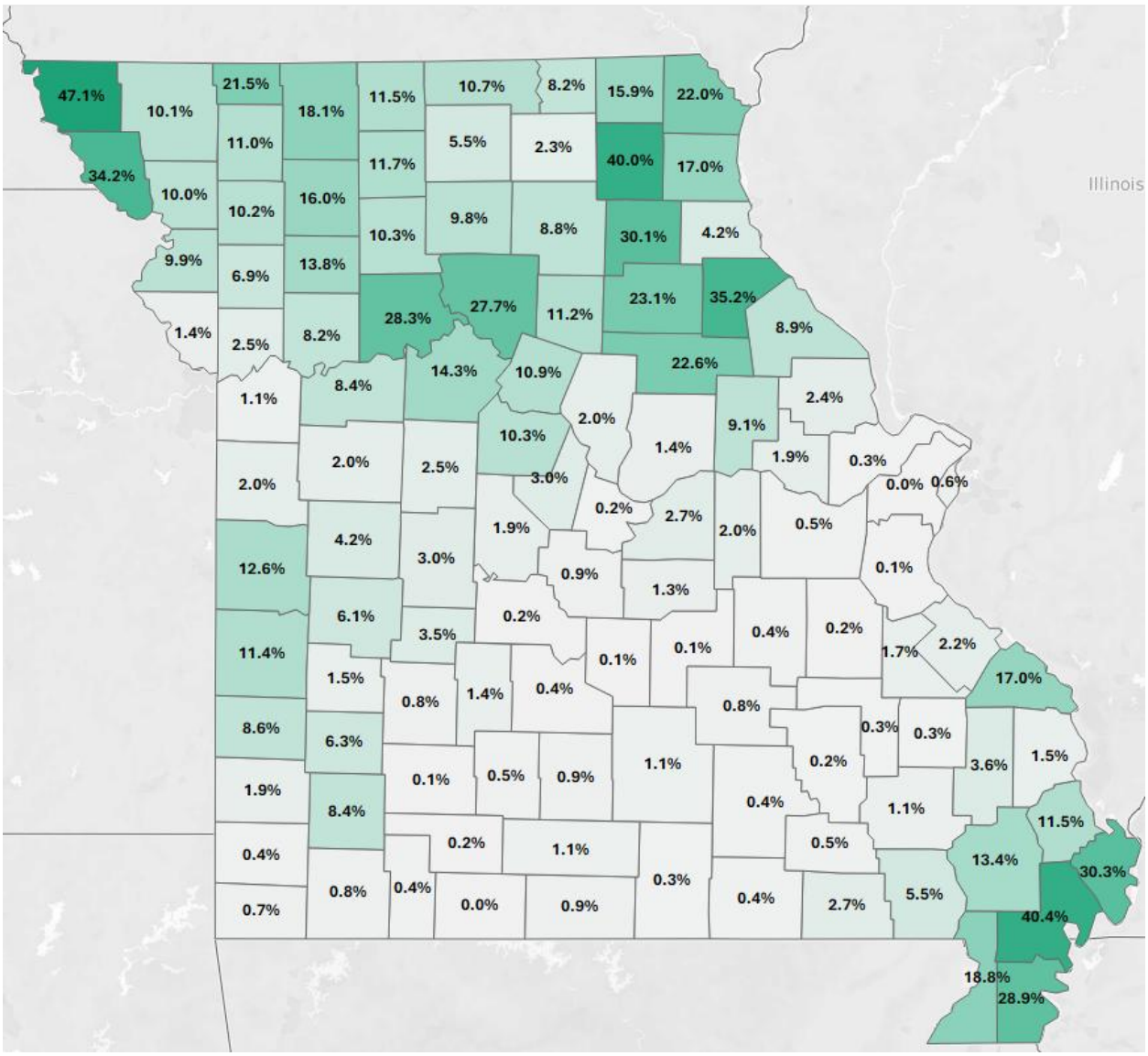
8 Appendix B, Detailed County and Congressional District Results

8.1 County Value Added

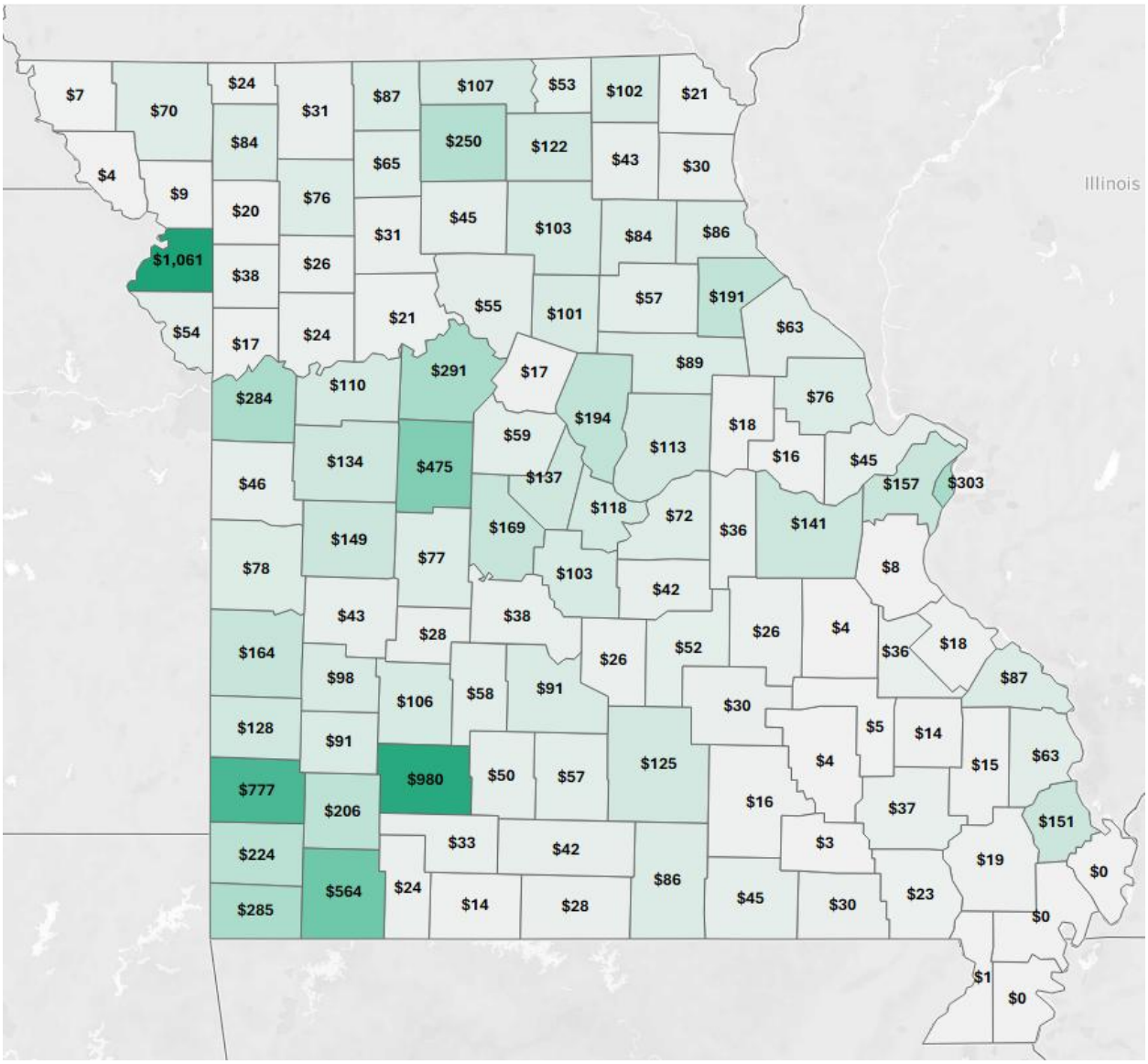


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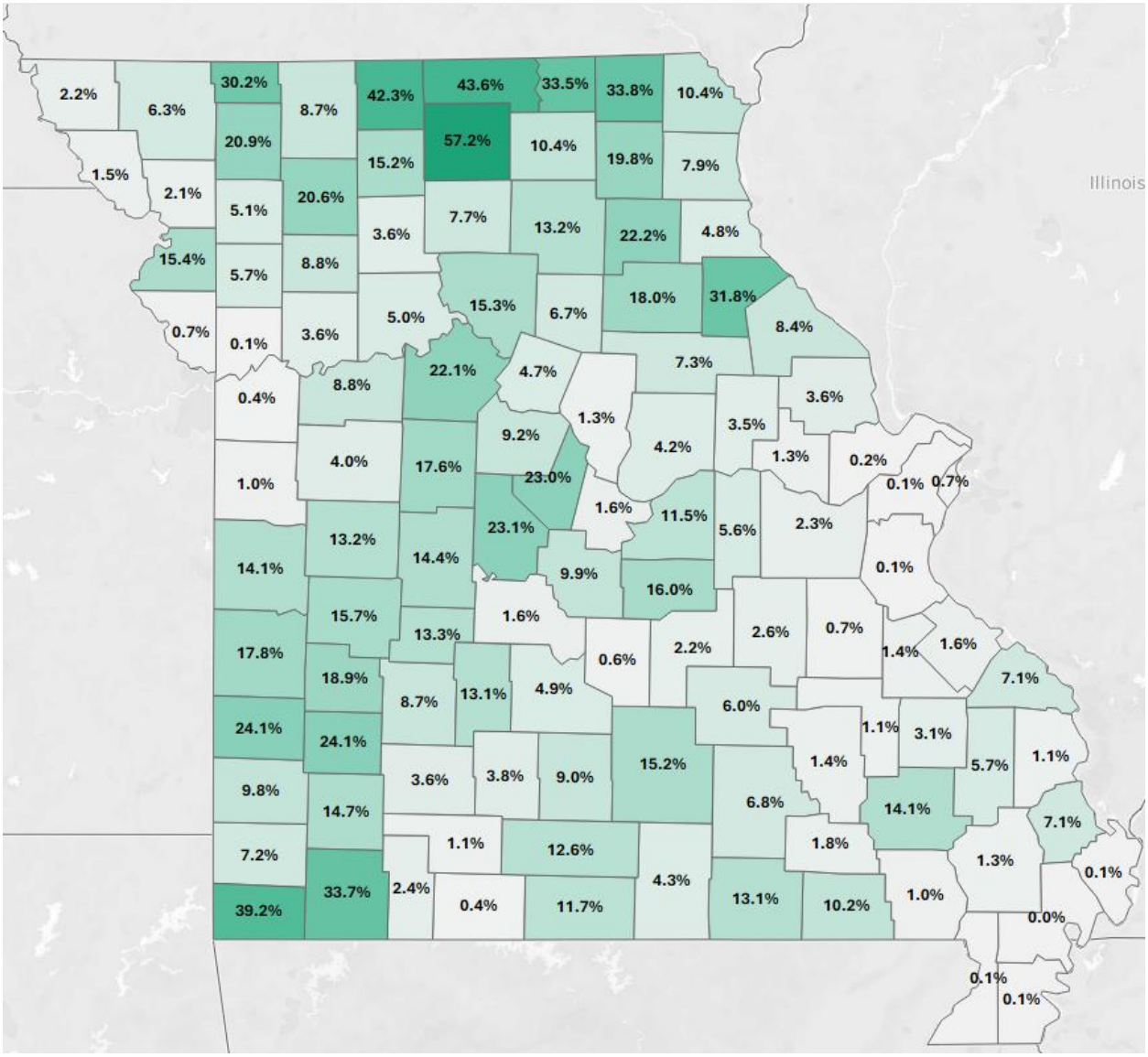
Percent of Total Value Added Derived from Crops



Value Added Derived from Livestock and Poultry ($ Million)

