Agriculture and a Changing Global Climate

Wednesday, February 21, 2007

Colorado AGRICULTURAL Outlook Forum

Inside:
Agricultural Outlook Articles
2007 Agricultural Industry Directory

Renaissance Denver Hotel
3801 Quebec Street, Denver, CO

From Colorado to the Clouds: Agriculture and a Changing Global Climate

"Welcome to the 2007 Colorado Agricultural Outlook Forum. This is a great opportunity to bring state and national leaders together to discuss timely issues and how they affect Colorado's agriculture industries. This year promises to be another informative session as experts focus on the global climate and Colorado's role in a changing world."

– Governor Bill Ritter

"In its 16th year, the Colorado Agricultural Outlook Forum continues to be on the forefront of agriculture issues. Within the past year, Colorado farmers and ranchers were faced with a spectrum of weather conditions. We started the year trying to recover from a round of blizzards that will have lasting effects on our livestock industry; meanwhile, an ongoing drought continues to impact the ag industry statewide. I urge everyone to share the Forum's valuable information to help shape a positive future for this state's agriculture industries."

– Colorado Agriculture Commissioner John R. Stulp

"As the theme of today's forum suggests, the climate for Colorado agriculture is changing in a variety of ways, influenced by global competition, innovation, shifting energy markets, consolidation and cost-cutting. This theme encapsulates a number of issues that are of tremendous importance to Colorado State University today-from the economic competitiveness of our rural communities to the impacts of global climate change and the technologies that can be developed to address those impacts on an international scale. The Colorado Agricultural Outlook Forum provides an opportunity each year to reinforce our commitment to Colorado agriculture, strengthen collaboration among industry segments and generate new ideas and opportunities for ensuring the viability of our statewide industry and the long-term health of our rural economies. Colorado State is, once again, proud to be a part of this important discussion."

– Larry Edward Penley, President, Colorado State University, Chancellor, Colorado State University System

Mission of the Colorado Agricultural Outlook Forum

To contribute to a healthy and viable agricultural industry in Colorado, this annual event shall seek to:

- Facilitate a spirit of community to enhance Colorado agriculture's competitiveness.
- Encourage positive awareness of Colorado agriculture.
- Encourage interaction among commodity and other industry segments.
- Present future-oriented, cutting edge topics that promote communication and understanding across the entire industry while considering the uniqueness among industry segments.
- Relate and connect a global outlook to state and local agricultural production, business, and policy issues.

Colorado State University Cooperative Extension

Funding for this publication was provided by Colorado State University Cooperative Extension.

2007 Colorado Agricultural Outlook Forum

Table of Contents

Page

Colorado Agricultural Outlook Summaries

Economic Outlook for Colorado Agriculture

By Tom Lipetzky, director, markets division, Colorado Department of Agriculture

This report was prepared by a committee of agricultural specialists for the 2007 Colorado Business Economic Outlook report by University of Colorado at Boulder's Business Research Division.

Drought was a dominant feature of Colorado agriculture in 2006. Beyond very poor dryland crop yields, irrigation water restrictions were a serious problem in some areas of the eastern Plains and mountain valleys. Drought and abnormally high temperatures also caused pasture and range conditions in Colorado to deteriorate quickly during the summer. Still, rather strong livestock prices continued to underpin the agricultural economy in Colorado during 2006.

The agriculture industry also established its role as a fuel producer during 2006, expanding beyond the traditional role of providing food and fiber. Buoyed by high energy prices, ethanol production has surged, even in Colorado which is traditionally a feed grain deficit state. Ethanol will impact Colorado agriculture directly and indirectly. For the next few years total receipts from the sale of Colorado's crops will increase significantly, but government program payments to crop producers will decline. Livestock producer net income will be pressured as producers face higher feedstuff costs.

Livestock prices in 2006 were generally below 2005 prices. Crop prices were up compared to levels of recent years, but drought reduced total production, especially for wheat. Still, in Colorado the agriculture industry will record an estimated net farm income of just under $1 billion for 2006. Cattle prices will decline some during 2007, with most of the decline occurring in calf and yearling prices. A return to normal weather, coupled with higher grain prices, should increase receipts from crop sales by about two percent in 2007 to $1.54 billion, its highest level since 1998.

Total livestock sales will be down in 2007 from levels recorded during the past three years, coming in just under $4 billion. This is due primarily to lower cattle prices. Most of the livestock industry, however, should experience another profitable year in 2007.

Colorado net farm income is expected to dip to about $700 million in 2007 – the state's lowest level since 2002. High fuel and fertilizer costs remain a concern and are having a strong negative impact on many grain farmers in Colorado. Livestock producers will face much higher feedstuff costs due to increased utilization of corn for ethanol production.

Livestock remains Colorado's largest agricultural sector representing over 70 percent of all farm gate sales. Cash receipts from cattle are the largest sector and receipts for 2006 will exceed three billion dollars for the third consecutive year. Although Colorado fed cattle marketings may decline some in 2007, the average steer and heifer price is projected as one of the highest recorded. Drought in 2006 dramatically slowed cyclical cattle herd rebuilding in Colorado and across the U.S. With normal weather in 2007, many producers will again attempt to rebuild breeding herd numbers. The biggest risk to lightweight cattle prices in 2007 will be high feedstuff prices, which will negatively impact the economics of feeding out lightweight cattle.

Dairy is becoming an increasingly important part of Colorado's agricultural economy. Dairy cattle numbers in Colorado have grown by about three percent annually over the past five years and now are approaching 115,000 head. Colorado ranks 15th in milk production in the U.S. and is consistently ranked in the top three for milk production per cow. In particular, Colorado is experiencing a significant increase in organic dairy production which is helping to drive organic hay and grain production. Dairy prices in 2007 will remain fairly flat, averaging about $12.50/cwt. and putting the value of statewide production at some $360 million.

Lamb prices in 2006 were below expectations, especially for the first half of the year. For the year, lamb prices were about 15 percent below 2005 prices and the lowest since 2002. Prices will likely hold steady for feeder lambs in 2007, while slaughter lamb prices post increases, especially in the first half of the year. Total sales of wool and lamb will be around $125 million. In 2007, hog prices will average about three percent below 2006 while U.S. production will increase two to three percent. In recent years, the U.S. pork industry has benefited from robust exports. Strong export markets have compensated for declining domestic consumer demand for pork. Total Colorado hog sales for 2007 will be off about two percent at $210 million. Egg production and prices will remain fairly steady with poultry and egg receipts for 2007 projected at about $120 million.

Total livestock sales will be down in 2007 from levels recorded during the past three years, coming in just under $4 billion. This is due primarily to lower cattle prices. Most of the livestock industry, however, should experience another profitable year in 2007.

The U.S. corn crop is forecast at 10.9 billion bushels. Although two percent below 2005 levels, production in 2006 is on track to be the third largest crop on record. Colorado's crop is expected to be down about ten percent in 2006. It is anticipated that continued pressure on fuel and fertilizer costs combined with water supply issues will be mitigated somewhat by increased demand to support fuel production,

resulting in higher crop prices. The crop is expected to remain constant in 2007 and with prices anticipated to be above current levels, expect cash receipts from the state's corn crop to total $270 million in 2007 – a level consistent with 2006.

Colorado net farm income is expected to dip to about $700 million in 2007 – the state's lowest level since 2002.

Colorado currently has three ethanol plants in operation with a capacity of 110 million gallons per year. This growth in ethanol production in Colorado and across the nation is responsible for the increased demand and price of corn. While this trend is positive for corn producers, it does have economic impacts on the livestock feeding sector in the form of higher feed prices. The full impact of these new ethanol facilities on Colorado's corn industry is still unknown.

Wheat harvests in Colorado have been disappointing in five of the last six years. Drought or abnormally hot weather has driven yields far below expected norms. U.S. wheat production of 1.8 billion bushels for 2006 was roughly 14 percent below the 2005 level. Colorado wheat production declined 23 percent from 54 to 42 million bushels. This was driven by a combination of acreage decline and disappointing yields per harvested acreage that decreased to 21.6 bushels per acre from 24.4 bushels in 2005 and 27.4 bushels in 2004. Tighter supplies have added value to the wheat crop with spot prices during the fall of 2006 approaching $5.00 per bushel. Good fall precipitation means that Colorado's 2007 crop appears to have excellent potential. Assuming the average of recent years' yields and continued strong prices of $4.10 to $4.60/bushel, expect a crop of about 50 million bushels and sales of $215 million.

Most Colorado agriculture program payments have historically been received by crop producers, especially corn and wheat farmers. Due to higher crop prices, those payments will decline compared to 2006 and crop specific price support payments will likely not be required. Overall, government payments to Colorado producers in 2007 will

Value Added by Agricultural Sector, Colorado 1999 – 2007

Year	Livestock	Crops	Total Value of Production	Value of Services and Forestry[1]	Government Payments[2]	Gross Value of Farm Revenue	Total Farm Production Expenses	Net Farm Income
	Million Dollars							
1999	$3,015.8	$1,341.8	$4,357.6	$578.7	$374.2	$5,310.5	$4,362.0	$948.5
2000	$3,325.3	$1,229.2	$4,554.5	$559.2	$351.4	$5,465.1	$4,675.0	$790.1
2001	$3,303.5	$1,417.9	$4,721.4	$603.0	$320.1	$5,644.5	$4,363.9	$1,280.6
2002	$3,208.1	$1,319.4	$4,527.5	$695.4	$211.0	$5,433.9	$4,721.5	$712.4
2003	$3,445.8	$1,442.7	$4,888.5	$661.9	$319.9	$5,870.3	$4,885.6	$984.7
2004	$4,237.5	$1,407.8	$5,645.3	$633.5	$221.2	$6,500.0	$4,983.2	$1,516.8
2005	$4,157.0	$1,476.3	$5,633.3	$713.2	$381.6	$6,728.1	$5,512.0	$1,216.1
2006[3]	$4,160.0	$1,630.0	$5,790.0	$680.0	$236.0	$6,706.0	$5,750.0	$956.0
2007[4]	$3,990.0	$1,695.0	$5,685.0	$715.0	$100.0	$6,500.0	$5,800.0	$700.0

[1]Includes sales of forest products, custom feeding fees, custom harvest fees, and other farm income.
[2]Includes farm program payments directly to producers.
[3]Estimated.
[4]Forecast.

Source: Colorado Business Economic Outlook Agricultural Committee.

decline by an estimated $136 million compared to 2006 and $280 million less than in 2005.

Hay remains our largest crop in terms of value ($480 million) but due to on-farm use, actual cash receipts are about one-half of that value. Colorado's alfalfa production in 2006 fell by an estimated nine percent to 2.7 million tons, largely due to a combination of winter-kill in the San Luis Valley and drought throughout Colorado. The drought conditions also limited forage production from pasture and rangeland in the state. Additionally, bordering states increased demand for supplemental feeding of hay. Hay prices during 2006 generally ranged from $100 to $135 per ton. Prices for hay will remain strong in 2007, with prices likely to average about $120/ton with total cash receipts coming in at around $245 million.

Potato producers in Colorado increased 2006 planted acreage by 800 acres to 64,000 acres and production is expected to be in the 22 to 25 million hundredweight (cwt.) range. Due to a marginal increase (2.7 percent) in U.S. planted acreage, prices are likely to remain at or near the prior year level of $8.85/cwt. with total cash receipts estimated at $190 million. Expect 2007 production to be on par with current year production and for prices to decline to the $8/cwt range lowering cash receipts to $180 million.

Sunflower production across the U.S. and in Colorado is forecast to decline precipitously in 2006; however, it is expected that Colorado production will increase in 2007. Total U.S. production for 2006 is forecast at just 2.1 billion pounds, down from 4.0 billion pounds in 2005. Colorado harvest acreage is down 55 percent with yields expected to decrease from 1,279 pounds/acre to 1,145 pounds/acre, bringing the total production in at about 1.1 million cwt. With prices in the $12.50/cwt. range for the 2006 crop, total cash receipts are estimated at $13.3 million. Look for Colorado production to increase to 1.6 million cwt. in 2007 as prices remain steady.

Greenhouse/nursery sales, driven mostly by growth in the turf grass and nursery industries, have been one of Colorado's fastest growing sectors since the early 1990's. Today, these sales exceed the sales from more traditional crops such as corn and wheat. Sales in 2007 are expected to remain at about $300 million.

Look for sales of specialty vegetables to be about $80 million in 2007. Expect dry beans, onions, sugar beets, and fruit receipts to remain fairly steady in 2007.

Other crops that have done well in recent years include specialty vegetables. Production is expected to remain steady in the Front Range area with farmers markets and other direct marketing opportunities providing ideal venues for sales. Look for sales of specialty vegetables to be about $80 million in 2007. Expect dry beans, onions, sugar beets, and fruit receipts to remain fairly steady in 2007.

