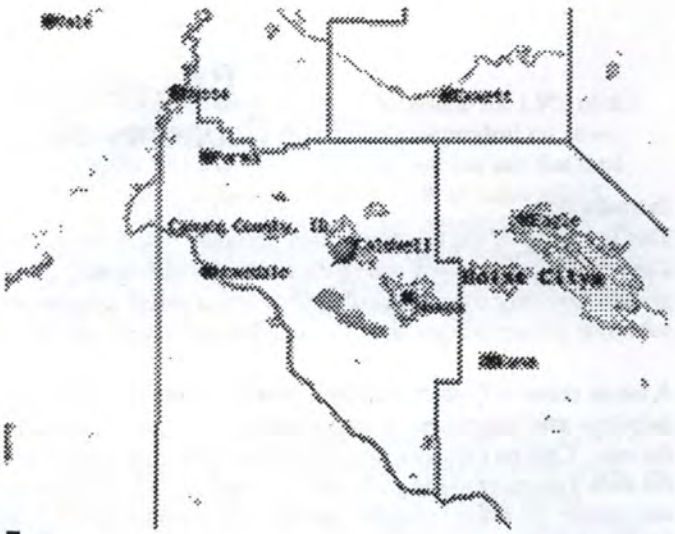

The Economy of Canyon County

A Report to the CAFE

Funded by Canyon County Farm Bureau, and Agricultural and Environmental Research Foundation, Inc.

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The Economy of Canyon County

Introduction

This is a study of the Canyon County economy, with a focus on agriculture and high technology manufacturing. Canyon County has been one of the fastest growing counties in Idaho during the 1990s. One major cause of this growth is from the attraction of new businesses and the expansion of existing local industries and businesses. A second important cause is from the spill-over growth from Boise City and Ada County to the east. Canyon County has a robust economic base including a large manufacturing and high technology sector. The county is also a bedroom community for Boise. Canyon County is providing Boise with housing for its rapidly expanding economy. Since 84.3% of the land area of Canyon County is in agriculture, policy makers are faced with the questions: What effect might new growth have on existing agriculture? How important is agriculture to the county's economy? Is new growth a substitute for agriculture or is it a complement? These are the important questions addressed in this report.

Overview of Canyon County

Canyon County is a small centrally located county in southwest Idaho. It is bordered on the north by Payette and Gem Counties, on the east by Ada County, and on the south by Owyhee County. Canyon County's southern border is the Snake River and to the west is the state of Oregon.

Canyon County is a tale of two worlds: One urban — one rural. The economy also reflects two contrasts: One based on agriculture and other natural resource industries and one based on rapidly growing high technology and service companies. These two separate economies reflect the past, present, and future of all of Idaho. They complement each other and also compete with each other for resources. This report is an analysis of Canyon County's economy and the challenges it faces in the present and future.

Geography and People

Idaho's economy is divided into three, integrated regional economic areas. The regional economic area for northern Idaho is centered in Spokane, Washington. Boise is the center of the economic area for southwestern Idaho; and Salt Lake City, Utah, for southeastern Idaho. Idaho's political boundaries bear little relationship to its economic boundaries (Figure 1). North Idaho, as far south as Grangeville, is

Figure 1

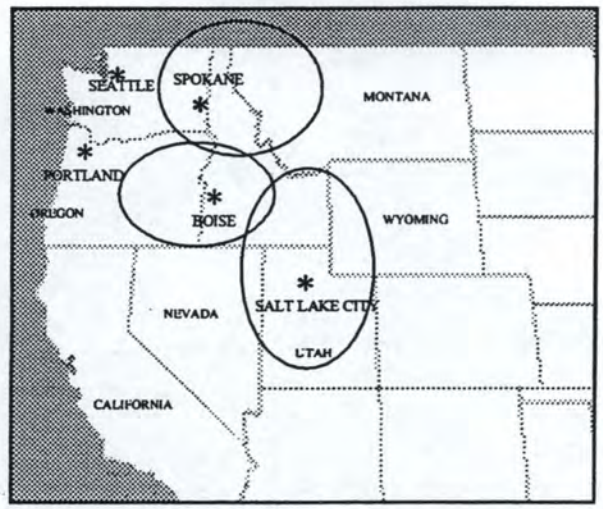


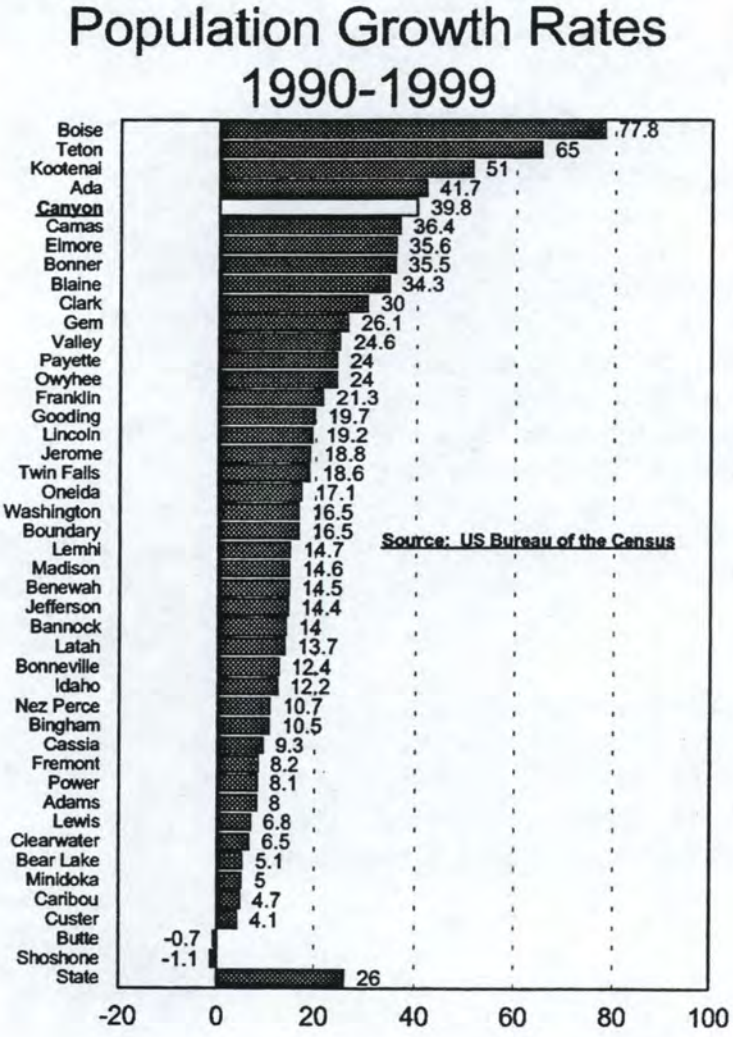
Figure 2

Resident Population, by State, in Rank Order, 2000.

	State	Population
1	California	33,871,648
2	Texas	20,851,820
3	New York	18,976,457
4	Florida	15,982,378
5	Illinois	12,419,293
6	Pennsylvania	12,281,054
7	Ohio	11,353,140
8	Michigan	9,938,444
9	New Jersey	8,414,350
10	Georgia	8,186,453
11	North Carolina	8,049,313
12	Virginia	7,078,515
13	Massachusetts	6,349,097
14	Indiana	6,080,485
15	Washington	5,894,121
16	Tennessee	5,689,283
17	Missouri	5,595,211
18	Wisconsin	5,363,675
19	Maryland	5,296,486
20	Arizona	5,130,632
21	Minnesota	4,919,479
22	Louisiana	4,468,976
23	Alabama	4,447,100
24	Colorado	4,301,261
25	Kentucky	4,041,769
26	South Carolina	4,012,012
27	Oklahoma	3,450,654
28	Oregon	3,421,399
29	Connecticut	3,405,565
30	Iowa	2,926,324
31	Mississippi	2,844,658
32	Kansas	2,688,418
33	Arkansas	2,673,400
34	Utah	2,233,169
35	Nevada	1,998,257
36	New Mexico	1,819,046
37	West Virginia	1,808,344
38	Nebraska	1,711,263
39	***Idaho***	***1,293,953***
40	Maine	1,274,923
41	New Hampshire	1,235,786
42	Hawaii	1,211,537
43	Rhode Island	1,048,319
44	Montana	902,195
45	Delaware	783,600
46	South Dakota	754,844
47	North Dakota	642,200
48	Alaska	626,932
49	Vermont	608,827
50	District of Columbia	572,059
51	Wyoming	493,782
	Total	281,421,906

Source: U.S. Department of Commerce, U.S. Census Bureau.

Figure 3



dominated by the Spokane, Washington orbit. Southwestern Idaho, eastern Oregon, and northern Nevada falls in the Boise orbit (Ada and Canyon Counties). Southeastern Idaho from Twin Falls to the Wyoming border is in the Salt Lake City orbit. Spokane, Washington; Boise, Idaho; and Salt Lake City all represent the "central place" of the surrounding hinterlands. The central place is the focus of economic activity for each hub. It is where major industries are located, where the majority of shopping and retail trade establishments exist, and where medical centers and other vital services are located.

Canyon County is part of the Boise, Idaho central place. Indeed it faces direct pressures from Boise region urban growth, primarily from the east. Growth is also occurring from within Canyon County in Caldwell, Nampa and other cities and towns.

Population Growth

Idaho's overall economic performance over the last decade has made it one of the five fastest-growing states in the nation. In terms of total population, the state grew 29% from 1990 to 2000 as opposed to 3.1% for the nation. Only two states grew faster. Arizona (40%) and Nevada (66.3%). By April 2000, Idaho's population had reached 1,293,953 (Figure 2). This growth is in sharp contrast to the 1980s, particularly the first half of that decade, when Idaho actually had a net loss of people. Canyon County was the fifth fastest growing county in the state with a 39.8% population growth from 1990-1999 (Figure 3). Overall, Canyon County is the second largest county in Idaho in terms of population at 139,821 people (Figure 4), a position it has held for decades. Since 1990, the county's population grew from approximately 90,000 to its current level of 139,821 (Figure 5). Canyon County's cities and towns have had rapid growth also in the 1990s. Nampa (the largest city) grew 83% from approximately 28,000 to 52,000. Caldwell, the second largest city grew 40%. Middleton grew 61%, and Melba grew 74% (Figure 6).

Idaho's spectacular growth has been unevenly distributed throughout the state. Boise County grew 77.8% from 1990–1999; Teton County, 65%; Kootenai County, 51%; Ada County, 41.7%; while Butte and Shoshone Counties declined approximately 1%. According to *Profile of Rural Idaho*, eighteen rural Idaho counties experienced population declines in the 1980s. From 1990–1998, four counties lost population. From 1997–1998, fourteen rural counties and one urban county, Latah, experienced decreases in population.

Population growth does not necessarily imply economic well-being. Incomes and output need to grow as well if per capita incomes are to increase.

Figure 4

County Rankings of Population

Rank	County	2001
1	Ada	312,337
2	***Canyon***	***139,821***
3	Kootenai	112,297
4	Bonneville	83,807
5	Bannock	75,323
6	Twin Falls	64,731
7	Bingham	42,335
8	Bonner	37,479
9	Nez Perce	37,095
10	Latah	34,476
11	Elmore	29,157
12	Madison	27,327
13	Cassia	21,577
14	Payette	20,868
15	Blaine	19,798
16	Minidoka	19,677
17	Jefferson	19,578
18	Jerome	18,449
19	Gem	15,482
20	Idaho	15,423
21	Gooding	14,207
22	Shoshone	13,443
23	Fremont	11,822
24	Franklin	11,590
25	Owyhee	11,008
26	Washington	9,956
27	Boundary	9,926
28	Benewah	8,995
29	Clearwater	8,544
30	Valley	7,716
31	Lemhi	7,606
32	Power	7,468
33	Caribou	7,397
34	Boise	7,011
35	Teton	6,419
36	Bear Lake	6,345
37	Custer	4,292
38	Oneida	4,210
39	Lincoln	4,132
40	Lewis	3,625
41	Adams	3,428
42	Butte	2,856
43	Camas	1,002
44	Clark	971

Source: US Bureau of Census

Figure 5

Population Growth of Canyon County 1990-2000

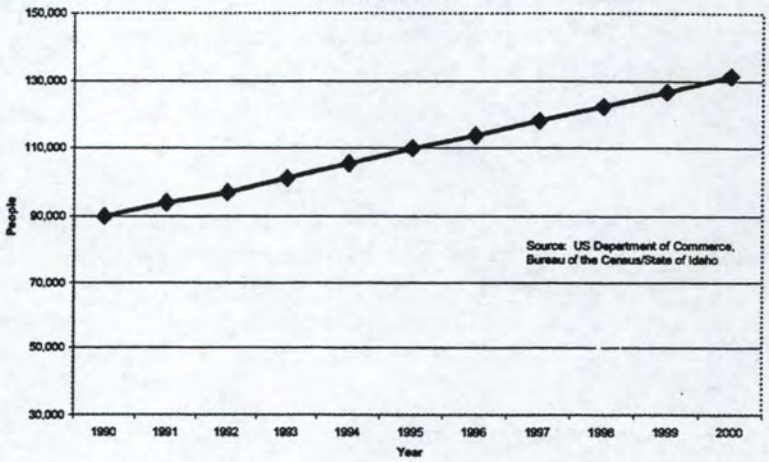


Figure 6

Population of Canyon County Cities, 1990-2000

City	1990	2000	# Chng. 1990-2000	% Chng. 1990-2000
Caldwell	18,586	25,967	7,381	40%
Greenleaf	648	862	214	33%
Melba	252	439	187	74%
Middleton	1,851	2,978	1,127	61%
Nampa	28,365	51,867	23,502	83%
Notus	380	458	78	21%
Parma	1597	1771	174	11%
Wilder	1232	1462	230	19%

Source: US Bureau of the Census, April 1, 2000

Figure 7

Canyon County Population Growth 1920-2000

Year	Population	% Change
1920	26,932	
1930	30,930	14.8%
1940	40,987	32.5%
1950	53,597	30.8%
1960	57,662	7.6%
1970	61,288	6.3%
1980	83,756	36.7%
1990	90,076	7.5%
2000	139,821	55.2%

Rural Versus Urban

There is a clear dichotomy in the State of Idaho's economic performance. One is the urban-rural split. Most of the gains in income and population have occurred in the urban regions. The second dichotomy is between the traditional natural resource industries (farming, mining, wood products, etc.) and newly emerging high technology and service industries. Most of the new growth is in high technology and related service industries.

According to the U.S. Bureau of the Census, rural is defined as any place with fewer than 2,500 residents and not included in an urbanized area. By this measure, 40% of Idaho is rural. A more traditional definition of urban is the Metropolitan Statistical Area (MSA), which is defined by the census bureau as a county or group of counties containing a place with a population of 50,000 or more. In Idaho, there are only two MSAs—Boise, which includes Ada and Canyon Counties, and Pocatello–Idaho Falls, which includes Bannock County. By this standard, 61.7 % of the state's population is non-metropolitan.

The Idaho Department of Commerce classifies 61.5% of Canyon County population as urban, up from 51.1% in 1980. Idaho's population is now classified as 62.4% urban, up from 54% in 1980 (County Profiles). As noted earlier, most of the population growth in the state has been in the urban regions. Strong economic gains have followed this growth. Rural regions, on the other hand, have faced economic stagnation and in some cases, population decline. They face the problems of attracting new businesses and keeping the existing industries from closing or leaving. The urban regions, on the other hand, have faced rapid growth and growth-related population pressures. The state's population base has been shifting from rural to urban areas—mainly in Ada County/Canyon County (Boise) and Kootenai County (Coeur d'Alene).

Traditional, natural resource-based industries are declining either in absolute or relative to other industries. The emerging high technology and service-related industries, including tourism, have gained an increasing share of the economy. The areas of the state where high technology or service industries are located have benefited from faster-than-average economic growth. Communities dependent on wood products and mining have experienced economic stagnation and declining income and employment. Agriculture is holding its own in absolute economic terms (i.e. sales and income) but it is declining in a relative sense because other industries have much faster growth rates.

Figure 8

Land Area Comparisons In Square Miles	
82,751	State of Idaho
9,283	New Hampshire
9,241	Massachusetts
8,485	Idaho County
8,215	New Jersey
6,459	Hawaii
5,544	Connecticut
2,488	Clearwater County
2,396	Delware
1,231	Rhode Island
1,055	Ada
849	Nez Perce County
590	***Canyon County***
479	Lewis County
68	District of Columbia

Source: Statistical Abstract of the US/County Profiles

Figure 9

Population Density 1998-2000 Persons Per Square Mile	
Idaho County	1.8
Clearwater County	3.6
Lewis County	7.8
State of Idaho	15.6
Nez Perce County	44.1
New Hampshire	127.7
Hawaii	184.7
Canyon County	***222.9***
Ada County	285.2
Delware	310.5
Connecticut	590.5
Massachusetts	665.2
Rhode Island	802.6
New Jersey	987.8
District of Columbia	7691.2

Source: Statistical Abstract of the US/County Profiles

Figure 10

LAND IN FARMS (ACRES) IN IDAHO

RANK	COUNTY	1997	1992	1987
1	BINGHAM	796,065	1,371,605	1,406,990
2	IDAHO	649,851	744,295	802,746
3	OWYHEE	682,860	752,032	716,637
4	CASSIA	656,658	666,342	653,525
5	CARIBOU	469,381	587,633	587,374
6	TWIN FALLS	456,378	489,993	552,538
7	WASHINGTON	443,184	556,131	523,171
8	BONNEVILLE	449,426	453,647	505,173
9	NEZ PERCE	339,476	477,839	473,987
10	POWER	424,085	435,069	436,494
11	ELMORE	355,590	353,528	401,677
12	FREMONT	334,151	380,928	383,875
13	CLARK	215,301	286,711	362,514
14	BANNOCK	309,281	325,338	358,189
15	LATAH	325,484	347,293	352,777
16	JEFFERSON	332,535	311,296	331,757
17	CANYON	354,919	391,050	327,869
18	ONEIDA	271,108	271,143	309,354
19	BEAR LAKE	221,717	269,435	269,211
20	ADA	231,188	232,879	247,084
21	BLAINE	214,985	266,293	246,774
22	FRANKLIN	246,127	230,086	242,091
23	MADISON	222,817	224,369	239,530
24	GOODING	220,362	227,114	239,328
25	GEM	182,981	197,176	222,950
26	LEWIS	193,582	211,039	222,624
27	MINIDOKA	206,882	208,161	207,965
28	ADAMS	200,480	221,209	207,722
29	JEROME	193,921	207,552	205,315
30	LEMHI	196,584	193,908	201,199
31	CAMAS	127,514	129,490	174,842
32	KOOTENAI	130,843	131,281	170,739
33	BUTTE	129,639	159,358	161,431
34	TETON	132,678	134,788	148,908
35	LINCOLN	131,473	132,429	145,251
36	CUSTER	147,913	140,701	137,022
37	BONNER	98,662	150,021	136,833
38	PAYETTE	148,467	148,776	135,359
39	CLEARWATER	73,103	103,246	134,891
40	BENEWAH	125,988	111,510	115,100
41	VALLEY	64,282	78,813	81,819
42	BOUNDARY	72,685	72,664	79,281
43	BOISE	45,461	80,333	66,811
44	SHOSHONE	4,100	4,428	5,148
	IDAHO STATE	11,830,167	13,468,992	13,931,875

Source: USDA , 1997 Census of Agriculture

Canyon County Historic Population Growth

Canyon County is in the middle of a periodic boom paradox. Its period of rapid growth occurred in the following decades: 1990-2000 (55.2%); 1970-1980 (36.7%); 1940-1950 (30.8%); 1930-1940 (32.5%). The decades of slow grow were 1980-1990 (7.5%); 1960-1970 (6.3%); and 1950-1960 (7.6%). In no case did Canyon County lose population (Figure 7).