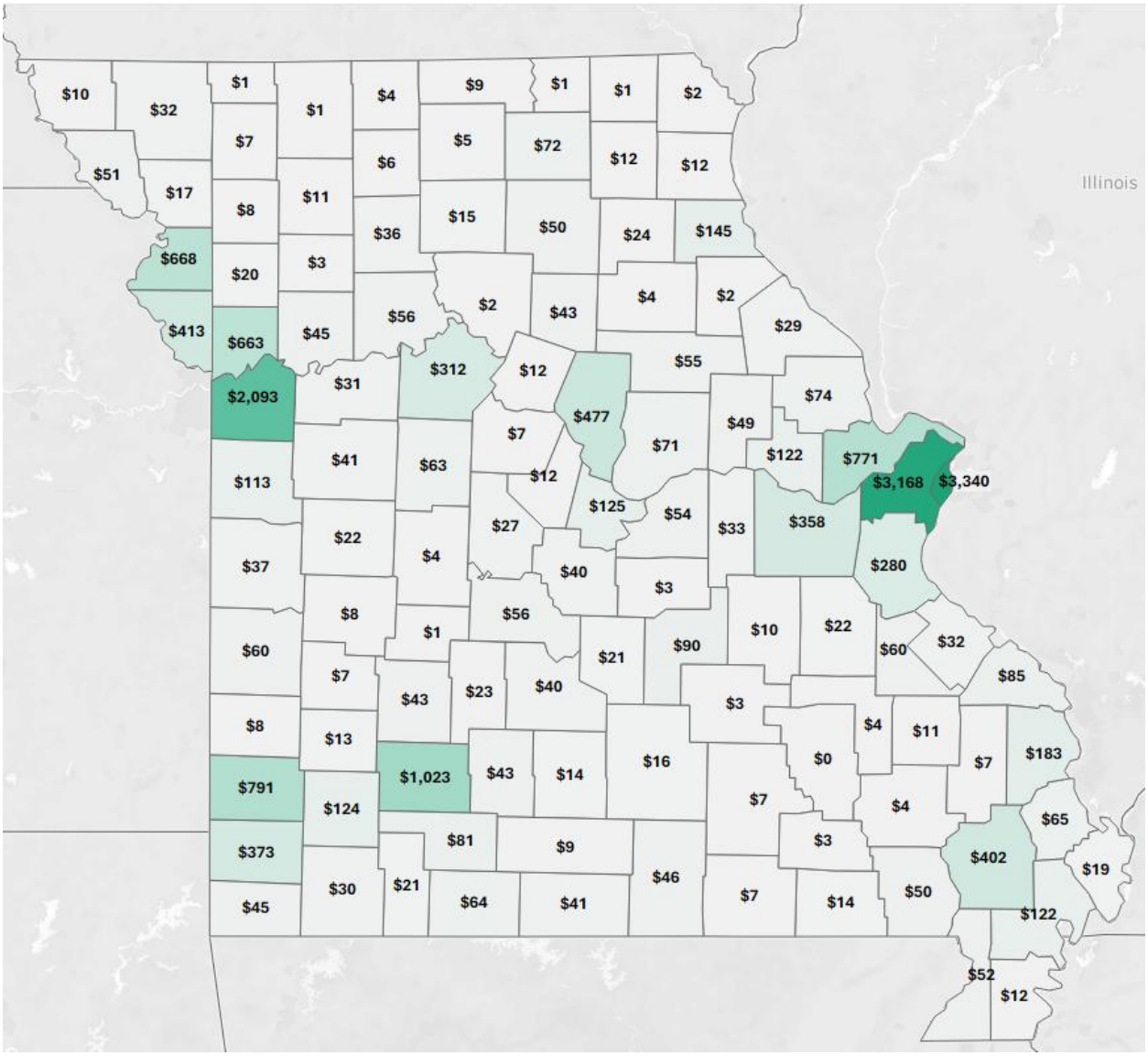


Percent of Total Value Added Derived from Livestock and Poultry

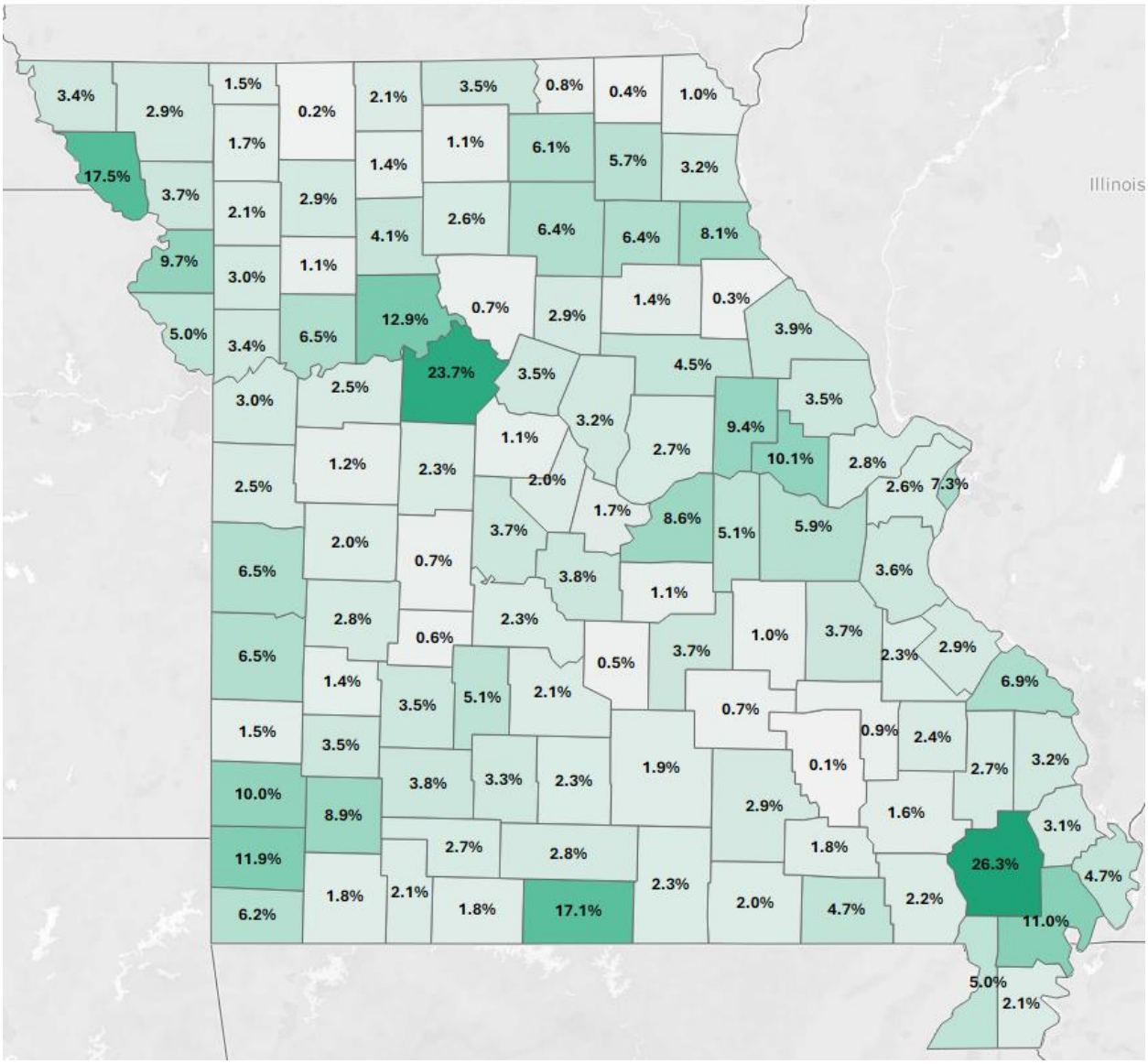


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Value Added Derived from Other Agriculture ($ Million)

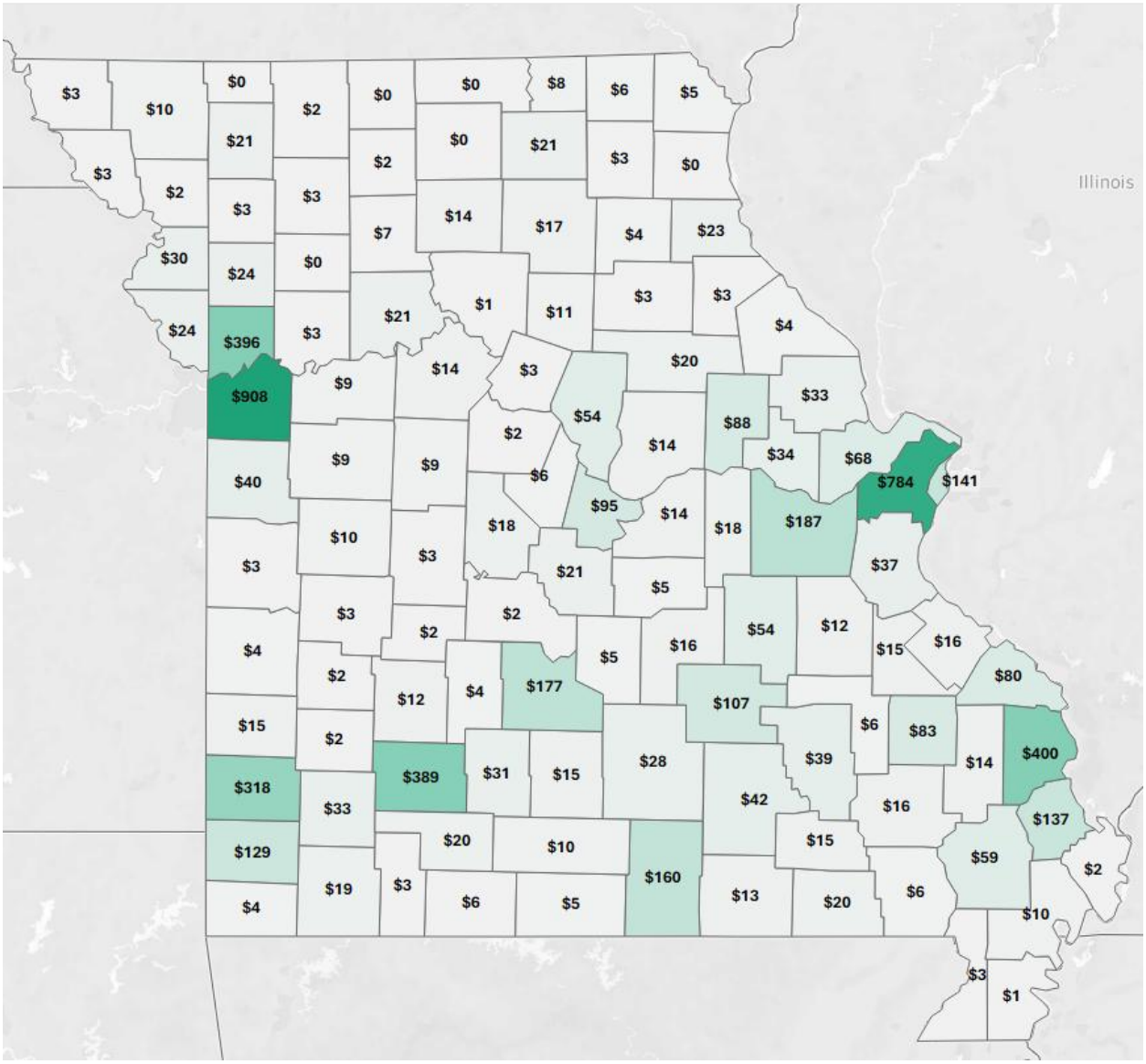


Percent of Total Value Added Derived from Other Agriculture

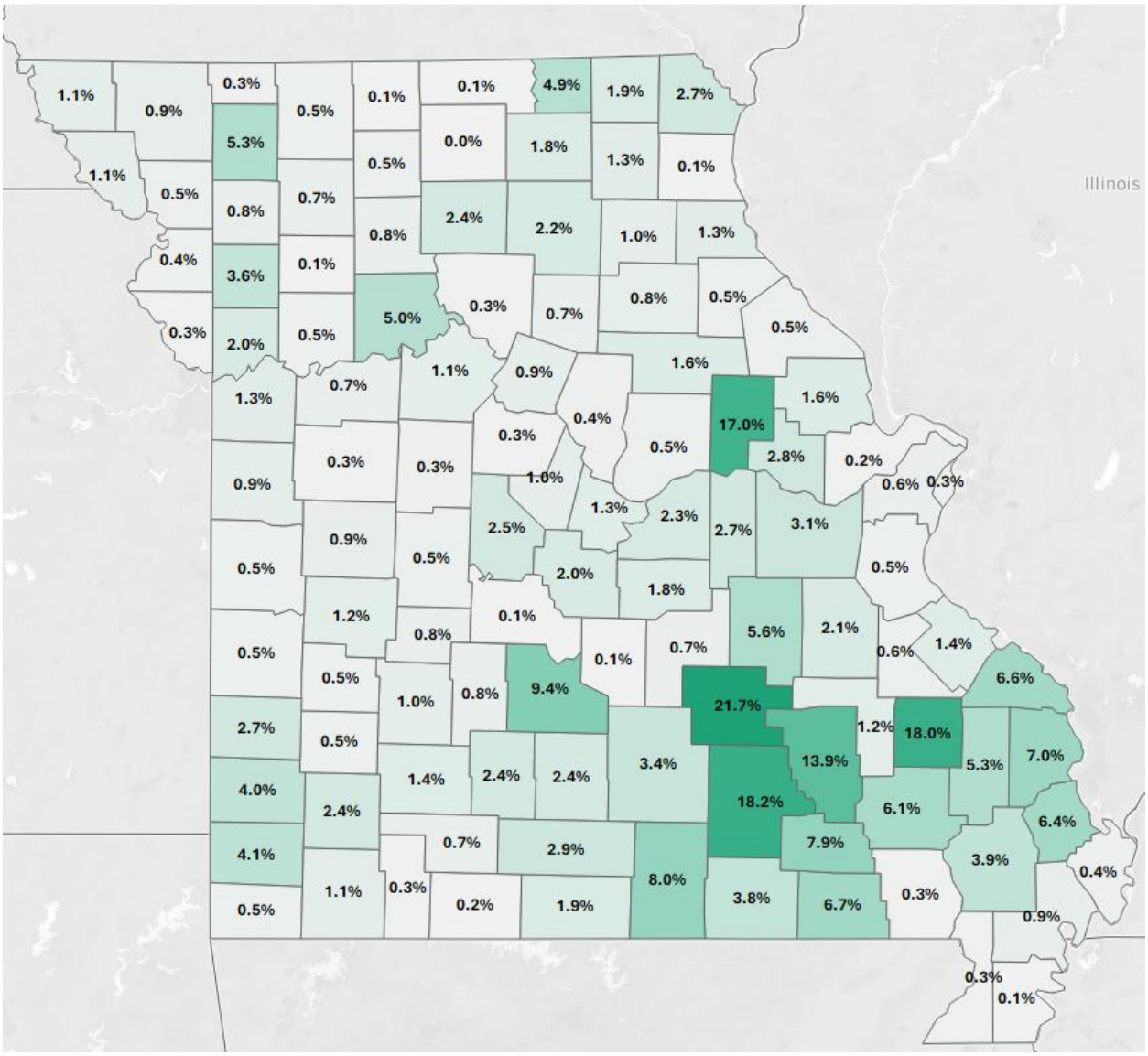


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Value Added Derived from Forestry ($ Million)