Colorado's agriculture industry is very diverse and its profitability is subject to influences beyond our borders. The opening and/or closing of export markets, global economic growth, and agricultural trade and policy decisions are just a few of the factors that have the potential to impact Colorado agriculture, both positively and negatively. Agricultural policy in 2007 will likely revolve around development of the next Federal Farm Bill. Nonetheless, the fate of Colorado's agricultural complex will depend largely on local growing conditions. The one constant is that every year will bring its own unique set of challenges and opportunities.

2007 Agricultural Outlook

Each December since 1966, the Colorado Business Economic Outlook has provided a 'state of the Colorado economy' overview for the coming year. This annual outlook conference and report includes information on the state and national economy and population trends, plus specific outlooks for several sectors of Colorado economy: agriculture; oil, gas, and mining; construction; manufacturing; transportation, communications, and pubic utilities; finance, insurance, and real estate; wholesale and retail trade; services; tourism, outdoor recreation, and conventions; government; and international trade.

The entire 74-page report is produced by the Business Research Division of the Leeds School of Business at the University of Colorado at Boulder. A copy of the report in pdf format will be available on-line at www.leeds.colorado.edu/brd or call 303-492-8227. Excerpts from the Agriculture and International Trade sections of the full report are given below. The full text, with tables, of information related to agriculture is available on-line at www.coloradoagforum.com with the permission of the Business Research Division.

Agriculture: Colorado just experienced the worst drought in recorded history and the impact may be felt more in 2003 than in 2002. The value of crop sales in Colorado established a record in 2002 as increased prices offset lower production. While 2002 appears to be a banner year for crop and livestock sales and farm income, it came at the cost of selling millions of bushels of crops in storage and thousands of head of breeding livestock.

The outlook report on agriculture was prepared by a committee of six agricultural specialists, chaired by Jim Rubingh, Markets Division Director, Colorado Department of Agriculture.

Agricultural Exports: Colorado's agricultural exports continue to be affected by reduced global demand, dropping 5.4% in 2001. They are projected to fall an additional 1% in 2002, to $860.5 million. Agricultural exports are projected to grow once again in 2003, with a gain of 7.4%, mainly attributed to increased market prices for U.S. grains and modest volume increases in meats and horticultural products.

The international trade outlook report was prepared by a committee of six international trade specialists and is chaired by Ms. Laurel Alpert, Senior Deputy Director, International Trade, Colorado International Trade Office. Tim Larsen, Senior International Marketing Specialist, Colorado Department of Agriculture, prepared the agricultural export portion of this report.

Fruit Industry Outlook

by Harold J. Larsen, Ph.D., Interim Manager, Colorado State University – Western Colorado Research Center, Grand Junction, CO

Colorado's fruit industry experienced a mixed season in 2006. Wine grapes and peaches had a good year while sweet cherries and pears had a reasonable year with slightly reduced production. Only apples were down significantly; 50 percent of a full crop was harvested due to alternate bearing and spring frost in some locations. Prices for all fruit commodities held near 2005 levels, however.

Colorado's grape growers harvested an estimated 1,800 tons in 2006 (an increase of 18 percent over the record 1,500 tons in 2005). Vineyard acreage continues to expand with a further increase in production expected as vines reach production age. Winery capacity (even with 90 wineries within the state) and grape production are not currently in balance and not all grapes produced were sold, including some Chardonnay and some Merlot. Other varieties, like Riesling, had more demand than could be filled. Wet October weather complicated harvest for late varieties in some instances, but winemakers reported excellent quality for the crop; prices were comparable to 2005 and crop valuation should be around $2.2-2.4 million. A conservative value-added multiplier of 10x puts the valuation for the wine from the 2006 crop at $22-24 million. Grapes currently are third in acreage, but they continue to increase in acreage and soon may challenge apple for second.

Colorado's grape growers harvested an estimated 1,800 tons in 2006 (an increase of 18 percent over the record 1,500 tons in 2005).

Peaches again were in demand on a national basis, and Colorado had around 85 percent of a full crop. This and the reputation of Colorado peaches kept prices high. Growers faced relatively few problems in 2006, primarily split pits and rapid ripening for early season varieties due largely to spring frost injury and higher than usual temperatures in June to early July. Other fruit commodities also were able to maintain excellent to adequate prices through the season. Sweet cherry and pear crops were near 75 percent, but apple production was down to near 50 percent due to alternate bearing and spring frost in several of the major portions of the growing area. Demand for organic fruit increased, outstripping supply in some cases such as organic Honeycrisp apples. Peaches, grapes, apples, pears, and sweet cherries continue to lead all Colorado fruit crops in crop acreage and valuation at this time.

Challenges faced by Colorado's fruit industry for 2007 include ensuring adequate fruit size in peaches and pears, maintaining fruit quality (all crops), and balancing increased wine grape production with winery capacity. Fruit size is

critical in sales of peach and pear; there is no position in the fresh market for small peaches or pears even if they are top quality. Minimum size (diameter) now is 23/4 inches for peaches and 21/2 inches for pears. Pears with more than 10 percent of the skin surface damaged are not salable in the fresh market and are diverted to the lower return processor market regardless of whether they are large or not. Continued availability of the processor market for pears is uncertain as availability of fruit from the Southern Hemisphere is beginning to make inroads there. European paper wasp injury to sweet cherries and grapes is becoming a problem that will need to be addressed, and better options to control bird damage to ripening fruit are increasingly needed. A balance is needed between production of and demand for different wine grape varieties by growers and wineries, respectively. This last challenge for wine grapes will be accentuated by the increase in bearing acreage likely to provide a new record production in 2007 (1,800 to 2,000 tons is expected). Grapevines entered the winter with adequate moisture in October to minimize winter injury to buds. However, overnight temperatures of -5 to -13° F in some locations in early December injured or killed some wine grape, peach, and sweet cherry buds in some of the colder areas of western Colorado. Impact of this event is likely to be local and will depend on vineyard and orchard location.

Fruit Industry Outlook: 2006-7 (Summary Paragraph)

by Harold J. Larsen, Ph.D., Cooperative Extension fruit and disease specialist, Interim Manager, Colorado State University – Western Colorado Research Center, Grand Junction, CO

Colorado's wine grape industry continued to do relatively well with an increased production, good prices and an increase in bearing acreage. New records were achieved for production and crop valuation of wine grapes: production was about 1,800 tons (over the previous record of 1,500 tons) and crop valuation about $2.2-2.4 million (over the previous record of $1.8 million). Value of the vintage is likely to be around $22-24 million using a conservative 10x multiplier. Peach production was reduced slightly (only about 85 percent of a full crop harvested) because of higher incidence of split pits, split fruit, bird feeding damage, and some spring frost damage in colder locations. Value of the peach crop for 2006 is estimated to be about $10 million. Pears also had some frost damage and production was estimated at around 1,800 tons; prices were good, however, and provided an estimated valuation of $1.1 million. Sweet cherry production was near 75 percent of a full crop and prices were near or above average. Apricots had a reasonably good crop, estimated to be about 80 percent of optimum with good prices. Only apples were down significantly, at an estimated 50 percent of average due to alternate bearing and spring frost. Prices for the portion of the crop harvested held well, however, and a crop valuation of $2.0 million is expected. Demand for organic fruit increased, outstripping supply in some cases. Challenges for 2007 include fruit quality and size, bird and pest damage, and matching production of wine grapes with winery capacity as wine grape production is expected to increase due to continued expansion in bearing acreage of wine grapes.

Feed Grain Outlook

by Rod Sharp, Cooperative Extension western regional agriculture and business management specialist, Colorado State University; James Robb, director, Livestock Marketing Information Center, Lakewood, CO

Colorado feed grain prices tend to reflect national and international market developments, especially the national corn market. In late 2006 corn prices surged due to ethanol demand and forecasts suggest that ending-stocks will not rebuild, and will likely shrink in the next two crop years.

The national cash corn price received by farmers for the 2005/06 crop-marketing year was $2.00 per bushel. That was 3 percent lower than a year ago and $0.12 per bushel lower than the 2001-2005 five-year average. The projected national weighted price for corn (received by farmers) is over $3.00 per bushel for 2006/07, the highest annual average since 1995/96. Forecasts call for even higher prices in the 2007/08 and 2008/09 crop-marketing years. Looking ahead to the next 12-months, the dominant factors in the feed grain markets will be U.S. and world corn supplies (acreage and yields), and the rate of increase in ethanol production.

Corn Supply

Higher input costs (especially fertilizer and fuel) reduced the number of acres planted in 2006 compared to the prior year, while drier than normal conditions resulted in a further decline in harvested acres and limited yields. Thus, the U.S. corn crop was down considerably from 2005's. Still, 2006 crop production does not represent the typical short crop given U.S. production was the third highest ever. Projections in late 2006 put total U.S. corn supply at 12.7 billion bushels. That was a decrease of 4 percent compared to a year ago.

Corn Usage

Annual U.S. corn usage is expected to increase 4 percent during the 2006/07 crop-marketing year supported by record large industrial usage (3.56 billion bushels). Both exports and feed usage are forecast to decrease slightly in 2006/07.

Feed Grain Price Outlook

Smaller carryover stocks, near record production, record high domestic use, and volatile world markets are expected to determine feed grain prices next year.

Any signs of a short corn crop in 2007 or 2008 will send corn prices surging higher, again. If that situation

materializes, feeder animal prices will drop quickly. On a crop-year basis, corn prices this year will be the highest in 10 years. With normal weather and increased corn plantings, the national average corn prices in 2007/08 and 2008/09 may increase another 10 cents per bushel each year. Watch crop plantings and growing conditions closely.

Colorado feed grain prices tend to reflect national and international market developments, especially the national corn market. Feed grain and livestock producers will again keep a close watch on corn and other feed grain prices this year. In late 2006 corn prices surged due to ethanol demand and forecasts suggest that ending-stocks will not rebuild, and will likely shrink in the next two crop years.

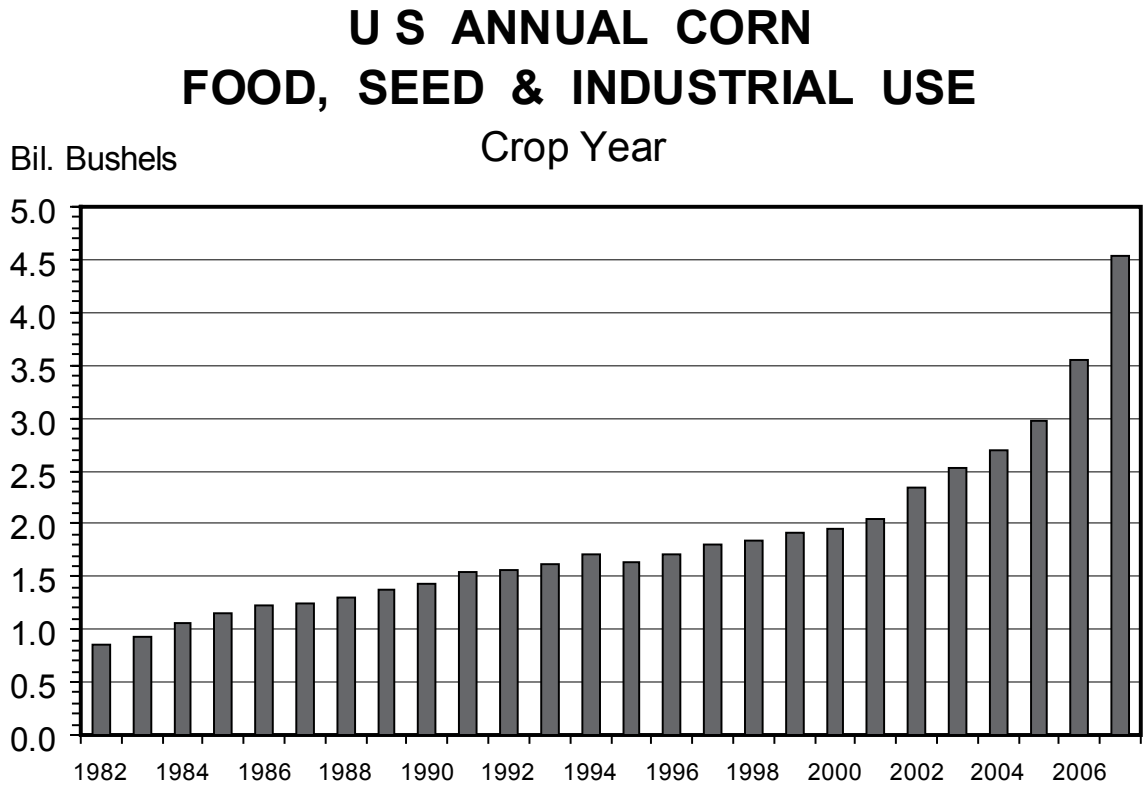
The national cash corn price received by farmers for the 2005/06 crop-marketing year was $2.00 per bushel. That was 3 percent lower than a year ago and $0.12 per bushel lower than the 2001-2005 five-year average. The projected national weighted price for corn (received by farmers) is over $3.00 per bushel for 2006/07, the highest annual average since 1995/96. Forecasts call for even higher prices in the 2007/08 and 2008/09 crop-marketing years. Looking ahead to the next 12-months, the dominant factors in the feed grain markets will be U.S. and world corn supplies (acreage and yields), and the rate of increase in ethanol production.

