Colorado Blueprint of Food and Agriculture
The Colorado Ag Experiment Station’s Role in the Colorado Blueprint

- Exploring the strategic planning and community engagement opportunities
- Documenting stakeholder priorities and potential levers to strengthen the food system
- Strengthening linkages with other Colorado partners and programming efforts
The Opportunity

• COFSAC:
  • Weaving together food system policy issues

• CDA:
  • Public attitudes survey for past 25 years
  • Collaboration with LiveWell and others state agencies for State-level staffing

• CSU:
  • Research Centers/Ag Experiment Station re-envisioning its role in agriculture including relationship with Extension
  • Office of Engagement: Opportunity to expand value chain of agriculture study
  • New Regional Economic Development Institute with Food and Ag arm
Our Vision
The Colorado agricultural and food system has a variety of stakeholders and identifying common ground is key to their ability to become stronger.

- We will formulate a blueprint of key assets, food system linkages, noting how they are influenced by emerging issues
- To guide priorities and levers we hope partner organizations will use as a guide for future investments, programming and policies
- To sustain the state’s standing as a global leader in production and processing while maintaining the culture of quality of life, health and livable communities that makes Colorado unique
Key Project Partners

- CSU Agricultural Experiment Station and Research Centers
- CO Food Systems Advisory Council
- CO Department of Agriculture
- CSU College of Agriculture
- CSU Extension
- LiveWell CO and the CO Food Policy Network
Advisory Board

**Colorado State University Team Members**
Dawn Thilmany, Greg Graff & Becca Jablonski, Dept. of Ag & Resource Economics
Kathay Rennels, Assoc. VP for Engagement, Bruno Sobral, Director, One Health Institute
Ashley Stokes, CSU Extension Dep. Director

**Colorado Ag, Food & Health Stakeholder Reps**
Blake Angelo, Manager of Food Systems, Denver Office of Economic Development
Wendy Peters Moschetti, Director of Food Systems, LiveWell Colorado
Gene Kelly, Deputy Director, Ag Experiment Station
Lisa Nichols, Loveland Products
Objectives

For the natural resource, agriculture, food industry and food access and security stakeholders, this blueprint’s mission and objectives are to:

• 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 & innovation across CO agriculture and food stakeholders;
• Enhance CSU’s knowledge of Colorado-specific research and engagement needs to support opportunities for all research and outreach units (on and off campus).
Strategic Use of Content

Value Chain Update
- Emphasis on new dynamics and linkages
- Increased attention to emerging or loosely defined sectors
  - Agritourism, green industry, beverages
- Visualizing data where possible

Public Attitude Survey
- Identify statewide behavior, perceptions and trust dimensions that may influence sectors
- Leverage in exploring cross cutting issues
- Common ground is the take home....
  - ....but what can we learn from where attitudes diverge?
Exploring Coloradans’ Attitudes about Food, Ag and Natural Resource Issues

- 2016 Update of a 20+year study commissioned by the Colorado Department of Agriculture;
- Replicates studies conducted in 1996, 2001 and 2006 – allowing for cross year comparisons;
- Survey of Colorado residents to determine the public’s attitudes towards such issues as:
  - food prices, food safety, pesticide use, environmental practices, wildlife and agriculture, animal welfare, land use, population growth and agricultural land preservation, among others.
- August 2016 survey of ~1000 Coloradans; results will be available by end of the year.
  - New partnership with Colorado Fruit and Vegetable Growers Association.
Survey’s General Themes

- The survey explores Coloradoans views on:
  - Affiliation with Agriculture
  - Impression and Knowledge about Agriculture
  - Perceived value of Agricultural Products
  - The Relative Economic Important of Agriculture
  - Maintaining and Protecting Agricultural Land and Water
  - Evaluating Agricultural Practices
  - Allocation of Water
  - Sources of Information about Agriculture
  - Familiarity with Colorado Department of Agriculture
  - Direct Markets in Agriculture
  - Factors influencing Purchasing Behavior
  - Agriculture and Quality of Life
What agricultural product would you say has the most economic importance for Colorado?