A Clash of Economies

Idaho as a state is a paradox consisting of some of the most remote and rural portions of Idaho along with some of the fastest urban growth regions. Idaho ranks 11th in the nation in terms of land area (excluding water). Idaho County alone is bigger than the states of New Hampshire and Massachusetts (Figure 8). Canyon County is a small county with approximately 590 square miles. In terms of population density, Idaho has 15.6 people per square mile as opposed to 79.6 in the USA. For purposes of comparison it is interesting to note that Idaho County has 1.8 persons per square mile, Canyon County has 222.9 persons per square mile, and the District of Columbia has 7691.2 (Figure 9).

Interestingly, Canyon County is one of Idaho's largest agricultural counties, ranking 17th out of 44 counties in terms of land area in farm acres (Figure 10), with over 354,919 acres in 1997. Bingham County was first with 769,065 acres in farms. Shoshone County was last with 4,100 acres. Overall, Idaho State had 11,830,167 in farm acres. In terms of cash receipts, Canyon County ranked 2nd in the state, behind Cassia County (Figure 11). Thus Canyon County is a paradox…one of the most urban counties in the state and yet 2nd in the state in agricultural receipts.

Land Use and Ownership

Approximately 84% of Canyon County is farmland, 7.7% rangeland, 3% forest, and 2% water. Approximately 2.9% is in urban use, versus 0.4% in the State of Idaho, and virtually 0% for Idaho County (Figure 12). Nearly 93.6% of Canyon County is in private ownership. In contrast 31.6% is in private ownership for Idaho and 15.2% for Idaho County. Over 63% of the State of Idaho is owned by the federal government versus only 5.4% of Canyon County. In contrast 83.3% of Idaho County is owned by the federal government (Figure 13).

Canyon County faces pressure given its land use characteristics. Most of its land is in agriculture and in private ownership. The county faces rapid population growth both from the east from Boise and from within.

Figure 11

Cash Receipts from Marketing (Agriculture)-1999

Rank	Region	Dollars
1	Idaho State total	$ 3,647,870,000
2	Cassia, Idaho	$ 374,624,000
3	***Canyon, Idaho***	***$ 328,150,000***
4	Gooding, Idaho	$ 321,467,000
5	Jerome, Idaho	$ 317,386,000
6	Twin Falls, Idaho	$ 260,573,000
7	Elmore, Idaho	$ 241,797,000
8	Bingham, Idaho	$ 229,563,000
9	Minidoka, Idaho	$ 164,869,000
10	Jefferson, Idaho	$ 142,914,000
11	Power, Idaho	$ 120,853,000
12	Ada, Idaho	$ 112,235,000
13	Owyhee, Idaho	$ 110,600,000
14	Bonneville, Idaho	$ 89,155,000
15	Madison, Idaho	$ 82,398,000
16	Fremont	$ 78,259,000
17	Franklin, Idaho	$ 70,102,000
18	Payette, Idaho	$ 56,732,000
19	Lincoln, Idaho	$ 48,036,000
20	Washington, Idaho	$ 42,182,000
21	Caribou, Idaho	$ 38,865,000
22	Clark, Idaho	$ 35,795,000
23	Nez Perce, Idaho	$ 34,085,000
24	Latah, Idaho	$ 33,308,000
25	Gem, Idaho	$ 32,568,000
26	Idaho, Idaho	$ 26,580,000
27	Bannock, Idaho	$ 25,432,000
28	Teton, Idaho	$ 22,908,000
29	Blaine, Idaho	$ 22,829,000
30	Butte, Idaho	$ 21,402,000
31	Lemhi, Idaho	$ 19,914,000
32	Lewis, Idaho	$ 17,915,000
33	Custer, Idaho	$ 17,551,000
34	Bear Lake, Idaho	$ 16,175,000
35	Oneida, Idaho	$ 15,021,000
36	Kootenai, Idaho	$ 14,021,000
37	Boundary, Idaho	$ 13,383,000
38	Benewah, Idaho	$ 9,773,000
39	Camas, Idaho	$ 9,237,000
40	Bonner, Idaho	$ 7,936,000
41	Adams, Idaho	$ 7,764,000
42	Valley, Idaho	$ 6,645,000
43	Clearwater, Idaho	$ 4,209,000
44	Boise, Idaho	$ 2,343,000
45	Shoshone, Idaho	$ 316,000

Source: REIS

Figure 12

Land Use for Selected Regions

	Canyon	%	State of Idaho	%	Idaho County	%
Urban Land	11,200	2.9%	214,700	0.4%	2,000	0.0%
Agricultural	322,800	84.3%	7,788,500	14.6%	233,400	4.3%
Rangeland	29,400	7.7%	21,985,700	41.1%	950,700	17.4%
Forest	11,500	3.0%	20,636,600	38.6%	4,265,300	78.2%
Water	7,800	2.0%	525,600	1.0%	2,700	0.0%
Wetland	0	0.0%	262,100	0.5%	-	0.0%
Barren Land	0	0.0%	2,058,000	3.8%	-	0.0%
Tundra	0	0.0%	11,400	0.0%	-	0.0%
Perennial Snow	0	0.0%	-	0.0%	-	0.0%
Total	382,700	100.0%	53,482,600	100.0%	5,454,100	100.0%

Source: Idaho Department of Commerce

Figure 13

Land Ownership

	Canyon	%	State of Idaho	%	Idaho County	%
Federal Land	20,486	5.4%	33,412,277	63.1%	4,523,385	83.3%
BLM	9,726	2.6%	11,836,481	22.3%	91,808	1.7%
Natural Forests	-	0.0%	20,458,276	38.6%	4,430,154	81.6%
Other	10,760	2.9%		0.0%	1,423	0.0%
State Land	2,900	0.8%	2,693,260	5.1%	75,648	1.4%
Endowment Land	738	0.2%	2,458,405	4.6%	74,573	1.4%
Fish and Game	1,968	0.5%	187,769	0.4%	1,075	0.0%
Parks and Recreation	-	0.0%	38,407	0.1%	-	0.0%
University of Idaho Land	194	0.1%	8,679	0.0%	-	0.0%
Private Land	353,236	93.6%	16,735,756	31.6%	826,261	15.2%
County Land	365	0.1%	96,311	0.2%	4,900	0.1%
Municipal Land	485	0.1%	22,972	0.0%	334	0.0%
Total	377,472	100.0%	52,960,576	100.0%	5,430,528	100.0%

Source: Idaho Department of Commerce

Figure 14

1997 Poverty Estimates in Idaho

	State and County	Percent Estimate
1	-Owyhee County	21.4
2	-Shoshone County	20.1
3	-Washington County	18.4
4	-Power County	17.8
5	-Idaho County	17.6
6	-Payette County	17.2
7	-Boundary County	16.5
8	-Minidoka County	16.3
9	***-Canyon County***	***16***
10	-Lemhi County	15.8
11	-Butte County	15.4
12	-Cassia County	15.4
13	-Gem County	15.4
14	-Jerome County	15.4
15	-Madison County	15.3
16	-Bonner County	15.2
17	-Lewis County	15.2
18	-Clearwater County	14.9
19	-Gooding County	14.8
20	-Bingham County	14.7
21	-Adams County	14.6
22	-Benewah County	14.4
23	-Fremont County	14.4
24	-Twin Falls County	14.1
25	-Bannock County	13.9
26	-Valley County	13.8
27	-Latah County	13.5
28	-Bear Lake County	13.4
29	-Jefferson County	13.1
30	Idaho State	13
31	-Lincoln County	13
32	-Nez Perce County	12.8
33	-Oneida County	12.8
34	-Elmore County	12.7
35	-Franklin County	12.5
36	-Clark County	12.4
37	-Bonneville County	12.2
38	-Custer County	12.1
39	-Kootenai County	11.5
40	-Boise County	11.3
41	-Teton County	9.7
42	-Caribou County	9.6
43	-Ada County	8.9
44	-Blaine County	7.5
45	-Camas County	7.4

1997 Poverty Estimates by State

	State and County	Percent Estimate
1	-New Mexico	19.3
2	-District of Columbia	19.3
3	-Louisiana	18.4
4	-Mississippi	18.1
5	-Arkansas	17.5
6	-West Virginia	16.8
7	-Texas	16.7
8	-Oklahoma	16.3
9	-Alabama	16.2
10	-Kentucky	16
11	-California	16
12	-New York	15.6
13	-Montana	15.5
14	-Arizona	15.5
15	-South Carolina	14.9
16	-Georgia	14.7
17	-Florida	14.4
18	-South Dakota	14
19	-Tennessee	13.6
20	United States	13.3
21	***-Idaho***	***13***
22	-North Carolina	12.6
23	-North Dakota	12.5
24	-Missouri	12.2
25	-Wyoming	12
26	-Virginia	11.6
27	-Oregon	11.6
28	-Michigan	11.5
29	-Illinois	11.3
30	-Rhode Island	11.2
31	-Alaska	11.2
32	-Hawaii	11.1
33	-Ohio	11
34	-Pennsylvania	10.9
35	-Kansas	10.9
36	-Nevada	10.7
37	-Massachusetts	10.7
38	-Maine	10.7
39	-Washington	10.2
40	-Colorado	10.2
41	-Utah	10
42	-Delaware	10
43	-Iowa	9.9
44	-Indiana	9.9
45	-Vermont	9.7
46	-Nebraska	9.6
47	-Maryland	9.5
48	-New Jersey	9.3
49	-Wisconsin	9.2
50	-Minnesota	8.9
51	-Connecticut	8.9
52	-New Hampshire	7.5

Source: US Bureau of the Census

1997 Median Family Income

1	Blaine	$45,504
2	Ada	$43,321
3	Caribou	$42,574
4	Bonneville	$39,962
5	Kootenai	$36,123
6	Madison	$35,718
7	Camas	$35,445
8	Bannock	$35,382
9	Latah	$35,005
10	Nez Perce	$34,963
11	Boise	$34,807
12	Bingham	$34,488
13	Custer	$34,460
14	Jefferson	$34,390
15	Franklin	$33,892
16	Idaho State	$33,612
17	Valley	$33,587
18	Oneida	$33,141
19	Clearwater	$32,881
20	Power	$32,719
21	Elmore	$32,486
22	Bear Lake	$32,181
23	Cassia	$32,175
24	Twin Falls	$32,169
25	Butte	$31,780
26	Benewah	$31,728
27	Teton	$31,680
28	***Canyon***	***$31,558***
29	Jerome	$30,938
30	Clark	$30,827
31	Minidoka	$30,598
32	Fremont	$30,579
33	Bonner	$30,311
34	Gem	$30,132
35	Lincoln	$30,036
36	Payette	$29,849
37	Boundary	$29,732
38	Idaho	$29,674
39	Gooding	$28,957
40	Adams	$28,944
41	Lewis	$28,202
42	Lemhi	$28,159
43	Shoshone	$27,555
44	Owyhee	$26,702
45	Washington	$26,134

Source: U.S. Census Bureau

Figure 15
Education Rankings for 1980 and 1990

% of Population with a HS Diploma

		1980	1990
1	Blaine	88.1%	91.7%
2	Madison	81.3%	87.6%
3	Ada	81.7%	87.2%
4	Latah	81.5%	86.6%
5	Caribou	76.2%	84.3%
6	Bonneville	80.6%	84.0%
7	Valley	80.3%	83.8%
8	Elmore	76.2%	83.1%
9	Bannock	79.2%	82.9%
10	Franklin	77.4%	82.2%
11	Camas	83.8%	81.8%
12	Custer	75.3%	81.7%
13	Kootenai	75.6%	81.1%
14	Butte	71.0%	80.4%
15	Teton	78.5%	80.2%
16	Boise	71.7%	80.0%
17	Nez Perce	72.3%	79.9%
18	Bear Lake	73.9%	79.8%
19	Lincoln	72.2%	79.8%
20	Lewis	67.2%	78.8%
21	Oneida	71.8%	78.7%
22	Bonner	72.0%	78.2%
23	Jefferson	70.6%	77.6%
24	Bingham	72.0%	76.8%
25	Fremont	71.5%	75.6%
26	Twin Falls	68.2%	75.4%
27	Adams	68.9%	75.3%
28	Idaho	68.6%	75.1%
29	Clark	75.6%	74.7%
30	Boundary	67.7%	74.6%
31	Benewah	65.3%	74.2%
32	Lemhi	70.3%	73.9%
33	Clearwater	68.2%	73.4%
34	Cassia	70.5%	72.7%
35	Washington	60.8%	72.7%
36	Gooding	66.0%	72.5%
37	Jerome	66.0%	72.4%
38	Power	70.5%	72.1%
39	***Canyon***	***65.2%***	***71.0%***
40	Gem	63.1%	70.1%
41	Shoshone	63.9%	70.1%
42	Minidoka	64.2%	68.5%
43	Payette	61.1%	67.4%
44	Owyhee	53.1%	62.0%
	State	73.7%	79.7%
	Urban	76.0%	81.7%
	Rural	70.7%	76.9%

Source: Rural Profile of Idaho

% of Population with a Bachelors Degree

		1980	1990
1	Latah	29.6%	35.8%
2	Blaine	30.4%	33.0%
3	Ada	22.1%	24.9%
4	Bonneville	21.1%	23.2%
5	Bannock	18.4%	19.8%
6	Valley	21.1%	19.4%
7	Madison	18.7%	19.2%
8	Teton	17.0%	17.4%
9	Kootenai	13.8%	16.0%
10	Elmore	13.5%	15.8%
11	Custer	13.4%	15.6%
12	Nez Perce	13.1%	15.6%
13	Bonner	12.1%	15.2%
14	Camas	17.7%	15.0%
15	Boise	13.0%	14.4%
16	Franklin	11.4%	14.3%
17	Clark	16.4%	14.1%
18	Cassia	11.4%	14.0%
19	Butte	14.5%	13.5%
20	Boundary	11.4%	13.3%
21	Gooding	12.8%	13.3%
22	Twin Falls	13.4%	13.3%
23	Lewis	11.8%	13.2%
24	Bingham	12.0%	13.1%
25	Oneida	12.6%	12.9%
26	Idaho	12.4%	12.7%
27	***Canyon***	***12.0%***	***12.0%***
28	Lincoln	11.8%	11.9%
29	Caribou	14.4%	11.8%
30	Jefferson	10.3%	11.8%
31	Lemhi	12.8%	11.8%
32	Bear Lake	11.2%	11.4%
33	Clearwater	10.6%	11.4%
34	Fremont	12.0%	11.1%
35	Power	11.1%	11.1%
36	Jerome	10.8%	11.0%
37	Adams	11.8%	10.8%
38	Washington	13.0%	10.3%
39	Payette	9.1%	9.8%
40	Minidoka	10.5%	9.0%
41	Shoshone	9.7%	9.0%
42	Benewah	10.0%	8.8%
43	Owyhee	7.4%	8.7%
44	Gem	8.1%	8.6%
	State	15.8%	17.7%
	Urban	17.5%	19.5%
	Rural	13.5%	14.9%

Source: Rural Profile of Idaho

Less than 9th Grade Education

		1990
1	Owyhee	18.5%
2	Minidoka	14.2%
3	Power	13.7%
4	Payette	13.5%
5	Washington	12.9%
6	***Canyon***	***12.6%***
7	Gem	12.2%
8	Clearwater	11.4%
9	Gooding	11.3%
10	Boundary	11.1%
11	Cassia	10.5%
12	Jerome	10.5%
13	Shoshone	10.5%
14	Idaho	10.4%
15	Lewis	10.4%
16	Fremont	9.9%
17	Lemhi	9.5%
18	Bingham	9.4%
19	Twin Falls	9.4%
20	Clark	9.1%
21	Butte	9.0%
22	Adams	8.7%
23	Benewah	8.7%
24	Jefferson	8.3%
25	Lincoln	7.9%
26	Boise	7.8%
27	Custer	7.6%
28	Teton	7.5%
29	Elmore	7.4%
30	Nez Perce	7.2%
31	Bonner	6.5%
32	Kootenai	5.6%
33	Oneida	5.3%
34	Bonneville	5.2%
35	Latah	5.2%
36	Bear Lake	5.1%
37	Madison	5.0%
38	Bannock	4.9%
39	Valley	4.9%
40	Caribou	4.6%
41	Franklin	4.6%
42	Ada	3.5%
43	Camas	3.0%
44	Blaine	2.1%
	State	7.4%
	Urban	6.2%
	Rural	9.1%

Source: Rural Profile of Idaho

Demographic and Social Characteristics

The demographics of Canyon County illustrate a county with a robust economy, but also an economy with problems—much like the State of Idaho. In 1997 Idaho ranked 21st in the nation in poverty (13%). New Mexico had the highest poverty rate in the nation (19.3%) and New Hampshire the lowest (7.5%). In Idaho, Canyon County ranked ninth highest in poverty at 16%. Owyhee had the highest poverty in the state (21.4%) while Camas County was the lowest at 7.4%. Interestingly, Ada County had only an 8.9% poverty rate. Thus Canyon County is not fully sharing in the benefits of urbanization that clearly are benefiting Ada County. In average family income, Canyon County was 28th in the state at $31,558. Blaine County was first at $45,504 followed by Ada County at $43,3421 (Figure 14). In 2000, the State of Idaho ranked 39th in the nation at $37,462. Ada County is considerably above Idaho State's level (even given the 3 year difference in data year) while Canyon County is below the State of Idaho. In terms of per capita personal income, Canyon County ranked 30th in the state in 1969, 29th in the state in 1979, and 30th in the state in 1998. Thus, over time, its relative position has not changed much.

Education Demographics

Education demographics in Idaho reflect the state's income demographics. In 1990, Canyon County ranked 39th in the state in the percent of population receiving a high school degree. Blaine County was first at 91.7% and Owyhee County was last at 62%. Ada County was third at 87.2%. In terms of the percent of the population with a bachelors degree, Canyon County (12%) ranked 27th, with Latah County being first (35.8%) and Gem County being last (8.6%). The percent of the population with less than a 9th grade education follows the inverse of the previous pattern. Canyon County ranked 6th in the state at 12.6% while Owhyee County was first at 18.5%. Likewise, Blaine County was last at 2.1% (Figure 15).