2006 Corn Supply

Higher input costs (especially fertilizer and fuel) reduced the number of acres planted in 2006 compared to the prior year, while drier than normal conditions resulted in a further decline in harvested acres and limited yields. Thus, the U.S. corn crop was down considerably from 2005. Still, 2006 crop production does not represent the typical short crop given U.S. production was the third highest ever. Projections in late 2006 put total U.S. corn supply at 12.7 billion bushels. That was a decrease of 4 percent compared to a year ago. Total supply is made up of beginning stocks, production, and imports.

Total 2006 U.S. corn production was 10.7 billion bushels compared to 11.1 billion bushels in 2005. That level of production resulted from fewer acres planted, fewer acres harvested, but higher yields than a year earlier. In 2006, acres planted (78.6 million acres) and acres harvested (71.0 million acres) were down 4 and 5 percent respectively, compared to a year ago.

In 2006, the national yield per acre was just over 151 bushels per acre, surprisingly good given dryer than normal Western Corn Belt conditions during the 2006 growing-season. That yield was 3 bushels per acre higher than 2005 and about 9 bushels per acre lower than 2004's record of



160.4 bushels. The long-term trend in corn yield remains up. In the decade of the 1990's, the national average corn yield was about 123 bushels per acre and the 1980's average was 106 bushels.

Corn crop-marketing year carryover stocks have declined in recent years. To begin the 2006/07 corn crop-marketing year, stocks were 1.97 billion bushels, a 7 percent year-to-year decline. Beginning stocks are projected to continue to decrease to just over 1 billion bushels in 2007/08.

Corn Usage is a Key

Annual U.S. corn usage is expected to increase 4 percent during the 2006/07 crop-marketing year supported by record large industrial usage (3.56 billion bushels). Both exports and feed usage are forecast to decrease slightly in 2006/07. Higher corn prices will likely lower corn exports in the years ahead. A decline in corn usage for feedstuffs is forecast as byproducts from ethanol production partly replace corn as a livestock feedstuff and as livestock and poultry operations react to higher corn prices.

U.S. industrial use of corn has continued to increase in recent years. Since the beginning of this decade, corn usage for industrial and food purposes in the U.S. has exceeded exports. Industrial, food and seed uses of corn in 2005/06 were over 800 million bushels above exports. By 2006/07 that difference will be 1.4 billion bushels. In 2007/08 preliminary forecasts put Industrial usage of corn over 4.5 billion bushels or about 35 percent of U.S. production. By 2010, U.S. usage of corn for ethanol could easily exceed usage by livestock and poultry.

How Many Corn Acres Will Be Planted?

It is still difficult to know how many acres of corn and other feed grains U.S. farmers will plant in 2007. But that number will play a critical role in determining prices. How many acres will be switched from soybeans and other crops to corn, especially in the Midwest? Most market analysts expect U.S. corn plantings to be well above 2006's (up over 5 million acres. High corn prices will likely support further corn acreage increases in 2008.

Outlook: High Prices to Continue

Smaller carryover stocks, near record production, record high domestic use, and volatile world markets are expected to determine feed grain prices next year.

In the short term (January through March 2007) the major factors that will influence feed grain prices will be U.S. export levels and South American feed grain developments. Come spring, prospects for the new U.S. corn crop will have increasing influence on prices. Preliminary projections put U.S. corn plantings in 2007 at about 5.2 million acres above 2005. With lower beginning stocks and very rapid growth in ethanol usage, the carryover stocks are expected to continue to dwindle even with normal crop growing conditions and high yields.

Any signs of a short corn crop in 2007 or 2008 will send corn prices surging higher, again. If that situation materializes, feeder animal prices will drop quickly. On a crop-year basis, corn prices this year will be the highest in 10 years. With normal weather and increased corn plantings, the national average corn prices in 2007/08 and 2008/09 may increase another 10 cents per bushel each year. Watch crop plantings and growing conditions closely.

Livestock Outlook

by Stephen R. Koontz, Ph.D., Cooperative Extension economist, Colorado State University; James G. Robb, director, Livestock Marketing Information Center; Erica L. Rosa, agricultural economist, Livestock Marketing Information Center, Lakewood, CO

Livestock prices generally remained strong in 2006, continuing a trend that began several years ago; however, drought and surging corn prices were major features of 2006. What does the market have in store for 2007 and 2008? We think more of the same but not as good for producers as the past few years have been.

Cattle Situation and Outlook

Feeder cattle and calf prices were very strong for most of 2006, but for the year were below 2005. Cow-calf producers were and are making good money - especially if they forward sold some of their calves during the summer, before surging corn prices rained on the calf price parade this past fall. While 400-500 pound calf prices are down this fall, these animals were still averaging over $110/cwt for the fourth quarter. The fed cattle market struggled in the second quarter of 2006, but most of the year fed cattle prices continued to be very strong and the average price for the year was just over $85/cwt.

The U.S. border with Canada has been open to live fed cattle for a year and a half and trade with Canada appears to be very similar to pre-border-closure levels. While Asian markets have been open to U.S. beef for portions of 2006, technical difficulties continued, so the earnest flow of trade has yet to be resumed. Partly compensating for rather small U.S. beef exports, U.S. beef imports dropped dramatically compared to a year earlier in 2006.

The dominant factor in the cattle outlook will be tight cattle numbers. Exactly how strong cattle prices will be as a result of this will depend on cow-calf producers.

It was clear in 2005 that the cattle cycle turned from herd liquidation to expansion. That expansion continued somewhat in 2006 but was severely limited by drought conditions. Heifers held as beef cow replacements in the July 2006 USDA Cattle and Calves report were flat with the previous year. This was following an expansion of 3.8 percent in the January report. All in all, the cattle herd expanded 1.1 percent as of July 2006 and 1.7 percent as of January 2006.

The dominant factor in the cattle outlook will be tight cattle numbers. Exactly how strong cattle prices will be as a result of this will depend on cow-calf producers. Cow-calf producers decide how many female animals are sent into the meat producing system and how many are held back to rebuild the beef cow herd. Holding heifers back to expand herd size will decrease short-run slaughter and keep beef and cattle prices high. Weather and forage supplies permitting, beef cow producers will attempt to expand herds during 2007 and 2008.

Tight calf supplies result in tighter feeder cattle numbers. These reduced supplies will negatively impact cattle feeders and meatpackers in Colorado. The cattle feeding industry will be faced with reduced numbers and tight margins between feeder cattle prices and fed cattle prices. Likewise, beef packers will continue to face limited supplies of cattle.

The strong feed grain prices that have emerged since last harvest are not a result of drought or supply problems, but are demand driven. And the demand is ethanol.

Feed grain prices are the main source of risk to calf and yearling prices in 2007 and 2008. The strong feed grain prices that have emerged since last harvest are not a result of drought or supply problems, but are demand driven. And the demand is ethanol. Corn prices will likely spend the next year well above $3.00/bu and this will take some of the steam out of the feeder cattle market. Expanded ethanol production is going to require at least another 5 million acres on top of what is usually an 80 million acre crop. Any shortage in acres or weather related yield problems would send corn prices even higher. Almost anything is possible in the corn market and that will translate into volatility for calf prices. In fact, the corn price impact on calves and yearlings the next few years could be greater than the cycle herd rebuilding influences.

The other side of the price coin from supply is demand. Beef producers have enjoyed years of improving beef demand but lately trouble has been brewing. The Beef Demand Index has showed a 26 percent increase between 1998 and 2004. The index nets out the effects of changing supplies and inflation on price. So in other words, consumers were willing to spend 26 percent more for beef, holding supply constant. However, there was trouble for demand in 2005, 2006, and we expect little if any improvement in 2007. Demand decreased 3 percent between 2004 and 2005 and we project that between 2005 and 2006 there was an even larger year-to-year decline. Fortunately for cattle producers, beef packers and retailers absorbed most of the year-to-year decline in U.S. consumer beef demand during 2006. The exact causes for the increase and decreases are not known but the weakening economy could be a factor in 2007.

Domestic consumers are one source of demand and international consumers are the other source. Export demand is growing but it is only one-third of market it was prior to January 2004. The strong export markets for beef are Mexico and Canada. Some beef trade is going to Asia, but not much and we don't see volumes jumping to former levels. Trade volumes will grow, but slowly. The issue on the horizon is – does the growth in trade expand as fast as the beef herd numbers? This is the important issue that will determine how strong cattle prices are three-five years from now.

Current forecasts call for a 0.7 percent year-to-year increase in U.S. beef production for 2007 and a similar increase in 2008. The net impact of trade likely will cause U.S. per capita consumption to be down slightly in 2007 and again in 2008. Because of reduced supplies and some weakening demand, beef and slaughter cattle prices will remain strong in 2007 and 2008. We look for fed cattle prices in 2007 to average in the mid-to-high $80s per cwt. Average fed cattle prices could push upwards to $90 in first and second quarters. Prices will moderate some in the third quarter with prices averaging in the low-to-mid $80 per cwt. Average fed cattle prices should be back in the mid-to-high $80s during the fourth quarter. Market prices are forecasted to average $86 to $90 for the year of 2008.

Feeder cattle and calf prices will stay strong during 2007 and 2008. But there is lots of downside risk due to higher feed prices. Generally, strong fed cattle and beef prices during 2007 and 2008 will continue to support feeder cattle prices. As a result, look for yearling feeder prices to be down modestly in 2007 and then down slightly more in 2008. Yearling feeders are forecasted to average $105-$108 per cwt throughout 2007 and average $99-$105 in 2008.

With normal weather in 2007, calf prices are expected to set seasonal high prices prior to availability of summer grass. Calf prices should remain well over $110 per cwt throughout the year. Prices should average over $115 in the first and second quarter, and could decrease some in the third quarter. In the fourth quarter, as usual, calf prices will be the lowest of the year. From a cyclical perspective, looking ahead to 2008 steer calf prices will likely remain well above $1.00 per pound.

But the writing is on the wall. Cattle and calf prices will have seen their cyclical peaks in 2005 and the outlook for calf and yearling prices is much more risky than normal due to high and volatile corn prices.

Hog Situation and Outlook

The hog market continues to show excellent resilience. The industry last faced very large numbers and low prices during 2002 and has seen very good prices and profits since 2003. Over the past several years we have been expecting cyclical expansion, lower prices, with the cyclical low in 2006 or 2007. The lean hog futures market agreed with us during the summer months of this year. Prices for the winter contracts were relatively low during the summer and around the June USDA Hogs and Pigs report; however, market prices rallied strongly. In part, as with last year, the strength in market prices this year was mostly due to excellent export demand for pork. Net carcass prices for barrows and gilts averaged in the high $50s during the first quarter, the high $60s during the second quarter, in the low $70s during the third quarter, and back to the low-to-mid $60s during the fourth quarter.

Expectations are for the December USDA Hogs and Pigs reports to show continued, but very restrained, herd expansion. That will suggest modest increases in U.S. pork production in 2007. Herd size will likely peak in 2007. This would be consistent with a normal cycle but expansion will be restrained due to recent surges cost of production due to higher corn prices. The U.S. inventory of market hogs is larger than a year earlier. Market hog numbers have increased even though the breeding herd has barely changed because of two factors: 1) increased productivity - pigs per litter and litters per year - and 2) increased feeder pig imports from Canada. Forecasts indicate that U.S. hog slaughter will be 0.7 percent above that of a year earlier in the first quarter of 2007. Hog slaughter will likely see larger year-to-year increases for the remaining three quarters of 2007. Market hog carcasses are generally larger than the previous year. However, the sharp increases in corn may moderate the potentially heavier weights. All in all, the market will see U.S. pork production increasing about 2 percent for the year.

In 2006, exports were excellent for the pork sector. U.S. pork exports in 2006 are likely to be 8-10 percent above 2005. The minimal amount of beef in the export mix to Asia appears to have been a cause of strong pork exports. Some Asian consumers have substituted pork for beef and continue to buy strong from the U.S. Further, U.S. pork exports to Mexico continue to be very strong. These foreign consumers prevented relatively low hog and pork prices from occurring during the second half of 2006.

Cyclically, barrow and gilt prices are anticipated to weaken in 2007 and 2008. Market hog prices are forecasted to be in the low-to-mid $60's per cwt. (carcass basis) in the first quarter of 2006. Market hog prices are forecasted to be in the mid-to-high $60's during the second and third quarters. Hog prices may finish the year in the high $50's to low $60's and should average in the $62 to $66 range for the year. Due to surging corn prices many U.S. hog operations had some red ink in late 2006. Most hog operations will return to profitability in early 2007. As U.S. breeding hog numbers stabilize in 2007, the Canadian herd will continue to downsize. Feeder pig prices will continue to post year-to-year declines, reflecting higher corn prices.

As has been the case in recent years, U.S. pork exports will be a key factor influencing hog prices in 2007 and 2008. Robust export demand for pork has masked lackluster at best domestic consumer demand in recent years.