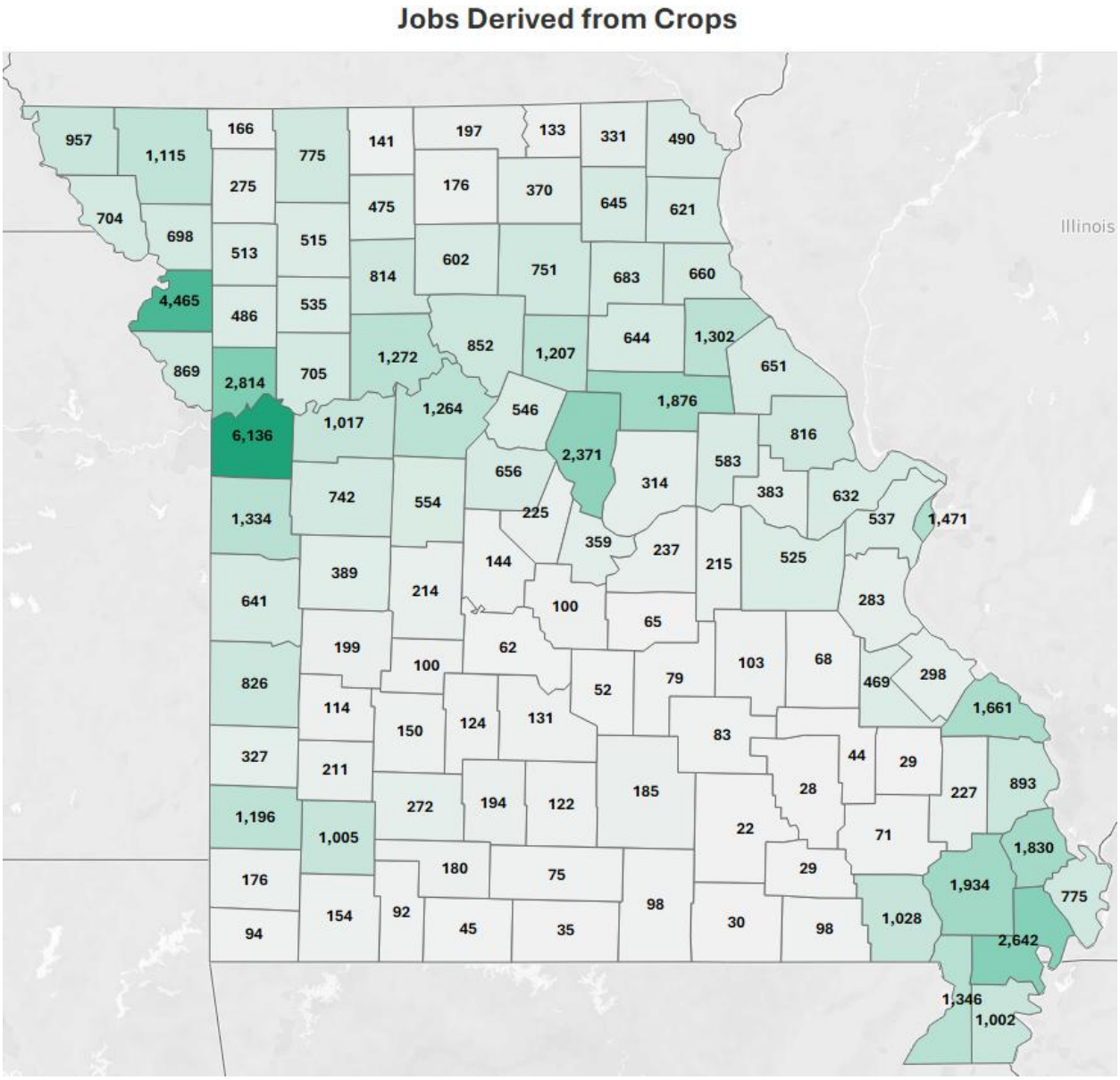


Percent of Total Value Added Derived from Forestry

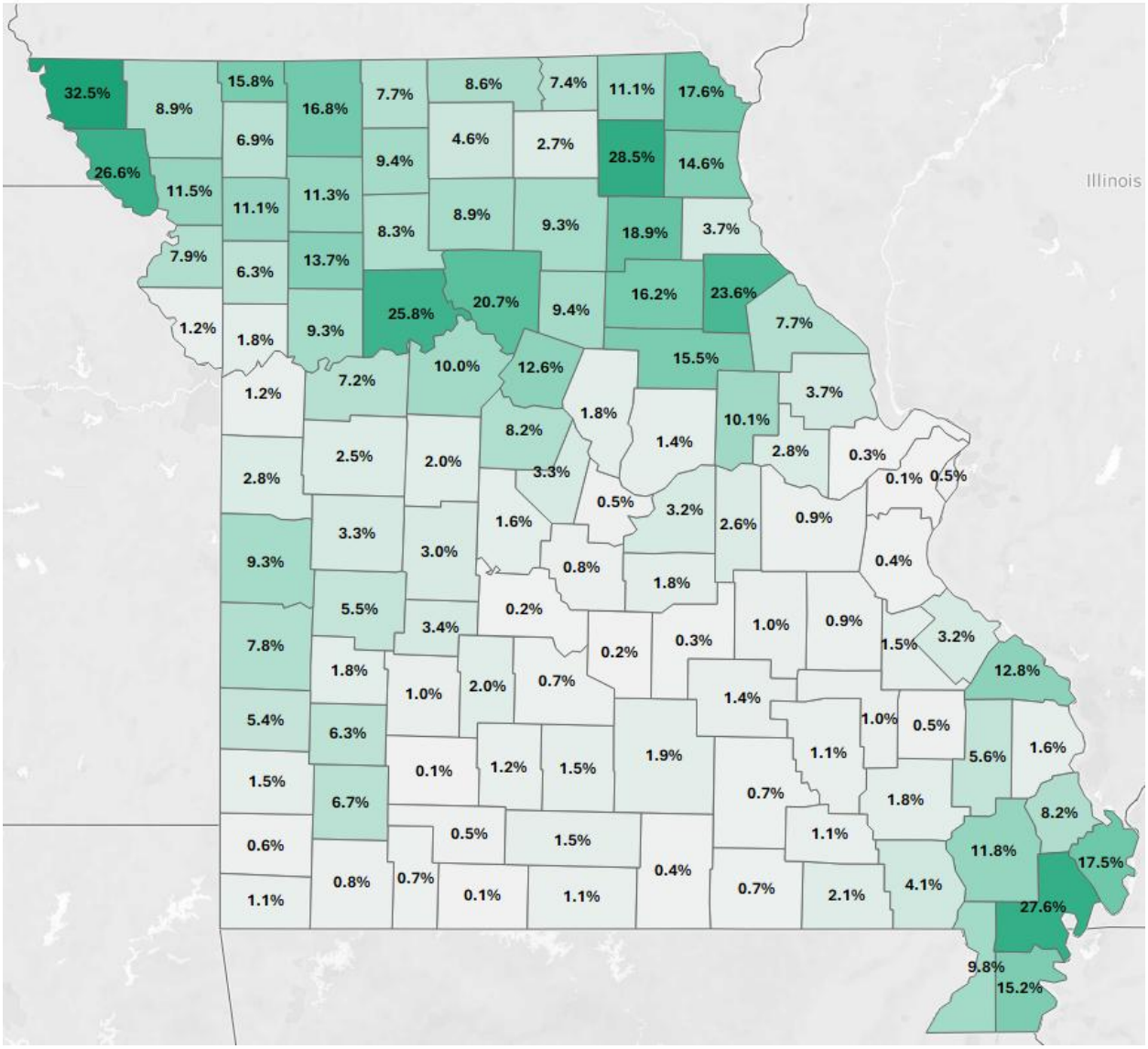


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8.2 County Jobs

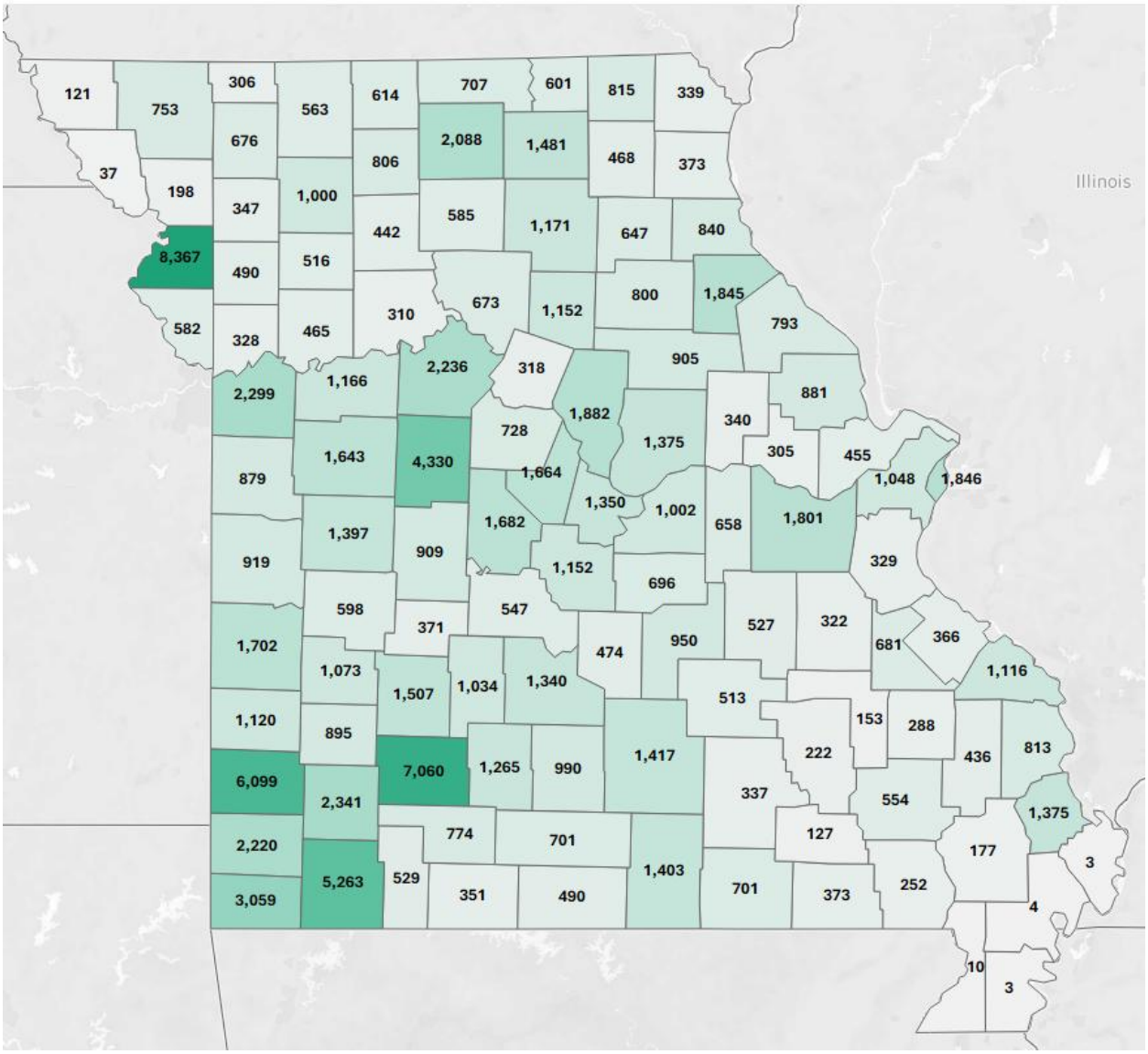


Percent of Total Jobs Derived from Crops

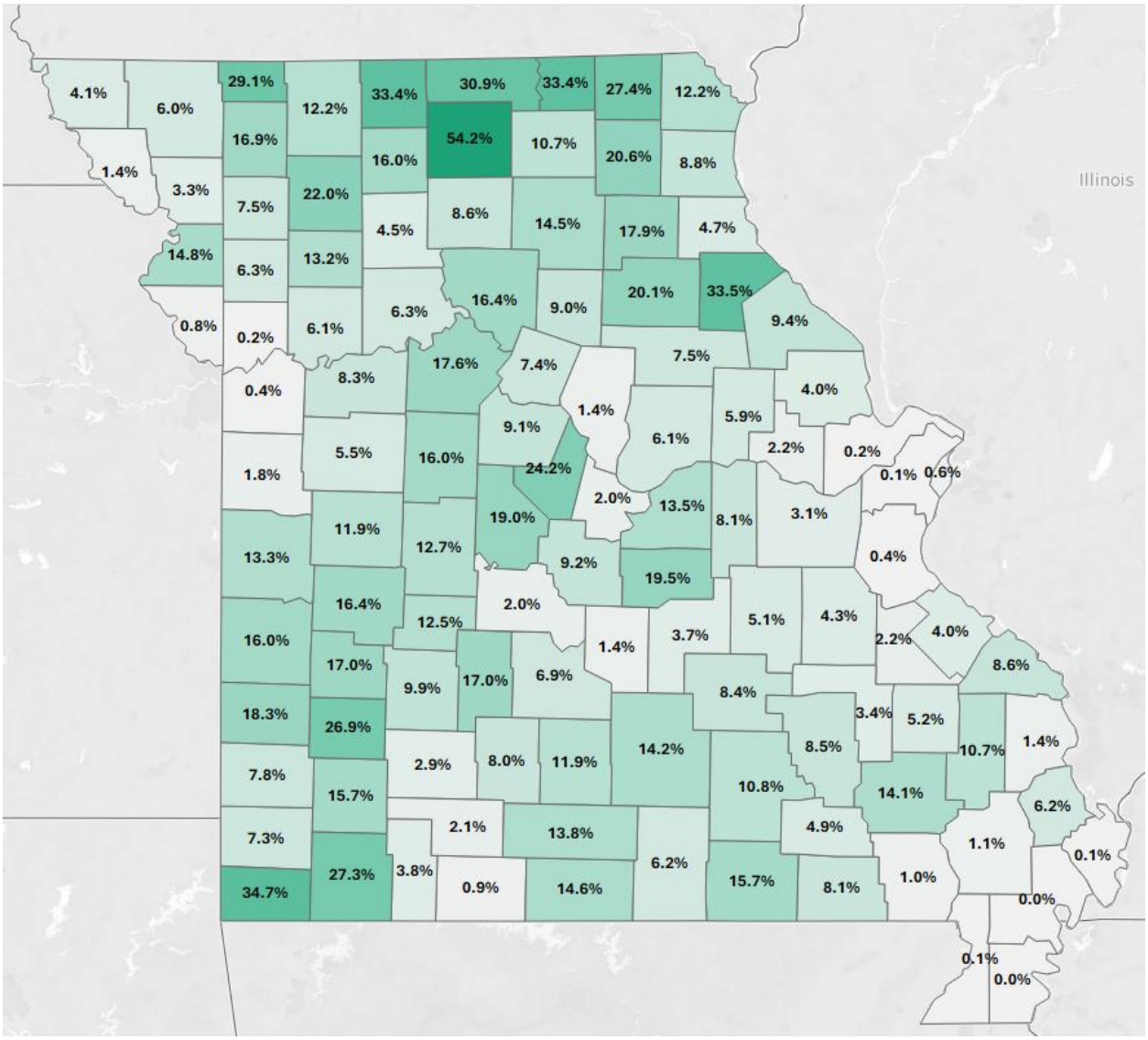


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Jobs Derived from Livestock and Poultry