Medical Demographics

Canyon County ranked relatively high in the availability of medical facilities. It ranked 14th in the state in physicians per 100,000 in 1997, 2nd in the state in hospital beds available, and 2nd in nursing home beds. In the latter two cases, only Ada County ranked higher. In terms of physicians, Blaine Count was first (Figure 16).

Figure 16
Medical-Related County Rankings

Physicians per 100,000	1998
1 Blaine	418.6
2 Ada	254.3
3 Nez Perce	246.9
4 Twin Falls	224.8
5 Bonneville	218.2
6 Bannock	205.7
7 Valley	199.9
8 Kootenai	180.5
9 Clearwater	150.4
10 Cassia	149.8
11 Bonner	144.8
12 Shoshone	144.2
13 Latah	137.3
14 Canyon	***135.6***
15 Butte	131.9
16 Teton	127.6
17 Madison	123
18 Idaho	112.8
19 Lemhi	112.1
20 Benewah	109.7
21 Boundary	81.6
22 Adams	78.9
23 Bear Lake	76.5
24 Minidoka	69.3
25 Gem	60.7
26 Bingham	59.8
27 Jerome	55.7
28 Caribou	53.9
29 Elmore	51.6
30 Oneida	49.4
31 Washington	49.2
32 Custer	48.7
33 Power	48.1
34 Gooding	44
35 Payette	43.9
36 Franklin	36
37 Lincoln	26.4
38 Fremont	25.2
39 Jefferson	20.9
40 Owyhee	9.7
41 Boise	0
42 Camas	0
43 Clark	0
44 Lewis	0
State	168.1
Urban	210.7
Rural	92.9

Source: Rural Profile of Idaho

Hospital Beds	1998
1 Ada	766
2 Canyon	***302***
3 Bannock	260
4 Bonneville	255
5 Kootenai	225
6 Twin Falls	217
7 Bingham	160
8 Nez Perce	145
9 Clearwater	83
10 Bonner	62
11 Madison	52
12 Cassia	40
13 Jerome	40
14 Latah	40
15 Blaine	39
16 Shoshone	36
17 Lemhi	35
18 Idaho	34
19 Elmore	28
20 Caribou	27
21 Washington	27
22 Benewah	25
23 Minidoka	25
24 Valley	25
25 Gem	24
26 Bear Lake	21
27 Franklin	20
28 Gooding	14
29 Teton	13
30 Oneida	11
31 Boundary	10
32 Butte	10
33 Power	10
34 Adams	6
35 Boise	0
36 Camas	0
37 Clark	0
38 Custer	0
39 Fremont	0
40 Jefferson	0
41 Lewis	0
42 Lincoln	0
43 Owyhee	0
44 Payette	0
State	3,087
Urban	2,210
Rural	877

Source: Rural Profile of Idaho

Nursing Home Beds	1998
1 Ada	1285
2 Canyon	***642***
3 Twin Falls	558
4 Kootenai	518
5 Nez Perce	461
6 Bannock	390
7 Bonneville	356
8 Latah	230
9 Bonner	219
10 Shoshone	179
11 Gem	135
12 Gooding	132
13 Madison	119
14 Bingham	105
15 Payette	103
16 Cassia	102
17 Idaho	101
18 Washington	89
19 Minidoka	78
20 Benewah	75
21 Valley	64
22 Clearwater	60
23 Elmore	55
24 Boundary	52
25 Owyhee	49
26 Franklin	45
27 Lemhi	45
28 Caribou	43
29 Oneida	41
30 Jerome	40
31 Lincoln	39
32 Bear Lake	37
33 Butte	33
34 Power	31
35 Fremont	27
36 Blaine	25
37 Adams	20
38 Boise	0
39 Camas	0
40 Clark	0
41 Custer	0
42 Jefferson	0
43 Lewis	0
44 Teton	0
State	6,583
Urban	4,440
Rural	2,143

Source: Rural Profile of Idaho

Crime/Divorce Demographics

Canyon County ranked 13th in the state in divorce (5.9/1000). Camas County was first (8.3/1000) and Clark County was last at 0%. Canyon County ranked 5th in the state in serious crime statistics reflecting its urbanization. In terms of total offense rate for crime, Canyon County was also ranked 5th place in 1997. (County Profiles reports Canyon County's overall crime rate per 100,000 declined from approximately 6,039 in 1990 to 4,169 in 1999.) Twin Falls County, on the other hand, ranked first in crime for both categories of crime. Lemhi County ranked last in both cases (Figure 18).

Age-Race Demographics

Age and race/ethnicity demographics are reported in Figure 19. One interesting demographic characteristic of Canyon County is its diversity. Hispanics constitute nearly 20% of the county population versus approximately 8% of the state's population.

Public Assistance

Canyon County had 8,595 individuals on Medicaid (the medical program for low income families) in 1999 or 6.2% of the population, versus 3.6% of the population for Ada County. Canyon County had 2,815 individuals receiving food stamps, and 180 individuals on TANF (Temporary Assistance for Needy Families).

Housing

Figure 20 reports county housing units by community. Housing needs drive much urban growth. The largest number of units are in Nampa (19,375), followed by Caldwell (9,603), and Middleton (1,066).

Canyon County Employment and Jobs

The largest single economic sector in Canyon County is services, employing 14,308 in 1998 or 24% of the workforce. This compares to 31% for the USA, 26% for Idaho State, 29% for Ada County, 28% for Nez Perce County, 19% for Idaho County, and 16% for Lewis County. Services, is of course, mostly a nonbase industry, dependent on economic activities that bring income in from outside of the region. The second biggest sector in the county is manufacturing (19%); compared to USA (12%), Idaho State (11%), Ada County (13%), Nez Perce County (15%), Idaho County (13%), and Lewis County (9%).

Retail trade is the 3rd largest sector for Canyon County constituting 15.5% of county employment. Total employment in 1998 was nearly 60,000 workers (Figure 21 and Figure 22).

Figure 17

Other County Rankings

Accidental Deaths Per 100,000

	1997
1 Bear Lake	166.7
2 Butte	161.3
3 Valley	135.8
4 Camas	125
5 Clark	125
6 Adams	102.6
7 Idaho	99.3
8 Custer	95.2
9 Franklin	92.6
10 Lincoln	78.9
11 Owyhee	78.4
12 Lemhi	74.1
13 Clearwater	73.7
14 Boundary	70.7
15 Bonner	54.6
16 Payette	54.5
17 Nez Perce	54.3
18 Bingham	52.9
19 Twin Falls	52.2
20 Cassia	51.4
21 Jerome	50.8
22 Oneida	50
23 Washington	49.5
24 Power	48.2
25 Madison	46.8
26 Blaine	46.5
27 Canyon	***45.4***
28 Benewah	44.4
29 Shoshone	42.9
30 Fremont	42.4
31 Kootenai	40.5
32 Boise	40
33 Latah	40
34 Bannock	39.2
35 Minidoka	38.6
36 Teton	37.7
37 Ada	29.6
38 Gooding	29.4
39 Bonneville	28.6
40 Elmore	28.1
41 Gem	27.6
42 Caribou	27
43 Jefferson	26.5
44 Lewis	24.4
State	44.1
Urban	37.7
Rural	55.3

Source: Rural Profile of Idaho

Teen Pregnancy Rate/1,000

	1997
1 Gooding	50.3
2 Gem	46.8
3 Clearwater	45.3
4 Valley	44.7
5 Benewah	42.4
6 Canyon	***41.3***
7 Lewis	41.2
8 Minidoka	39.2
9 Nez Perce	38.8
10 Blaine	38.3
11 Bonner	36.8
12 Twin Falls	36.7
13 Jerome	33.5
14 Lincoln	33.1
15 Kootenai	29.8
16 Power	29.6
17 Fremont	28.8
18 Payette	28.4
19 Shoshone	27.8
20 Bingham	27.4
21 Ada	26.8
22 Elmore	26.8
23 Bonneville	25.3
24 Owyhee	24.3
25 Idaho	24
26 Cassia	23.4
27 Franklin	23.4
28 Bannock	20.2
29 Lemhi	19.9
30 Boise	18
31 Custer	16.9
32 Bear Lake	16.7
33 Jefferson	15.7
34 Washington	14.4
35 Latah	13.8
36 Boundary	13.7
37 Madison	10.4
38 Oneida	9.3
39 Teton	8.7
40 Butte	8.5
41 Adams	0
42 Camas	0
43 Caribou	0
44 Clark	0
State	28.6
Urban	29.6
Rural	27.1

Source: Rural Profile of Idaho

Marriages/1000

	1997
1 Kootenai	45.9
2 Custer	17.4
3 Bonneville	16.9
4 Valley	16.5
5 Boise	14.9
6 Blaine	14.2
7 Payette	13.3
8 Camas	11.9
9 Lemhi	11.4
10 Nez Perce	10.9
11 Fremont	10
12 Twin Falls	10
13 Ada	9.6
14 Canyon	***9.4***
15 Idaho	8.9
16 Shoshone	8.9
17 Washington	8.9
18 Bear Lake	8.8
19 Elmore	8.8
20 Cassia	8.7
21 Oneida	8.7
22 Teton	8.5
23 Bonner	8.2
24 Lewis	8.1
25 Power	8.1
26 Adams	8
27 Butte	8
28 Clearwater	8
29 Minidoka	8
30 Bannock	7.5
31 Jerome	7.4
32 Bingham	7.3
33 Boundary	7.3
34 Jefferson	7.3
35 Caribou	7.2
36 Franklin	6.9
37 Gooding	6.9
38 Gem	6.8
39 Clark	6
40 Benewah	5.9
41 Latah	5.8
42 Lincoln	5.8
43 Owyhee	5.5
44 Madison	4.8
State	12.5
Urban	14.7
Rural	8.6

Source: Rural Profile of Idaho

Figure 18
Other County Rankings-Continued

	Divorce/1000	1997
1	Camas	8.3
2	Valley	7.7
3	Bonneville	7.4
4	Gem	7.2
5	Kootenai	7.2
6	Payette	7.1
7	Elmore	6.8
8	Nez Perce	6.8
9	Twin Falls	6.7
10	Cassia	6.4
11	Custer	6.4
12	Ada	6.3
13	***Canyon***	***5.9***
14	Jerome	5.8
15	Blaine	5.7
16	Clearwater	5.6
17	Teton	5.6
18	Shoshone	5.4
19	Washington	5.4
20	Bonner	5.3
21	Lemhi	5.2
22	Benewah	5.1
23	Latah	5.1
24	Adams	4.9
25	Lincoln	4.7
26	Jefferson	4.5
27	Bannock	4.3
28	Caribou	4.3
29	Idaho	4
30	Oneida	4
31	Gooding	3.9
32	Lewis	3.9
33	Minidoka	3.9
34	Boise	3.8
35	Bear Lake	3.6
36	Bingham	3.6
37	Butte	3.5
38	Power	3.5
39	Fremont	3.3
40	Franklin	3.1
41	Owyhee	2.6
42	Boundary	2.5
43	Madison	2.5
44	Clark	0
	State	5.8
	Urban	6.4
	Rural	4.9

Source: Rural Profile of Idaho

	Serious Crime Rate	1997
1	Twin Falls	7,353
2	Kootenai	4,970
3	Nez Perce	4,959
4	Cassia	4,945
5	***Canyon***	***4,888***
6	Bonneville	4,790
7	Bannock	4,306
8	Ada	4,269
9	Power	4,107
10	Shoshone	3,958
11	Jerome	3,803
12	Bonner	3,659
13	Owyhee	3,518
14	Minidoka	3,479
15	Payette	3,360
16	Valley	3,337
17	Blaine	3,222
18	Gooding	3,007
19	Latah	2,922
20	Clark	2,880
21	Elmore	2,757
22	Benewah	2,710
23	Madison	2,500
24	Bingham	2,379
25	Idaho	2,170
26	Boise	2,144
27	Camas	2,130
28	Franklin	2,130
29	Oneida	1,998
30	Lewis	1,978
31	Clearwater	1,954
32	Custer	1,881
33	Boundary	1,865
34	Adams	1,703
35	Washington	1,699
36	Caribou	1,487
37	Teton	1,426
38	Fremont	1,373
39	Gem	1,328
40	Jefferson	1,138
41	Butte	769
42	Bear Lake	641
43	Lincoln	315
44	Lemhi	177
	State	3,966
	Urban	4,734
	Rural	2,665

Source: Rural Profile of Idaho

	Total Offense Rate	1997
1	Twin Falls	12,630
2	Cassia	9,683
3	Nez Perce	9,648
4	Bonneville	9,619
5	***Canyon***	***9,286***
6	Kootenai	9,258
7	Bannock	9,050
8	Valley	8,698
9	Ada	8,540
10	Shoshone	8,294
11	Power	8,225
12	Payette	7,673
13	Jerome	7,408
14	Bonner	7,024
15	Owyhee	6,777
16	Minidoka	6,564
17	Blaine	6,532
18	Clark	6,336
19	Elmore	6,227
20	Benewah	6,066
21	Idaho	5,579
22	Gooding	5,511
23	Latah	5,486
24	Bingham	4,944
25	Madison	4,653
26	Camas	4,615
27	Lewis	4,614
28	Gem	4,318
29	Caribou	4,304
30	Boundary	4,301
31	Oneida	4,176
32	Clearwater	4,072
33	Boise	3,935
34	Adams	3,917
35	Washington	3,910
36	Teton	3,795
37	Custer	3,620
38	Franklin	3,413
39	Fremont	3,299
40	Jefferson	2,774
41	Butte	1,415
42	Bear Lake	903
43	Lincoln	630
44	Lemhi	416
	State	7,829
	Urban	9,162
	Rural	5,572

Source: Rural Profile of Idaho

From 1990-1999, Canyon County experienced a 42.2% increase in employment growth. Ada County had a 55.9% increase, Idaho State increased by 36.7%, Idaho County had only 16.4% rate of growth in the 1990s. The construction sector was the fastest growing sector for Canyon County (143.6%), followed by services (52.9%), manufacturing (47.7%), and the retail trade and finance services sectors at about 41% each (Figure 23).

Three economic sectors actually lost employment in the 1990s, mining (-15.3%), military (-14%), and state government (-17.2%).

Largest Canyon County Employers

Figure 24 lists Canyon County's top employers by community as reported by the Idaho Department of Commerce. *These numbers must be viewed as estimates only and not necessarily comprehensive*. The largest private employers are Micron PC at 1,200 workers and JR Simplot, also at 1,200 workers. These two companies represent the dual economy of Canyon County—high technology and agriculture and agriculture processing. Other big private employers are Kit -trailer manufacturing (592 workers), Armour Foods-meat processing (550 workers), Amalgamated Sugar- sugar processing (500 workers), Zilog –integrated circuit boards (500 workers), MCMS-custom computer boards (460 workers), SSI-meat processing (400 workers), Nestle-food processing (350 workers), and Woodgrain Milwork – wood processing (350 workers).

The largest institutional employers include the Nampa School District (1300 workers), Mercy Medical Center (650 workers), and Albertson College (460 workers).

Unemployment Rates

The covered unemployment rate for Canyon County for March 2002 was estimated at 5.8% seasonally adjusted. This is up from a low of 4.5% in year 2000. The highest unemployment rate in the state is Adams County (12.6%), followed by Clearwater County (12%), Shoshone County (10.9%), and Benewah County (10.6%). These are all wood products dependent economies. The counties with the lowest unemployment rates are Madison (1.5%), Camas (2.1%), and Butte (3.2%).

For Idaho State, the unemployment rate stood at 5.3% in March 2002. Canyon County's covered employment stood at 65,232 employees in March 2002. Covered

Figure 19a
Age-Demographics

Population under 18 years old

	County	1980	1990	1997
1	Jefferson	40.3%	40.4%	38.7%
2	Franklin	40.3%	39.7%	37.5%
3	Bingham	40.1%	38.6%	36.9%
4	Caribou	38.9%	38.0%	35.9%
5	Fremont	39.7%	37.9%	35.9%
6	Cassia	38.4%	36.6%	35.3%
7	Bear Lake	37.5%	37.4%	34.7%
8	Power	36.8%	35.0%	34.4%
9	Minidoka	36.8%	35.1%	34.2%
10	Butte	36.1%	35.1%	33.8%
11	Oneida	35.0%	37.2%	33.6%
12	Bonneville	36.7%	35.2%	33.4%
13	Teton	36.5%	33.6%	32.3%
14	Owyhee	35.6%	33.1%	32.0%
15	Jerome	33.4%	32.1%	30.9%
16	Bannock	32.8%	32.5%	30.7%
17	Boundary	33.7%	32.4%	30.5%
18	Elmore	32.2%	31.5%	30.3%
19	***Canyon***	***32.3%***	***30.8%***	***30.0%***
20	Lincoln	32.4%	31.4%	29.8%
21	Madison	33.0%	32.2%	29.7%
22	Payette	32.0%	30.4%	29.0%
23	Camas	31.7%	29.7%	28.9%
24	Custer	31.0%	30.5%	28.9%
25	Gooding	30.9%	30.3%	28.8%
26	Twin Falls	30.9%	29.9%	28.7%
27	Washington	31.0%	29.0%	28.1%
28	Benewah	32.4%	29.6%	28.0%
29	Clark	34.5%	30.4%	28.0%
30	Bonner	30.2%	28.5%	26.9%
31	Ada	30.2%	28.3%	26.8%
32	Boise	31.1%	28.3%	26.8%
33	Lewis	30.3%	28.2%	26.8%
34	Gem	31.5%	28.2%	26.7%
35	Adams	31.6%	28.4%	26.6%
36	Lemhi	31.6%	27.5%	26.3%
37	Valley	29.3%	27.9%	26.2%
38	Idaho	31.5%	27.9%	26.0%
39	Kootenai	30.7%	27.1%	25.5%
40	Blaine	25.5%	26.6%	25.2%
41	Shoshone	32.4%	25.8%	24.9%
42	Clearwater	32.1%	25.2%	23.5%
43	Nez Perce	28.5%	24.9%	23.3%
44	Latah	23.1%	22.9%	22.0%
	State	32.5%	30.6%	29.0%
	Urban	31.7%	29.8%	28.0%
	Rural	33.6%	31.8%	30.8%