Lamb Situation and Outlook

Quarterly slaughter lamb prices in 2006 were 8-26 percent worse than those in 2005 over the first three quarters and were 3 percent better than those in 2005 for the fourth quarter. The first and second quarters saw a 25-26 percent drop in price from the previous year. Choice lamb carcass prices averaged about $175 per cwt in 2006, 15 percent below 2005 for the year. Feeder lamb prices received by producers averaged about $105 per cwt in 2006, 19 percent below the 2005 price. The lower lamb prices, especially in early 2006, were due to several factors including heavy carcass weights in late 2005 and early 2006. U.S. lamb production actually fell in 2006. We were expecting an increase because of the good prices over the previous years. U.S. production is expected to increase for 2007 and 2008 so some further price decreases are likely in the works. Forecasts suggest a 0.3 percent increase in production in 2007 and a 2 percent increase in 2008. U.S. lamb imports are also expected to increase in 2007 and 2008. If both of these scenarios occur, then on a carcass basis slaughter lamb prices could average $188-197 per cwt in 2007 and $186-196 per cwt in 2008.

The strong lamb prices of recent years warn us of the dynamics that occur in most commodity livestock industries. The sheep and lamb industry faced very low prices in 2001 and – like the cattle industry – faced production pressures due the extreme drought in the western U.S. during 2002. The response to this economic market signal was reduced supplies, which now that this is completed, result in improved prices. These persistent improved prices – and if improved forage and grazing conditions persist – will provide an economic market signal to increase production and this will moderate the current high prices. This is forecast to happen through 2007 and 2008.

Oilseed and Dry Bean Outlook

by Dennis A. Kaan, Cooperative Extension northern region, agriculture and business management specialist, Colorado State University

Sunflower and Oilseed Outlook

Producers planted nearly two million acres of sunflowers in 2006, up slightly from the estimate from the June acreage report and reflecting greater sowing of oil-type varieties in North Dakota and South Dakota. Even so, the decline in sunflower acreage from last year still totals 725,000 acres. That factor alone would be enough to substantially cut sunflower seed production. Confection-type sunflower seed took a disproportionate amount of the acreage reduction in 2006. In addition, sunflower seed yields are forecast down sharply this year. A dry summer in the Great Plains slashed sunflower seed yields in all states except Minnesota. For North Dakota, the June-July cumulative precipitation was only half of normal. Following a record high national average yield last year of 1,540 pounds per acre, the 2006 yield could be reduced by a quarter toward 1,134 pounds per acre. Combined with the loss of acreage, the yield reduction lowers expected sunflower seed production in 2006 by 47 percent to 2,114 million pounds. The two largest producing states, North Dakota and South Dakota, should account for 60 percent of the total output decline.

Cushioning the crop losses is a record-large carryover of sunflower seed stocks remaining from last year's bumper harvest. September 1, sunflower seed stocks totaled 781 million pounds, up from just 199 million the previous year. Total 2006/07 supplies will then be down by 1.25 billion pounds, compared with a crop reduction of 1.9 billion pounds. Strong demand for sunflower seed oil is expected to boost crushing to around 1.3 billion pounds. Ending stocks should be drawn down substantially toward a minimal pipeline level, but it is unlikely that a major reduction in non-oil uses and exports can be avoided. The average sunflower seed price may not differ markedly from the 2005/06 average of $12.00 per hundredweight.

In recent weeks, a higher price level has led to a mild slackening of soybean exports, but the overall pace is still comparatively brisk.

At 30.4 million metric tons, world sunflower seed production for 2006/07 is now forecast 1.3 million tons higher than a month ago, and is likely to eclipse last year's former record of 29.8 million tons. Leading the way are Russia and Ukraine, the world's top two sunflower seed-producing countries. World trade in sunflower seed may expand modestly, however, as more crushing takes place in these countries and the export of sunflower seed oil expands.

In recent weeks, a higher price level has led to a mild slackening of soybean exports, but the overall pace is still comparatively brisk. First-quarter export inspections totaled 371 million bushels, up 65 million from the 2005/06 pace. Similarly, domestic processors crushed an all-time record in October of 161.7 million bushels of soybeans.

However, the forecast of the national average farm price was raised this month to $5.70-$6.50 per bushel from $5.40-$6.40 previously. Soybean prices continued to rise throughout November, although not as rapidly as in October.

More soybean oil was produced in October 2006 than in any month ever. Aside from the record crush, the expected extraction rate for soybean oil in 2006/07 was raised slightly, although it is seen well below last season's peak. Use of soybean oil was also near an all-time high in October. The 2006/07 export outlook for soybean oil is appearing somewhat brighter, and was raised 100 million pounds this month to 1,350 million pounds, compared with 1,153 million in 2005/06. U.S. export sales to China have given the market an early boost. Despite the robust October demand, the output surge pushed up soybean oil stocks to 3,035 million pounds. By October 2007, continued brisk consumption is anticipated to trim back the U.S. soybean oil inventory to 2,729 million pounds.

Even with a plentiful supply, the price for soybean oil surged to a November average of 27.6 cents per pound from 24.8 cents in October. A sharp increase in worldwide vegetable oil demand has diminished the price-depressing effect of these large stocks. Reflecting this, USDA raised its forecast range of the 2006/07 average price to 26.0-29.0 cents per pound from the prior 24.0-28.0 cents. The share for soybean oil in the total value from crushing soybeans continues to rise, while the contribution from soybean meal is slipping.

Dry Bean Outlook

The U.S. dry edible bean crop was estimated to be 23.8 million cwt-down 11 percent from a year earlier. Although harvested area was down less than 1 percent, hot, dry weather in most major states impacted crop development and yield potential. As a result, national per-acre yield averaged 15.6 cwt, down 11 percent from a year earlier but 7 percent above the freeze-impacted low of 2 years ago. In North Dakota, again the leading State with 32 percent of the 2006 crop, production declined 11 percent to 7.62 million cwt. Crop conditions in Michigan, the second leading State in 2006, were favorable for dry beans until late in the harvest season, with State yield rising 6 percent to 18.0 cwt per acre. In Nebraska, the third leading producer, dry bean yields were reduced 4 percent by an early frost.

A combination of less harvested area and reduced yields pulled the pinto crop down, but pintos easily remained the top bean class with 40 percent of the 2006 crop. Pinto bean harvested area was down 10 percent to 651,700 acres, while

average yields dropped 15 percent due largely to the hot, dry summer. Pinto output was down in 11 of the 14 producing states, with North Dakota, the leading decline; down 25 percent to 4.91 million cwt. Output of pinto beans declined 34 percent in Nebraska, the second-leading producer, largely because of a 31 percent cut in harvested area. Growers in Colorado produced 8 percent fewer pintos as a 20 percent reduction in harvested area outweighed a 15-percent gain in yield. Pinto yield in Colorado was second only to the 2002 record.

As pinto bean stocks are drawn lower this season, grower and wholesale prices are likely to continue strengthening. Grower prices (CO/NE) began the marketing year in September at $17.67 per cwt, up 20 percent from a year earlier. With limited open market activity, grower bids in North Dakota-Minnesota had climbed to $19.50 by mid-December, up 40 percent from a year earlier.

With stocks of several dry bean classes likely to be low by next summer, reduced supplies and higher prices over the coming marketing year would normally be an automatic indicator of a significant increase in area planted next spring. However, dry beans may face a substantial challenge in the coming year from traditional rotational crops such as corn, soybeans, barley, and wheat. Prices for these grains have risen greatly over the past few months due in part to strong demand for field corn by a rapidly expanding ethanol industry. Fundamentals in the corn market set the tone in many agricultural crop markets. Currently, field corn is running at more than $3.00/bushel, wheat is over $4.50/bushel, and soybeans are over $6/bushel- all well above a year earlier and their long run averages. Although dry bean prices have risen, they are currently uncompetitive with most of these alternative crops. This suggests that in the absence of changes in commodity price relationships this winter, U.S. dry bean acreage could decline 10-15 percent in 2007. Assuming that yields return to either trend or their long run average, the decline in U.S. dry bean production would be less than the percentage reduction in area.

Vegetable Crop Production Outlook

by Michael Bartolo, Ph.D., Cooperative Extension vegetable crops specialist, Arkansas Valley Research Center, Colorado State University

The 2006 season generally saw good vegetable growing conditions for most parts of the state. Northern Colorado stayed dry for most of the season and Southern Colorado saw considerable precipitation after July 1. Parts of Northern Colorado also faced unanticipated water problems associated with controversial restrictions to well pumping.

Once again, one of the most notable issues faced by growers was high fuel prices. High fuel prices significantly increased general production and shipping costs. In addition, the availability and cost of labor continues to be a major source of concern for vegetable growers. Related to the overall labor situation, significant changes to the immigration laws and minimum wage level are looming on the horizon. Both of these issues could have a dramatic and potentially devastating effect on vegetable production around the state. Overall, unless the vegetable industry becomes more mechanized, statewide vegetable production is likely to decline.

Vegetable production has decreased slightly to approximately 30,000 acres. This amount reflects a wide assortment of crops grown in almost every region of the state. Onions continue to be the most widely grown vegetable crop at roughly 11,500 acres. Generally, onion yields and quality were good and prices remained strong throughout the harvest and subsequent storage period. The Colorado onion industry is currently being threatened by the presence of a relatively new disease, Iris Yellow-Spot Virus (IYSV). IYSV is transmitted and spread by onion thrips, a destructive onion pest unto itself. As the onion thrips become more difficult to control due to increased resistance to pesticides, the potential for serious yield losses remain a concern in the future.

Second to onions in terms of acreage was sweet corn. Sweet corn was grown on roughly 9,500 acres. The most notable production areas for sweet corn were northeast of Denver and the ever popular Olathe area. Sweet corn is grown just about everywhere in the state and is a staple for most direct-marketing operations.

Cabbage, grown on about 3,500 acres was the next largest crops in terms of acreage. Other crops such as cantaloupe, spinach, lettuce, pumpkins, and peppers remained major contributors to the state's vegetable total. Watermelons, both seeded and the increasingly popular seedless watermelons, also contributed to the state's total crop production.

The vegetable processing industry has suffered some severe setbacks in recent years. In some places, the infrastructure for facilities remains in place and thus, the potential for new opportunities are possible. New facilities that process Colorado-grown crops, however, will not come to realization without serious efforts at the state and local levels.

Organic production continues to thrive in the state. Given Colorado's climate, the opportunities for continued growth remain strong. Major grocery outlets throughout the state continue to expand their selection of organic items. As a result, Colorado growers, including some of the larger traditional growers, have stepped up to fill the demand. Even so, the potential for further growth remains excellent.

Wheat Outlook for 2007

by Stephen R. Koontz, Cooperative Extension economist and commodity marketing specialist and associate professor; John Deering, Cooperative Extension agriculture and business management, agent, Washington County, Colorado State University

Nowhere in the US does the wheat in the field look as good as it does in Colorado. Much of the Colorado wheat crop is in outstanding condition. And the market prices are outstanding as well. The past several years have seen poor crops in Colorado and better crops in other states - so market prices were low. The shoe appears to be on the other foot - at least for the time being. But hopefully the current crop will not suffer a similar fate as last year. This time last year, prospects were very good for the 2006 Colorado wheat crop. But Colorado, like Kansas, Oklahoma and Texas, saw dry weather through the spring and harvest yields were well below early season expectations. The 2007 crop in the field reflects the moisture that eastern Colorado received in late summer and fall. Kansas, Oklahoma and Texas have seen some soil moisture improvement but much less so than Colorado. Those neighboring areas can quickly return to drought conditions. Keeping an eye on the winter weather will be important for understanding future changes in wheat prices.

Excellent wheat prices but limited moisture was present in many winter wheat producing U.S. states when planting decisions were made. Thus, acres planted to wheat are uncertain.

World stocks of all wheat had been generally declining for the last 15 years. The 2006/07 crop year is no exception. The only substantial increase in recent years was in 2004/05. The December 11, 2006 USDA World Agricultural Supply and Demand Estimates (WASDE) reported ending stocks decreased 18 percent from last year and are down 20 percent from two years ago. Lower ending stocks were due to decreased production in major wheat growing and export countries. World use was relatively constant and world trade was down slightly. The decline in world stocks is the reason wheat prices have increased and have been volatile over the two past years. It is very likely that this price behavior will continue for the future. There will be sharp run-ups in price and possibly sharp declines in price. This price behavior will continue until a world crop is exceptionally large, as there was in 1998.

U.S. production was down 14 percent, domestic consumption was flat and exports were curtailed 10 percent, this resulted in stocks tightening considerably – 23 percent – for the end of the 2006/07 crop year. The WASDE reported 403 million bushels of ending stock for 2006/07 and 528 million bushels 2005/06. The changes in supply and demand conditions in the U.S. have not exactly paralleled changes in the world supply and demand conditions. The U.S. continues to plant fewer and fewer acres to wheat. Ten years ago over 70 million acres were planted. The 2006/07 crop year saw less than 58 million acres planted. Meanwhile, production and consumption grows worldwide. However, the persistent higher wheat prices may encourage the planting of additional acres and potentially level off the declining acre numbers. The very strong corn prices that we are seeing, however, may continue to put a damper on wheat acreage. Corn prices are very strong relative to wheat and those producers that can grow corn will likely grow corn.