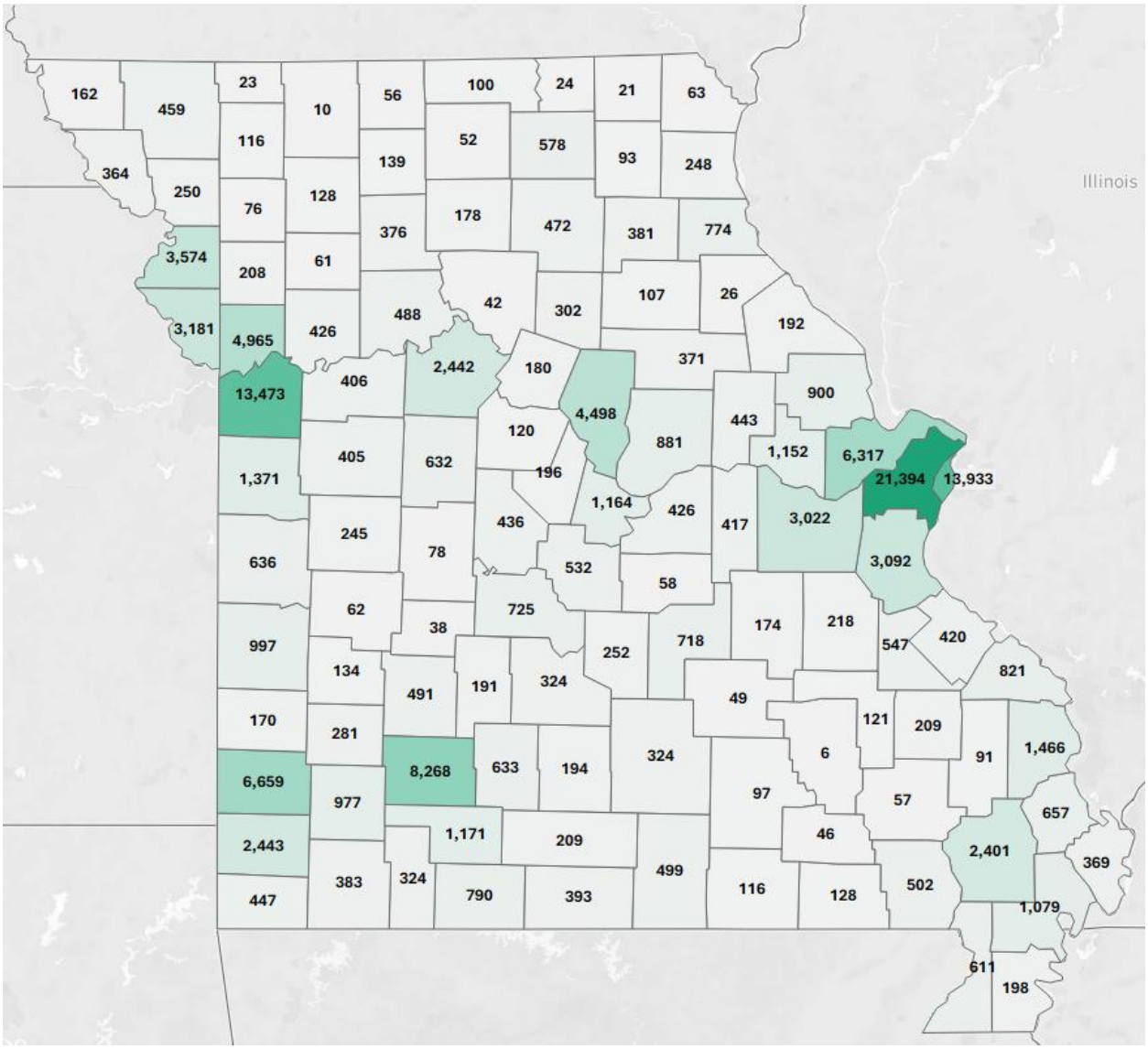


Percent of Total Jobs Derived from Livestock and Poultry



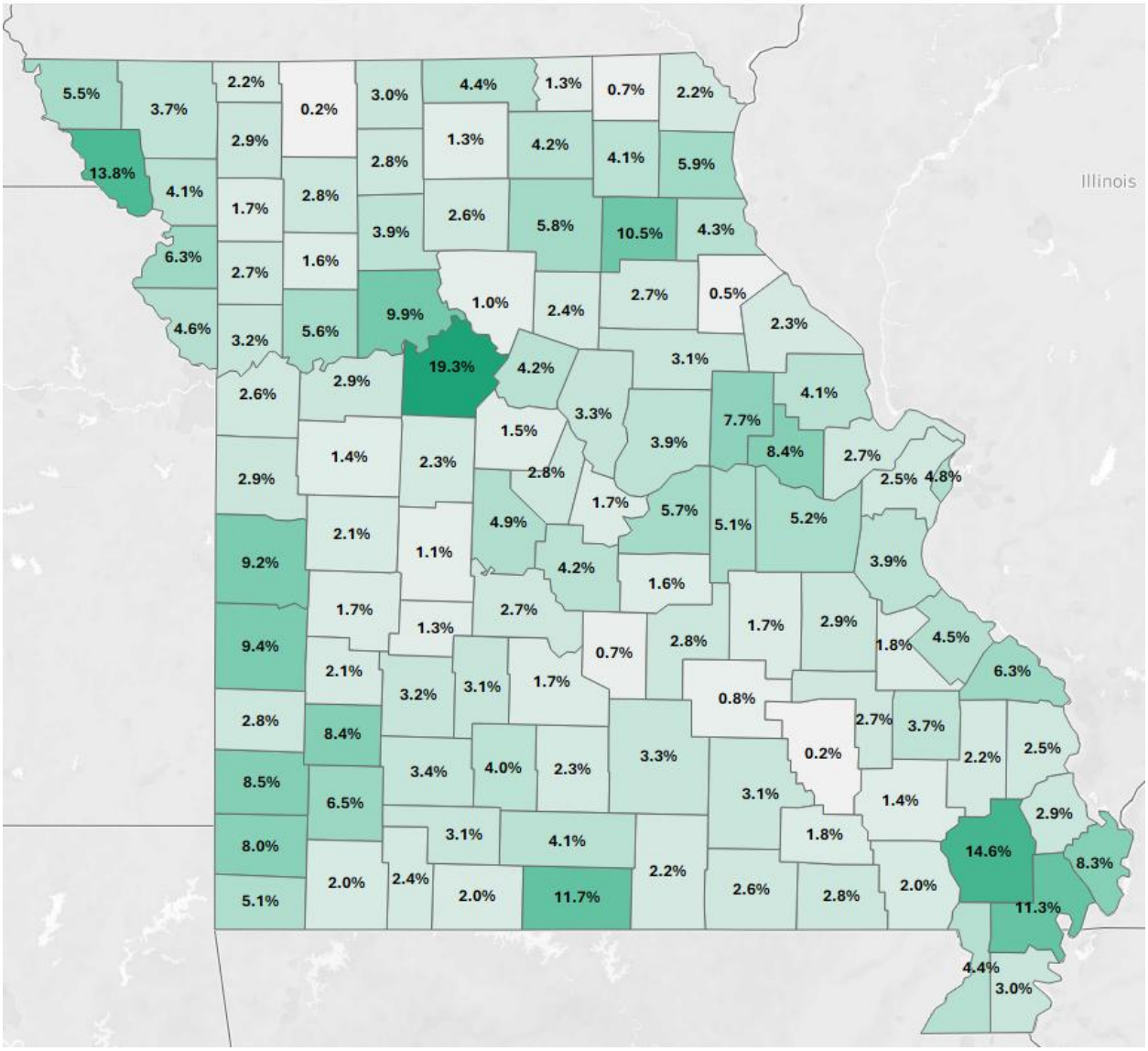
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Jobs Derived from Other Agriculture

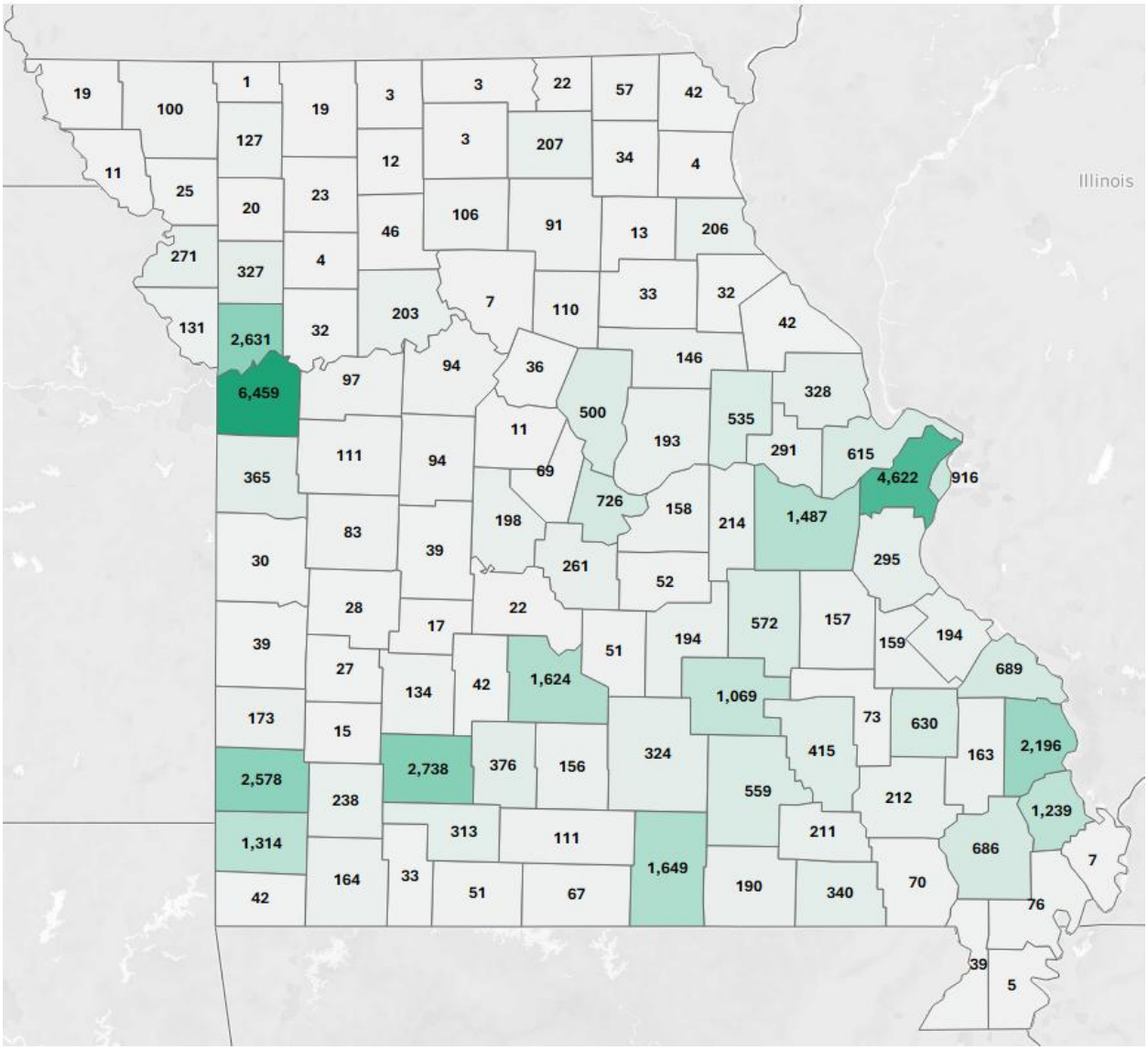


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Percent of Total Jobs Derived from Other Agriculture

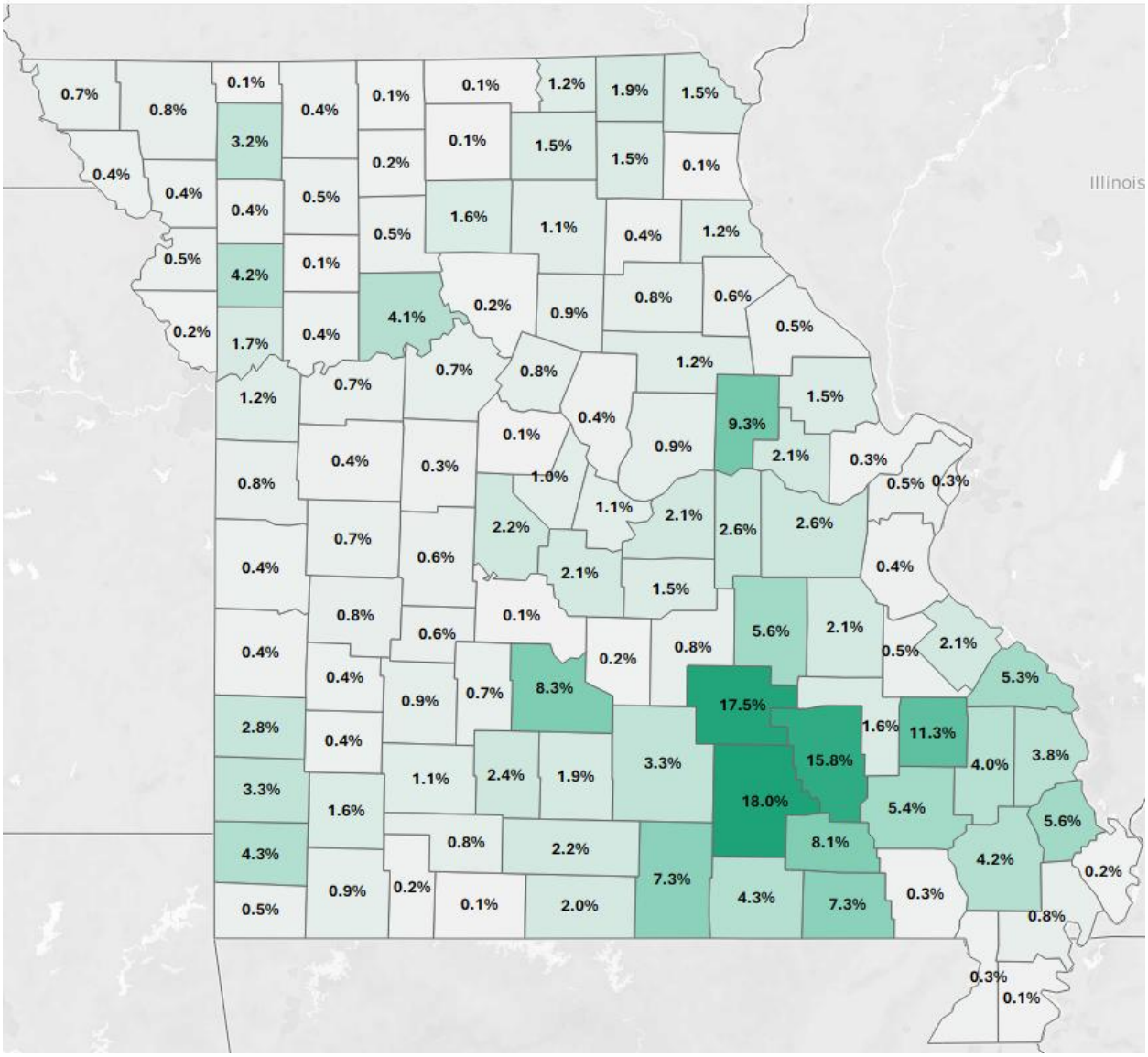


Jobs Derived from Forestry



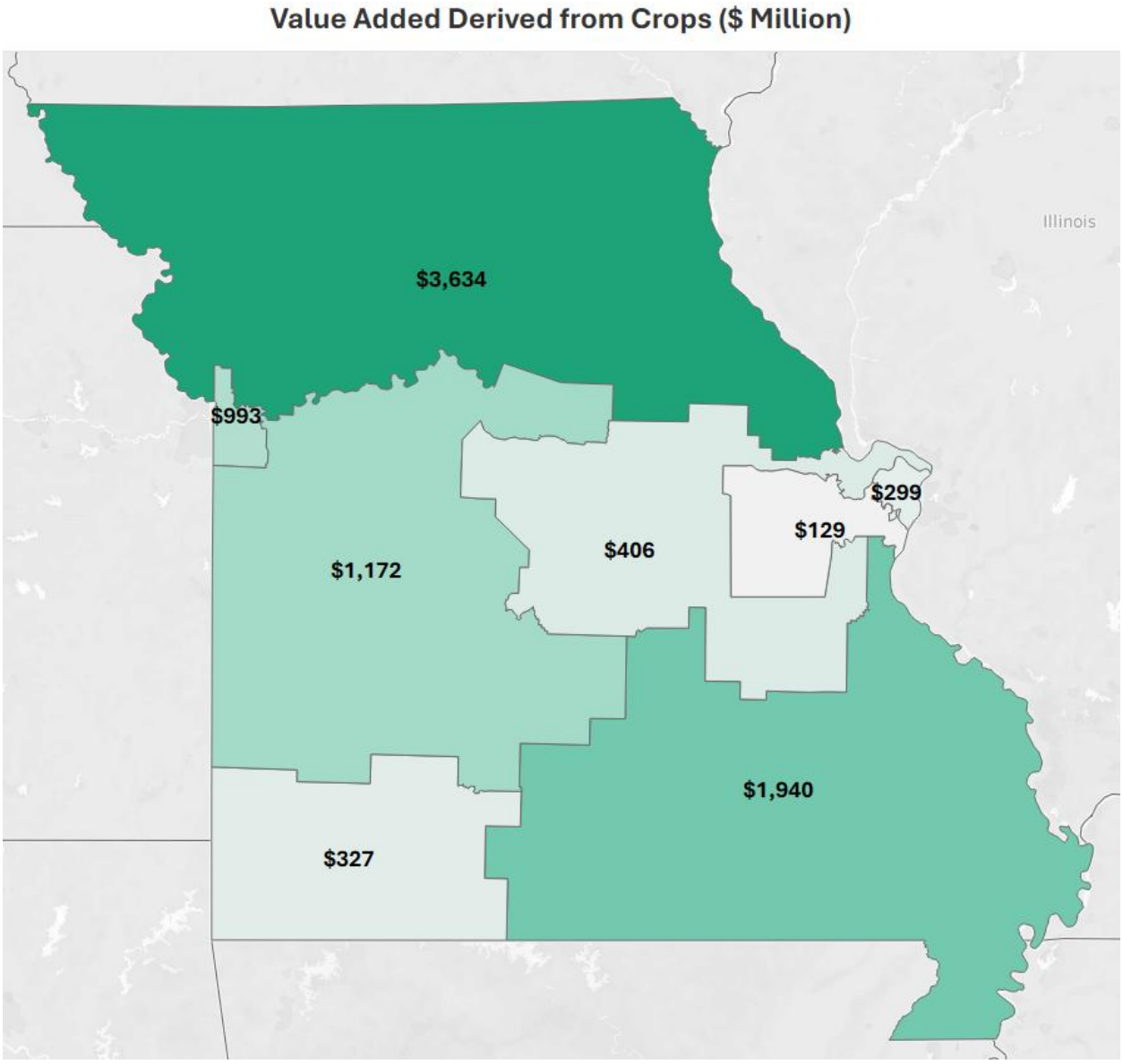
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Percent of Total Jobs Derived from Forestry