Source: Rural Profile of Idaho

Population over 65 years old

	County	1980	1990	1997
1	Washington	17.80%	19.90%	18.40%
2	Oneida	16.60%	17.70%	17.80%
3	Gem	14.40%	17.90%	16.80%
4	Lewis	13.70%	17.50%	16.50%
5	Lemhi	12.00%	17.50%	16.20%
6	Gooding	15.20%	17.30%	16.10%
7	Shoshone	10.30%	16.70%	15.70%
8	Nez Perce	12.70%	16.10%	15.30%
9	Payette	14.60%	16.00%	15.00%
10	Bear Lake	12.00%	15.00%	14.80%
11	Idaho	12.50%	15.60%	14.80%
12	Clearwater	9.60%	15.10%	14.30%
13	Twin Falls	13.00%	15.30%	14.30%
14	Lincoln	12.70%	14.40%	14.10%
15	Adams	12.40%	14.60%	13.80%
16	Franklin	12.80%	13.90%	13.50%
17	Bonner	11.30%	14.30%	13.40%
18	Jerome	10.80%	14.10%	13.10%
19	Camas	12.10%	13.60%	12.70%
20	***Canyon***	***11.80%***	***13.70%***	***12.50%***
21	Kootenai	10.90%	13.40%	12.50%
22	Benewah	10.90%	13.10%	12.30%
23	Boundary	11.30%	12.30%	12.00%
24	Owyhee	11.80%	12.80%	11.90%
25	Butte	11.00%	12.90%	11.60%
26	Valley	8.20%	12.80%	11.60%
27	Custer	11.30%	12.00%	11.50%
28	Cassia	9.60%	12.40%	11.40%
29	Clark	9.80%	12.20%	11.40%
30	Caribou	7.60%	11.70%	11.30%
31	Minidoka	8.50%	12.50%	11.10%
32	Fremont	9.60%	11.30%	10.50%
33	Teton	9.50%	11.10%	10.30%
34	Boise	8.90%	10.90%	10.10%
35	Ada	8.60%	10.40%	9.80%
36	Bannock	8.00%	10.10%	9.60%
37	Latah	9.30%	9.70%	9.60%
38	Bingham	8.10%	10.00%	9.50%
39	Power	8.00%	10.20%	9.30%
40	Jefferson	8.50%	9.80%	9.10%
41	Bonneville	7.00%	9.00%	8.40%
42	Elmore	5.30%	7.50%	7.20%
43	Blaine	6.00%	6.60%	6.30%
44	Madison	5.20%	5.80%	5.30%
	State	9.90%	12.00%	11.30%
	Urban	9.80%	11.80%	11.00%
	Rural	10.10%	12.40%	11.80%

Source: Rural Profile of Idaho

Median Age

		1997
1	Lemhi	40.3
2	Clearwater	39.8
3	Shoshone	39.6
4	Lewis	39.5
5	Camas	39.4
6	Washington	39.3
7	Idaho	38.8
8	Adams	38.7
9	Gem	38.6
10	Valley	38.5
11	Bonner	38.3
12	Nez Perce	37.8
13	Boise	37.6
14	Kootenai	37.3
15	Benewah	37.1
16	Gooding	37.1
17	Custer	36.6
18	Payette	36.5
19	Lincoln	35.9
20	Butte	35.7
21	Twin Falls	35.4
22	Clark	35.3
23	Blaine	35.2
24	Boundary	35.1
25	Jerome	34.6
26	Oneida	34.1
27	Ada	33.8
28	***Canyon***	***33.5***
29	Bear Lake	33.2
30	Owyhee	32.4
31	Caribou	32
32	Minidoka	31.8
33	Teton	31.6
34	Power	31.3
35	Bannock	30.9
36	Cassia	30.6
37	Bonneville	30
38	Fremont	29.7
39	Bingham	29.2
40	Franklin	29.2
41	Elmore	28.6
42	Latah	28.3
43	Jefferson	27.7
44	Madison	20.2
	State	33.5
	Urban	33.6
	Rural	33.4

Source: Rural Profile of Idaho

Figure 19b
Canyon County-Population Demographics

Age Group	White Non-Hispanic Male	White Non-Hispanic Female	White Hispanic Male	White Hispanic Female	Black Male	Black Female	Am. Ind., Esk., Aleut Male	Am. Ind., Esk., Aleut Female	Asian & Pacific Islander Male	Asian & Pacific Islander Female	Hispanic (of any race) Male	Hispanic (of any race) Female	Age Group Total
0-4	3,442	3,328	1,636	1,561	23	18	34	36	71	55	1,681	1,601	10,204
5-9	3,525	3,149	1,375	1,269	25	43	34	26	52	84	1,416	1,353	9,582
10-14	3,875	3,574	1,196	1,138	41	26	54	57	101	101	1,256	1,199	10,163
15-19	4,467	4,295	1,248	1,239	15	22	58	44	82	70	1,284	1,264	11,540
20-24	3,851	3,658	1,136	1,077	10	14	50	63	57	64	1,164	1,116	9,980
25-29	2,848	2,977	816	870	37	32	48	42	71	68	874	932	7,809
30-34	2,559	2,642	714	755	27	19	45	37	53	74	754	785	6,925
35-39	3,222	3,403	850	776	21	7	37	35	72	69	887	795	8,492
40-44	3,730	3,746	716	631	11	8	37	42	92	78	746	647	9,091
45-49	3,640	3,833	497	464	12	13	31	30	76	53	520	473	8,649
50-54	3,046	3,159	370	310	19	13	21	30	36	39	376	336	7,043
55-59	2,448	2,729	248	272	14	0	23	12	20	26	257	274	5,792
60-64	2,081	2,433	164	219	6	8	16	15	19	25	167	226	4,986
65-69	1,492	1,815	108	86	6	3	4	17	17	30	110	86	3,578
70-74	1,492	1,727	69	55	6	4	5	9	21	22	69	60	3,410
75-79	1,246	1,576	70	48	9	2	2	3	20	12	70	49	2,988
80-84	812	1,242	21	43	1	0	1	6	16	0	21	43	2,142
85+	670	1,274	19	83	0	0	2	5	7	8	19	83	2,068
Total	48,446	50,560	11,253	10,896	283	232	502	509	883	878	11,671	11,322	124,442

Source: U.S. Bureau of the Census, August 30, 2000

Figure 20

Housing Data for Canyon County City and Towns

	Caldwell	Greenleaf	Melba	Middleton	Nampa	Notus	Parma	Wilder
Total Housing Units	9,603	284	164	1,066	19,379	156	676	421
Occupied Housing Units	8,963	277	156	1,017	18,090	147	617	389
Vacant Housing Units	640	7	8	49	1,289	9	59	32
For Seasonal, Rec, or Occ Use	23	1	0	3	57	2	3	1
Home-owner Vacancy Rate (%)	2.5	1.4	1.0	2.1	3.4	2.6	2.9	1.6
Rental Vacancy Rate (%)	7.9	3.1	1.7	5.4	7.5	5.7	9.7	5.2
Occupied Housing Units	8,963	277	156	1,017	18,090	147	617	389
Owner Occupied Housing Units	5,852	215	98	823	12,567	114	430	189
Renter Occupied Housing Units	3,111	62	58	194	5,523	33	187	200
Avg. HH Size of Owner Occupied Units	2.83	3.24	2.81	2.92	2.80	3.11	2.83	3.28
Avg. HH Size of Renter Occupied Units	2.72	2.68	2.83	2.96	2.69	3.12	2.89	4.22

Source: US Bureau of the Census and State of Idaho

Figure 21

Employment by Industry (1998)

Industry	USA	Idaho State	Ada	Idaho	Lewis	Nez Perce	Canyon
Farm employment	3,127,000	40,394	1,767	974	255	601	3765
Ag. services, forestry, fishing	2,042,600	17,424	2,440	151	115	340	1827
Mining	855,500	4,134	305	112	8	132	63
Construction	8,799,100	51,042	15,178	530	126	1,336	4789
Manufacturing	19,568,500	82,872	26,399	991	190	4,102	11593
Transportation and public utilities	7,668,300	31,691	9,813	326	90	1,490	2584
Wholesale trade	7,351,900	33,423	10,817	178	90	955	2274
Retail trade	26,710,200	130,837	36,470	1,122	378	5,015	9267
Finance, insurance, and real estate	12,229,900	45,821	17,335	366	89	1,990	3003
Services	49,897,700	190,065	61,418	1,470	325	7,506	14308
Federal, civilian	2,808,000	12,728	4,475	467	38	200	341
Military	2,098,000	9,768	1,321	67	18	165	534
State	4,786,000	27,119	10,553	153	48	1,305	993
Local	12,256,000	59,799	10,083	778	318	1,567	4580
Total	160,198,700	737,116	208,374	7,685	2,088	26,704	59,921

Percent of Employment by Industry (1998)

Industry	USA	Idaho State	Ada	Idaho	Lewis	Nez Perce	Canyon
Farm employment	2%	5%	1%	13%	12%	2%	6%
Ag. services, forestry, fishing	1%	2%	1%	2%	6%	1%	3%
Mining	1%	1%	0%	1%	0%	0%	0%
Construction	5%	7%	7%	7%	6%	5%	8%
Manufacturing	12%	11%	13%	13%	9%	15%	19%
Transportation and public utilities	5%	4%	5%	4%	4%	6%	4%
Wholesale trade	5%	5%	5%	2%	4%	4%	4%
Retail trade	17%	18%	18%	15%	18%	19%	15%
Finance, insurance, and real estate	8%	6%	8%	5%	4%	7%	5%
Services	31%	26%	29%	19%	16%	28%	24%
Federal, civilian	2%	2%	2%	6%	2%	1%	1%
Military	1%	1%	1%	1%	1%	1%	1%
State	3%	4%	5%	2%	2%	5%	2%
Local	8%	8%	5%	10%	15%	6%	8%
Total	100%	100%	100%	100%	100%	100%	100%

employment includes all employers paying unemployment insurance premiums. It excludes self-employed individuals (Figure 25 and Figure 26).

Canyon County Earnings

Figure 27 illustrates earning by industry for selected regions, for both 1979 and 1998, as percentages of total earnings. The top Canyon County industry in 1998 was manufacturing (26% of total earnings) versus 23% in 1979. Note that for employment, the share of the economy in manufacturing in 1998 was 19%. Thus the share of earnings for manufacturing exceeds the share of employment —implying relatively high paying jobs in the manufacturing sector. In contrast, services constitute a 19% share of earnings but a 24% share of employment, implying relatively lower paying jobs in the service sector.

The earnings share of manufacturing has fallen in the USA from 25% in 1979 to 17% in 1998. In contrast manufacturing grew in Idaho from 19% (1979) to 26% (1998). Canyon County trends are following Idaho in an expanding manufacturing base (Figure 27).

Identifying Individual Industries in a County

Due to disclosure problems, it is not easy to identify individual firms and some economic sectors, especially at the city or county level. State laws prevent the government from publishing statistics that could identify confidential information of privately held firms. This creates obvious problems for economists in conducting economic analyses. Methods have been developed to estimate data suppressions—with varying degrees of accuracy. The economic impact analysis conducted later in this report includes data from Implan, a private firm that provides data for input-output regional economic models. It has its own system for estimating data suppressions.

Earnings by Sector

Figure 28 identifies earnings by sector for Canyon County at a more detailed level than reported earlier. It also contains suppressions identified by the letter (D). The bracketed headings are the major industry totals. Manufacturing, for example, paid out $389,968,000 in earnings; of which $80,223,000 occurred in Industrial machinery and equipment; $70,423,000 in electronic and electric equipment, and $115,532,000 in food and kindred products (food processing).

Figure 22

Percent of Employment by Industry -- 1998

USA	%	Canyon	%	State of Idaho	%	Ada	%
Services	31%	Services	23.9%	Services	26%	Services	29%
Retail trade	17%	Manufacturing	19.3%	Retail trade	18%	Retail trade	18%
Manufacturing	12%	Retail trade	15.5%	Manufacturing	11%	Manufacturing	13%
Local	8%	Construction	8.0%	Local	8%	Finance	8%
Finance	8%	Local	7.6%	Construction	7%	Construction	7%
Construction	5%	Farm employment	6.3%	Finance	6%	Wholesale trade	5%
Transportation	5%	Finance, insurance	5.0%	Farm	5%	State	5%
Wholesale	5%	Transportation and	4.3%	Wholesale trade	5%	Local	5%
State	3%	Wholesale trade	3.8%	Transportation	4%	Transportation	5%
Farm	2%	Ag. services, forest	3.0%	State	4%	Federal, civ	2%
Federal, civ	2%	State	1.7%	Ag. Services	2%	Ag. Services	1%
Military	1%	Military	0.9%	Federal, civ	2%	Farm	1%
Ag. Services	1%	Federal, civilian	0.6%	Military	1%	Military	1%
Mining	1%	Mining	0.1%	Mining	1%	Mining	0%

Idaho	%	Lewis	%	Nez Perce	%
Services	19%	Retail trade	18%	Services	28%
Retail trade	15%	Services	16%	Retail trade	19%
Manufacturing	13%	Local	15%	Manufacturing	15%
Farm	13%	Farm	12%	Finance	7%
Local	10%	Manufacturing	9%	Local	6%
Construction	7%	Construction	6%	Transportation	6%
Federal, civ	6%	Ag. Services	6%	Construction	5%
Finance	5%	Transportation	4%	State	5%
Transportation	4%	Wholesale trade	4%	Wholesale trade	4%
Wholesale trade	2%	Finance	4%	Farm	2%
State	2%	State	2%	Ag. Services	1%
Ag. Services	2%	Federal, civ	2%	Federal, civ	1%
Mining	1%	Military	1%	Military	1%
Military	1%	Mining	0%	Mining	0%

Source: REIS

Figure 23

Employment Growth Rates 1990-1999

Industry:	Idaho State	Ada County	Canyon County	Idaho County
Total full-time and part-time employment	36.7%	55.9%	42.2%	16.4%
Wage and salary employment	36.7%	59.0%	41.6%	4.8%
Proprietors' employment	36.9%	43.2%	44.3%	39.8%
Farm proprietors' employment	10.5%	6.8%	5.8%	9.9%
Nonfarm proprietors' employment	42.7%	44.9%	53.0%	53.5%
Farm employment	6.6%	-0.4%	9.4%	15.6%
Nonfarm employment	38.9%	56.7%	44.9%	16.5%
Private employment	43.0%	61.5%	48.0%	21.0%
Ag. services, forestry, fishing, & other	37.3%	50.3%	28.2%	64.3%
Mining	-29.0%	-16.1%	-15.3%	-14.4%
Construction	74.4%	72.8%	143.6%	92.5%
Manufacturing	21.2%	52.8%	47.7%	-18.8%
Transportation and public utilities	34.8%	53.7%	17.3%	18.2%
Wholesale trade	37.3%	55.6%	11.7%	-13.4%
Retail trade	42.0%	56.2%	40.8%	21.4%
Finance, insurance, and real estate	42.7%	44.1%	40.5%	103.6%
Services	53.5%	76.1%	52.9%	35.3%
Government and government enterprises	19.9%	29.9%	25.0%	2.5%
Federal, civilian	-2.6%	5.5%	42.0%	-23.4%
Military	-14.7%	-7.1%	-14.0%	-26.1%
State and local	30.0%	40.1%	29.4%	27.0%
State	17.9%	26.3%	-17.2%	22.8%
Local	36.0%	57.1%	48.8%	27.9%

Source: REIS

Figure 24

LARGEST EMPLOYERS/MANUFACTURERS BY CITY

City	Name	Product or Service	Number of Employees
Caldwell	J.R. Simplot Company	Food Processing, Transportation	1200
Caldwell	Kit Manufacturing	Trailer Manufacture	592
Caldwell	Columbia West Valley Medical Center	Health Care	500
Caldwell	Albertson College of Idaho	Education	460
Caldwell	Crookham Company	Agricultural Seed	150
Caldwell	Western World, Inc.	Horse Trailer Manufacture	125
Caldwell	Cascade Care Center	Health Care	90
Caldwell	Larry Miller Auto Dealers	Auto Sale, Lease, Rent, & Service	90
Melba	Melba School District	Education	107
Melba	Charter Seed Company	Seed, Agricultural	10
Melba	Melba Quick Stop	Convenience Store	10
Melba	Fly Logic	Fishing Supplies	8
Melba	Cooks Bar & Grill	Restaurant and Bar	6
Melba	Melba Post Office	Postal Services	6
Melba	Double D Feed & Seed	Agricultural Supply	5
Melba	Melba Family Medical Clinic	Health Care	5
Melba	Melba Valley Repair & Fabrication	Mechanic Services	4
Middleton	Middleton School District	Education	194
Middleton	Diamond Z	Industrial Grinder & Screen Manufactur	95
Middleton	Rule Steel Tank, Inc.	Steel Fabrication	32
Middleton	Ridley's Food and Drug	Retail Grocery	30
Middleton	City of Middleton	Local Government	7
Nampa	Nampa School Dist. #131	Education	1300
Nampa	MicronPC	Electronics and Computer Production	1200
Nampa	Mercy Medical Center	Health Care	650
Nampa	Armour Foods	Meat Products	550
Nampa	Amalgamated Sugar Company	Food Processing	500
Nampa	Zilog Corporation	Integrated Circuits Mfg.	500
Nampa	MCMS, Inc.	Custom Computer Boards Mfg.	460
Nampa	Nestle Brands Food Service	Food Processing	350
Nampa	Woodgrain Millwork, Inc.	Wood Processing	350
Parma	J.C. Watson Co.	Potato/onion plant	247
Parma	Parma School District	Education	121
Parma	Tamura Produce	Potato/onion plant	75
Parma	Parma Company	Farm equipment	49
Parma	University of Idaho	Research & Ag. Extension Service	45
Parma	Champion Produce	Onion plant	35
Parma	Riverside Electric	Motor & pump rebuilding	35
Parma	Specialized Parts & Mfg.	Farm equipment	15
Wilder	S.S.I.	Meat Processing	400
Wilder	Wilder Schools	Education	60

Source: Idaho Department of Commerce

Figure 25

Covered Labor Force Statistics for Idaho

March 2002 (Source: Idaho Department of Labor)

