Community Context for a Sector-Wide Conversation

- 2017 update The Value Chain of Colorado Agriculture
- 2017 Public Attitudes about Agriculture in Colorado
- 2017 Regional Community Food and Ag Town Halls

COLORADO BLUEPRINT – PROJECT TEAM

- Dawn Thilmany McFadden
  Professor – Outreach Coordinator
- Gregory Graff
  Associate Professor
- Becca Jablonski
  Assistant Professor and Food Systems Extension Economist
The Blueprint documents key assets, emerging issues, and shared priorities for future investments in food and agriculture around the state.
Sponsors and Partners
The CO Blueprint for Food and Agriculture: Why?

- Understand opportunities and challenges resulting from changing public attitudes
- Assess opportunities for CO food system policy to address challenges and needs
- Document, assess, and highlight key linkages in Colorado’s food supply chain and infrastructure
- Develop priorities for capacity building, investment, and innovation for stakeholders across CO agriculture and food
- Enhance CSU’s knowledge of Colorado-specific research and engagement needs, to support opportunities for all research and outreach units (both on and off campus).
The CO Blueprint for Food and Agriculture: How?

### Baseline Planning
- **September-October 2016**
  - Convene Advisory Board
  - Engage Key Project Partners
  - Convene Regional Advisory Teams

### Data for Analysis
- **October-November 2016**
  - Community Commons (Public Health)
  - Value Chain of Colorado Agriculture
  - Public Attitudes Survey

### Townhall Meetings
- **December 2016-March 2017**
  - Regional Townhall Meetings with 9 Regions in CO
  - Industry Focus Groups
  - Online and Public Comment

### Blueprint Rollout
- **September-December 2017**
  - Regional Opportunity Reports
  - Ag Innovation Summit
  - Blueprint Adoption and Next Steps
The CO Blueprint for Food and Agriculture: What?

Part 1. The Value Chain of Colorado Agriculture
• Assessing the size, linkages, and opportunities for the food and ag sector
• Main report forthcoming in Winter 2018

Part 2. Public Attitudes about Agriculture in Colorado
• Exploring Coloradans’ attitudes about food, ag, and natural resource issues
• Main report published by CDA in March 2017.
• Three “food systems” reports published online (so far) at foodsystems.colostate.edu

Part 3. Regional and industry town hall meetings
• Engaging communities to explore their issues and priorities
• Regional opportunity reports published online at foodsystems.colostate.edu

Synthesis of opportunities
• Eight major cross-cutting issues
Part 1.
The Value Chain of Colorado Agriculture
The Value Chain:

More than 225 distinct economic activities, subsectors, or specific industry classes (according to official NAICS codes)

With up to ten years of data: 2005-2015.

-and-

Analyses of a wide range of ag- and food-related activities.
Retail in 2015

Total Ag Product Retail Sales in Colorado = $34 billion

Food & Beverage Retail Sales = $31.5 billion

- Food at home = $13.1 billion
- Food away from home = $12.6 billion
- The big five = $5.4 billion
  - Full service restaurants = $6.7 billion
  - Alcoholic bevs. = $5.8 billion
  - Garden, nursery, landscaping = $1.9 billion
  - Pet food = $190 million
  - Fuel ethanol = $391 million

Other Retail Sales = $2.5 billion

- Walmart = $3.2 billion
- Other Retail Sales = $2.5 billion

The big five = $5.4 billion (Walmart = $3.2 billion)
Food & beverage wholesale in 2015

Over 2,000 companies and almost 35,000 jobs in Colorado.

Annual average job growth: 4.6%

Highest average earning among major segments of the ag value chain: $57,000
A State of Beef & Beer

Value of slaughtered animals & packaged meat = $3.2 billion

Value of beer brewing = $3.5 billion
Revenues from Crop Production

On farm production = $2.2 billion

Grains and fodder

Sugar crops

Oilseeds

Fruits and vegetables
Distribution of sales by Colorado’s 37,054 farms and ranches

2.5% of operations account for 75% of total value of ag sales

- Sales by the 7,996 that sell $10,000 to $99,999
- Sales by the 2,329 that sell $100,000 to $249,999
- Sales by the 1,479 that sell $250,000 to $499,999
- Sales by the 894 that sell $500,000 to $999,999
- Sales by the 931 that sell $1,000,000 or more
- Sales by the 22,551 that sell less than $10,000
Natural Resources

Of the **31 million acres of land** in ag production each year:

22 million acres (69%) are owned by ag operators

= $35 billion

10 million acres, or 31%, are rented

= $93 million/year

Of the **13.8 million acre feet of water** ag uses each year:

12.2 million AF per year (88%) are owned by ag operators

= $11.2 billion

1.6 million AF per year (12%) are rented

= $53 million/year
Part 2. Public Attitudes about Agriculture in Colorado
Public Attitudes about Agriculture in Colorado

Survey and Analysis team: CSU Dept of Ag and Resource Economics

- Michael Martin — Assistant Professor, Ag Literacy
- Dawn Thilmany McFadden — Professor, Agribusiness Extension Economist
- Becca B.R. Jablonski — Assistant Professor, Food Systems Ext. Economist
- Martha Sullins — Ag Business Management Extension Specialist
- Chad Chriestenson — Graduate Student
About the Survey