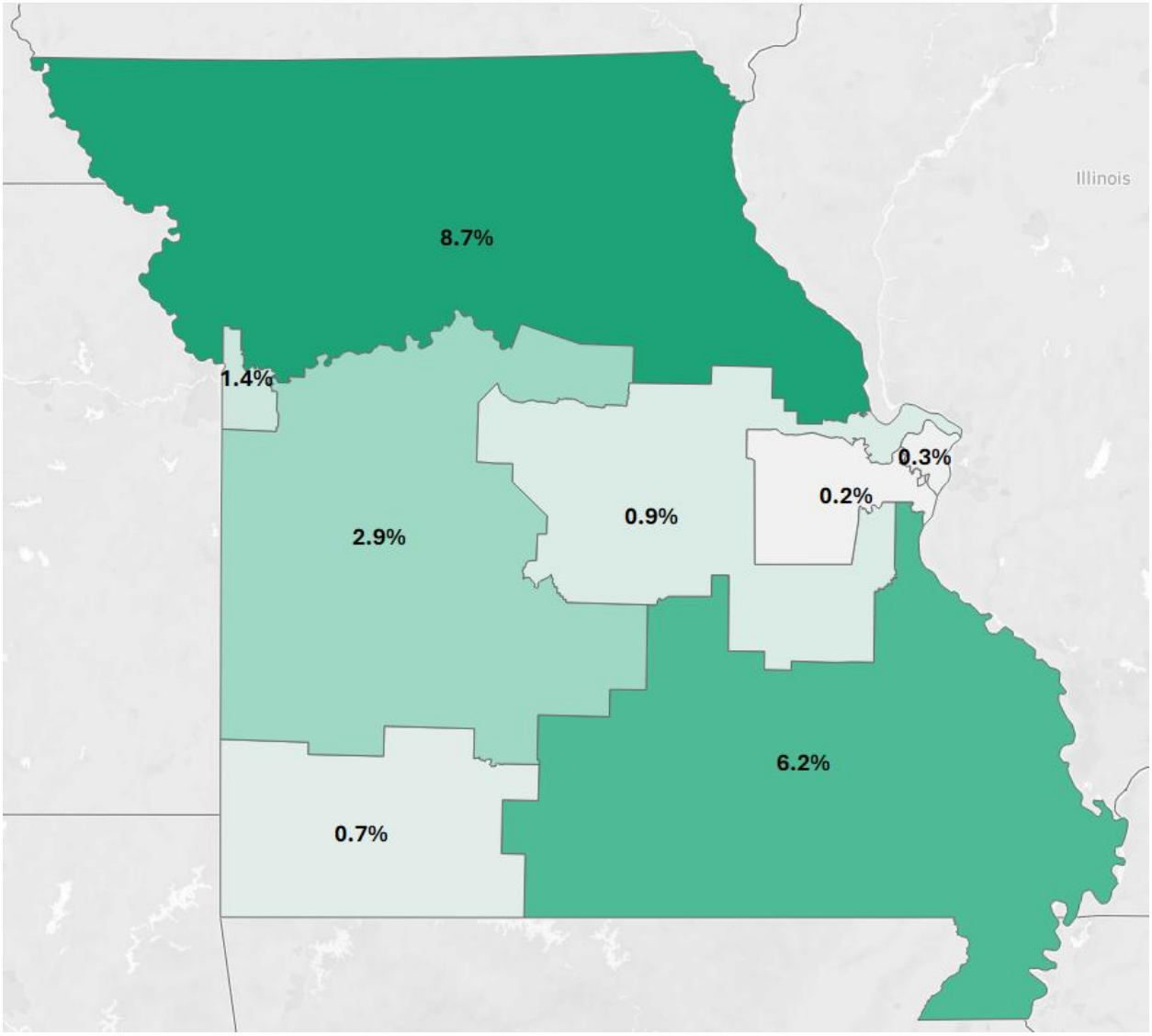


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8.3 Congressional District Value Added

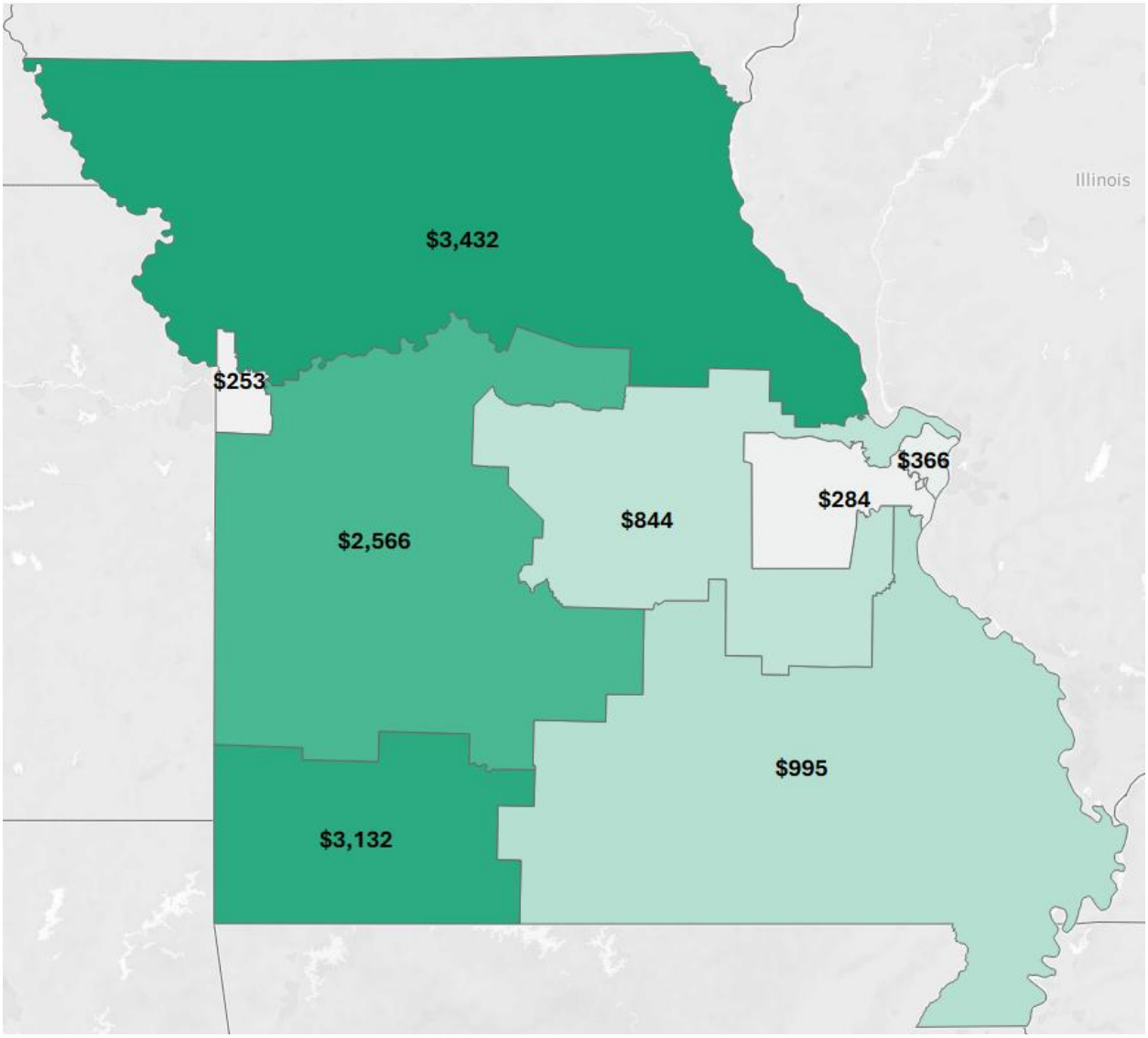


Percent of Total Value Added Derived from Crops



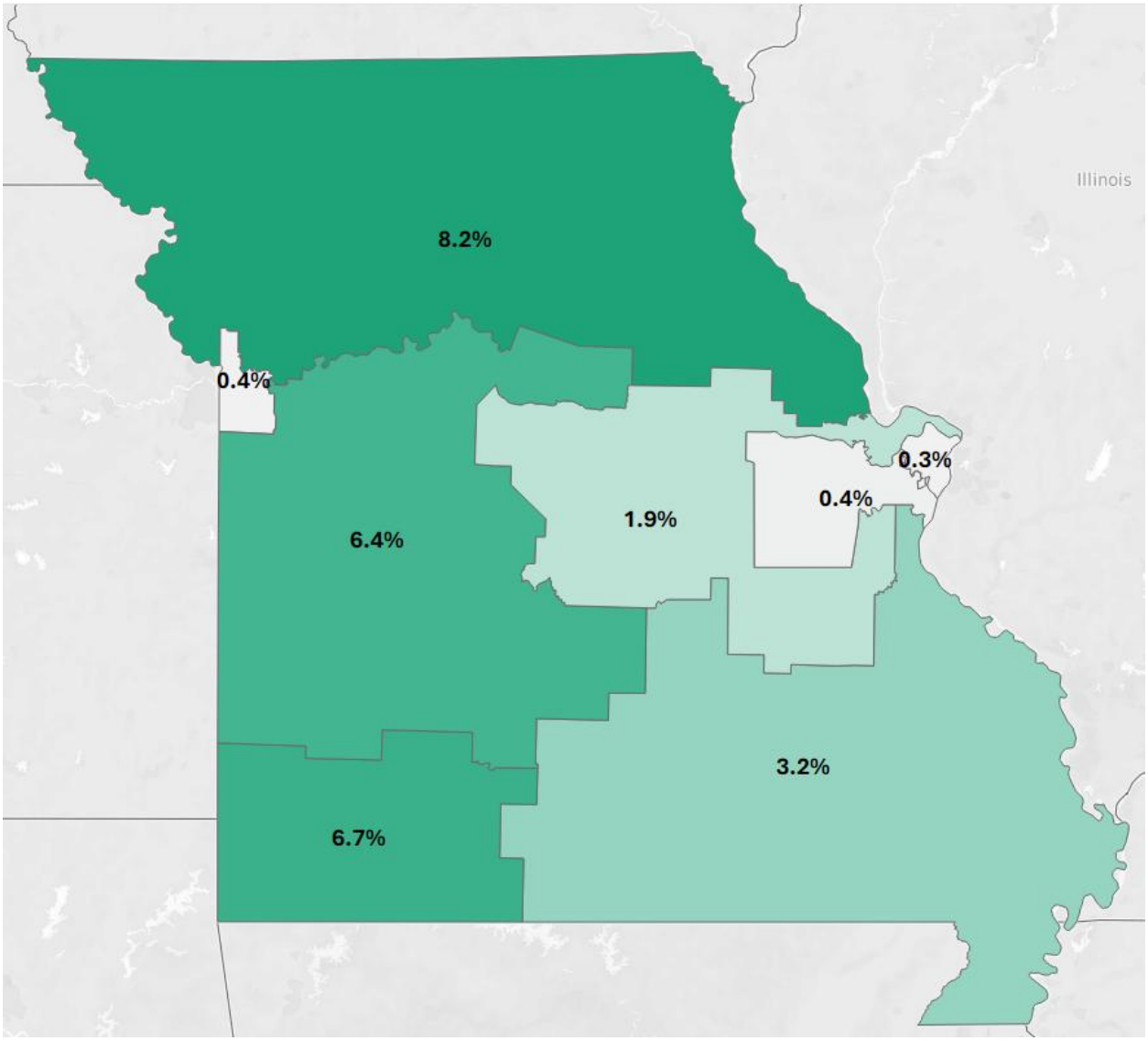
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Value Added Derived from Livestock and Poultry ($ Million)