	Seasonally Adjusted				Seasonally Unadjusted			
	Labor Force	Unemployed	U-Rate	Total Employment	Labor Force	Unemployed	U-Rate	Total Employment
MADISON	12,017	186	1.5	11,831	12,094	168	1.4	11,926
CAMAS	403	12	3.1	391	375	15	4	360
BUTTE	1,621	52	3.2	1,569	1,618	59	3.6	1,559
BONNEVILLE	47,288	1,563	3.3	45,725	47,025	1,455	3.1	45,570
BLAINE	12,623	431	3.4	12,192	12,230	506	4.1	11,724
LATAH	15,465	525	3.4	14,940	15,767	762	4.8	15,005
GOODING	7,052	249	3.5	6,804	6,933	229	3.3	6,704
CLARK	737	26	3.5	712	700	22	3.1	678
ONEIDA	1,813	66	3.6	1,747	1,791	62	3.5	1,729
TETON	3,938	142	3.6	3,796	3,731	147	3.9	3,584
BONNEVILLE LMA	81,584	2,979	3.7	78,605	81,006	2,662	3.3	78,344
JEFFERSON	10,428	396	3.8	10,032	10,349	333	3.2	10,016
MAGIC VALLEY LMA	50,582	1,905	3.8	48,677	49,753	1,788	3.6	47,965
JEROME	9,481	360	3.8	9,121	9,299	315	3.4	8,984
TWIN FALLS	34,049	1,296	3.8	32,753	33,521	1,244	3.7	32,277
NEZ PERCE	22,669	937	4.1	21,733	22,777	995	4.4	21,782
BOISE	2,762	114	4.1	2,647	2,901	156	5.4	2,745
SEAPORT LMA	33,878	1,427	4.2	32,451	33,987	1,460	4.3	32,527
ADA	181,762	7,624	4.2	174,137	180,576	7,259	4	173,317
ASOTIN	11,209	491	4.4	10,719	11,210	465	4.1	10,745
BINGHAM	22,247	968	4.4	21,279	22,014	816	3.7	21,198
FRANKLIN	5,147	230	4.5	4,916	5,133	214	4.2	4,919
BOISE CITY MSA	251,265	11,636	4.6	239,628	249,926	11,377	4.6	238,549
BEAR LAKE	2,888	139	4.8	2,749	2,785	137	4.9	2,648
OWYHEE	4,253	204	4.8	4,049	4,270	209	4.9	4,061
FREMONT	4,782	259	5.4	4,523	4,608	263	5.7	4,345
CASSIA	9,773	539	5.5	9,234	9,683	501	5.2	9,182
LINCOLN	2,071	118	5.7	1,954	2,010	112	5.6	1,898
CANYON	69,503	4,012	5.8	65,491	69,350	4,118	5.9	65,232
POCATELLO CITY MSA	41,472	2,546	6.1	38,927	41,762	2,526	6	39,236
CASSIA-MINIDOKA LMA	19,829	1,273	6.4	18,555	19,610	1,178	6	18,432
CARIBOU	3,490	223	6.4	3,267	3,452	218	6.3	3,234
LEMHI	3,727	240	6.4	3,487	3,586	264	7.4	3,322
LEWIS	1,534	100	6.5	1,435	1,477	110	7.4	1,367
ELMORE	9,904	653	6.6	9,251	9,870	611	6.2	9,259
CUSTER	2,222	160	7.2	2,062	2,076	170	8.2	1,906
MINIDOKA	10,056	734	7.3	9,321	9,927	677	6.8	9,250
BOUNDARY	4,596	338	7.3	4,258	4,616	449	9.7	4,167
PAYETTE	9,982	763	7.6	9,219	9,505	823	8.7	8,682
WASHINGTON	4,497	354	7.9	4,144	4,281	375	8.8	3,906
VALLEY	4,110	329	8	3,782	3,907	479	12.3	3,428
GEM	6,754	544	8.1	6,210	6,581	582	8.8	5,999
BONNER	17,976	1,474	8.2	16,501	18,094	1,919	10.6	16,175
KOOTENAI	58,443	4,793	8.2	53,649	57,642	4,959	8.6	52,683
POWER	3,510	292	8.3	3,218	3,457	248	7.2	3,209
PANHANDLE LMA	92,398	7,833	8.5	84,565	92,011	9,063	9.8	82,948
IDAHO-LEWIS LMA	7,693	663	8.6	7,029	7,550	851	11.3	6,699
IDAHO	6,159	564	9.2	5,595	6,073	741	12.2	5,332
BENEWAH	4,546	484	10.6	4,062	4,781	807	16.9	3,974
SHOSHONE	6,838	744	10.9	6,094	6,876	928	13.5	5,948
CLEARWATER	3,630	435	12	3,194	3,648	677	18.6	2,971
ADAMS	1,572	198	12.6	1,374	1,535	327	21.3	1,208
STATE OF IDAHO	689,753	36,415	5.3	653,338	684,688	37,986	5.5	646,702
IDAHO CITIES								
BOISE CITY	115,414	4,784	4.1	110,630	114,279	4,544	4	109,735
COEUR D' ALENE	20,690	1,313	6.3	19,376	20,288	1,343	6.6	18,945
IDAHO FALLS	29,318	1,021	3.5	28,296	29,036	938	3.2	28,098
LEWISTON	19,459	724	3.7	18,735	19,428	743	3.8	18,685
NAMPA	21,320	1,323	6.2	19,998	21,207	1,353	6.4	19,854
POCATELLO CITY	29,915	1,793	6	28,122	29,896	1,781	6	28,115
TWIN FALLS	17,857	713	4	17,144	17,530	683	3.9	16,847

Figure 26
County Unemployment Rates 1990-2000

Rank	County	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
45	Clearwater	13.9	15.6	15.5	15.8	14.7	13.2	11.9	12.2	12.8	13.5	14.3
44	Adams	12.7	14.4	13.9	14.6	11.8	14.2	14.3	14.4	14.5	14.9	13.0
43	Benewah	11.5	12.4	11.5	10.9	10.0	10.6	11.5	10.1	11.7	12.4	12.4
42	Shoshone	9.8	17.1	16.1	14.3	11.6	10.5	10.0	10.2	11.1	11.3	11.1
41	Idaho	8.9	11.7	11.8	13.0	11.4	11.6	11.1	10.8	10.5	10.8	10.2
40	Lemhi	8.3	11.2	10.7	10.8	8.3	7.2	8.2	9.2	8.4	7.9	9.0
39	Bonner	9.7	10.6	10.2	9.9	8.6	9.0	9.3	8.8	8.2	9.6	9.0
38	Boundary	9.3	10.2	9.6	9.3	8.8	8.8	9.5	8.8	9.0	9.2	8.6
37	Washington	10.4	13.4	10.3	9.0	9.6	8.8	8.1	8.3	7.7	8.2	8.6
36	Valley	8.9	10.5	10.3	11.3	8.7	9.1	9.3	9.9	9.2	9.5	7.8
35	Lewis	8.3	7.1	6.5	8.5	6.8	7.0	7.2	7.7	7.4	6.7	7.7
34	Kootenai	7.9	7.9	7.9	8.0	7.5	7.6	7.9	8.5	7.7	8.1	7.4
33	Minidoka	7.6	6.5	8.7	9.1	8.7	7.7	7.1	8.2	7.9	7.6	7.2
32	Custer	4.8	6.5	9.6	15.3	8.3	5.8	6.1	7.0	8.6	8.2	7.1
31	Boise	6.2	7.3	7.7	7.3	6.1	5.1	5.9	6.6	5.9	7.3	7.1
30	Fremont	8.7	8.4	8.5	9.1	8.3	8.4	7.9	8.0	7.0	6.9	7.0
29	Power	9.2	6.9	7.4	5.4	7.2	6.9	6.2	6.3	5.7	7.2	7.0
28	Payette	9.1	7.4	10.1	8.6	8.4	7.0	7.0	7.9	7.3	7.3	6.9
27	Cassia	7.8	6.3	8.2	8.6	8.0	6.6	6.2	7.0	7.0	6.9	6.2
26	Elmore	6.1	5.5	7.0	7.2	6.6	6.0	6.1	6.3	5.9	6.5	6.1
25	Caribou	5.1	5.9	6.6	7.1	7.5	6.8	6.5	6.2	5.9	6.0	6.0
24	Bear Lake	5.6	5.0	5.3	5.9	6.0	5.1	5.0	4.6	4.5	4.5	5.8
23	Gem	7.0	8.6	8.2	7.8	6.6	7.5	7.1	6.7	6.9	6.9	5.8
22	Bannock	7.3	6.9	7.5	6.4	6.2	5.9	5.4	5.5	4.9	5.2	5.0
21	State of Idaho	5.9	6.2	6.5	6.2	5.6	5.4	5.2	5.3	5.0	5.2	4.9
20	Lincoln	3.8	5.9	6.6	6.1	4.8	4.1	4.8	5.1	5.0	5.4	4.9
19	Clark	3.0	2.7	4.5	5.7	4.4	4.4	3.6	4.2	3.8	3.5	4.8
18	Bingham	5.8	5.5	6.3	5.8	5.9	5.6	5.3	5.0	4.9	5.0	4.6
17	Canyon	6.9	7.1	6.7	6.6	5.9	5.6	5.3	5.6	5.0	4.8	4.5
16	Jerome	4.9	5.6	6.6	6.6	5.1	4.6	4.3	4.7	4.5	4.5	4.5
15	Twin Falls	4.8	5.7	7.1	6.7	5.0	4.8	4.5	4.6	4.7	4.9	4.4
14	Owyhee	5.2	5.7	5.8	5.6	3.3	3.1	3.0	2.8	2.7	4.3	4.2
13	Nez Perce	4.1	4.8	4.5	3.9	3.5	4.1	3.5	3.6	3.7	3.9	4.2
12	Camas	6.9	5.0	5.9	4.8	2.5	3.1	4.4	4.6	3.4	4.2	4.0
11	Gooding	4.2	4.4	5.1	5.4	4.3	4.1	4.2	4.2	3.8	3.6	3.9
10	Jefferson	5.5	5.4	6.1	5.4	5.4	5.1	4.7	4.4	4.3	4.5	3.9
9	Franklin	3.6	3.4	3.5	3.5	3.5	4.2	4.4	4.1	3.5	3.5	3.9
8	Butte	4.6	5.9	7.3	6.3	5.0	4.0	4.7	4.8	4.2	3.9	3.7
7	Oneida	3.4	3.6	5.0	3.6	3.7	4.0	3.1	3.5	3.6	4.1	3.6
6	Latah	5.1	4.4	3.8	3.5	2.9	3.0	3.2	3.5	3.4	3.3	3.4
5	Bonneville	3.9	4.1	4.9	4.4	4.3	4.3	4.1	3.9	3.5	3.6	3.4
4	Blaine	3.2	6.1	7.4	5.9	5.2	4.3	4.1	4.9	3.9	3.8	3.3
3	Teton	4.2	3.7	4.0	4.1	3.7	3.3	4.7	4.8	3.6	3.5	3.1
2	Ada	4.0	4.2	4.3	4.0	3.5	3.5	3.3	3.2	3.1	3.3	3.0
1	Madison	4.9	4.4	2.9	3.1	3.3	3.3	3.2	3.3	2.8	2.6	2.5

Source: **Idaho Department of Labor**

Figure 27

Percent of Earnings by Industry -- 1998

USA	%	State of Idaho	%	Ada	%
Total Earnings	100%	Total Earnings	100%	Total Earnings	100%
Farm earnings	1%	Farm earnings	5%	Farm earnings	0%
Ag. Services	1%	Ag. Services	1%	Ag. Services	1%
Mining	1%	Mining	1%	Mining	0%
Construction	6%	Construction	8%	Construction	10%
Manufacturing	17%	Manufacturing	17%	Manufacturing	22%
Transportation	7%	Transportation	7%	Transportation	7%
Wholesale trad	6%	Wholesale trade	5%	Wholesale trad	6%
Retail trade	9%	Retail trade	10%	Retail trade	9%
Finance	9%	Finance	5%	Finance	7%
Services	28%	Services	22%	Services	22%
Federal, civilian	3%	Federal, civilian	4%	Federal, civilian	4%
Military	1%	Military	1%	Military	0%
State	3%	State	4%	State	5%
Local	8%	Local	9%	Local	

Idaho	%	Canyon	%	Nez Perce	%
Total Earnings	100%	Total Earnings	100%	Total Earnings	100%
Farm earnings	-1%	Farm earnings	7%	Farm earnings	0%
Ag. Services	1%	Ag. Services	2%	Ag. Services	0%
Mining	3%	Mining	0%	Mining	0%
Construction	8%	Construction	8%	Construction	5%
Manufacturing	16%	Manufacturing	26%	Manufacturing	26%
Transportation	8%	Transportation	6%	Transportation	7%
Wholesale trad	3%	Wholesale trade	5%	Wholesale trad	4%
Retail trade	10%	Retail trade	10%	Retail trade	11%
Finance	4%	Finance	4%	Finance	7%
Services	14%	Services	19%	Services	24%
Federal, civilian	18%	Federal, civilian	1%	Federal, civilian	2%
Military	1%	Military	0%	Military	0%
State	4%	State	2%	State	5%
Local	13%	Local	9%	Local	7%

Source: REIS

Percent of Earnings by Industry -- 1979

USA	%	State of Idaho	%	Ada	%
Total Earnings	100%	Total Earnings	100%	Total Earnings	100%
Farm earnings	2%	Farm earnings	4%	Farm earnings	0%
Ag. Services	0%	Ag. Services	1%	Ag. Services	1%
Mining	2%	Mining	2%	Mining	0%
Construction	7%	Construction	9%	Construction	14%
Manufacturing	25%	Manufacturing	19%	Manufacturing	13%
Transportation	7%	Transportation	8%	Transportation	8%
Wholesale trad	6%	Wholesale trade	6%	Wholesale trac	8%
Retail trade	10%	Retail trade	12%	Retail trade	12%
Finance	6%	Finance	4%	Finance	8%
Services	18%	Services	17%	Services	17%
Federal, civilian	4%	Federal, civilian	5%	Federal, civiliar	7%
Military	2%	Military	2%	Military	0%
State	3%	State	4%	State	7%
Local	8%	Local	7%	Local	5%

Idaho	%	Canyon	%	Nez Perce	%
Total Earnings (p	100%	Total Earnings	100%	Total Earnings	100%
Farm earnings	7%	Farm earnings	5%	Farm earnings	2%
Ag. Services	0%	Ag. Services	2%	Ag. Services	1%
Mining	1%	Mining	0%	Mining	0%
Construction	5%	Construction	8%	Construction	8%
Manufacturing	35%	Manufacturing	23%	Manufacturing	34%
Transportation	4%	Transportation	10%	Transportation	8%
Wholesale trad	3%	Wholesale trade	7%	Wholesale trac	5%
Retail trade	8%	Retail trade	13%	Retail trade	13%
Finance	2%	Finance	3%	Finance	3%
Services	10%	Services	17%	Services	15%
Federal, civilian	15%	Federal, civilian	1%	Federal, civiliar	2%
Military	1%	Military	1%	Military	0%
State	1%	State	3%	State	4%
Local	7%	Local	7%	Local	5%

Source: REIS

Figure 28

1999 Earnings for Canyon County by Sector

D= Disclosure Supression

Earnings by place of work	$	1,498,806,000
Farm earnings	$	84,045,000
Ag. services, forestry, fishing, & other	$	30,018,000
Agricultural services		(D)
Forestry, fishing, and other		(D)
Forestry	$	116,000
Fishing		(D)
Other 8/	$	-
Mining	$	2,421,000
Metal mining		(D)
Coal mining	$	-
Oil and gas extraction	$	-
Nonmetallic minerals, except fuels		(D)
Construction	$	133,272,000
General building contractors	$	21,974,000
Heavy construction contractors	$	27,260,000
Special trade contractors	$	84,038,000
Manufacturing	$	389,968,000
Durable goods	$	246,196,000
Lumber and wood products	$	38,179,000
Furniture and fixtures	$	8,747,000
Stone, clay, and glass products	$	6,294,000
Primary metal industries		(D)
Fabricated metal products	$	21,007,000
Industrial machinery and equipment	$	80,223,000
Electronic and other electric equipment	$	70,423,000
Motor vehicles and equipment		(D)
Other transportation equipment		(D)
Instruments and related products	$	191,000
Miscellaneous manufacturing industries	$	687,000
Ordnance 9/		(D)
Nondurable goods	$	143,772,000
Food and kindred products	$	115,532,000
Tobacco products	$	-
Textile mill products	$	-
Apparel and other textile products	$	204,000
Paper and allied products		(D)
Printing and publishing	$	14,759,000
Chemicals and allied products	$	1,098,000
Petroleum and coal products		(D)
Rubber and misc. plastics products	$	6,934,000
Leather and leather products	$	-

Transportation and public utilities	$	96,420,000
Railroad transportation	$	12,852,000
Trucking and warehousing	$	43,193,000
Water transportation	$	-
Other transportation	$	12,117,000
Local and interurban passenger transit	$	4,682,000
Transportation by air		(D)
Pipelines, except natural gas	$	-
Transportation services		(D)
Communications	$	10,122,000
Electric, gas, and sanitary services	$	18,136,000
Wholesale trade	$	78,143,000
Retail trade	$	144,914,000
Building materials and garden equipment	$	20,194,000
General merchandise stores	$	10,268,000
Food stores	$	29,047,000
Automotive dealers and service stations	$	36,314,000
Apparel and accessory stores	$	2,246,000
Home furniture and furnishings stores	$	7,719,000
Eating and drinking places	$	25,723,000
Miscellaneous retail	$	13,403,000
Finance, insurance, and real estate	$	55,606,000
Depository and nondepository institutions	$	17,030,000
Other finance, insurance, and real estate	$	38,576,000
Security and commodity brokers	$	3,983,000
Insurance carriers	$	5,455,000
Insurance agents, brokers, and services	$	8,025,000
Real estate	$	20,372,000
Combined real estate, insurance, etc.		(N)
Holding and other investment offices	$	741,000
Services	$	285,013,000
Hotels and other lodging places	$	2,310,000
Personal services	$	10,372,000
Private households	$	2,437,000
Business services	$	37,175,000
Auto repair, services, and parking	$	18,412,000
Miscellaneous repair services	$	8,397,000
Amusement and recreation services	$	3,269,000
Motion pictures	$	1,343,000
Health services	$	126,639,000
Legal services	$	9,416,000
Educational services	$	19,918,000
Social services	$	18,592,000
Museums, botanical, zoological gardens		(D)
Membership organizations	$	7,648,000
Engineering and management services 1	$	15,852,000
Miscellaneous services		(D)
Government and government enterprises	$	198,986,000
Federal, civilian	$	18,851,000
Military	$	7,581,000
State	$	37,295,000
Local	$	135,259,000

Source: REIS

Figure 29

Canyon County Livestock Measures--1987,1992, 1997

Livestock Measure	Farms			Number		
	1987	1992	1997	1987	1992	1997
Livestock and poultry: Cattle and calves inventory	1030	963	1047	130,677	130,789	144,366
Beef cows	520	588	638	16,413	18,882	20,489
Milk cows	197	154	124	14,289	14,014	17,665
Cattle and calves sold	1019	934	979	178,598	133,496	168,414
Hogs and pigs inventory	77	73	56	3,873	2,827	1,253
Hogs and pigs sold	74	53	39	5,132	3,761	1,439
Sheep and lambs inventory	101	101	99	8,447	16,128	18,436
Layers and pullets 13 weeks old and older inventory-	151	107	92	7,170	7,831	(D)
Broilers and other meat-type chickens sold	6	5	9	1,485	11,675	3,085

Source: USDA

Basic (Export) Industries Versus Nonbasic Industries

A county has two types of industries: base industries and nonbase industries. Base industries are defined as any economic activity that brings income into the region when goods are sold by regional firms. For Canyon County the base industries are high technology companies and agriculture food processing, as well as other manufacturing firms. Agriculture, tourism, and the region's consumer and business-related wholesale and retail trade industries also served an economic base function. For example, firms providing services to individuals living outside the region's trade center, such as medical and legal services, were included in the region's base. Payments from state and federal governments (including social security, Medicare, funding for universities, welfare payments) were other sources of outside income to business and residents in Canyon County were counted as part of the economic base.