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Corn</td>
<td>10%</td>
<td>9%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Wheat</td>
<td>29%</td>
<td>18%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Beets</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Cattle or Beef</td>
<td>22%</td>
<td>22%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Vegetables</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Peaches</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Melons &amp; Fruit</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>5%</td>
</tr>
<tr>
<td>Alfalfa Hay</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Potatoes</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>
What basic approach should be used to protect agricultural land and water in Colorado?
We can also explore relationships between different issues on the surveys as part of our Blueprint.
The Need for a Value Chain Analysis

To provide a comprehensive foundation of data on the Ag and Food industries, in order to...

• *Identify areas where businesses share a common fate*
• *Bring Colorado’s regions together around shared economic strengths*
• *Provide an integrated perspective to inform policy and regulatory decision making across all sectors of the Value Chain*
• *Highlight connections, allow for a deeper understanding of agriculture and its impact*
• *Create a new conversation about Colorado agriculture*
Mapping Colorado’s Agricultural and Food Industries

We identify and map the structure of economic value flows throughout Colorado’s agriculture and food industries, including:

1) agricultural inputs
2) primary agricultural production
3) agricultural output marketing, processing, and manufacturing
4) wholesale
5) retail
6) services and amenities not captured in markets.

Within these broad segments of the value chain, more than 125 distinct economic activities, sub-sectors, or specific industry classifications (NAICS codes) are considered.
• Creating a business- & consumer-friendly regulatory environment
• Addressing how scale impacts market performance, access & opportunities
  • Workforce & youth development for agricultural sector
  • Innovation & new technology for food and agriculture
  • Creation & retention of agriculture and food firms
  • Access to capital for agriculture & food firms
• Colorado brand that reflects unique qualities of agriculture, food, & beverages
• Interface of food and agriculture, and key and support resources to contribute to vibrant communities
Leveraging the Investments of Other Key Partners

The Colorado Food Systems Hub offers access to a custom report, populated with a combination of secondary data from national sources and local data collected by LiveWell Colorado and its partners. Select your county below to get started!

- Food Systems Report
- Data Library
- Template Reports
- Tutorials & FAQ's

CREATE A NEW FOOD SYSTEMS REPORT

Select your county to create your report:

http://www.communitycommons.org/groups/colorado-food-system/
http://www.communitycommons.org/groups/colorado-food-system/
### Farms with Direct Sales

This table shows the number of farms producing agricultural products sold directly to individuals for human consumption from roadside stands, farmers' markets, pick-your-own sites, etc. It excludes non-edible products such as nursery crops, cut flowers, and wool but includes livestock sales. Sales of agricultural products by vertically integrated operations through their own processing and marketing operations were excluded.

<table>
<thead>
<tr>
<th>Report Area</th>
<th>Farms</th>
<th>Value of Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso County, CO</td>
<td>99</td>
<td>$366,000</td>
</tr>
<tr>
<td>Colorado</td>
<td>2,896</td>
<td>$19,104,000</td>
</tr>
</tbody>
</table>

*Data Source: US Department of Agriculture, Census of Agriculture.*
Fruit and Vegetable Expenditures

This indicator reports estimated expenditures for fruits and vegetables purchased for in-home consumption, as a percentage of total food-at-home expenditures. This indicator is relevant because current behaviors are determinants of future health, and because unhealthy eating habits may illustrate a cause of significant health issues, such as obesity and diabetes. Expenditures data are suppressed for single counties and single-geography custom areas. Rank data are not available custom report areas or multi-county areas.

<table>
<thead>
<tr>
<th>Report Area</th>
<th>State Rank</th>
<th>Z-Score (US)</th>
<th>Z-Score (State)</th>
<th>Average Expenditures (USD)</th>
<th>Percentage of Food-At-Home Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso County, CO</td>
<td>52</td>
<td>0.44</td>
<td>-0.37</td>
<td>suppressed</td>
<td>suppressed</td>
</tr>
<tr>
<td>Colorado</td>
<td>no data</td>
<td>0.42</td>
<td>0</td>
<td>$805.14</td>
<td>13.07%</td>
</tr>
<tr>
<td>United States</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>$744.71</td>
<td>12.68%</td>
</tr>
</tbody>
</table>

Note: This indicator is compared with the state average.
Data Source: Nielsen, Nielsen SiteReports, 2014. Source geography: Tract

Fruit and Vegetable Expenditures, Percent of Food-At-Home Expenditures, National Rank by Tract, Nielsen 2014