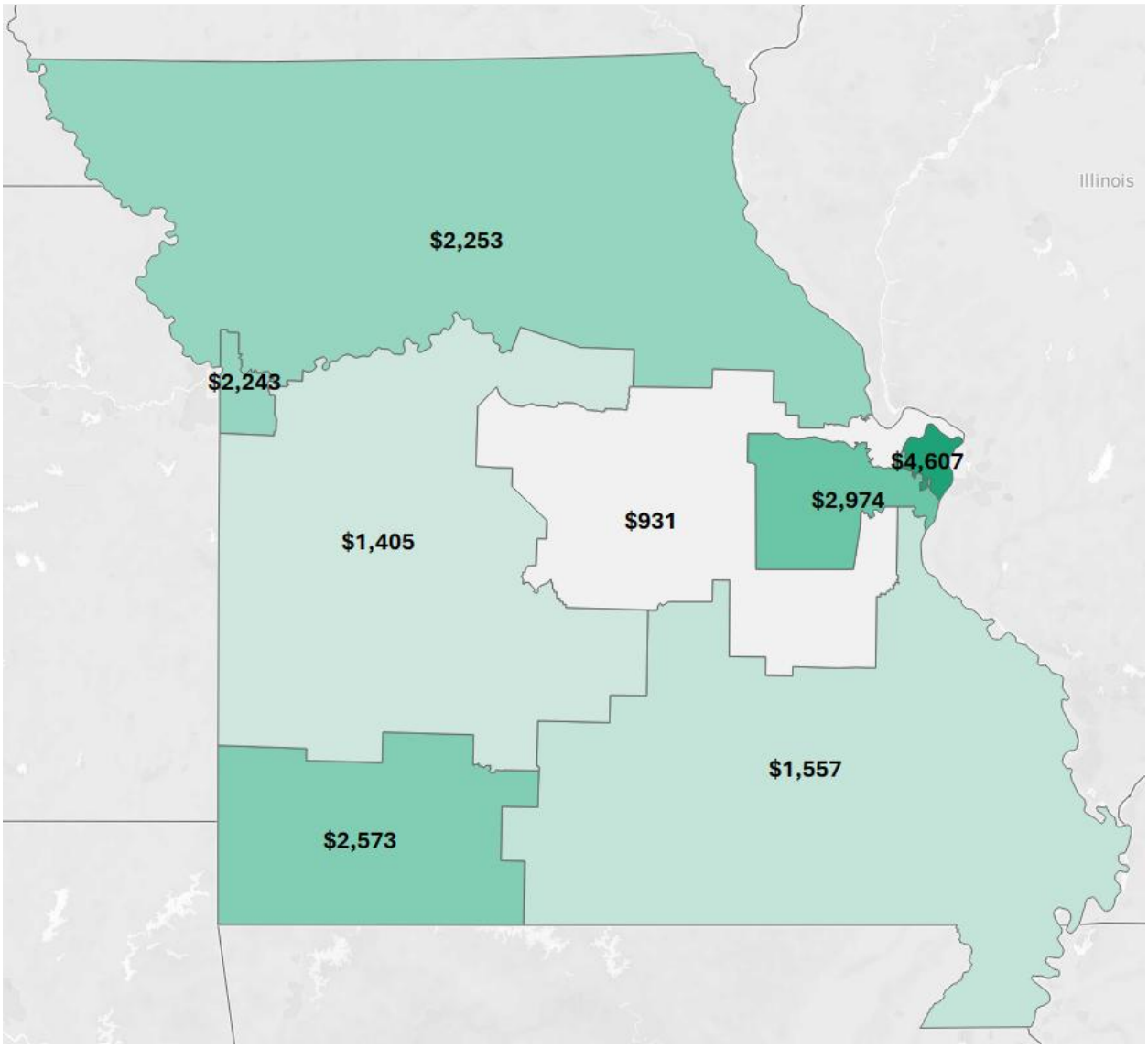
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Percent of Total Value Added Derived from Livestock and Poultry



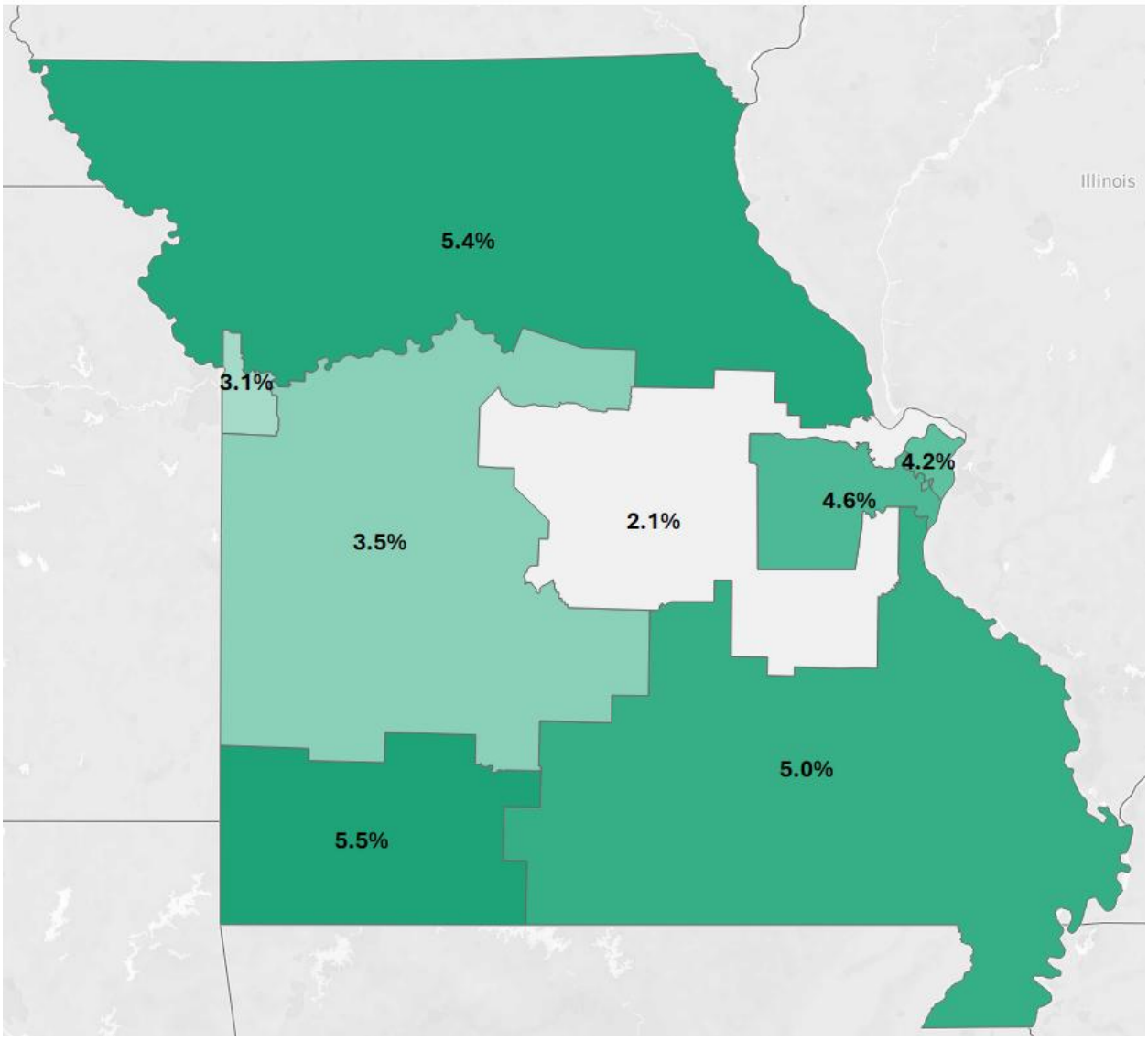
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Value Added Derived from Other Agriculture ($ Million)



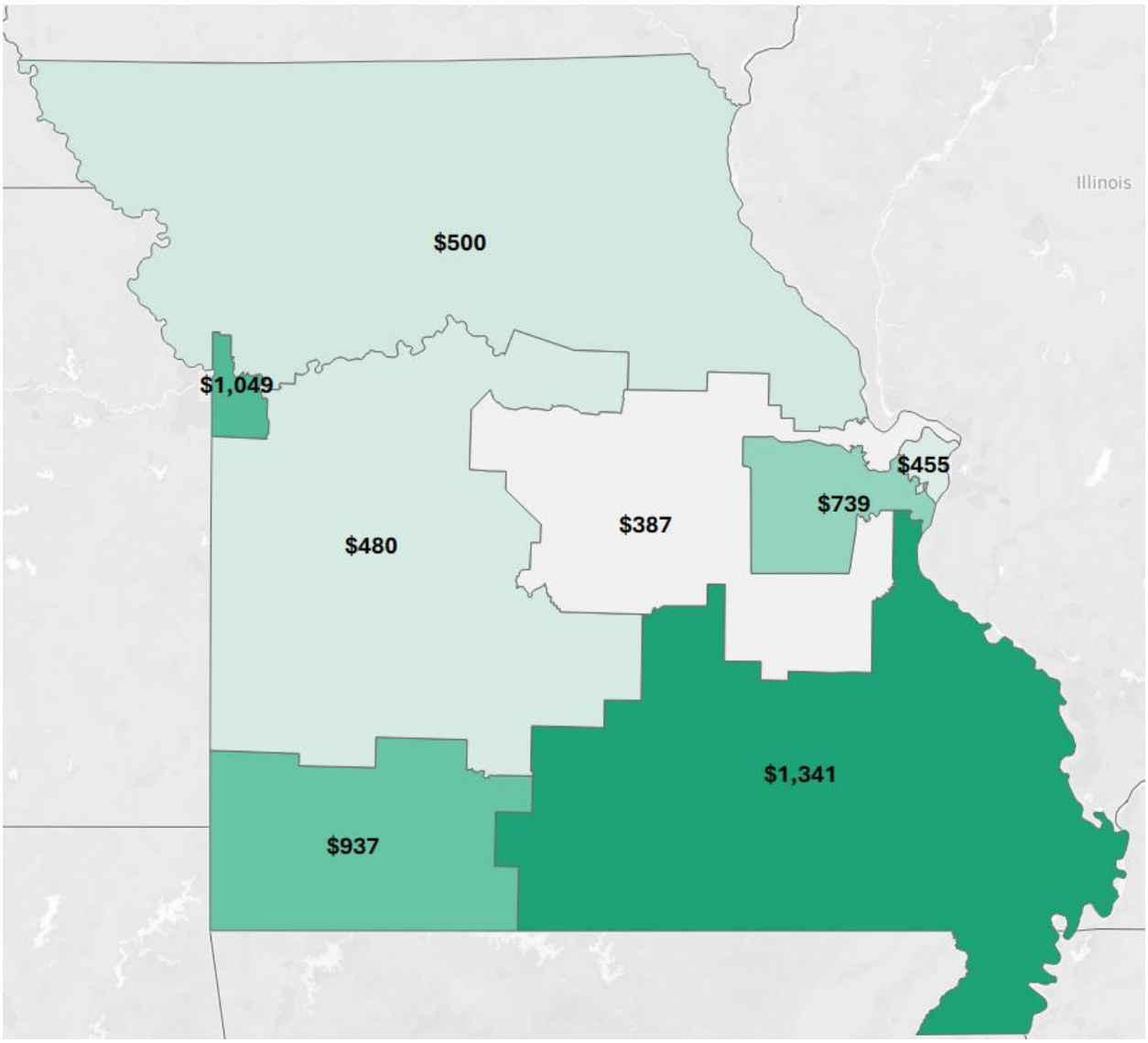
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Percent of Total Value Added Derived from Other Agriculture



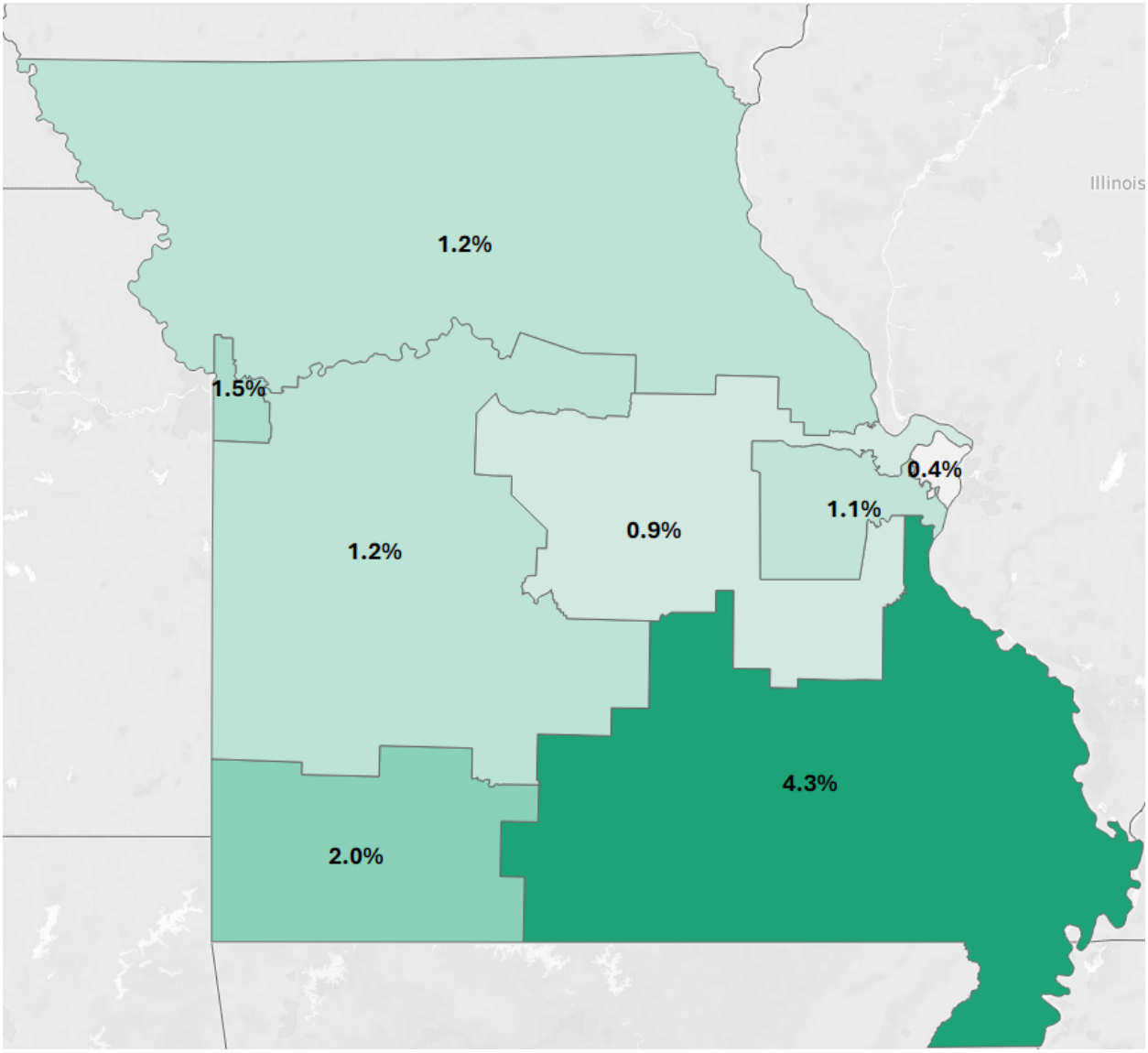
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Value Added Derived from Forestry ($ Million)