Colorado has followed suite with the rest of the nation with respect to trends in wheat production. Acres have declined and appeared to be leveling off at 2.5 million acres. But then Colorado planted 2.170 million acres and harvested 1.919 million acres in 2006. So the decline continues. Colorado wheat production was 41.5 million bushels in 2006. That is down 23 percent from 2005 and down 11 percent from 2004. Average yields were 21.6 bushels per acre in 2006, 24.4 in 2005, and 27.4 in 2004. This last year saw the smallest yield since the 1970s. This is smaller than the drought year of 2003. Thus, Colorado production is down in 2006 because of decreased planted acres, decreased harvested acres, and decreased yields over the previous year. The reason for declining planted acres is fairly clear.

The price outlook for wheat in 2006/07 crop year will depend on production in the U.S., and world, this next year. Excellent wheat prices but limited moisture was present in many winter wheat producing U.S. states when planting decisions were made. Thus, acres planted to wheat are uncertain. But some market analysts are expecting producers to respond to the higher prices. Unofficial estimates of the number of acres of wheat planted in the U.S. for the 2007/08 crop year are at approximately 59.9 million acres, an increase of 4.5 percent over 2006/07. We will have to wait and see though.

The winter wheat crop in Colorado and most of the U.S. was planted on scheduled. As of November 27, 2006, USDA Crop Progress report 100 percent of Colorado's winter wheat crop had emerged and the crop is in outstanding condition. At the end of November, 40 percent was in excellent condition, 34 percent was good, 20 percent was fair, 4 percent was poor, and 2 percent was in very poor condition. This compares to the conditions of the 18 largest wheat producing states were 10 percent of the winter wheat is in excellent condition, 43 percent is in good condition, 36 percent is fair, 8 percent is poor, and 3 percent is in very poor condition. The condition of Colorado's crop was better than any of the other 18 major producing states. But that happened last year too. The winter wheat crop in Texas is in the poorest shape. Oklahoma is in somewhat bad shape while Kansas largely mirrors the 18-state figures.

The USDA Winter Wheat Seedings report to be released on January 12, 2007 will provide official estimates of planted acres that will allow more accurate production and price forecasting. USDA Crop Progress reports will not be issued again until April 2, 2007. Wheat crop conditions for the 18 largest producing states will be known then and updated weekly. We will then see how wheat fared over the winter. Accurate forecasts of harvested acres and yields will be difficult until the winter and spring weather is observed and reports are continued. Until then, current forecasts indicate an increase in harvested acres, comparable to planted acres, and increases in yields over last year's very poor crop, with U.S. production increasing due to both. Forecasts also suggest slight increases in domestic food and feed use and steady exports. All of this translates into increasing ending stocks for the 2006/07 crop year.

If world production is down and the world economy stays strong then U.S. wheat exports could improve. U.S. wheat prices are largely dependent on the world wheat export market.

Reasonable production and use forecasts suggest 2007/08 ending stocks between 440 million bushels and 600 million bushels. With the lower of the two stocks numbers, a $4.25/bushel Colorado wheat price is expected and with the higher ending stock number then $3.50/bushel is expected. With ending stocks in the middle of this range, then a $4.00/bushel Colorado wheat price for the 2007/08 crop year is likely.

The factors that need to be watched over the winter and spring include the weather and its impact on production and then exports. The U.S. dollar has weakened late in 2006 but is following the strengthening of the previous year. If world production is down and the world economy stays strong then U.S. wheat exports could improve. U.S. wheat prices are largely dependent on the world wheat export market. The U.S. competes in the world export market along with the big four exporters: Argentina, Australia, Canada and the European Union. 2006/07 world wheat trade is forecasted at 109 million metric tons, down 5.7 percent from 2005/06. Global consumption of wheat was at 615 MMT in 2006/07, down 1.4 percent from 624 MMT in 2005/06, and up 0.8 percent from 610 MMT in 2004/05. Global production was 589 MMT, down 5 percent from 620 MMT in 2005/06, and down 6.4 percent from 629 MMT is 2004/05. World ending stocks are expected to be tight and prices high. There will be good opportunities for Colorado wheat producers in 2007 if the crop condition stays as good as it is at the end of 2006.

Green Industry Outlook

by James E. Klett, Ph.D., Cooperative Extension landscape horticulture specialist and professor, horticulture and landscape management, Colorado State University

The green industry in Colorado continues to be the fastest growing segment of agriculture in Colorado. A recent United States study estimates that consumers spent nearly $40.7 billion on garden-related products in 2002, up 12.1% from $36.3 billion in 2000. Colorado expenditures on garden-related products, landscape and lawn services and other related green industries (irrigation, botanical gardens, outdoor equipment) have followed a similar trajectory, averaging 10% growth per year since 1993, for a total of $1.731 billion in 2002. Based on various multipliers generated through an IMPLAN input/output model, total economic contributions of Colorado's Green Industry totals could include: 1) 2.1 billion (using a Type I multiplier that includes indirect activity with other businesses); 2) 3.3 billion dollars (using a type II multiplier that includes indirect activity and expenditures from wage payments to households; 3) 5 billion (using a SAM multiplier that includes indirect activity and wages and factor payments to broader economic agents).

In 2002 an independent economic and environmental aspects study of Colorado golf courses was conducted. The study revealed that the golf industry accounted for $560 million in direct revenue to the Colorado economy which contributed to overall impact of $1.2 billion. This was determined by a customized IMPLAN regional economic study.

In 2002, the total green industry employment was about 34,000 part and full-time jobs. There was an increase of 11,000 jobs since 1994 (6% growth per year) with $825 million in payroll (up from $450 million from 1994 or 18% annual growth). These increases are indicative of the demand for green services and the ability of the green industry to hire workers on a more year-round basis.

The green industry companies include: 1) retail florist and nurseries and lawn and garden supplies; 2) wholesale florist and nursery stock companies and suppliers; 3) landscape architects and landscape and horticultural service suppliers; 4) greenhouse, nursery and turf production and distribution ; and 5) membership and public golf courses and the horticultural maintenance of them.

In January of each year, the green industry in Colorado sponsors a week-long expo held at the Colorado Convention Center in Denver, which attracts over 6,000 professionals with over 600 booths at a trade show. This event is viewed as the premier green industry event for the entire Rocky Mountain region and beyond.

The green industries of Colorado are a co-sponsor of Planttalk Colorado™, which is a phone and web-based gardening information system for the gardening public. The Planttalk Colorado™ website now includes over 450 web messages in both English and Spanish. They also co-sponsor Plant Select®, a plant introduction and recommendation program for the Rocky Mountain Region and beyond which is now recognized nationwide.

In 2006, the Green Industries of Colorado (GreenCO) continued "It's Easy Being Green" campaign to highlight the industries sound water and best management practices across Colorado and to ensure landscapes remain an essential foundation of Colorado's quality of life, economic health and public image. GreenCO, an alliance of green landscape-related organizations has established and adopted a set of industry guidelines and standards known as Best Management Practices (BMPs). The BMPs are seen as such an effective tool for water conservation and management.

GreenCO, an alliance of green landscape-related organizations has established and adopted a set of industry guidelines and standards known as Best Management Practices (BMPs).

In 2006, GreenCO published the fifth joint "new and improved" buyer's guide, listing association information, member data and auxiliary resources. Also, the fifth joint meeting of owners and managers from several green industry organizations was held in November in Vail, Colorado. It provided a connection between the collective membership. GreenCO has approximately 1,500 member companies across Colorado.

Colorado's Agricultural Export Trends

by Timothy J. Larsen, senior international marketing specialist, Colorado Department of Agriculture

Colorado's agricultural exports were down three percent in 2005 from 2004 levels and continue to be below the 2003 export levels. The impact of the closure of world markets to Colorado and U.S. beef due to the December 23, 2003 discovery of a cow with BSE (Bovine Spongiform Encephalopathy) continues to be felt by Colorado's beef industry. While Colorado beef exports grew in 2005 versus 2004, due to strong markets in Canada and Mexico, Colorado's reduced grain harvest translated to lower exports for grains which offset the gains in Colorado's beef exports.

Colorado's 2005 exports were lower than recent historical levels due to the continued closure of the Japanese and Korean beef markets and a continuing drought, which has reduced Colorado's grain harvest and exports. With the opening of the Japan market in July of 2006, and the Korea market in September, Colorado's beef industry is poised to begin the multi-year effort to rebuild and regain their markets in Asia. While the agreement in principal exists, the implementation of the agreement to open the market could prove to be difficult. In 2005, Taiwan opened their market to Colorado and U.S. beef and purchased more U.S. beef in 2005 than pre- BSE (2003) market periods.

The primary challenge facing the U.S. beef industry is how to regain consumer confidence in the international markets after an absence from the market since December 2003. In Japan, consumer surveys indicate reluctance in purchasing U.S. beef products though recent U.S. beef industry promotions have provided promising consumer responses when offered U.S. beef in cooperation with Japanese meat industry representatives. Key to the opening of the Japanese and other Asian markets is to build acceptance by the consumer and the food service provider.

Colorado's top agricultural export markets continue to be influenced by the Colorado beef export trends. Colorado's largest export market is Mexico, lead by beef imports which were almost equal to pre-2003 levels and in 2006 continue to grow with import increases from the U.S. exceeding 50 percent in the first seven months of 2006 versus 2005 purchases. Canada's beef imports continue to rise and should reach pre-BSE levels in 2006.

Japan's imports from Colorado continue to lag due to the previously closed market. The U.S. beef industry is anticipating that aggressive marketing and promotion is required to grow this market and a return to pre-BSE import levels could be several years in the development. Korea's drop is also beef related. With the opening of the Korean

Agricultural Exports From The State Of Colorado

Value in millions of dollars

	2003	2004	2005	2006*	2007**
Beef, livestock and meat products	431.4	225.9	294.4	350.9	426
Hides and Skins	135.8	138.1	121.8	114.6	125.5
Wheat, flour and products	119.9	200.6	121.9	131.9	131.9
Course grains/feed/ fodder	130.7	160.7	151.7	166.9	188.3
Fruits & Vegetables	74	74	79.7	85	88.9
Misc processed foods and Ag. products	46.9	59	62	64.8	67.5
Dairy	13	16.9	23	23.2	23.2
Animal fats/oils	36.8	36.5	27.1	29.8	31.1
Total	988.5	911.7	881.6	967.1	1082.4

*Projection based on ytd 05 versus 06 exports from Colorado (WISER) and USDA, ERS forecasts
**USDA forecast
Source: U.S. Department of Agriculture Economic Research Service (ERS) and WISER

market, the industry will initiate market promotions to rebuild this market as well.

Colorado's 2006 exports will benefit from the continued market acceptance of beef in Mexico where U.S. exports have surged over 50 percent in the first seven months of 2006 versus 2005. Orders for U.S. beef in Japan are beginning and while growth will probably not be significant in 2006, the industry is aggressively working to begin regaining the consumer and trade confidence which could lead to appreciable export growth in beef to Japan in 2007. Japan and Korea beef imports represented over $168 million in exports from Colorado in 2003 and the industry will work to regain these exports in 2007.

Colorado's Top Agricultural Export Markets
Value in Millions of Dollars

Country	2003	2004	2005
EU 25	27.467	26.65	23.034
Canada	143.819	128.349	153.287
China	39.716	62.166	46.369
H Kong	39.821	24.479	18.355
Japan	157.798	74.462	78.36
Korea	108.286	45.287	33.737
Mexico	236.4	232.558	263.152
Taiwan	59.096	51.874	49.683
Total Top 8 Markets	812.403	645.825	665.977

Analysis of U.S. Mexico Agricultural Trade Since NAFTA

Timothy J. Larsen, senior international marketing specialist and
Michael Coe, intern, Markets Division, Colorado Department of Agriculture

NAFTA is beneficial to U.S. agriculture and has provided substantial American export growth since its implementation on January 1, 1994. U.S. agricultural exports to Mexico have grown faster than our U.S. global exports. Nearly all tariffs have been reduced to zero and the remaining agricultural provisions are to be fully implemented by 2008.

Between 1993 and 2005, global U.S. agricultural exports increased from $42.9 billion to $63 billion, a total gain of 47 percent, or $20.1 billion. During the same period, U.S. agricultural exports to Mexico increased from $3.6 billion in 1993 to $9.4 billion in 2005, an increase of 161 percent, or $5.8 billion, representing over 27 percent of all export growth.

Mexico purchased 8 percent of all U.S. agricultural exports in 1993 and grew to over 15 percent in 2005. Exports to Canada and Mexico (NAFTA countries) now represent 31 percent of all total U.S. agricultural exports and, since 1994, two-thirds of the worldwide increase in U.S. exports.