Nonbase industries are defined as economic activity within a region that support local consumers and businesses within the base sector, recirculating incomes generated within the region. These activities include shopping malls that serve the local population, business and personal services consumed locally, and local construction contracts. Nonbase industries support the base industries.

Base industries are sometimes confused with nonbase industries. Canyon County, for example, had a large service sector that employed 14,308 workers or 24% of the workforce. From these numbers it appeared that the service sector contributed a large amount of economic base employment and earnings to the economy. In reality much of this service sector employment was consumed by local industries and their workers, such as Micron and JR Simplot workers. Only the market activities and employees serving visitors from outside the area were counted as economic base activity and employment. The Case of Nez Perce County is a good example. For the service sector, the portion of the employment dependent on visitor spending (i.e. real base activity) was estimated in a previous study to be only 0.9% of the total local service employment. The service sector on paper, however, constitutes 28% share of total area employment. It was reduced to 0.9% of the employment for inclusion in the economic base (The actual base component was a little larger than 0.9% because part of the service sector exports were included in the central function of the county in that economic model).

Figure 30

Canyon County Crops -- 1987,1992-1997

Crops	Farms			Crops			Acres		
	1987	1992	1997	1987	1992	1997	1987	1992	1997
Barley for grain (bushels)	408	224	171	1,295,847	785,659	585,336	14,323	9,298	6,164
Dry edible beans, excluding dry limas (hundredweigh)	277	159	194	(D)	169,833	252,342	(D)	8,488	11,353
Hay-alfalfa,other, tons dry	999	867	969	153,790	146,957	223,375	36,271	32,773	46,456
Potatoes, excluding sweetpotatoes (hundredweight)	82	86	95	1,986,845	2,671,929	3,596,706	5,387	7,137	8,563
Sugar beets for sugar (tons)	307	270	133	944,467	900,320	378,447	30,918	32,464	12,577
Wheat for grain (bushels)	480	503	432	2,072,266	3,678,978	4,234,738	23,776	41,617	37,848

Source: USDA

Figure 31

Livestock Products (Cash Receipts)-1999

1	Idaho State total	$ 1,900,550,000
2	Gooding, Idaho	$ 269,831,000
3	Jerome, Idaho	$ 236,515,000
4	Cassia, Idaho	$ 233,039,000
5	Elmore, Idaho	$ 178,013,000
6	Canyon, Idaho	$ 168,028,000
7	Twin Falls, Idaho	$ 134,830,000
8	Ada, Idaho	$ 73,531,000
9	Bingham, Idaho	$ 64,959,000
10	Owyhee, Idaho	$ 63,341,000
11	Franklin, Idaho	$ 59,525,000
12	Jefferson, Idaho	$ 56,628,000
13	Minidoka, Idaho	$ 47,492,000
14	Power, Idaho	$ 34,872,000
15	Payette, Idaho	$ 27,640,000
16	Lincoln, Idaho	$ 21,888,000
17	Gem, Idaho	$ 20,027,000
18	Bonneville, Idaho	$ 18,818,000
19	Lemhi, Idaho	$ 18,209,000
20	Washington, Idaho	$ 15,870,000
21	Idaho, Idaho	$ 13,974,000
22	Custer, Idaho	$ 13,863,000
23	Caribou, Idaho	$ 13,711,000
24	Bear Lake, Idaho	$ 12,421,000
25	Fremont	$ 11,601,000
26	Bannock, Idaho	$ 10,393,000
27	Blaine, Idaho	$ 9,884,000
28	Madison, Idaho	$ 8,800,000
29	Clark, Idaho	$ 8,159,000
30	Butte, Idaho	$ 7,204,000
31	Adams, Idaho	$ 6,701,000
32	Teton, Idaho	$ 6,604,000
33	Oneida, Idaho	$ 6,589,000
34	Valley, Idaho	$ 5,137,000
35	Nez Perce, Idaho	$ 4,304,000
36	Bonner, Idaho	$ 3,453,000
37	Latah, Idaho	$ 3,396,000
38	Kootenai, Idaho	$ 2,560,000
39	Camas, Idaho	$ 2,226,000
40	Boundary, Idaho	$ 1,929,000
41	Lewis, Idaho	$ 1,351,000
42	Clearwater, Idaho	$ 1,082,000
43	Boise, Idaho	$ 1,029,000
44	Benewah, Idaho	$ 902,000
45	Shoshone, Idaho	$ 221,000

Source: REIS

Figure 32

Crop Products (Cash Receipts)-1999

1	Idaho State total	$ 1,747,320
2	Bingham, Idaho	$ 164,604
3	Canyon, Idaho	$ 160,122
4	Cassia, Idaho	$ 141,585
5	Twin Falls, Idaho	$ 125,743
6	Minidoka, Idaho	$ 117,377
7	Jefferson, Idaho	$ 86,286
8	Power, Idaho	$ 85,981
9	Jerome, Idaho	$ 80,871
10	Madison, Idaho	$ 73,598
11	Bonneville, Idaho	$ 70,337
12	Fremont	$ 66,658
13	Elmore, Idaho	$ 63,784
14	Gooding, Idaho	$ 51,636
15	Owyhee, Idaho	$ 47,259
16	Ada, Idaho	$ 38,704
17	Latah, Idaho	$ 29,912
18	Nez Perce, Idaho	$ 29,781
19	Payette, Idaho	$ 29,092
20	Clark, Idaho	$ 27,636
21	Washington, Idaho	$ 26,312
22	Lincoln, Idaho	$ 26,148
23	Caribou, Idaho	$ 25,154
24	Lewis, Idaho	$ 16,564
25	Teton, Idaho	$ 16,304
26	Bannock, Idaho	$ 15,039
27	Butte, Idaho	$ 14,198
28	Blaine, Idaho	$ 12,945
29	Idaho, Idaho	$ 12,606
30	Gem, Idaho	$ 12,541
31	Kootenai, Idaho	$ 11,461
32	Boundary, Idaho	$ 11,454
33	Franklin, Idaho	$ 10,577
34	Benewah, Idaho	$ 8,871
35	Oneida, Idaho	$ 8,432
36	Camas, Idaho	$ 7,011
37	Bonner, Idaho	$ 4,483
38	Bear Lake, Idaho	$ 3,754
39	Custer, Idaho	$ 3,688
40	Clearwater, Idaho	$ 3,127
41	Lemhi, Idaho	$ 1,705
42	Valley, Idaho	$ 1,508
43	Boise, Idaho	$ 1,314
44	Adams, Idaho	$ 1,063
45	Shoshone, Idaho	$ 95

Source: REIS

Figure 33

Farm Subsidies--1999

1	Idaho State total	$ 208,846,000
2	Cassia, Idaho	$ 15,904,000
3	Power, Idaho	$ 15,792,000
4	Bingham, Idaho	$ 14,537,000
5	Bonneville, Idaho	$ 12,258,000
6	Latah, Idaho	$ 11,762,000
7	Nez Perce, Idaho	$ 10,988,000
8	Twin Falls, Idaho	$ 9,029,000
9	Minidoka, Idaho	$ 8,595,000
10	Caribou, Idaho	$ 8,149,000
11	Idaho, Idaho	$ 7,666,000
12	Fremont	$ 6,960,000
13	Lewis, Idaho	$ 6,928,000
14	Canyon, Idaho	$ 6,580,000
15	Jefferson, Idaho	$ 6,472,000
16	Bannock, Idaho	$ 6,100,000
17	Oneida, Idaho	$ 5,801,000
18	Madison, Idaho	$ 5,684,000
19	Jerome, Idaho	$ 5,565,000
20	Franklin, Idaho	$ 4,022,000
21	Gooding, Idaho	$ 3,789,000
22	Benewah, Idaho	$ 2,961,000
23	Elmore, Idaho	$ 2,935,000
24	Teton, Idaho	$ 2,926,000
25	Owyhee, Idaho	$ 2,775,000
26	Bear Lake, Idaho	$ 2,548,000
27	Kootenai, Idaho	$ 2,475,000
28	Payette, Idaho	$ 2,271,000
29	Lincoln, Idaho	$ 2,162,000
30	Ada, Idaho	$ 2,141,000
31	Clark, Idaho	$ 2,115,000
32	Washington, Idaho	$ 2,069,000
33	Butte, Idaho	$ 1,867,000
34	Boundary, Idaho	$ 1,791,000
35	Gem, Idaho	$ 1,531,000
36	Camas, Idaho	$ 1,025,000
37	Clearwater, Idaho	$ 1,004,000
38	Blaine, Idaho	$ 1,002,000
39	Custer, Idaho	$ 222,000
40	Lemhi, Idaho	$ 178,000
41	Adams, Idaho	$ 127,000
42	Bonner, Idaho	$ 70,000
43	Valley, Idaho	$ 50,000
44	Shoshone, Idaho	$ -
45	Boise, Idaho	Supression

Source: REIS

Economic base analysis is important for identifying the vital export industries of a region. Nonbase industries, on the other hand, are important for keeping money within a region and stimulating local economic activity for residents. In this respect, nonbase industries can function in the same manner as an export industry. For example, a patient elects surgery at a local hospital instead of traveling to Salt Lake City, Utah. The substitution of local services for an imported service is the equivalent of an increase in demand for local business services. By keeping income in the community, it will have similar multiplier effects as an increase in demand for an export industry. Ultimately, however, nonbase industries depend on the basic industries for their survival.

Canyon County Agriculture

Canyon County has the 2nd (or 3rd) largest agricultural sector in Idaho (depending on how it is measured) and the county has the 2nd largest population in the state. It is both a rural county and an urban county at the same time. Canyon County had 354,919 acres of farms, ranking 17th in the State of Idaho in 1997. Bingham County, in contrast, had 796,069 in farm acres, ranking first in the state. Canyon County had 1,898 farms in 1997, down from 2,009 in 1987. The average farm size was 187 acres, up from 163 in 1987 but down from an average of 209 acres in 1992. The total number of acres planted in crops was 235,077 in 1997, down from 247,966 in 1987.

The total number of irrigated acres in Canynon County were 1,684 in 1997, down from 1,745 acres in 1987. As in most of south Idaho, most of the farmland in the county must be irrigated, due to the lack of rainfall.

Figures 29 and 30 outline agriculture profiles (production and farms) for livestock and crop measures of Canyon County from the last three agricultural census (1997, 1992, 1987). For example, Canyon County had 144,366 cows and calves in inventory in 1997, up from 130,677 in 1987. Other production measures include beef cows, milk cows, hogs and pigs, sheep and lambs, layers and pullets , broilers and other meat type chickens sold. Figure 30 outlines production in barley, beans, alfalfa, potatoes, sugar beets, and grain.

Sales Receipts

Canyon County was 2nd in the state in overall cash receipts from agriculture ($328,150,000) in 1999, just behind Cassia County ($374,624,000), as seen in Figure 11.

Canyon County was 6th in the state in livestock cash receipts ($169,029,000) as seen in Figure 31. Gooding County was 1st at $269,801,000. Canyon County was 2nd in cash crop receipts at $160,122,000. Cassia County was first at $164,604,000 (Figure 32). In terms of farm support payments, Canyon County ranked 14th in the state (Figure 33) at $6,590,000. Cassia County ranked first ($15,904,000). Figure 34 illustrates Canyon County's agricultural cash receipts from 1969-1999 in both nominal terms (in current

Figure 34

Nominal Versus Real Farm Cash Receipts
Canyon County-1969-1999

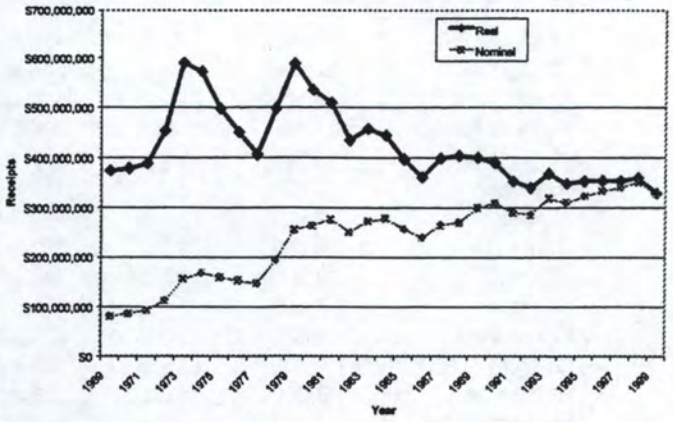


Figure 36

Potato Production in Canyon County 1990-2000

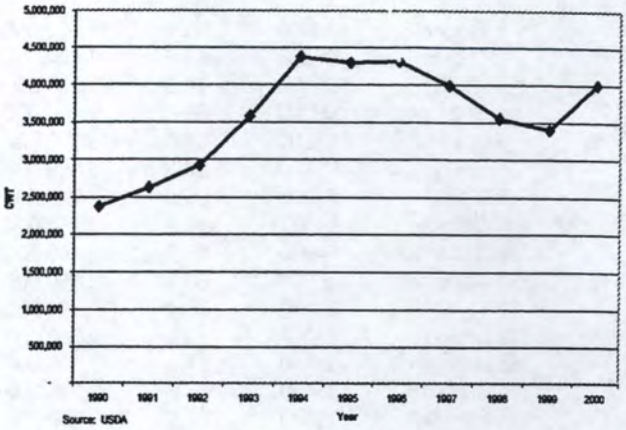


Figure 35

Potato Production in Idaho --- 2000

Rank	County	Acres	Yield	Production (CWT)
1	Bingham	67,500	375	25,104,000
2	Cassia	35,500	425	15,004,000
3	Power	36,900	357	13,111,000
4	Minidoka	30,400	410	12,382,000
5	Madison	35,800	315	11,214,000
6	Fremont	35,000	317	11,063,000
7	Jefferson	31,000	345	10,660,000
8	Bonneville	30,000	302	9,000,000
9	Twin Falls	19,000	420	7,980,000
10	Jerome	15,700	420	6,552,000
11	Elmore	11,100	534	5,932,000
12	Canyon	8,700	460	4,000,000
13	Gooding	8,800	400	3,520,000
14	Lincoln	6,000	400	2,397,000
15	Owyhee	4,600	492	2,261,000
16	Caribou	7,800	290	2,233,000
17	Teton	8,700	215	1,870,000
18	Bannock	5,200	340	1,768,000
19	Payette	1,800	450	810,000
20	Blaine	2,000	400	800,000
21	Butte	2,800	270	729,000
22	Ada	1,100	410	451,000
23	Washington	600	400	240,000

Source:USDA http://www.nass.usda.gov:81/ipedb/

Figure 37

Wheat Production--Canyon County 1990-2001

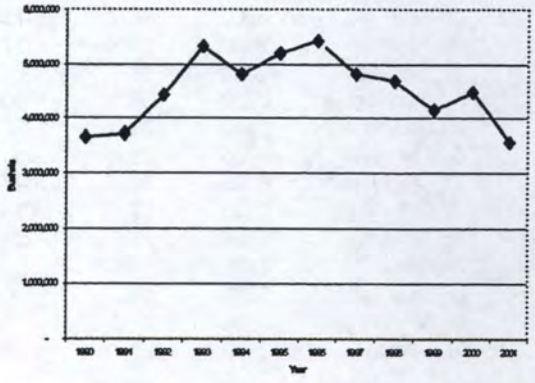


Figure 38

Wheat Production In Idaho 2001

Rank	County	Acres	Yield	Production (BU)
1	Bingham	126000	93.2	11,320,000
2	Cassia	96000	84.6	7,820,000
3	Latah	105000	74.6	7,560,000
4	Nez Perce	109000	67.8	7,140,000
5	Power	117000	51.6	5,310,000
6	Lewis	77000	67.3	5,000,000
7	Idaho	67000	65.8	4,225,000
8	***Canyon***	***34000***	***107.6***	***3,562,000***
9	Bonneville	64000	55.7	3,280,000
10	Madison	36900	80.8	2,950,000
11	Twin Falls	33000	93.4	2,820,000
12	Minidoka	37000	79	2,780,000
13	Jefferson	33100	81.8	2,536,000
14	Benewah	35500	66.6	2,265,000
15	Fremont	29300	71.8	2,039,000
16	Clark	16800	86.1	1,351,000
17	Caribou	26100	52.8	1,325,000
18	Bannock	31000	47.2	1,236,000
19	Jerome	13700	94.7	1,221,000
20	Boundary	15600	66.4	970,000
21	Elmore	11600	89.4	867,000
22	Kootenai	13500	57.3	750,000
23	Washingto	10900	73.1	746,000
24	Lincoln	11200	76.8	737,000
25	Ada	8200	94.2	735,000
26	Payette	7800	99.6	717,000
27	Oneida	42000	18.7	642,000
28	Gooding	7000	98.2	609,000
29	Clearwater	9400	59.3	540,000
30	Franklin	20700	28.3	501,000
31	Owyhee	6100	91.7	431,000
32	Butte	5200	77.1	378,000
33	Teton	5900	37.5	210,000
34	Gem	2300	95	209,000
35	Bear Lake	9700	18.3	168,000
36	Blaine	1400	77.8	70,000
37	Camas	2700	20.4	53,000

Source: USDA

Figure 39

Sugar Beet Production in Idaho 2000

Rank	County	Acres	Yield	Production
1	Minidoka	47,700	27.3	1,123,900
2	Cassia	37,600	28.3	980,400
3	Bingham	23,500	29.9	654,400
4	Twin Falls	17,400	30.3	460,000
5	***Canyon***	***15,700***	***33.1***	***457,200***
6	Power	13,600	30.1	382,600
7	Elmore	12,000	31.8	368,500
8	Jerome	13,900	28.5	353,300
9	Owyhee	9,000	29.6	230,800
10	Lincoln	7,300	24.2	166,800
11	Gooding	4,800	30.1	135,500
12	Ada	4,100	35.8	132,400
13	Payette	3,000	32.3	87,200
14	Washington	1,700	31.9	44,600

Figure 40

Corn for Silage -2001

County	Acres-Harvested	Yield	Production (Tons)
Jerome	23,200	26.3	609,900
Gooding	20,300	27.5	557,900
Twin Falls	17,700	24	425,300
Canyon	***14,500***	***26.6***	***385,000***
Cassia	10,900	23.6	257,300
Ada	7,100	24.8	176,100
Owyhee	6,700	25	167,300
Payette	4,000	26.6	106,500
Lincoln	3,400	25.7	87,400
Jefferson	3,300	17.6	58,000
Minidoka	2,900	19.7	57,200
Gem	2,300	23	52,900
Bingham	2,000	22	44,000
Franklin	2,200	20	44,000
Bonneville	1,700	23	39,100
Washingto	1,100	22.9	25,200
Elmore	1,000	19	19,000
Power	100	20	2,000

Source: USDA

Figure 41

Hay, Alfalfa Production in Idaho (2000)