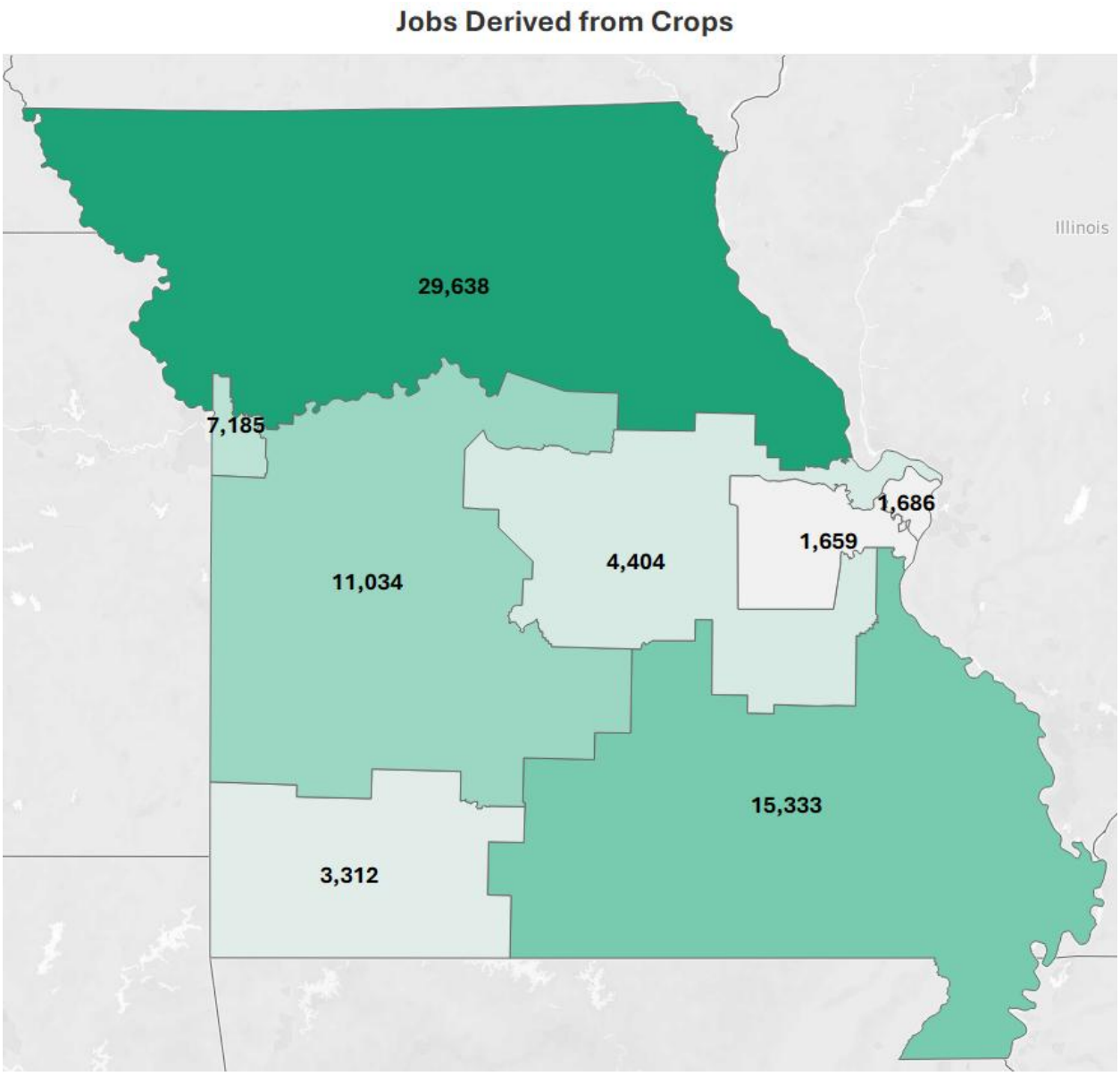
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Percent of Total Value Added Derived from Agriculture and Forestry

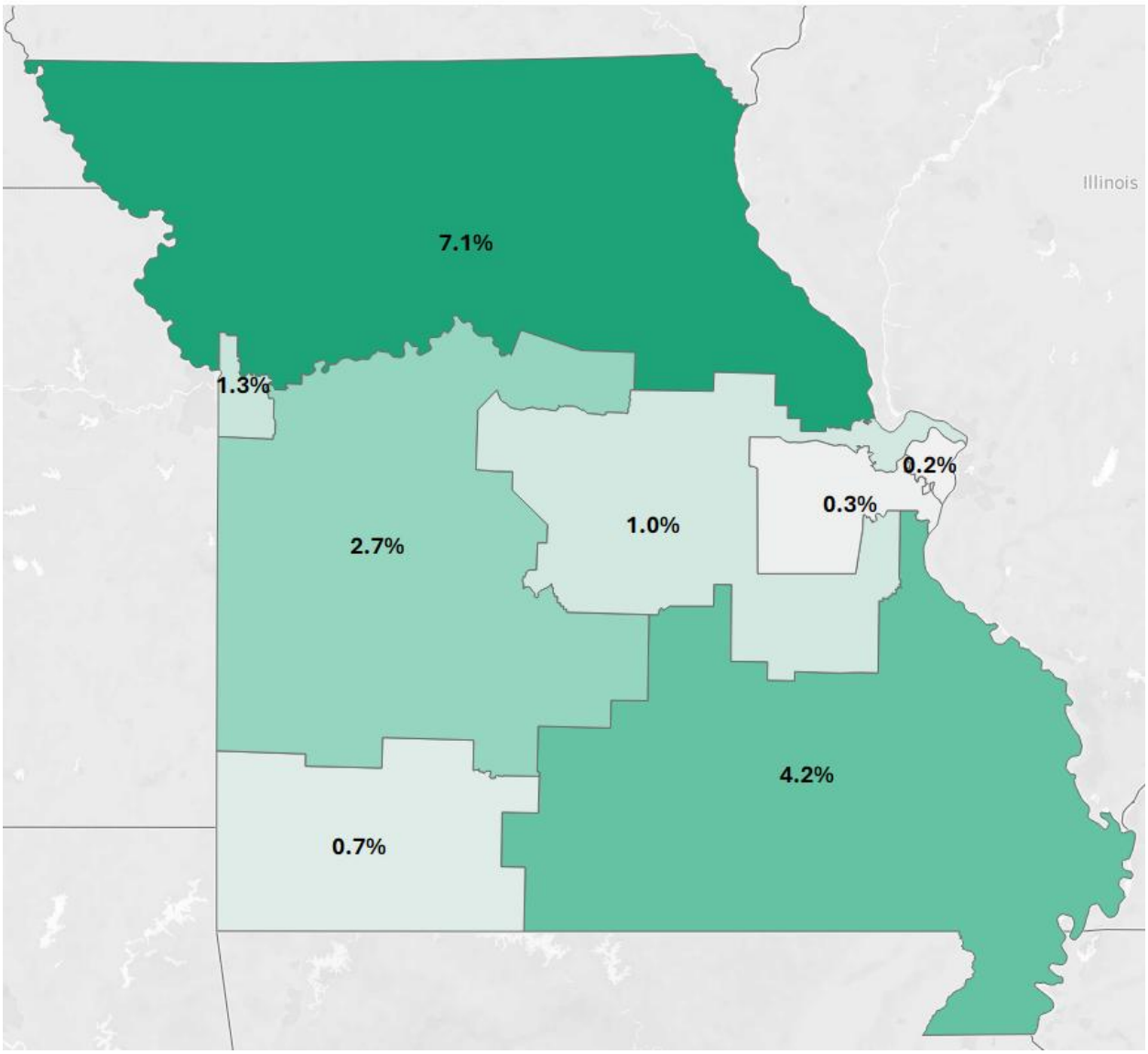


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8.4 Congressional District Jobs

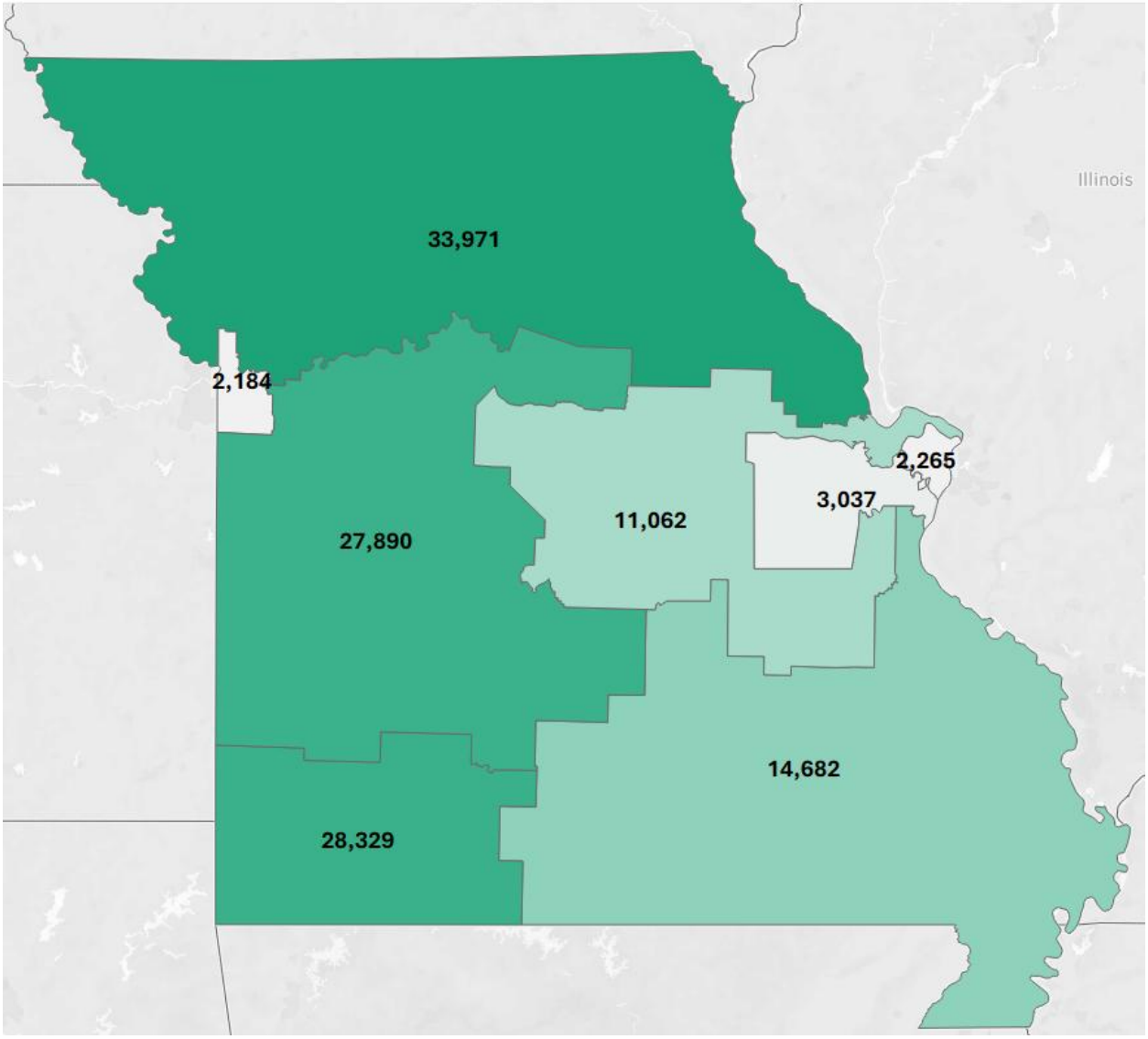


Percent of Total Jobs Derived from Crops



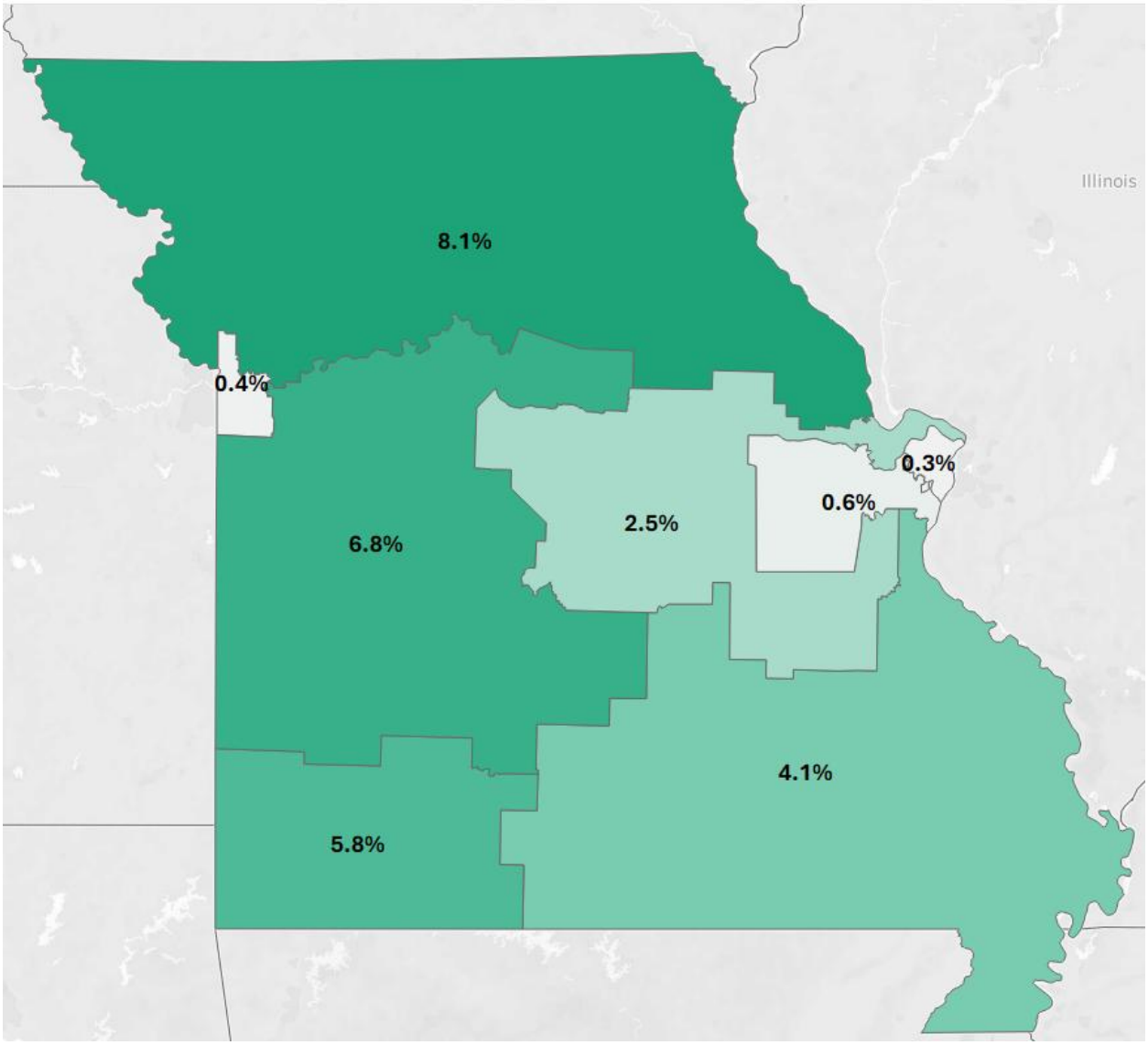
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Jobs Derived from Livestock and Poultry



