



COLORADO

KEY INDUSTRY

FOOD & AGRICULTURE



INDUSTRY FACTS

2013 TOTAL EXPORTS

\$1.6
BILLION

TOP 3 EXPORT MARKETS

- 1. Canada
- 2. Mexico
- 3. China

NUMBER OF COMPANIES

4.4K

AVERAGE ANNUAL EMPLOYMENT

115.6K

Colorado has a strong heritage in farming and ranching, as well as great depth in natural and organic foods, craft beverages and global restaurant franchises.

Innovation and the determination to succeed continue to define Colorado's food and agriculture industry, which has persevered since the first pioneers settled the state. Companies in the food and agriculture industry include crop production and services, livestock, food processing, agricultural machinery and equipment, agricultural chemical manufacturing, and food and beverage wholesalers, as well as food and agricultural-related transportation, warehousing and storage. The food and agriculture industry includes all types of food processing businesses encompassing everything from meat packing plants, and tortilla manufacturing to companies that produce cheese, pet food, and baked goods. The industry also includes manufacturers of malt beverages, wines, distilled liquors, bottled drinks, ice and tobacco products. The food and agriculture industry is linked with several other key industries including energy and natural resources and bioscience because of the similarity in some production processes and raw materials used.

Food & Agriculture Assets

Colorado's diverse agriculture and food industry plays an important role in the state's vitality. The state's agriculture industry is a critical driver of Colorado's overall economy, contributing \$41 billion. Exports are also a major driver of the industry, with food and agriculture products being imported by more than 130 countries worldwide. Colorado maintains a strong reputation for large production agriculture, as well as organic and natural foods, and is a leading producer of specialty products including fresh market potatoes, barley, cantaloupe, lettuce, potatoes, sweet corn and winter wheat. Additionally, Colorado is a leader in dairy production and the number of cattle and lambs fed. The state is also recognized for its meat processing technology and leadership in animal welfare. With more than 200 breweries statewide, Colorado is among the top states for number of breweries, per capita production, and economic impact. The state also hosts some of the top brewing companies in the nation including New Belgium Brewing, Oskar Blues and Odell Brewing Company. The state is also expanding its international craft beer presence, exporting more than 9,360 barrels of beer to international destinations. Similarly, distilleries and wineries have significant growth potential, with Colorado's two wine regions already generating significant economic activity annually for wine-based tourism.

Major Employers

- Anheuser-Busch
- Beverage Distributors Co.
- Cargill
- JBS USA
- Leprino Foods Company
- MillerCoors Brewing
- Navajo Express
- PepsiCo Bottling Company
- Shamrock Foods
- Steven Roberts Original Desserts

TOP OCCUPATIONS BY EMPLOYMENT

1. Farmers, Ranchers, & Other Agricultural Managers
2. Farmworkers & Laborers, Crop, Nursery, & Greenhouse
3. Heavy & Tractor-Trailer Truck Drivers
4. Sales Reps., Wholesale & Mfg., Except Technical & Scientific Products
5. Laborers & Freight, Stock, & Material Movers, Hand

ANNUAL
PAYROLL
\$5
BILLION

DID YOU
KNOW?

CO's craft breweries contributed \$826 million to the state's economy in 2013, an increase of 17% from 2012.
(University of Colorado, 2014)

CO is at the forefront of the organic industry, which includes nearly 270 certified farms and ranches with more organic certified acres than any other state.
(Colorado Department of Agriculture, 2013)

Colorado has the 2nd-highest milk production per dairy cow in the U.S.
(United States Department of Agriculture, 2014)

Colorado ranked 4th out of the 50 states in breweries per capita in 2013.
(Brewer's Association, 2014)

Colorado ranked 4th in the nation for agritourism offerings.
(US Census Bureau, 2012)

Note: An establishment is defined as a single physical location that produces some form of economic activity. One company can have multiple establishments.

Sources: QCEW Employees, Non-QCEW Employees, Self-Employed, & Extended Proprietors – EMSI 2014.2 Class of Worker; WISERTrade.

Workforce

Colorado's food and agriculture industry includes a large pool of talented, skilled workers. Compared with the age distribution across all industries, the food and agriculture industry has a larger share of employees between the ages of 55 and 64 years old.

About 59 percent of food and agriculture-related occupations in Colorado require a high school diploma or equivalent, while 4 percent require a bachelor's degree or higher. Nearly 61 percent of the food and agriculture-related occupations require some sort of on-the-job training.

Education and Training

The higher education system in Colorado provides an excellent support system for the food and agriculture industry in the state and offers a broad range of technical, scientific, and specialized degrees. There are 28 public institutions of higher education in Colorado, consisting of 13 four-year and 15 two-year public institutions offering food and agriculture-related programs. In addition, there are more than 30 private and religious accredited institutions and about 15 private occupational and technical schools offering more than 130 food and agriculture-related programs throughout the state.

Key Locational Factors

1. Access to a large, highly qualified workforce

- Of Colorado's adult population, more than 37 percent have completed a bachelor's or higher-level degree, making Colorado the second-most highly educated state in the nation behind Massachusetts. (U.S. Census Bureau, 2012 American Community Survey)
- Colorado's farmers, ranchers, and other agricultural managers account for 28 percent of the total jobs in the food and agriculture industry and grew more than 10 percent over the last decade. (EMSI, 2014)

2. Direct access to a large and growing customer base

- Colorado is the most populous state in the Rocky Mountain region and ranked as the third-fastest growing state between July 2012 and July 2013. Colorado's population increased 1.6 percent to 5.3 million, a rate over two times faster than the rate of the nation. (Colorado Demography Office, 2014)
- Colorado ranked among the top 10 in the nation for the highest median fruit and vegetable consumption. (Centers for Disease Control and Prevention, 2013)

3. Available capacity of community utilities (water, waste-water, electricity and natural gas)

- More than 60 percent of Colorado's electricity is generated by coal, the most inexpensive source of electricity. About 20 percent of Colorado's electricity is generated by natural gas and 17 percent from renewable energy resources. (U.S. Department of Energy, 2014)
- The Colorado River supplies water to more than 25 million people and helps to irrigate 3.5 million acres of farmland, producing a vast food supply. More water is exported from the Colorado River's basin than from any other river basin in the world. (Water Education Foundation, 2014)

4. Presence of co-packers and contract food manufacturers

- Nearly 15 contract-packaging, or co-pack companies operate in Colorado and handle all aspects of food production for food companies. (Colorado Department of Agriculture, 2014)
- Colorado is home to major co-pack companies that are helping the food manufacturing grow in the state. The Colorado Department of Agriculture's prepared the Colorado Co-Pack Directory to encourage the growth of existing businesses and the establishment of start-up businesses. Visit www.colorado.gov/ag for more information. (Colorado Department of Agriculture, 2014)

Learn more about Colorado's food & agriculture industry at
www.advancecolorado.com/food.



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