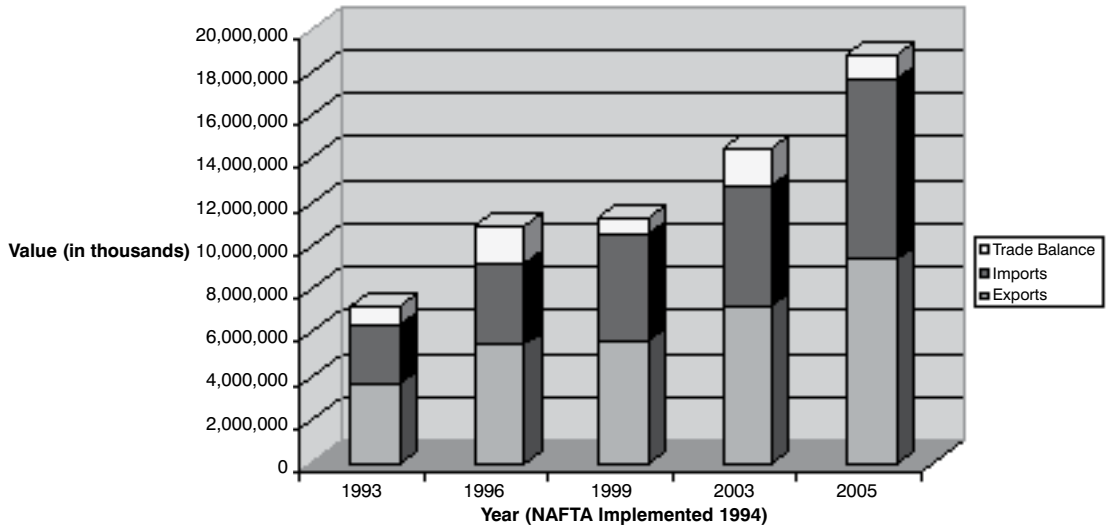
Remarkably, our increased exports occurred during a period (1995-mid 2002) when the high value of the U.S. dollar put American exports at a competitive disadvantage. This is especially true in Mexico. In 1993, the value of the peso to the U.S. dollar was 3:1. At the beginning of 2006, the exchange rate was 10 pesos to 1 US dollar – nearly a 3x increase in prices for Mexicans importing U.S. goods. Despite this, record U.S. export growth continued. Now, as the value of the U.S. dollar continues to decrease, U.S. exports have become less expensive for international buyers and will continue to increase.

While a wide variety of U.S. agricultural products have benefited from NAFTA, the best performers include: beef, including offals, corn, soybeans, cotton, fresh vegetables, fresh fruits, dried/dehydrated vegetables, feed ingredients, wheat, sorghum, grocery products and pork.

Mexico has also benefited from the NAFTA accord, with agricultural exports to the U.S. growing from $2.7 billion in 1993 to $8.3 billion in 2005. During this time, U.S. agriculture has continued to export nearly a billion dollars more annually to Mexico than it imports contributing to the U.S. agricultural industry's positive impact on the U.S. trade balance.

The majority of agricultural imports from Mexico to the United States do not compete with American industries because: a) they are products of specific consumer choice (e.g. Corona beer), b) they are products not grown/produced

U.S.-Mexico Agricultural Trade



in the United States (i.e. chocolate, coffee), or c) they are products available on a seasonal basis, such as year-round fresh fruits and vegetables.

Over 64 percent of the fruits and vegetables imported from Mexico are during the December to May winter months, providing products that are not available in the U.S. and not competing with any Colorado agricultural production. December through May imports of fruits and vegetables represents over 40 percent of all annual imports from Mexico.

Another 21 percent of all annual agricultural imports consist of beer or liquor (including tequila). 5.1 percent of total imports from Mexico are seafood products, and 3.7 percent are coffee and chocolate, which have no U.S. production.

Reduced tariffs and market access from the NAFTA agreement have provided consumers, including Colorado consumers, greater choice and better prices for high-quality agricultural products year-round while minimizing impacts upon Colorado businesses. Simultaneously Colorado, U.S. and Mexican agricultural producers have experienced significant increases in markets for their products and commodities due to the expanded access for agricultural products.

2005 U.S. Agricultural Imports From Mexico

Note: statistics reflect agricultural commodities with average import values > $500k/yr
Values in thousands of dollars

	Dec20 04-May-2005 Value	Dec. - May percent of Annual Total	Annual Value	percent of Total Annual Mex. Ag. Imports
Beer & Liquor	--	--	1,844,180	21.0 percent
Fish/Seafood	--	--	445,499	5.1 percent
Coffee & Chocolate	--	--	322,522	3.7 percent
Fresh Fruits	665,649	54.8 percent	1,215,780	13.8 percent
Fresh Vegetables	1,632,262	69.0 percent	2,367,149	27.0 percent
Fr. Fruits + Veg.	2,297,911	64.1 percent	3,582,929	40.8 percent
Beer/Liq., Cof/Choc. & Seafood		--	2,612,201	29.8 percent
Beer/Liq., Cof/Choc. & Seafood, & Dec-May Fruit/Veg	4,910,112*	--		55.9 percent
U.S. Ag. imports from Mexico			8,332,982	
fish/seafood imports from Mexico			445,499	
Total U.S. Ag. Imports from Mexico			8,778,481	

*Includes annual totals for Beer/Liq., Seafood, Coffee & Chocolate, and 6 months of Fresh Fruits and Vegetables

2007 Colorado Agricultural Directory

Alpaca Breeders of the Rockies
47705 East County Road 34
Bennett, CO 80102-8201
(303) 644-4110; fax: (303) 646-2654
www.alpacabreeders.com

Colorado Agricultural Aviation Association
11166 Huron Street, Suite 27
Denver, CO 80234
(303) 433-4446; fax: (303) 458-0002
www.coagav.org

Colorado Apple Administrative Committee
215 Silver St.
Delta, CO 81416
(970) 240-8373; fax: (970) 240-8426
www.coloradoapples.com

Colorado Aquaculture Association
P.O. Box 1992
Estes Park, CO 80517
(970) 586-9519; fax: (970) 586-6685
www.colaqua.org

Colorado Association of Conservation Districts
743 Horizon Court, Suite 322
Grand Junction, CO 81506
(970) 248-0070; fax: (970) 248-9229
www.cacd.us

Colorado Beef Council
789 Sherman Street, Suite 105
Denver, CO 80203-3530
(303) 830-7892; fax: (303) 830-7896
www.cobeef.com

Colorado Beekeepers Association
PO Box 159
Palmer Lake, CO 80133
(719) 481-8369; fax: (970) 876-5676
www.coloradobeekeepers.com

Colorado Cattlemen's Association
8833 Ralston Road
Arvada, CO 80002
(303) 431-6422; fax: (303) 431-6446
http://cca.beef.org

Colorado CattleWomen, Inc.
P.O. Box 68
Matheson, CO 80830
(719) 541-2763; fax: (719) 843-7758
www.yampavalleyinfo/coloradocattlewo.asp

Colorado Cooperative Council
PO Box 506
Eaton, CO 80615
(970)454-4054; fax: (970) 454-4082
www.coloradocoops.coop

Colorado Corn Administrative Committee-Colorado Corn Growers Association
127 22nd Street
Greeley, CO 80631
(970) 351-8201; fax: (970) 351-8203
www.coloradocorn.com

Colorado Dry Bean Administrative Committee
31221 Northwoods Circle
Buena Vista, CO 81211
(800) 318-8049 / (888) 841-1243

Colorado Egg Producers Association
6004 County Road 68C
Red Feather Lake, CO 80545
(970) 881-2902; (970) 881-2587

Colorado Elk Breeders Association
2055 Highway 50
Penrose, CO 81240
(719) 238-0171; fax: (719) 372-0418
www.wapiti.net/ceba/

Colorado Farm Bureau
9177 East Mineral Circle
Centennial, CO 80112
(303) 749-7500; fax: (303) 749-7703
www.colofb.com

Colorado Foundation for Agriculture
P.O. Box 10
Livermore, CO 80536
(970) 881-2902; fax: (970) 881-2587
www.growingyourfuture.com

Colorado Future Farmers of America (FFA) Association
9101 E Lowry Boulevard
Denver, CO 80230
(303) 595-1562; fax (720) 858-3130
www.njc.edu/ffa

Colorado Future Farmers of America (FFA) Foundation
62768 N. Star Drive
Montrose, CO 81401
(970) 249-1465
www.coloradoffafoundation.org

Colorado Hay and Forage Association
PO Box 416, Mead, CO 80542
(970) 774-4429; fax: (970)774-6281
www.coloradohay.org

Colorado Horse Development Authority-Rocky Mountain Horse Expo
420 E 58th Avenue, #145
Denver, CO 80216
(303) 292-4981; fax: (303) 293-2412
www.cohoco.com

Colorado Horticultural Society
22821 Sweet Clover
Cedaredge, CO 81413
(970) 835-4039

Colorado Livestock Association
822 7th Street, Suite 210
Greeley, CO 80631-3938
(970) 378-0500; fax: (970) 378-1962
www.coloradolivestock.org

Colorado Milk Marketing Board
1776 South Jackson Street, Ste 600
Denver, CO 80210-3805
(303) 757-7418; fax: (303) 757-7488

Colorado Nursery & Greenhouse Association
959 S Kipling Pkwy, Suite 200
Lakewood, CO 80226
(303) 758-6672; fax: (303)758-6805
www.coloradonga.org

Colorado Onion Association
201 N 1st St.
Lasalle, CO 80645
(970) 284-6982; fax: (970) 284-6428

Colorado Organic Producers Association
2727 County Road 134
Hesperus, CO 81326
(970) 588-2292; fax: (970) 588-2294
www.organiccolorado.org

Colorado Pork Producers Council
822 7th Street, Suite 210
Greeley, CO 80631-3938
(970) 378-0500; fax: (970) 378-1962

Colorado Potato Administrative Committee Area II
PO Box 348
Monte Vista, CO 81144-0348
(719) 852-3322; fax: (719) 852-4684
www.coloradopotato.org

Colorado Potato Administrative Committee Area III
PO Box 1774
Greeley, CO 80632-1774
(970) 304-0861; fax: (970) 352-5231
www.coloradopotato.org

Colorado Poultry Improvement Board
4816 E. Co. Rd. #30
Fort Collins, CO 80528
(970) 528-9324; fax: (970) 226-3680

Colorado Rural Development Council
1313 Sherman Street, Room 500
Denver, CO 80203
(303) 866-5193
www.ruralcolorado.org

Colorado Seed Growers Association
Department of Soil & Crop Sciences
Colorado State University
C143 Plant Sciences Bldg
Fort Collins, CO 80523-1170
(970) 491-6202; fax: (970) 491-1173
www.seeds.colostate.edu/CSGA/csga.html

Colorado State Forest Service
Colorado State University
Campus Delivery 5060
Foothills Campus Bldg 1050
Fort Collins, CO 80523-5060
(970) 491-6303; fax: (970) 491-7736
www.csfs.colostate.edu/

Colorado State Grange
7275 S Lima Street
Centennial, CO 80112-3850
(303) 708-0606; fax: (303) 708-0411
www.coloradograngе.org

Colorado Sugar Beet Growers Association
822 7th Street, Suite 620
Greeley, CO 80631
(970) 352-6875; fax: (970) 353-6463

Colorado Sunflower Administrative Committee
251 16th Street, Suite 101
Burlington, CO 80807
(719) 346-5571/(303) 646-8883
fax: (719) 346-5660
www.sunflowernsa.com

Colorado Sweet Corn
Administrative Committee
P.O. Box 1438
Montrose, CO 81402-1438
(970) 249-1083

Colorado Veterinary Medical Association
789 Sherman Street, Suite 550
Denver, CO 80203-3596
(303) 318-0447; fax: (303) 318-0450
www.colovma.com

Colorado Weed Management Association
6456 S. Niagra Ct
Centennial, CO 80111
(303) 779-7939; fax: (303) 220-5833
www.cwma.org

Colorado Wheat Administrative Committee-Colorado Association of Wheat Growers
7100 S Clinton Street, Suite 120
Centennial, CO 80112
(303) 721-3300; fax: (303) 721-7555
www.coloradowheat.org

Colorado Wine Industry
Development Board
700 Kipling Street, Suite 4000
Lakewood, CO 80215
(303) 239-4114; fax: (303) 239-4125
www.coloradowine.com

Colorado Wool Growers Association-Colorado Sheep and Wool Authority
8833 Ralston Road, Suite 200
Arvada, CO 80002
(303) 431-8310; fax: (303) 431-2156
www.coloradosheep.org

Colorado Young Farmers
Education Association
Northeast Junior College
100 College Drive, Box C129
Sterling, CO 80751
(970) 521-6690; fax: (970) 521-6801
www.coloradoyoungfarmer.com

Green Industries of Colorado
9367 W Vandeventor Drive
Littleton CO 80128
(303) 973-4026; fax: (303) 973-2263
www.greenco.org