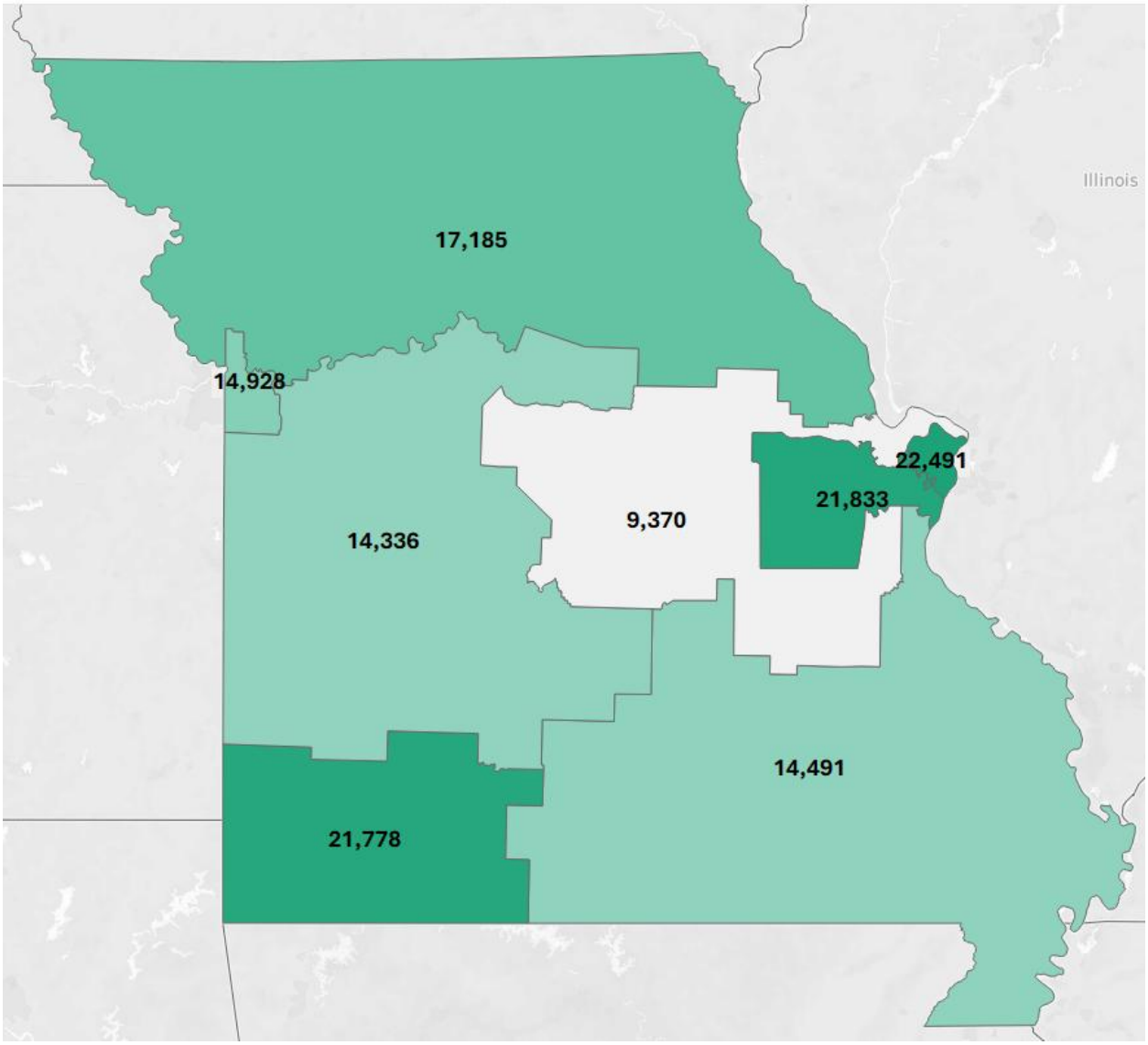
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Percent of Total Jobs Derived from Livestock and Poultry



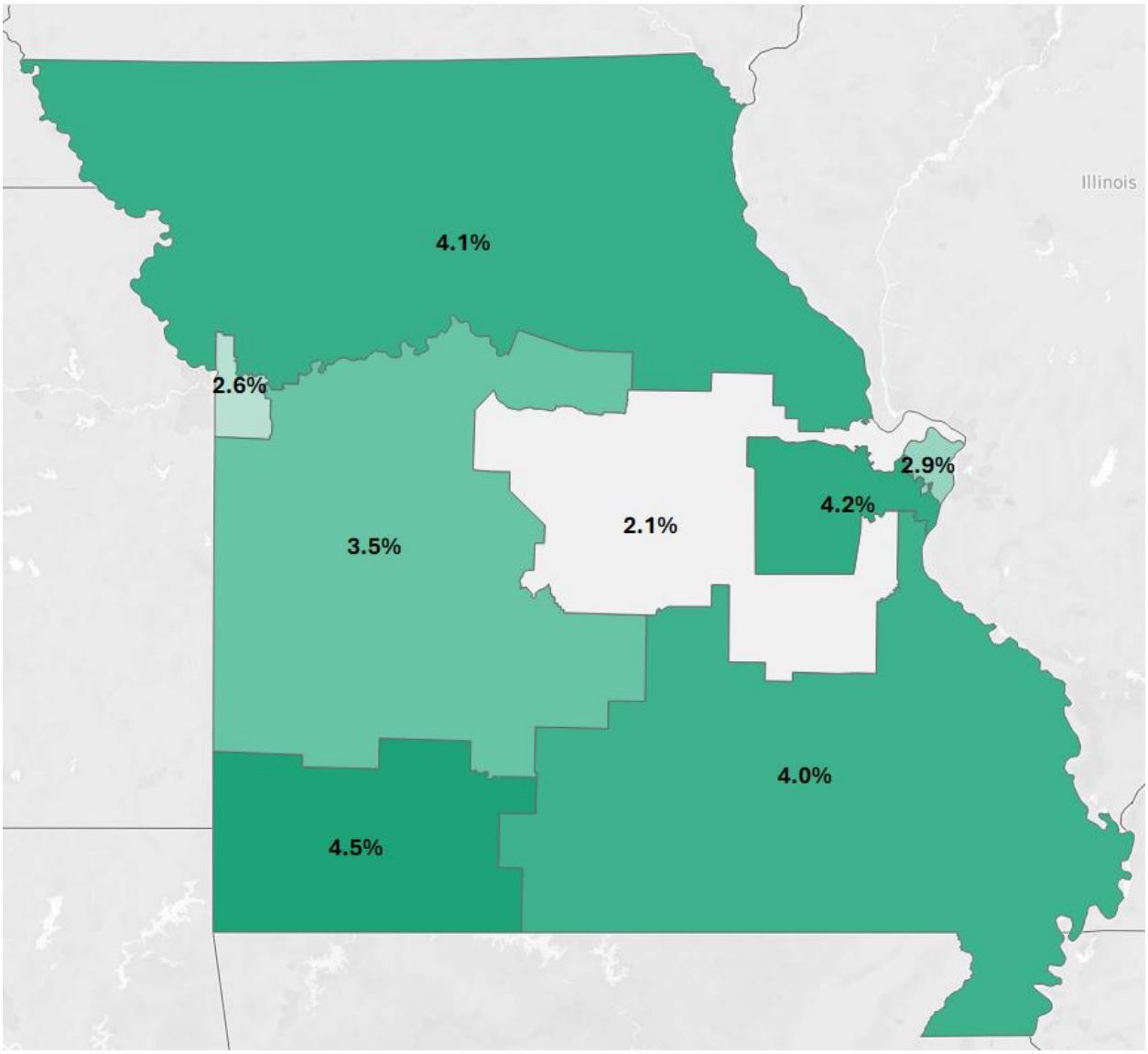
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Jobs Derived from Other Agriculture



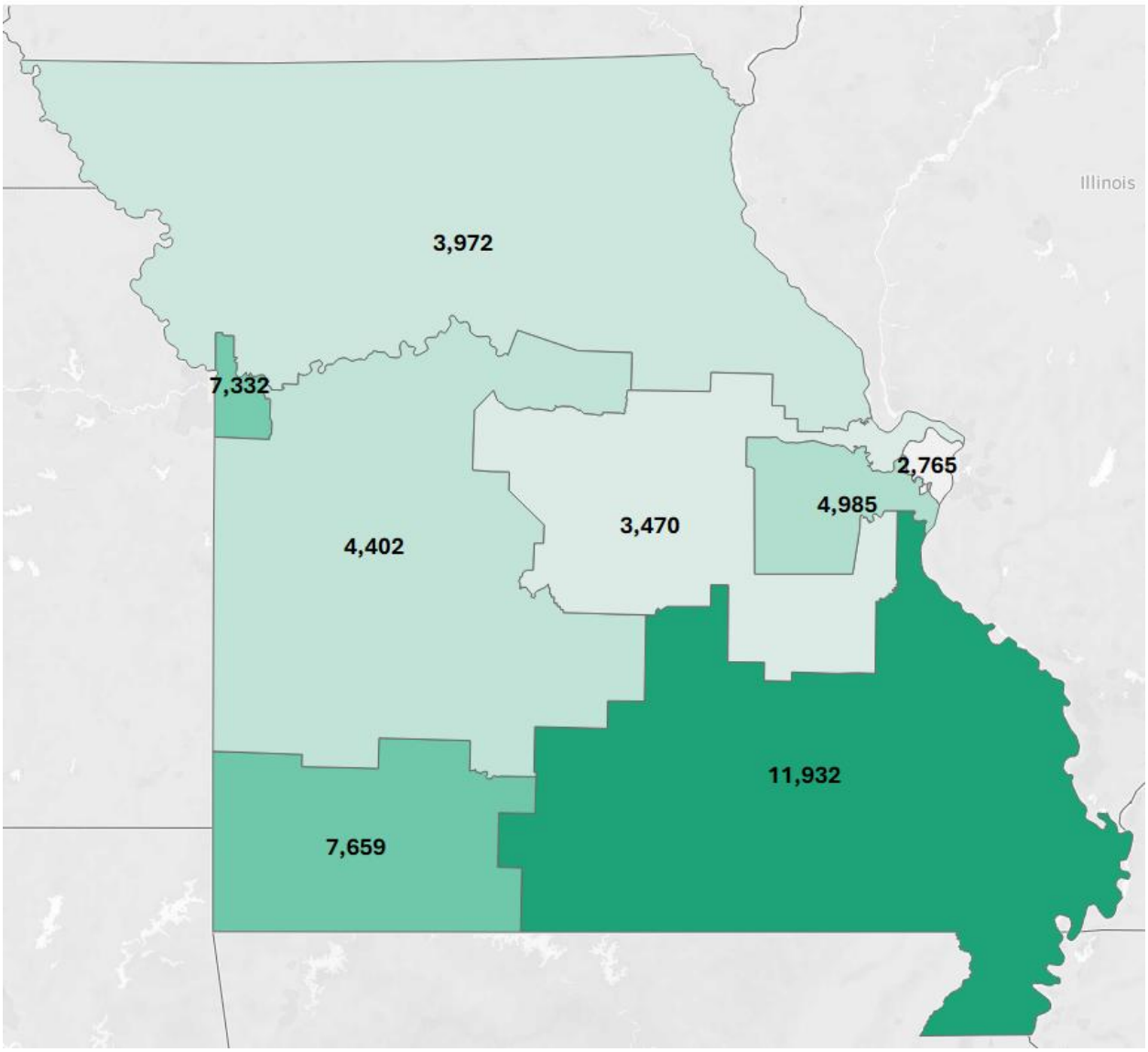
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Percent of Total Jobs Derived from Other Agriculture



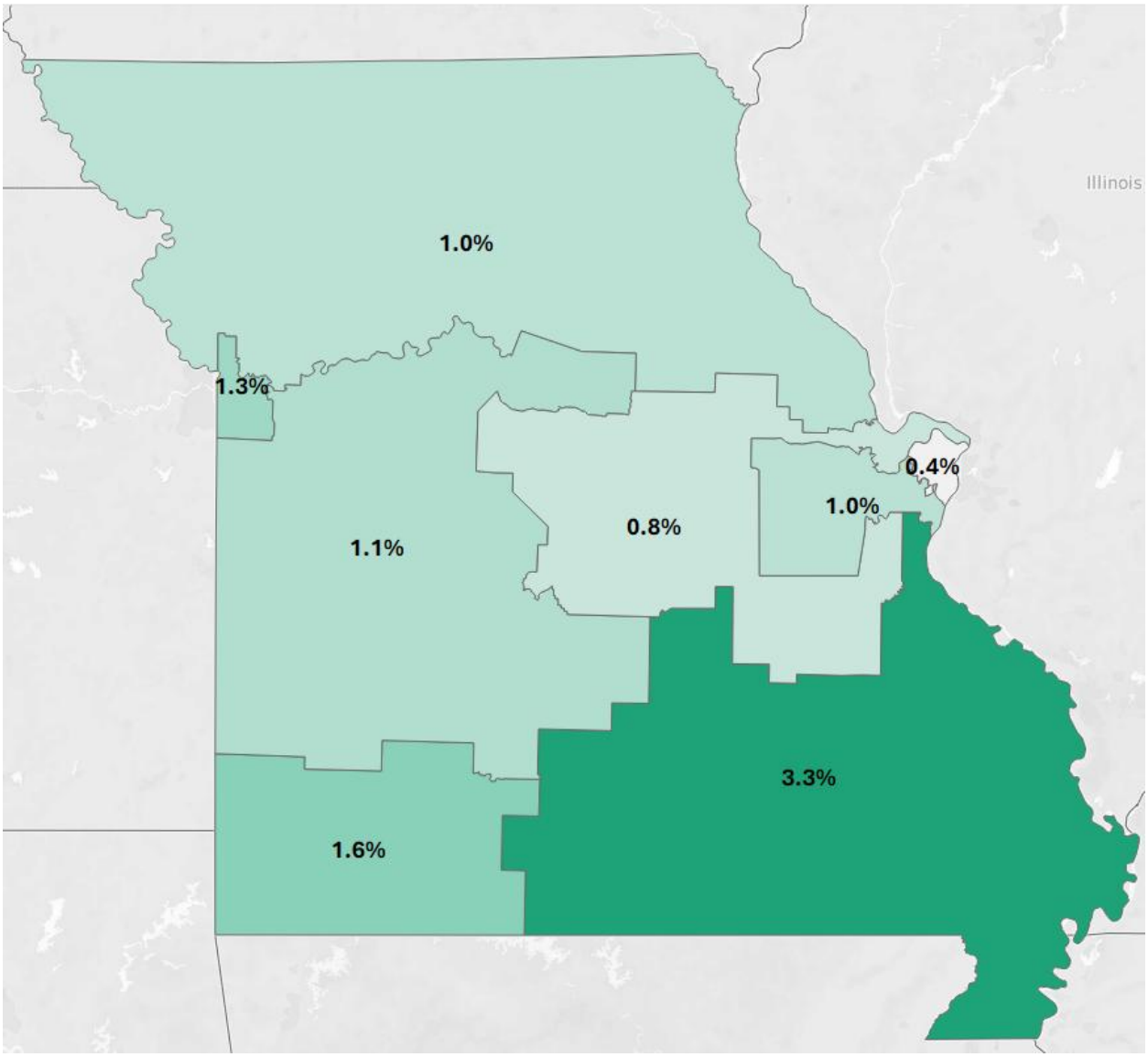
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Jobs Derived from Forestry



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Percent of Total Jobs Derived from Forestry



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