✓ The Public Attitudes survey has been conducted by the CDA with support from Colorado State University every five years since 1996.
✓ The 2016 survey represents the perceptions of 1,000 CO residents.
✓ Questions related to ...
  • Affiliation with agriculture, knowledge of Colorado agriculture, and economic importance.
  • Agriculture and quality of life
  • Maintaining and protecting agricultural land and water.
  • Agricultural practices.
  • Factors influencing purchase behavior.
  • Sources of information.
✓ Respondents ...
  • On average have lived in CO just under 16 years (down from over 20 years in 2011 survey).
  • Average age ~50 years old.
  • 42% male and 58% female.
  • Median income between $50k and $75K (state median income = $55k in 2015).
Respondent’s Experience with Agriculture Continues to Decline

Currently Live or Work on Farm or Ranch

Have at Some Time Lived or Worked on Farm or Ranch

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado. Q1a) Do you currently live or work on a farm or ranch and Q1b) Have you ever lived or worked on a farm or ranch?
# Food/Agricultural Product of Most Economic Importance

## Public Perception

<table>
<thead>
<tr>
<th>Rank</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Corn</td>
</tr>
<tr>
<td>#2</td>
<td>Cattle/Beef</td>
</tr>
<tr>
<td>#3</td>
<td>Wheat</td>
</tr>
<tr>
<td>#4</td>
<td>Marijuana</td>
</tr>
<tr>
<td>#5</td>
<td>Peaches</td>
</tr>
<tr>
<td>#6</td>
<td>Vegetables/Potatoes</td>
</tr>
</tbody>
</table>

## Reality

<table>
<thead>
<tr>
<th>Product</th>
<th>2015 Cash Receipts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cattle/Beef</td>
<td>$4 Billion</td>
</tr>
<tr>
<td>Dairy/Milk</td>
<td>$664 Million</td>
</tr>
<tr>
<td>Corn</td>
<td>$498 Million</td>
</tr>
<tr>
<td>Hay</td>
<td>$398 Million</td>
</tr>
<tr>
<td>Wheat</td>
<td>$359 Million</td>
</tr>
<tr>
<td>Vegetables/Potatoes</td>
<td>$258 Million</td>
</tr>
</tbody>
</table>

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado.  Q2c) What agricultural product would you say has the most economic importance for Colorado?
Importance of Agriculture to the Quality of Life in Colorado

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado. Q31) How important is the presence of ranches, farms and agriculture to the quality of life in Colorado?
Maintaining Land & Water in Agricultural Use in Colorado

In Colorado, considerable agricultural land and water is being converted to non-agricultural uses such as houses, roads, and other uses. How important do you think it is to maintain land and water in agricultural production?

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado. Q6)
Most Important Reason for Maintaining Agricultural Land and Water Use in CO

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado.
Q7) Here are four reasons people give for protecting Colorado’s agricultural land and water. Please tell us how important each one is to you.
Best Approach to Protecting Agricultural Land and Water

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado. Q9) What basic approach should be used to protect agricultural land and water in Colorado?

- Financial Incentives: 46%
- Zoning Regulations: 31%
- Let the Market Place Decide: 13%
- Other: 10%
Local Foods

Developing Local Food Systems is Important?

<table>
<thead>
<tr>
<th>Year</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
</tr>
</tbody>
</table>

What Does Local Mean to You?

- Within Colorado: 74.80%
- <100 Miles: 7.50%
- <250 Miles: 3.70%
- <400 Miles: 2.60%
- Within Your County: 7.80%
- Don't Know: 3.20%

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado. Q17) Thinking about current practices in agriculture, please tell us how you feel about “developing and supporting local and regional food systems” and Q24a) When you shop for fruits, vegetables, meat, dairy and other food products, what does local mean to you?
How Responsible is Colorado Agriculture in Protecting the Environment

Source: CDA 2016 Survey of Public Attitudes about Agriculture in Colorado. Q11) How responsible do you believe agriculture in Colorado has been in protecting the environment?
Key Takeaways

✓ The percentage of the public having any direct linkage to agriculture is continuing to decline, and their perceptions often differ from the reality.

✓ The public strongly believes agriculture contributes to the quality of life in Colorado and that it’s important to maintain land and water in agricultural production. They are also highly supportive of local foods.

✓ A majority of the public believes Colorado’s agriculture industry is environmentally responsible, and is effective in using agricultural practices that conserve water and soil.
Part 3.
Regional and industry town hall meetings
Regional and industry town hall meetings

- Regional townhalls: 13, 249 attendees, 343 registered, Made possible by 158 community organizations.
- Industry townhalls: 4, 110 attendees, Made possible by 47 organizations.
- Public presentations to CO groups ranging from 25-250 participants: 10, 2,107 pageviews.
- 395 people want to stay connected, 1,497 unique pageviews.
Synthesis: eight major cross-cutting opportunities
The Value Chain of Colorado Agriculture

Public Attitudes about Agriculture in Colorado

Regional and Industry Townhalls

Identify and inform 8 cross-cutting opportunities

1. Create, retain and recruit agricultural and food firms;
2. Develop workforce and youth to support ag and food sectors;
3. Promote the Colorado brand, ensuring it reflects the unique qualities of the agriculture and food sectors;
4. Support a business- and consumer-friendly regulatory environment;
5. Address how scale impacts market performance, access, and opportunities;
6. Innovate and support new technology for ag and food businesses;
7. Improve access to resources and capital for ag and food firms;
8. Integrate ag and food with healthy, vibrant communities.
Opportunities for
Southern Rocky Mountain Ag
1. Create and Retain Ag & Food Firms

Cooperative efforts and fuller utilization of infrastructure and assets.

Map of food manufacturing firms that purchase product and/or manufacture items from Colorado farmers and ranchers.