International Society of Arboriculture-Rocky Mtn Chapter
9137 E. Mineral Avenue, Ste 306
Centennial, CO 80112
(303) 756-1815; fax: (303) 798-1315
www.isarmc.org

Rocky Mountain Agri-Business Association
11166 Huron Street, Suite 27
Denver, CO 80234
(303) 433-4446/(800) 243-1233 fax:
(303) 458-0002; www.rmagbiz.org

Rocky Mountain Bean Dealers Association
P.O. Box 1285
Elizabeth, CO 80107
(303) 646-8883; fax: (303) 646-8914

Rocky Mountain Farmers Union
5655 S. Yosemite Street, Ste 400
Greenwood Village, CO 80111
(303) 752-5800; fax: (303) 752-5810
www.rmfu.org

Rocky Mountain Food Industry Association
1370 Pennsylvania Street, Ste 320
Denver, CO 80203
(303) 830-7001; fax: (303) 830-7040

Society for Range Management
10030 W. 27th Avenue
Wheatridge, CO 80215-6601
(303) 986-3309; fax: (303) 986-3892
www.rangelands.org

Western Colorado Horticulture Society
PO Box 1221
Palisade, CO 81526-1221
(970) 241-6407

Western Dairy Farmers' Promotion Association
12000 N Washington St, Ste 200
Thornton, CO 80241-1926
(303) 451-7711; fax: (303) 451-0411
www.wdairycouncil.com

National Agricultural Organizations in Colorado

American Gelbvieh Association
10900 Dover Street
Westminster, CO 80021
(303) 465-2333; fax: (303) 465-2339
www.gelbvieh.org

American National Cattlewomen, Inc.
P.O. Box 3881
Englewood, CO 80155
(303) 694-0313; fax: (303) 694-2390
www.ancw.org

American Sheep Industry Association
9785 Maroon Circle, Suite 360
Centennial, CO 80112
(303) 771-3500 ext. 30
fax: (303) 771-8200
www.sheepusa.org

American Lamb Board
6300 E. Hampden Ave, Suite 2106
Denver, CO 80237
886-327-5262; fax (303) 759-5832
www.americanlambboard.org

American Society of Farm Managers and Rural Appraisers, Inc.
950 South Cherry, Suite 508
Denver, CO 80246-2664
(303) 758-3513; fax: (303) 758-0190
www.asfmra.org

Dairy Farmers of America
9775 E 97th Place
Henderson, CO 80640
(800) 626-6455; fax: (303) 853-0737
www.dfamilk.com

National Bison Association
1400 W. 122 Avenue, Suite 106
Westminster, CO 80234
(303) 292-2833; fax: (303) 292-2564
www.bisoncentral.com

National Cattlemen's Beef Assn
9110 E Nichols Avenue, #300
Centennial, CO 80112
(303) 694-0305; fax: (303) 694-2851
www.beef.org

National Farmers Union
5619 DTC Parkway, Suite 300
Greenwood Village, CO 80111-3136
(303) 337-5500; fax: (303) 771-1770
www.nfu.org

National Honey Board
11409 Business Park Circle, Suite 210
Firestone, CO 80501-6045
(303) 776-2337; (800) 553-7162
fax: (303) 776-1177
www.honey.com

National Livestock Producers Assn
660 Southpointe Court, Suite 314
Colorado Springs, CO 80906
(719) 538-8843; (800) 237-7193 fax:
(719) 538-8847
www.nlpa.org

National Onion Association
822 7th Street, Suite 510
Greeley, CO 80631
(970) 353-5895; fax: (970) 353-5897
www.onions-usa.org

National Potato Promotion Board
7555 East Hampden Ave, Ste 412
Denver, CO 80231
(303) 369-7783; fax: (303) 369-7718
www.potatohelp.com
www.uspotatoes.com

National Western Stock Show, Rodeo & Horse Show
4655 Humboldt Street
Denver, CO 80216
(303) 297-1166; fax: (303) 292-1708
www.nationalwestern.com

Wheat Food Council
10841 S. Crossroads Dr., Suite 105
Parker, CO 80134
(303) 840-8787; fax: (303) 840-6877
www.wheatfoods.org

U.S. Meat Export Federation
1050 17th Street, Suite 2200
Denver, CO 80265
(303) 623-6328; fax: (303) 623-0297
www.usmef.org

Conservation Districts

Agate
PO Box 215, Simla, CO 80835
(719) 541-2359; fax (719) 541-3061

Baca County
PO Box 398, Springfield, CO 81073
(719) 523-4522; fax (719) 523-6263

Bent
760 Bent Avenue, Las Animas, CO 81054
(719) 456-0120; fax (719) 456-2717

Big Thompson
PO Box 441, Berthoud, CO 80513
(970) 443-1110; fax (970) 667-1052

Bookcliff
PO Box 1302, Glenwood Sprgs, CO 81602
(970) 945-5494; fax (970) 945-0837

Boulder Valley
9595 Nelson Rd. Box D
Longmont, CO 80501
(303) 776-4034; fax (303) 684-9893

Branson/Trinchera
3590 E. Main St., Trinidad, CO 81082
(719) 846-3681; fax (719) 846-0525

Burlington
138 South 14th St., Burlington, CO 80807
(719) 346-7699; fax (719) 346-5179

Centennial
621 Iris Dr., Sterling, CO 80751
(970) 522-7440; fax (970) 522-3528
Center
PO Box 424, Center, CO 81125
(719) 754-3400; fax (719) 754-3109

Central Colorado
16995 Old Pueblo Rd., Fountain, CO 80817
(719) 382-8041; fax (719) 382-8041

Cheyenne
PO 850, Cheyenne Wells, CO 80810
(719) 767-5648; fax (719) 767-5041

Colorado First
356 Ranney St., Craig, CO 81625
(970) 824-3476; fax (970) 824-7055

Conejos County
PO Box 255, La Jara, CO 81140
(719) 274-4311; fax (719) 274-4312

Cope
2862 WA CR LL, Flagler, CO 80815
(970) 383-2324; fax (970) 383-2324

Costilla
PO Box 345, San Luis, CO 81152
(719) 672-3673; fax (719) 672-3315

Custer County - Divide
PO Box 389, Westcliffe, CO 81252
(719) 783-2481; fax (719) 783-9528

Debeque - Plateau Valley
2738 Crossroads Blvd, # 102
Grand Jct, CO 81506
(970) 242-4511; fax (970) 242-8469

Deer Trail
133 West Bijou Ave, Byers, CO 80103
(303) 822-5257; fax (303) 822-9542

Delta
690 Industrial Blvd, Delta, CO 81416
(970) 874-5735; fax (970) 874-7768

Dolores
628 W 5th St., Cortez, CO 81321
(970) 565-9045; fax (979) 565-8797

Double El
PO Box 215, Simla, CO 80835
(719) 541-2359; fax (719) 541-3061

Douglas County
PO 88, Franktown, CO 80116
(303) 688-3042; fax (303) 660-3838

Douglas Creek
PO Box 837, Meeker, CO 81641
(970) 878-5628; fax (970) 878-3730

Dove Creek
PO Box 10, Dove Creek, CO 81324
(970) 677-2463; fax (970) 677-2453

Eagle County
401 23rd St. Rm. 106, Glenwood Springs, CO 81601
(970) 945-5494, fax (970) 945-0837

East Adams
133 West Bijou Ave, Byers, CO 80103
(303) 822-5257; fax (303) 822-9542

East Otero
200 S. 10th St, Rocky Ford, CO 81067
(719) 254-7672; fax (719) 254-4541

El Paso County
1826 E Platte Ave., Ste 114
Colorado Springs, CO 80909
(719) 632-9598

Flager
PO Box 447, Flagler, CO 80815
(719) 765-4676; fax (719) 765-4370

Fort Collins
1415 N College Ave., Ste 3
Ft. Collins, CO 80524
(970) 221-0611; fax (970) 221-0611

Fremont
248 Dozier Ave, Canon City, CO 81212
(719) 275-4465; fax (719) 275-3019
Gunnison
216 N Colorado, Gunnison, CO 81230
(970) 642-4461; fax (970) 642-4425

Haxtun
1280 SW Interocean Dr
Holyoke, CO 80734
(970) 854-2812; fax (970) 854-2854

High Plains
PO Box 127, Hugo, CO 80821
(719) 743-2408; fax (719) 743-2501

Jefferson
655 Parfet St. Rm E-300
Lakewood, CO 80215-5517
(720) 544-2870; fax (720) 544-2964

Kiowa
PO 688, Franktown, CO 80116
(303) 621-2070; fax (303) 660-3838

Kiowa County
PO Box 845, Eads, CO 81036-0845
(719) 438-5414; fax (719) 438-5410

La Plata
PO Box 623, Durango, CO 81302
(970)588-3370; fax: (970) 588-3370

Lake County
PO Box 1287, Leadville, CO 80461
(719) 486-0438

Longmont
9595 Nelson Rd Box D
Longmont, CO 80501
(303) 776-4034; fax (303) 684-9893

Mancos
PO Box 308, Mancos, CO 81328
(970) 533-7317; fax (970) 533-7317

Mesa
2738 Crossroads Blvd #102
Grand Jct, CO 81506
(970) 242-4511; fax (970) 242-8469

Middle Park
PO Box 265, Kremmling, CO 80459
(970) 724-3456; fax (970) 724-0807

Morgan
200 W Railroad Ave, Ft Morgan, CO 80701
(970) 867-9659; fax (970) 867-9410

Mosca - Hooper
101 S. Craft Dr., Alamosa, CO 81101
(719) 589-3907; fax (719) 378-2980

Mount Sopris
PO 1302, Glenwood Springs, CO 81602
(970) 945-5494; fax (970) 945-0837

North Park
PO Box 1136, Walden, CO 80480
(970) 723-8204; fax (970) 723-4709

Northeast Prowers
PO Box 535, Holly, CO 81047
(719) 537-6506; fax (719) 537-6625

Olney - Boone
200 S 10th St, Rocky Ford, CO 81067
(719) 254-7672; fax (719) 254-4541

Pine River
31 Suttle St, Durango, CO 81303
(970) 259-3289; fax (970) 247-9301

Platte Valley
840 Broadway, Fort Lupton, CO 80621-2125, fax (303) 857-6721

Prairie
PO Box 127, Hugo, CO 80821
(719) 743-2408; fax (719) 743-2501

Prowers
3503 S Main, Lamar, CO 81052
(719) 336-3437; fax (719) 336-2210

Rio Grande
PO Box 801
Monte Vista, CO 81144
(719) 852-5114; fax (719) 852-3835

Routt County
1475 Pine Grove Rd, # 201A
Steamboat Spgs, CO 80487
(970) 879-3225; fax (970) 879-2517

San Juan
505A CR 600, Pagosa Springs, CO 81147
(970) 731-3615; fax (970) 731-1570

San Miguel Basin
PO Box 102, Norwood, CO 81423
(970) 327-4642; fax (970) 327-4090

Sedgwick County
210 Elm, St. Julesburg, CO 80737
(970) 474-2518; fax (970) 474-4918

Shavano
102 Par Place, Montrose, CO 81401
(970) 249-8407; fax (970) 249-5718

South Platte
621 Iris Dr, Sterling, CO 80751
(970) 522-7440; fax (970) 522-3528

South Pueblo County
200 S. Santa Fe Ave. 4th Floor, West Pueblo, CO 81003
(719) 543-8386; fax (719) 543-3914

South Side
PO Box 1302
Glenwood Springs, CO 81602
(970) 945-5494; fax (970) 945-0837

Southeast Weld
57 W Bromley Ln, Brighton, CO 80601
(303) 903-9833; fax (303) 659-1768

Spanish Peaks Purgatoire River
3590 E. Main St, Trinidad, CO 81082
(719) 846-3681; fax (719) 846-0525

Teller - Park
800 Research Drive, Ste. 100
Woodland Park, CO 80863
(719) 686-9405; fax (719) 686-9403

Turkey Creek
200 S. Santa Fe Ave. 4th Floor, W. Pueblo, CO 81003
(719) 543-8386; fax (719) 543-3914

Upper Arkansas
325 W Rainbow Blvd, Salida, CO 81201
(719) 539-7331; fax (719) 539-3593

Upper Huerfano
711 Walsen Ave., #A
Walsenburg, CO 81089-2476
(719) 738-1171; fax (719) 738-4873

Washington County
PO Box U, Akron, CO 80720
(970) 345-2006; fax (970) 345-6610

West Adams
224 S 14th Ave, Brighton, CO 80601
(303) 659-3118; fax (303) 655-2081

West Arapahoe
21901 E Hampden Ave, Aurora, CO 80013
(303) 693-3621; fax (303) 693-3379

West Greeley
4302 W 9th St Rd, Greeley, CO 80634
(970) 356-8097; fax (970) 351-0392

West Otero Timpas
200 S. 10th St., Rocky Ford, CO 81067
(719) 254-7672; fax (719) 254-4541