Rank	County	Acres	Yield	Production (Tons)
1	Jefferson	98,400	4.85	477,600
2	Twin Falls	67,100	5.83	390,900
3	***Canyon***	***50,000***	***5.92***	***296,000***
4	Owyhee	48,900	5.53	270,400
5	Jerome	48,000	5.56	266,800
6	Bingham	52,300	4.95	258,800
7	Gooding	39,900	5.93	236,800
8	Cassia	47,600	4.84	230,200
9	Elmore	38,300	5.56	213,100
10	Franklin	47,000	3.94	185,300
11	Ada	28,600	5	143,100
12	Minidoka	25,900	5.43	140,700
13	Bonneville	34,000	3.78	128,500
14	Butte	29,000	4.26	123,600
15	Washington	31,600	3.03	95,600
16	Fremont	27,300	3.47	94,800
17	Lemhi	28,800	3.19	91,800
18	Clark	21,100	4.21	88,900
19	Lincoln	20,100	4.38	88,100
20	Madison	20,000	4.1	81,900
21	Custer	27,000	2.86	77,200
22	Caribou	27,000	2.81	75,800
23	Blaine	18,400	3.99	73,400
24	Payette	12,900	5.25	67,700
25	Oneida	26,500	2.51	66,500
26	Camas	45,000	1.38	62,100
27	Bannock	17,400	3.31	57,600
28	Gem	15,500	3.6	55,800
29	Bear Lake	26,800	1.66	44,400
30	Idaho	22,600	1.93	43,700
31	Teton	18,500	2.26	41,900
32	Power	9,900	3.78	37,400
33	Boundary	10,000	3.49	34,900
34	Adams	8,000	2.44	19,500
35	Bonner	7,000	2.17	15,200
36	Kootenai	5,300	2.81	14,900
37	Lewis	7,000	2.09	14,600
38	Nez Perce	6,300	1.7	10,700
39	Latah	5,400	1.74	9,400
40	Clearwater	4,300	1.79	7,700
41	Valley	2,100	2.76	5,800
42	Boise	2,100	2.38	5,000
43	Benewah	1,000	1.8	1,800

Source: USDA

Figure 42

Alfalfa, Hay Production in Canyon County 1990-2000

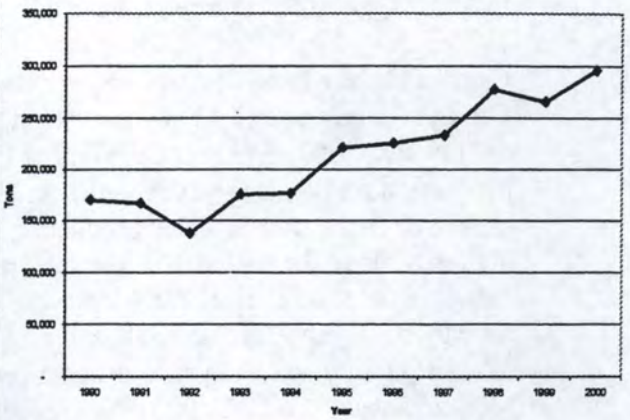
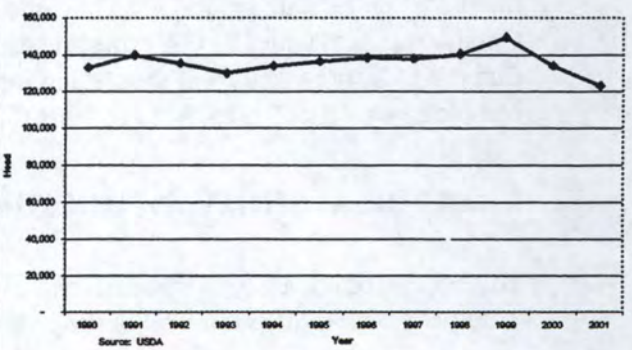


Figure 43

Total Calves and Cattle, Headcount, 1990-2001-Canyon County



dollars) and in real terms (adjusted for inflation using the consumer price index). In real terms, overall farm receipts have fallen considerably since the mid-1970s.

Canyon County Farm Output Comparisons

Canyon County ranked 12th in the state of Idaho in potato production (4,000,000 cwt) in year 2000. Bingham County was 1st at 25,104,000 cwt (Figure 35). Total production for potatoes was reported for 1990-2000 in Figure 36. Canyon County ranked 8th in the state in wheat production in 2001 (3,562,000 bushels), and had the highest yield in the state at 107.6 bushels per acre. Bingham County had the largest output in the state at 11,320,000 bushels. Wheat production is reported for the state by county rank in Figure 38, and for Canyon County (1990-2001) in Figure 37. The county was 5th in state in sugar beet production at 457,200 tons in 2000. Minidoka was 1st at 1,123,900 tons of production (Figure 39). Canyon County was 1st in the state in corn for grain production (1,982,000 bushels) Figure 40), and 4th in corn production for silage at 385,000 tons (Figure 41).

Canyon County was 3rd in the state in hay alfalfa production at 296,000 tons in 2000. Jefferson County was first at 477,600 bushels (Figures 41 and 42). In 2001 Canyon County ranked 18th in the state in barley production at 678,000 bushels. Bonneville County ranked 1st at 4,910,000 bushels (Figure 44). Canyon County ranked 6th in the state in total head of cattle — 123,000 cows and calves. Jerome County was first with 170,000 cows and calves (Figures 43 and 45). Finally Canyon County ranked 5th in the state in sheep and lambs at 19,000 head in 2001. Minidoka was 1st at 33,000 head in 2001 (Figure 46).

Canyon County Economic Impact Assessment

This section of our analysis identifies the causation of economic activity in Canyon County. An input/output model of the economy is used for this purpose.

Economic Profile Versus Economic Base Assessment

Figure 47 reports the total sales, value-added, wages, indirect business taxes, and employment for Canyon County in 1998 by major industry category. Total sales reported in the county in 1998 were $5,181,225,000. Value added was reported at $2,262,206,000, total earnings— $1,299,416,000, indirect business taxes, $153,939,000, and employment at 59,287 jobs. (Value added is the regional equivalent of gross domestic product (GDP), which is how economists measure the macro economy. Indirect business taxes include all taxes except corporate and

Figure 44
Barley Production in Idaho 2001

Rank	County	Acrea	Yield	Production (BU)
1	Bonneville	61,300	81.7	4,910,000
2	Caribou	74,200	62	4,276,000
3	Fremont	71,600	62.5	4,250,000
4	Minidoka	42,000	99.7	4,096,000
5	Jefferson	42,800	94	3,912,000
6	Twin Falls	37,900	102.4	3,800,000
7	Madison	44,700	70.1	3,071,000
8	Cassia	32,100	97.4	2,923,000
9	Teton	43,100	58.3	2,484,000
10	Bingham	22,000	93.1	1,983,000
11	Jerome	18,300	102.9	1,862,000
12	Idaho	21,500	63.5	1,346,000
13	Blaine	13,100	102	1,285,000
14	Nez Perce	18,300	68.9	1,247,000
15	Lewis	18,900	65.8	1,231,000
16	Latah	16,100	66.9	1,063,000
17	Butte	11,600	85.8	892,000
18	***Canyon***	***7,500***	***96.9***	***678,000***
19	Franklin	11,700	53.1	563,000
20	Lincoln	5,700	89.6	493,000
21	Camas	15,900	22.1	347,000
22	Power	6,500	56.7	346,000
23	Boundary	3,500	95.6	325,000
24	Oneida	10,500	31	301,000
25	Benewah	3,800	70.8	269,000
26	Bear Lake	8,400	36.8	261,000
27	Elmore	4,500	55.9	229,000
28	Bannock	8,300	36.4	211,000
29	Clark	2,300	85	187,000
30	Owyhee	3,400	92.5	185,000
31	Washington	3,400	61	183,000
32	Clearwater	3,000	58.7	176,000
33	Gooding	2,000	88.9	169,000
34	Gem	2,100	75	150,000
35	Payette	1,700	93.1	149,000
36	Ada	2,000	76.3	145,000
37	Kootenai	1,700	58.8	100,000
38	Custer	1,400	74.5	82,000
39	Lemhi	600	65	39,000

Source: USDA

Figure 45

Idaho Rankings on Cattle--2001 (Head)

Rank	County	Total	Beef Cows	Milk Cows
1	Jerome	170,000	10,000	77,500
2	Cassia	169,000	26,500	19,000
3	Gooding	163,000	17,000	81,500
4	Elmore	142,000	14,000	100
5	Twin Falls	124,000	25,000	46,000
6	***Canyon***	***123,000***	***19,500***	***29,000***
7	Owyhee	110,000	42,500	16,000
8	Bingham	84,000	24,000	9,500
9	Ada	70,000	10,900	17,500
10	Jefferson	69,000	17,000	4,600
11	Payette	55,000	7,900	7,500
12	Lemhi	48,000	29,500	900
13	Bonneville	45,000	14,500	1,200
14	Washington	43,500	18,000	600
15	Franklin	39,500	7,400	12,200
16	Minidoka	39,000	5,100	9,200
17	Idaho	38,500	19,200	400
18	Custer	38,500	23,000	
19	Lincoln	36,000	6,200	10,500
20	Power	34,000	7,600	600
21	Gem	31,500	13,600	2,500
22	Bear Lake	28,000	14,500	1,500
23	Caribou	26,000	12,600	1,100
24	Bannock	23,500	11,100	800
25	Oneida	21,000	11,700	500
26	Butte	21,000	9,900	600
27	Fremont	20,500	8,700	700
28	Blaine	20,000	9,600	300
29	Madison	18,000	6,900	800
30	Adams	18,000	8,000	
31	Nez Perce	13,300	5,400	
32	Teton	13,000	5,200	1,000
33	Clark	13,000	5,400	
34	Latah	8,900	4,600	100
35	Bonner	8,900	4,200	200
36	Camas	8,000	2,600	
37	Valley	7,300	2,600	
38	Kootenai	6,700	3,200	
39	Boundary	5,200	2,600	100
40	Lewis	4,800	2,100	
41	Clearwater	4,500	2,300	
42	Benewah	3,900	1,700	
43	Boise	3,700	2,500	
44	Shoshone	300	200	

Source: USDA

Figure 46

Sheep and Lambs--Idaho 2001

Rank	County	Sheep/Lambs Head
1	Minidoka	33,000
2	Blaine	28,000
3	Fremont	22,500
4	Gooding	22,000
5	***Canyon***	***19,000***
6	Washington	17,200
7	Jefferson	15,500
8	Twin Falls	15,000
9	Cassia	14,000
10	Bingham	13,500
11	Butte	10,500
12	Owyhee	8,500
13	Caribou	8,000
14	Clark	6,500
15	Bonneville	5,500
16	Jerome	5,000
17	Bear Lake	4,000
18	Idaho	3,200
19	Gem	2,500
20	Lemhi	2,500
21	Ada	2,000
22	Latah	2,000
23	Power	2,000
24	Custer	1,500
25	Franklin	1,500
26	Payette	1,100
27	Bonner	1,000

Source: USDA

personal income taxes.) This economic profile reports economic activity by sector. It identifies economic activity....but does not explain what drives or causes economic activity. Retail trade and wholesale trade for example, constitutes 19.2% of the employment in Canyon County. Much of this activity is really derived by other major basic export industries. Exports(or base activity) is defined as any activity that brings money into the community (as discussed earlier in this report). Thus much of the trade activity is really derived from food processing and high technology companies.

Figure 49 illustrates the problem of identifying which economic variables should be used in ranking economic activity. Industrial sectors are ranked in Canyon County by sales and alternatively by employment. The top five industries ranked by sales are: 1) construction, 2) food processing (crops), 3) industrial machinery, 4) trade, and 5) food processing (animal). The top five industries ranked by employment are: 1) trade, 2) construction, 3) state and local government, 4) health services, and 5) education services. These widely different rankings illustrate part of the problem of identifying the sources of economic activity. Typically economists focus on earnings and employment measures as the most important and tangible measures of economy activity.

Figure 50 compares an economic profile with an economic basic approach to ranking industries. The top earnings industry with the profile and the economic base is manufacturing. In the economic base approach, however, agriculture-related industries rank second, as opposed to services in the profile. In terms of employment rankings, services and retail trade are ranked 1st and 2nd place. In the economic base assessment agriculture-related businesses and manufacturing were 1st and 2nd place. Clearly agricultural-related businesses and manufacturing and not services and retail trade, drive the Canyon County economy.

What is an Economic Base Assessment?

We created a model of the Canyon County economy using an Implan input/output model. A technical discussion of the model and the supporting mathematics can be found in: M. C. Guaderrama, N. Meyer, and R. G. Taylor, *Developing Coefficients and Building Input–Output Models*, University of Idaho Department of Agricultural Economics and Rural Sociology, September 2000.

Our model creates an economic base assessment of the economy. It is an approximate measurement of the causation of economic activity. For example, the trade sector (retail and wholesale trade) which officially employs 19.2% of the county's employment is

Figure 47

Economic Profile of Canyon County -- 1998

Industry		Sales	%		Total Value Added	%
Ag-livestock	$	166,856,000	3.2%	$	51,651,000	2.3%
Ag-non livestock	$	128,401,000	2.5%	$	54,198,000	2.4%
Ag Services	$	53,661,000	1.0%	$	32,128,000	1.4%
Mining	$	9,303,000	0.2%	$	4,580,000	0.2%
Construction	$	564,562,000	10.9%	$	199,683,000	8.8%
Food Processing Animal	$	483,345,000	9.3%	$	56,927,000	2.5%
Food processing-Plant	$	557,194,000	10.8%	$	110,265,000	4.9%
Other	$	13,774,000	0.3%	$	13,774,000	0.6%
Apparel	$	425,000	0.0%	$	102,000	0.0%
Wood products	$	143,186,000	2.8%	$	63,265,000	2.8%
Furniture	$	16,138,000	0.3%	$	4,727,000	0.2%
Pulp and paper	$	28,838,000	0.6%	$	7,415,000	0.3%
Printing and publishing	$	51,266,000	1.0%	$	18,494,000	0.8%
Chemicals and allied	$	11,024,000	0.2%	$	1,417,000	0.1%
Petroleum products	$	672,000	0.0%	$	139,000	0.0%
Rubber products	$	31,090,000	0.6%	$	7,204,000	0.3%
Stone, glass and clay	$	22,221,000	0.4%	$	7,559,000	0.3%
Fabricated metal	$	84,474,000	1.6%	$	37,483,000	1.7%
Industrial machinery	$	545,930,000	10.5%	$	123,906,000	5.5%
Electrical equipment	$	176,314,000	3.4%	$	102,145,000	4.5%
Transportation equipment	$	121,143,000	2.3%	$	23,436,000	1.0%
Scientific instruments	$	9,228,000	0.2%	$	1,005,000	0.0%
Miscellaneous mfg	$	3,069,000	0.1%	$	1,135,000	0.1%
Basic Transportation	$	196,904,000	3.8%	$	90,418,000	4.0%
Transportation Services	$	2,984,000	0.1%	$	2,094,000	0.1%
Communications	$	37,478,000	0.7%	$	18,321,000	0.8%
Utilities	$	67,415,000	1.3%	$	45,991,000	2.0%
Trade	$	518,367,000	10.0%	$	387,547,000	17.1%
Financial Services	$	105,193,000	2.0%	$	74,860,000	3.3%
Real estate	$	218,199,000	4.2%	$	158,409,000	7.0%
Personal services	$	27,360,000	0.5%	$	16,367,000	0.7%
Business services	$	60,433,000	1.2%	$	39,866,000	1.8%
Automotive services	$	49,876,000	1.0%	$	28,114,000	1.2%
Repair services	$	26,970,000	0.5%	$	10,968,000	0.5%
Recreation services	$	17,937,000	0.3%	$	8,296,000	0.4%
Health services	$	237,287,000	4.6%	$	153,861,000	6.8%
Education services	$	65,041,000	1.3%	$	34,748,000	1.5%
Social services	$	41,439,000	0.8%	$	18,961,000	0.8%
Non-profit organizations	$	9,746,000	0.2%	$	6,399,000	0.3%
Professional services	$	39,970,000	0.8%	$	25,690,000	1.1%
State & local government	$	198,373,000	3.8%	$	184,269,000	8.1%
Federal	$	38,139,000	0.7%	$	34,389,000	1.5%
Totals	$	5,181,225,000	100.0%	$	2,262,206,000	100.0%

Source: Implan and REIS

Economic Profile of Canyon County – 1998 (Continued)

Industry	Wages	%	Indirect Business Tax	%	Employment	%
Ag-livestock	$ 12,966,000	1.0%	$ 3,207,000	2.1%	1,032	1.7%
Ag-non livestock	$ 13,448,000	1.0%	$ 3,730,000	2.4%	2,553	4.3%
Ag Services	$ 18,044,000	1.4%	$ 1,056,000	0.7%	2,042	3.4%
Mining	$ 2,288,000	0.2%	$ 272,000	0.2%	49	0.1%
Construction	$ 121,291,000	9.3%	$ 3,827,000	2.5%	5,765	9.7%
Food Processing Animal	$ 41,341,000	3.2%	$ 3,090,000	2.0%	1,465	2.5%
Food processing-Plant	$ 75,004,000	5.8%	$ 5,004,000	3.3%	1,838	3.1%
Other	$ -	0.0%	$ -	0.0%	-	0.0%
Apparel	$ 65,000	0.0%	$ 1,000	0.0%	8	0.0%
Wood products	$ 31,599,000	2.4%	$ 1,505,000	1.0%	1,158	2.0%
Furniture	$ 3,196,000	0.2%	$ 72,000	0.0%	185	0.3%
Pulp and paper	$ 5,791,000	0.4%	$ 285,000	0.2%	152	0.3%
Printing and publishing	$ 13,446,000	1.0%	$ 451,000	0.3%	545	0.9%
Chemicals and allied	$ 907,000	0.1%	$ 73,000	0.0%	30	0.1%
Petroleum products	$ 65,000	0.0%	$ 10,000	0.0%	1	0.0%
Rubber products	$ 5,211,000	0.4%	$ 167,000	0.1%	212	0.4%
Stone, glass and clay	$ 5,013,000	0.4%	$ 271,000	0.2%	178	0.3%
Fabricated metal	$ 21,104,000	1.6%	$ 761,000	0.5%	707	1.2%
Industrial machinery	$ 102,871,000	7.9%	$ 3,020,000	2.0%	2,214	3.7%
Electrical equipment	$ 49,054,000	3.8%	$ 1,641,000	1.1%	1,040	1.8%
Transportation equipment	$ 16,982,000	1.3%	$ 634,000	0.4%	775	1.3%
Scientific instruments	$ 860,000	0.1%	$ 32,000	0.0%	63	0.1%
Miscellaneous mfg	$ 605,000	0.0%	$ 46,000	0.0%	38	0.1%
Basic Transportation	$ 55,073,000	4.2%	$ 3,744,000	2.4%	2,047	3.5%
Transportation Services	$ 1,065,000	0.1%	$ 51,000	0.0%	61	0.1%
Communications	$ 9,121,000	0.7%	$ 1,262,000	0.8%	267	0.5%
Utilities	$ 5,995,000	0.5%	$ 7,426,000	4.8%	122	0.2%
Trade	$ 217,345,000	16.7%	$ 73,865,000	48.0%	11,395	19.2%
Financial Services	$ 31,945,000	2.5%	$ 2,906,000	1.9%	1,242	2.1%
Real estate	$ 6,017,000	0.5%	$ 26,799,000	17.4%	1,351	2.3%
Personal services	$ 9,079,000	0.7%	$ 475,000	0.3%	1,387	2.3%
Business services	$ 19,947,000	1.5%	$ 1,185,000	0.8%	1,921	3.2%
Automotive services	$ 11,571,000	0.9%	$ 2,548,000	1.7%	787	1.3%
Repair services	$ 5,013,000	0.4%	$ 649,000	0.4%	468	0.8%
Recreation services	$ 4,870,000	0.4%	$ 770,000	0.5%	570	1.0%
Health services	$ 115,189,000	8.9%	$ 2,511,000	1.6%	3,865	6.5%
Education services	$ 32,199,000	2.5%	$ 6,000	0.0%	2,790	4.7%
Social services	$ 18,324,000	1.4%	$ 208,000	0.1%	1,256	2.1%
Non-profit organizations	$ 6,327,000	0.5%	$ 35,000	0.0%	535	0.9%
Professional services	$ 18,875,000	1.5%	$ 344,000	0.2%	772	1.3%
State & local government	$ 162,624,000	12.5%	$ -	0.0%	5,435	9.2%
Federal	$ 27,686,000	2.1%	$ -	0.0%	966	1.6%
Totals	$ 1,299,416,000	100.0%	$ 153,939,000	100.0%	59,287	100.0%