- 1st Quintile (Highest Expenditures)
- 2nd Quintile
- 3rd Quintile
- 4th Quintile
- 5th Quintile (Lowest Expenditures)
- No Data or Data Suppressed
- Report Area

View larger map
Process and Timeline

- Regional Teams organized and given charge by 12/15/2016
  - Initial Blueprint website including regional pages by 12/20/2016
- Regional Teams set townhall location, date and times by 1/15/2017 (including resource requests)
- Regional townhalls completed and feedback compiled by 3/31/2017
- Industry, Organization and Stakeholder presentations and discussions complete by 6/30/2017
- Draft report and presentation @ CSU Innovation Summit 9/2017
- Final report by 12/31/2017
Regional Advisory Teams

- 9 regions (7 research centers + Denver metro and NW)
Regional Advisory Teams

• Each team includes ‘core’ members from:
  • CO Food Systems Advisory Council
  • CSU Ag Experiment Station
  • CO Food Policy Network
  • CSU Extension (food systems PRU)
Regional Teams

• Provide guidance on regional event/townhall (by 1/15/17)
  • Where? When? Who?
  • Content focus area?
• Work with Libby Christensen to customize webpage and regional materials (by 2 weeks before program)
• Review, as appropriate, regionally-specific recommendations to be included in the blueprint report (Summer 2017)
• Assist in disseminating briefs, drafts and the final report through existing regional network (Fall 2017-Winter 2018).
Food Systems

BLUEPRINT

The task is set for a variety of Colorado agricultural and food system stakeholders to focus, guide, and innovate a blueprint of the sector's key issues, emerging issues and priorities for future investments and policies to maintain the state's established and growing as a global leader in production and processing, while maintaining the culture of quality of life, health and viable communities that have made it a valued by both its long-time residents and those who choose to move to Colorado as their new home.

The Blueprint is a unique opportunity to frame and strengthen key food and agriculture issues through stakeholder-driven conversations around industry and issue clusters that will be developed in 2016, initially released in early 2017 and integrated with community feedback for a final report in 2017. We will be traveling across the state holding regional listening sessions and would love to hear from you.

Click on a region to find out more.

Learn more

Connect info.dawn.thilmany@colostate.edu

Foodsystems.colostate.edu
Sw CO (Southwestern) (Archuleta, Dolores, Hinsdale, La Plata, Mineral, Montezuma, Ouray, San Juan, and San Miguel)

Regional Advisory team:

- Abdel Berrada – Research Center
- Kris Holstrom, SW Food Coalition
- Jim Dyer, Healthy Community Food Systems and Southwest Marketing Network – COFPN
- Darrin Parmenter – CSU Food Systems Extension Team
- Wendy Peters Moschetti – COFSAC

Resources:

Meeting Details:

- More details coming soon
For regional event/townhall

• Regionally-defined agenda!

• Short presentation by CSU-led team
  • Opportunity for your team to select ~4 of ~20 different multi-faceted topics or issues that are:
    • Likely to generate areas where there is more common ground than perceived
    • Dynamic or involve innovative linkages
    • Interesting intersection between policy and economic or community development
Want more information? Want to get involved?

- Attend a town hall
- Look for updates: FoodSystems.colostate.edu
- Share on Twitter #COFoodBlueprint
- Email thoughts or comments to: Dawn.Thilmany@colostate.edu
Appendices
New Questions in 2016

- **Affiliation with Agriculture**
  - Do you raise any of your own food?

- **Evaluating Agricultural Practices**
  - Necessity of GMO’s, antibiotics & hormones for production
  - Safety of food produced with pesticides, fertilizers, antibiotics, hormones
  - Safety of organic vs. conventional practices
  - Safety of fruit, veggies, dairy, eggs, meat & grain
  - Safety of farmers’ markets, produce stands, CSA’s, grocery store & restaurants

- **Familiarity with the Colorado Department of Agriculture**
  - Program value/ knowledge

- **Direct Markets in Agriculture**
  - Sources visited for food purchases & share of income spent
  - Local food labelling confidence

- **Factors Influencing Purchase Behavior**
  - Awareness levels of CO products & seasonality
  - Motivations for purchasing CO produce and food products
  - Methods of obtaining information about food and agriculture

- **Agriculture and Quality of Life**
  - Participation in agritourism