Source: Implan and REIS

Figure 48

Unadjusted Exports (Domestic and Foreign) -Canyon County 1998

1	Food processing-Plant	$ 554,451,000
2	Food Processing Animal	$ 365,572,000
3	Industrial machinery	$ 172,426,000
4	Wood products	$ 130,524,000
5	Construction	$ 122,565,000
6	Transportation equipment	$ 118,173,000
7	Electrical equipment	$ 87,746,000
8	Fabricated metal	$ 81,692,000
9	Ag-non livestock	$ 62,987,000
10	Education services	$ 31,094,000
11	Rubber products	$ 30,284,000
12	Basic Transportation	$ 28,838,000
13	Printing and publishing	$ 25,358,000
14	Stone, glass and clay	$ 21,884,000
15	Utilities	$ 19,559,000
16	Trade	$ 15,678,000
17	Repair services	$ 14,294,000
18	Ag Services	$ 13,878,000
19	Social services	$ 9,274,000
20	Chemicals and allied	$ 9,109,000
21	Mining	$ 9,075,000
22	Real estate	$ 6,719,000
23	State & local government	$ 4,588,000
24	Other	$ 4,261,000
25	Financial Services	$ 4,041,000
26	Ag-livestock	$ 3,211,000
27	Furniture	$ 2,892,000
28	Miscellaneous mfg	$ 2,741,000
29	Scientific instruments	$ 1,876,000
30	Pulp and paper	$ 1,609,000
31	Federal	$ 1,397,000
32	Professional services	$ 896,000
33	Recreation services	$ 547,000
34	Business services	$ 427,000
35	Transportation Services	$ 342,000
36	Communications	$ 293,000
37	Petroleum products	$ 44,000
38	Automotive services	$ 22,000
39	Non-profit organizations	$ 17,000
40	Health services	$ 15,000
41	Apparel	$ 8,000

actually responsible for only 1.9% of the region's employment. This occurs because most of retail trade is endogenous to the economy, dependent on other industries that bring money into the county from outside the region. Two factors determine the size and magnitude of export or basic activity: 1) the magnitude in dollars of exports in an industrial sector (i.e. sales outside the county) and 2) magnitude of the multiplier. The multiplier identifies the backward linkages of each industrial sector into the economy (type 1 multiplier); along with the impacts of employee spending (type 2 multiplier). The greater the backward linkages (ceteris paribus), the greater the multiplier. For example, for each dollar of processed meat sold outside the county, there exists a huge supporting "cast" of industries inside the county. The processing plants purchase much of their raw materials and supplies from other firms inside the county (although some purchases are made outside the county which constitutes leakages or imports). The primary input is cattle raised in feedlots, which is a major industry in its own right in Canyon County. Cattle are fed from alfalfa hay, corn, wheat, and potato wastes grown on farms in the county. Thus each dollar of processed meat exported sets off a chain reaction of rounds of spending— from direct suppliers, to feedlots, to basic agriculture, and finally through related employee spending. Putting this effect in dollar terms, each dollar of exports of processed meats creates over $1.9 in total sales in Canyon County.

A listing of unadjusted exports can be seen in Figure 48. The largest export sector is food processing (crops) at $554.5 million dollars, followed by food processing (animal) $365.6 million, industrial machinery $172.4 million, wood products $130.5 million, and construction $122.6 million. Exports do not tell the entire story however, as noted earlier. The size of the backward linkages (and magnitude of employee spending) must be factored in by the multiplier to calculate the total magnitude of each basic industry.

Basic Industries of Canyon County

Total agriculture and agricultural processing constitutes 32.4% of total sales in Canyon County, 22.7% of value added, 20.8% of wages, 26.1% of indirect business taxes, and 23.6% of employment. Most of the basic agriculture in the county is absorbed in forward linkages, and relatively little is sold outside the county. Specialty crops such as seed production are the exception. Most traditional crops go into food or meat processing or directly into the feedlots. Thus agriculture-related export sales outside the region come mostly from food or meat processing.

Manufacturing in Canyon County constituted 27.1% of sales, 24.6% of value added, 25.3% of wages, 19.8% of indirect business taxes, and 20.5% of employment. Roughly 39% of all jobs in the manufacturing sector come from high-technology related jobs.

Figure 49

Economic Profile of Canyon County -- 1998

Ranked by Sales

	Industry		Sales	%
1	Construction	$	564,562,000	10.9%
2	Food processing-Plant	$	557,194,000	10.8%
3	Industrial machinery	$	545,930,000	10.5%
4	Trade	$	518,367,000	10.0%
5	Food Processing Animal	$	483,345,000	9.3%
6	Health services	$	237,287,000	4.6%
7	Real estate	$	218,199,000	4.2%
8	State & local government	$	198,373,000	3.8%
9	Basic Transportation	$	196,904,000	3.8%
10	Electrical equipment	$	176,314,000	3.4%
11	Ag-livestock	$	166,856,000	3.2%
12	Wood products	$	143,186,000	2.8%
13	Ag-non livestock	$	128,401,000	2.5%
14	Transportation equipment	$	121,143,000	2.3%
15	Financial Services	$	105,193,000	2.0%
16	Fabricated metal	$	84,474,000	1.6%
17	Utilities	$	67,415,000	1.3%
18	Education services	$	65,041,000	1.3%
19	Business services	$	60,433,000	1.2%
20	Ag Services	$	53,661,000	1.0%
21	Printing and publishing	$	51,266,000	1.0%
22	Automotive services	$	49,876,000	1.0%
23	Social services	$	41,439,000	0.8%
24	Professional services	$	39,970,000	0.8%
25	Federal	$	38,139,000	0.7%
26	Communications	$	37,478,000	0.7%
27	Rubber products	$	31,090,000	0.6%
28	Pulp and paper	$	28,838,000	0.6%
29	Personal services	$	27,360,000	0.5%
30	Repair services	$	26,970,000	0.5%
31	Stone, glass and clay	$	22,221,000	0.4%
32	Recreation services	$	17,937,000	0.3%
33	Furniture	$	16,138,000	0.3%
34	Other	$	13,774,000	0.3%
35	Chemicals and allied	$	11,024,000	0.2%
36	Non-profit organizations	$	9,746,000	0.2%
37	Mining	$	9,303,000	0.2%
38	Scientific instruments	$	9,228,000	0.2%
39	Miscellaneous mfg	$	3,069,000	0.1%
40	Transportation Services	$	2,984,000	0.1%
41	Petroleum products	$	672,000	0.0%
42	Apparel	$	425,000	0.0%

Ranked by Employment

	Industry	Employment	%
1	Trade	11,395	19.2%
2	Construction	5,765	9.7%
3	State & local government	5,435	9.2%
4	Health services	3,865	6.5%
5	Education services	2,790	4.7%
6	Ag-non livestock	2,553	4.3%
7	Industrial machinery	2,214	3.7%
8	Basic Transportation	2,047	3.5%
9	Ag Services	2,042	3.4%
10	Business services	1,921	3.2%
11	Food processing-Plant	1,838	3.1%
12	Food Processing Animal	1,465	2.5%
13	Personal services	1,387	2.3%
14	Real estate	1,351	2.3%
15	Social services	1,256	2.1%
16	Financial Services	1,242	2.1%
17	Wood products	1,158	2.0%
18	Electrical equipment	1,040	1.8%
19	Ag-livestock	1,032	1.7%
20	Federal	966	1.6%
21	Automotive services	787	1.3%
22	Transportation equipment	775	1.3%
23	Professional services	772	1.3%
24	Fabricated metal	707	1.2%
25	Recreation services	570	1.0%
26	Printing and publishing	545	0.9%
27	Non-profit organizations	535	0.9%
28	Repair services	468	0.8%
29	Communications	267	0.5%
30	Rubber products	212	0.4%
31	Furniture	185	0.3%
32	Stone, glass and clay	178	0.3%
33	Pulp and paper	152	0.3%
34	Utilities	122	0.2%
35	Scientific instruments	63	0.1%
36	Transportation Services	61	0.1%
37	Mining	49	0.1%
38	Miscellaneous mfg	38	0.1%
39	Chemicals and allied	30	0.1%
40	Apparel	8	0.0%
41	Petroleum products	1	0.0%
42	Other	-	0.0%

Source: Implan and REIS

Figure 50

Earnings-Comparisons

Base		Profile	
Manufacturing	$ 328,243,025	Manufacturing	$ 256,769,000
Ag/ Ag Processsing	$ 269,933,121	Services	$ 241,394,000
State/local GOV	$ 177,072,423	Trade	$ 217,345,000
Construction	$ 163,977,000	State/local GOV	$ 162,624,000
Transfers	$ 149,219,880	Ag/ Ag Processsing	$ 160,803,000
DIR	$ 80,349,166	Construction	$ 121,291,000
Federal Gov	$ 50,348,730	Transp/C/U	$ 71,254,000
Services	$ 32,425,685	Fire	$ 37,962,000
Trade	$ 21,024,012	Federal Gov	$ 27,686,000
Transp/C/U	$ 20,857,966	Mining	$ 2,288,000
Mining	$ 3,190,333	DIR	
Fire	$ 2,774,659	Transfers	
	$ 1,299,416,000		$ 1,299,416,000

Employment Comparisons

Base		Profile	
Ag/ Ag Processsing	14,015	Services	14,351
Manufacturing	12,146	Trade	11,395
Construction	7,928	Ag/ Ag Processsing	8,930
Transfers	7,620	Manufacturing	7,306
State/local GOV	6,667	Construction	5,765
DIR	4,103	State/local GOV	5,435
Services	2,407	Fire	2,593
Federal Gov	2,166	Transp/C/U	2,497
Trade	1,107	Federal Gov	966
Transp/C/U	845	Mining	49
Fire	188	DIR	
Mining	95	Transfers	
	59,287		59,287

Other major export or basic industries include state and local government (11.2%) of employment; transfer payments 12.9%; and dividends, interest, and rents – DIR 6.9%.

Economic Growth of the Canyon County Economy

What does the future hold for Canyon County? Agriculture related industries constitute 32.4% of sales and 23.6% of employment. Historically, it has been the largest component of the economy. Agriculture is a mature industry, however, and not likely to have opportunities for major expansions. It will, however, have opportunities for expanding niche markets, both in specialty corps and agricultural related businesses. The bulk of the future expansion will likely occur from three sources: 1) expansion of existing businesses, 2) new businesses and industries moving into the region—many in the high technology and service sectors, and 3) residential growth from Boise. Growth creates both opportunities and challenges. Clearly economic growth (particularly enhanced average incomes) is needed given the economic and social demographics discussed earlier. Canyon County has a robust and prosperous economy but it also has a fairly high level of poverty—and the accompanying social problems associated with that poverty.

Several key issues emerge when considering the effects of economic growth: 1) Is the newly expanding high technology and service economy in conflict with the existing economic base of Canyon County (primarily agriculture)? 2) What is the economic cost of reducing or eliminating the older basic industries in Canyon County such as agriculture? 3) Can Canyon County have both new growth while maintaining its older economic base?

These issues are explored in the next section of this report. First, it is important to identify the economic costs of reducing or eliminating agriculture and agricultural related industries.

Value of Cultivated Cropland to Agriculture

Agriculture (non-livestock) generated $ 128,401,000 in sales receipts in 1998. If we divide this by the total number of harvested cropland acres (196,689 acres); we arrive at

Figure 51

The Economic Base of Canyon County

Industry	Sales	%	Total Value Added	%	Wages	%
Ag/ Ag Processsing	$1,678,502,979	32.4%	$ 513,649,363	22.7%	$ 269,933,121	20.8%
Ag/Plant and Processing	$ 882,590,032	17.0%	$ 270,086,984	11.9%	$ 141,936,168	10.9%
Ag/Meat and Meat Processing	$ 795,912,947	15.4%	$ 243,562,379	10.8%	$ 127,996,952	9.9%
Mining	$ 12,199,846	0.2%	$ 6,349,496	0.3%	$ 3,190,333	0.2%
Construction	$ 660,115,019	12.7%	$ 284,375,348	12.6%	$ 163,977,000	12.6%
Manufacturing	$1,404,104,794	27.1%	$ 557,589,380	24.6%	$ 328,243,025	25.3%
High Technology	$ 547,600,870	10.6%	$ 217,459,858	9.6%	$ 128,014,780	9.9%
All Other Manufacturing	$ 856,503,924	16.5%	$ 340,129,522	15.0%	$ 200,228,245	15.4%
Transp/C/U	$ 85,724,184	1.7%	$ 47,150,486	2.1%	$ 20,857,966	1.6%
Trade	$ 53,965,264	1.0%	$ 38,416,749	1.7%	$ 21,024,012	1.6%
Fire	$ 20,508,179	0.4%	$ 14,305,868	0.6%	$ 2,774,659	0.2%
Services	$ 88,497,463	1.7%	$ 46,898,193	2.1%	$ 32,425,685	2.5%
State/local GOV	$ 314,228,590	6.1%	$ 233,555,396	10.3%	$ 177,072,423	13.6%
Federal Gov	$ 119,329,373	2.3%	$ 78,888,749	3.5%	$ 50,348,730	3.9%
DIR	$ 260,417,258	5.0%	$ 154,359,440	6.8%	$ 80,349,166	6.2%
Transfers	$ 483,632,051	9.3%	$ 286,667,532	12.7%	$ 149,219,880	11.5%
Totals	$5,181,225,000	100.0%	$ 2,262,206,000	100.0%	$ 1,299,416,000	100.0%

Industry	Indirect Business Tax	%	Employment	%
Ag/ Ag Processsing				
Ag/Plant and Processing	$ 40,104,450	26.1%	14,015	23.6%
Ag/Meat and Meat Processing	$ 21,087,712	13.7%	7,369	12.4%
	$ 19,016,738	12.4%	6,646	11.2%
Mining				
Construction	$ 457,329	0.3%	95	0.2%
Manufacturing	$ 15,218,582	9.9%	7,928	13.4%
High Technology	$ 30,517,007	19.8%	12,146	20.5%
All Other Manufacturing	$ 11,901,633	7.7%	4,737	8.0%
	$ 18,615,374	12.1%	7,409	12.5%
Transp/C/U				
Trade	$ 4,215,983	2.7%	845	1.4%
Fire	$ 6,469,421	4.2%	1,107	1.9%
Services	$ 1,817,685	1.2%	188	0.3%
State/local GOV	$ 2,126,250	1.4%	2,407	4.1%
Federal Gov	$ 6,776,077	4.4%	6,667	11.2%
DIR	$ 3,964,938	2.6%	2,166	3.7%
Transfers	$ 14,794,947	9.6%	4,103	6.9%
	$ 27,476,331	17.8%	7,620	12.9%
Totals				
	$ 153,939,000	100.0%	59,287	100.0%

Figure 52

Value Per Acre of Harvest Cropland

	Harvested Cropland (farms)	Harvested cropland (acres)
Sales $	1,245,180	$ 8,534
Wages $	200,247	$ 1,372
Indirect Business Taxes $	29,751	$ 204
Employment	10.397	0.071

$652.81 sales/acre of value to agriculture. If we assume all agriculture including agriculture processing and meat processing is dependent on harvested cropland, then total agriculture related sales/acre is equal to $7,064 ($1,389,457,000 divided by 196,689). This analysis is based on reported sales by industry as part of the economic profile of the county. It does not address the source or causation of economic activity. Thus a better approach is to utilize an economic base analysis to estimate the value of harvested farm ground.

Using an economic base approach, the total economic value of cultivated farm ground can be estimated on a per farm or per acre measure, as seen in Figure 52 using an input/output model. Each acre of cultivated farm ground causes $8,534 of sales per year, $1,372 in wages, $204 in indirect business taxes, and 0.071 in jobs.
This is based on total agriculture related economic impacts of: sales $1,678,502,979, value-added of $513,649,363, earnings $269,933,121, indirect business taxes $ 40,104,450, and 14,015 jobs. Total harvested cropland consisted of 196,689 acres as discussed earlier.

Each average size farm causes total sales of $1,245,180; wages of $200,000; indirect business taxes of $29,751; and jobs of 10.4. Total number of farms as estimated by the United States Department of Agriculture (USDA) is 1,348. Since food and meat processing are directly tied economically to farm output, these impacts are included in this analysis. The average size farm in this analysis has 145.9 harvestable acres.

This analysis assumes a continuous and linear relationship between land taken out of agriculture and economic activity dependent on that land. Suppose that a nonlinear relationship exists, these numbers could rise sharply. The key question here is the degree of dependence of agricultural processing (crops), feed lots, and meat processing. Can these industries survive if 20% of land goes out of production? 30%? 50%. Is there a critical amount of land needed to keep processing in business?

Economic Trade-offs

Manufacturing is the second largest basic industry in Canyon County. Nearly 40% of the employment in manufacturing is in high technology companies. Expansion of these economic sectors will be an important growth engine in the future. The character of this growth is important, however. If the new manufacturing facilities and housing tracts of the employees locate on irrigated farmland, then this growth comes with an economic trade-off. Every acre taken out of production will reduce aggregate economic sales in the county by $8,535 per year. The benefits of new manufacturing jobs would have to be weighed against the cost of lost agriculture-related sales. On the other hand, if new manufacturing facilities and related employee housing tracts are located on somewhere other than on irrigated farmland, then we do have this trade-off. It is a "win-win" situation. The same is true with the expansion of any other industries, services, or retail trade.

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