White River
PO Box 837, Meeker, CO 81641
(970) 878-5628; fax (970) 878-3730

Yuma
PO Box 116, Yuma, CO 80759
(970) 8 48-5605; fax (970) 848-5613

Yuma County
247 N Clay St Ste 1, Wray, CO 80758
(970) 332-3173; fax (970) 332-4425

Government

Governor Bill Ritter
136 State Capitol
Denver, CO 80203
(303) 866-2471; fax: (303) 866-2003
www.colorado.gov

Office of Economic Development & International Trade
1625 Broadway, Suite 1700
Denver, CO 80202
(303) 892-3840; fax: (303) 892-3848
www.state.co.us/oed

Office of Energy Management and Conservation
225 E 16th Avenue, Suite 650
Denver, CO 80203
(303) 866-2100 / (800) 632-6662
fax: (303) 866-2930
www.state.co.us/oemc

Governor's Advocate Office
127 State Capitol
Denver, CO 80203
(303) 866-2885 / (800) 283-7215
fax: (303) 866-6326
www.state.co.us/govsadvocateoffice

Department of Agriculture
700 Kipling Street, Suite 4000
Lakewood, CO 80215-8000
(303) 239-4100 / (800) 886-7683
fax: (303) 239-4125
www.ag.state.co.us

Animal Industry Division
(303) 239-4161; fax: (303) 239-4164

Brand Inspection Division
4701 Marion Street, Suite 201
Denver, CO 80216
(303) 294-0895; fax: (303) 294-0918

Colorado State Fair
1001 Beulah Ave. Pueblo, CO 81004
(719) 561-8484; (800) 876-456

Conservation Services Division
(303) 239-4112; fax: (303) 239-4125

Inspection & Consumer Serv. Div.
2331 W 31st Ave, Denver, CO 80211
(303) 477-0076; fax: (303) 480-9236

Markets Division
(303) 239-4114; fax: (303) 239-4125

Plant Industry Division
(303) 239-4140; fax: (303) 239-4177

Department of Natural Resources
1313 Sherman Street, Suite 718
Denver, CO 80203
(303) 866-3311 / (800) 536-5308
fax: (303) 866-2115

Colorado State Parks
(303) 866-3437
Division of Minerals & Geology
(303) 866-3567; fax: (303) 832-8106

Division of Water Resources
(303) 866-3581; fax: (303) 866-3589

Division of Wildlife
6060 Broadway, Denver, CO 80216
(303) 297-1192

State Land Board
(303) 866-3454; fax: (303) 866-3152
Water Conservation Board
(303) 866-3441

Dept. of Public Health & Environ.
4300 Cherry Creek Drive South
Denver, CO 80246
(303) 692-2000/(800) 886-7689

Air Pollution Control Division
(303) 692-3100

Environmental Sustainability
Program, (303) 692-3269
Water Quality Control Division
(303) 692-3500

Great Outdoors Colorado
1600 Broadway, Suite 1650
Denver, CO 80202
(303) 863-7522; fax: (303) 863-7517
www.goco.org

Federal Government Agencies

Federal Information Center
(800) 688-9889

U.S. Department of Agriculture
655 Parfet Street
Lakewood, CO 80215

Agricultural Statistics Service
(303) 236-2300
www.nass.usda.gov/co

Animal & Plant Health Inspection Service (APHIS)
Plant Protection & Quarantine
3950 Lewiston Road
Aurora, CO 80011
(303) 371-3355

Animal & Plant Health Inspection Service (APHIS)
Veterinary Services
755 Parfet Street, Suite 136
Lakewood, CO 80215
(303) 231-5385

Farm Service Agency
(720) 544-2876, www.fsa.usda.gov/co
Food & Nutrition Services
665 Broadway, Suite B
Denver, CO 80303
(303) 497-5411; (303) 497-7306

Natural Resources Conservation Service
(720) 544-2810
www.co.nrcs.usda.gov

GIPSA - Packers & Stockyard Programs
3950 Lewiston, Suite 200
Aurora, CO 80011-1556
(303) 375-4240

Rural Development
(720) 544-2903
www.rurdev.usda.gov/co

U.S. Forest Service/Regional Office
740 Simms Street, Golden, CO 80401
(303) 275-5350, fax: (303) 275-5327

U.S. Department of Commerce
U.S. Export Assistance Center
1625 Broadway, Suite 680
Denver, CO 80202
(303) 844-6622, ext. 18

U.S. Department of the Interior
Bureau of Land Management - State Office
2850 Youngfield Street
Lakewood, CO 80215
(303) 239-3600; fax: (303) 239-3933
www.co.blm.gov

National Park Service
12795 W Alameda Parkway
Lakewood, CO 80228
(303) 969-2000

U.S. Fish and Wildlife Service
134 Union Boulevard, Suite 670
Lakewood, CO 80228
(303) 236-4773
www.mountain-prairie.fws.gov/co

U.S. Geological Survey
1313 Sherman Street, Room 715
Denver Federal Center
Lakewood, CO 80203
(303) 866-2611

U.S. Environmental Protection Agency (EPA) - Region 8 Office
999 18th Street, Suite 200
Denver, CO 80202
(303) 312-6312; (800) 227-8917
www.epa.gov/region8

The White House
1600 Pennsylvania Avenue NW
Washington, DC 20500
Comments: (202) 456-1111
Switchboard: (202) 456-1414
www.whitehouse.gov

Colorado Congressional Offices

Congressman Ed Perlmutter
415 Cannon House Office Building
Washington, D.C. 20515
(202) 225-2645; fax: (202) 225-5278
www.house.gov/perlmutter
Aurora (303) 369-4727
Wheatridge (303) 940-5821

Congresswoman Diana DeGette
2421 Rayburn House Office Bldg
Washington, DC 20515
(202) 225-4431; fax: (202) 225-5657
www.house.gov/degette
Denver (303) 844-4988

Congressman Doug Lamborn
437 Cannon House Office Bldg
Washington, DC 20515
(202) 225-4422; fax: (202) 225-1942
www.house.gov/hefley
Colorado Springs (719) 520-0055

Congresswoman Marilyn Musgrave
1507 Longworth House Office Bldg
Washington, DC 20515
(202) 225-4676; fax: (202) 225-5870
www.house.gov/musgrave
Greeley (970) 352-4037
Las Animas (719) 456-0925
Longmont (720) 494-4336
Loveland (970) 663-3536
Sterling (970) 522-1788

Congressman Tom Tancredo
1131 Longworth House Office Bldg
Washington, DC 20515
(202) 225-7882; fax: (202) 226-4623
www.house.gov/tancredo
Castle Rock (303) 688-3430
Centennial (720) 283-9772
Littleton (720) 283-7575

Congressman John T. Salazar
1531 Longworth House Office Bldg
Washington, DC 20515
(202) 225-4761; fax: (202) 226-9669
www.house.gov/salazar
Alamosa (719) 587-5105
Durango (970) 375-3264
Grand Junction (970) 245-7107
Pueblo (719) 543-8200

Congressman Mark Udall
100 Cannon House Office Building
Washington, DC 20515
(202) 225-2161, fax: (202) 226-7840
www.house.gov/markudall
Minturn (970) 827-4154
Westminster (303) 650-7820

Senator Wayne Allard
521 Dirksen Senate Office Building
Washington, DC 20510
(202) 224-5941; fax: (202) 224-6471
www.allard.senate.gov
Colorado Springs (719) 634-6071
Durango (970) 375-6311
Englewood (303) 220-7414
Grand Junction (970) 245-9553
Loveland (970) 461-3530
Pueblo (719) 545-9751

Senator Ken Salazar
702 Hart Senate Office Bldg
Washington, DC 20510
(202) 244-5852, fax: (202) 228-5036
www.salazar.senate.gov
Alamosa (719) 587-0096
Colorado Springs (719) 328-1100
Denver (303) 455-7600/866-455-9866
Durango (970) 259-1710
Fort Collins/Greeley (970) 224-2200
Fort Morgan (970) 542-9446
Grand Junction (970) 241-6631
Pueblo (719) 542-7550

Farm/Ranch Management Assistance

Colorado Comm. College System
9101 East Lowry Blvd.
Denver, CO 80230, (303) 620-4000

Colorado Northwestern Community College
Rangely, (800) 562-1105

Colo. State University Department of Agricultural and Resource Economics
(970) 491-6955

Delta-Montrose Area Vocational Technical Center
Delta (970) 874-7671

Lamar Community College
(719) 336-2248

Mesa College
Grand Junction
(970) 248-1020 / (800) 982-6372
Montrose Center
(970) 249-7009

Morgan Community College
Fort Morgan
(970) 542-3100 / (800) 622-0216

Northeastern Jr. College
Sterling
(970) 521-6600 / (800) 626-4637

Otero Jr. College
La Junta
(719) 384-6831

Pueblo Community College
(719) 549-3200

San Juan Basin Technical School and Pueblo Community College
Cortez (970) 565-7496
Durango (970) 247-2929

Trinidad State Jr. College
(719) 846-5011 / (800) 621-8752

Valley Campus
(719) 589-7000 / (800) 411-8382

Colorado State University

Fort Collins, CO 80523
Information: (970) 491-1101
www.colostate.edu

Agricultural Experiment Station (and Research Centers)
(970) 491-5371

Research Centers:
ARDEC (Agricultural Research, Development and Education Center), Fort Collins
(970) 491-2405

Arkansas Valley, Rocky Ford
(719) 254-6312

Eastern Colorado, Akron
(970) 345-6402
Plainsman, Walsh (970) 324-5643

San Juan Basin, Hesperus
(970) 385-4574

San Luis Valley, Center
(970) 754-3594

Southwestern Colorado
Yellow Jacket (970) 562-4255

Western Colorado (3 locations):
Fruita (970) 858-3629
Orchard Mesa (970) 434-3264
Rogers Mesa (970) 872-3387

College of Agricultural Sciences
(970) 491-6274

Colorado Agricultural & Rural Leadership Program
(970) 491-2246

Colorado State Forester
(970) 491-6303

Colorado Water Resources Research Institute
(970) 491-6308

Cooperative Extension
(970) 491-6281
(County Offices listed opposite page)

Food Safety Specialist
(970) 491-7334

Colorado State University Cooperative Extension Offices

Adams County
Brighton (303) 637-8100

Alamosa County
San Luis Valley Area Office
Monte Vista (719) 853-7381

Arapahoe County
Littleton (303) 730-1920

Archuleta County
Pagosa Springs (970) 264-5931

Baca County
Springfield (719) 523-6971

Bent County
Las Animas (719) 456-0764

Boulder County
Longmont (303) 678-6238

Broomfield County
Broomfield (720) 887-2286

Chaffee County
Salida (719) 539-6447

Cheyenne County
Cheyenne Wells (719) 767-5716

Conejos County
San Luis Valley Area
La Jara (719) 274-5200

Costilla County
San Luis Valley Area Office
(719) 853-7381

Crowley County
Ordway (719) 267-4741 ext. 7

Custer County
Westcliffe (719) 783-2514

Delta County
Delta (970) 874-2195

Denver County
Denver (720) 913-5270

Dolores County
Dove Creek (970) 677-2283

Douglas County
Castle Rock (720) 733-6930

Eagle County
Eagle (970) 328-8630

Elbert County
Simla (719) 541-2361
Kiowa Branch (303) 621-3162

El Paso County
Colorado Springs (719) 636-8920

Fremont County
Canon City (719) 276-7390

Garfield County
Rifle (970) 625-3969

Gilpin County
Golden (303) 582-9106

Grand County
Kremmling (970) 724-3436

Gunnison County
Gunnison (970) 641-1260

Huerfano County
Walsenburg (719) 738-2170

Jackson County
Walden (970) 723-4298

Jefferson County
Golden (303) 271-6620

Kiowa County
Kiowa (719) 438-5321

Kit Carson County
Burlington (719) 346-5571

La Plata County
Durango (970) 247-4355

Larimer County
Fort Collins (970) 498-6000

Las Animas County
Trinidad (719) 846-6881

Lincoln County
Hugo (719) 743-2542

Logan County
Sterling (970) 522-3200 ext.

Mesa County
Grand Junction (970) 244-1834

Mineral County
San Luis Valley Area Office
(719) 852-7381

Moffat County
Craig (970) 824-9180

Montezuma County
Cortez (970) 565-3123

Montrose & Ouray Counties
Montrose (970) 249-3935

Morgan County
Fort Morgan (970) 542-3540

Otero County
Rocky Ford (719) 254-7608

Park County
Fairplay (719) 836-4289

Phillips County
Holyoke (970) 854-3616

Prowers County
Lamar (719) 336-7734

Pueblo County
Pueblo (719) 583-6566

Rio Blanco County
Meeker (970) 878-4093
Western Annex (970) 675-2417

Rio Grande County
San Luis Valley Area Office
(719) 657-0213

Routt County
Steamboat Springs
(970) 879-0825

San Luis Valley Area Office
Monte Vista
(719) 852-7381

San Luis Valley Research Center
Center (719) 754-3494

San Miguel County-West Montrose
Norwood (970) 327-4393

Sedgwick County
Julesburg (970) 474-3479

Summit County
Frisco (970) 668-3595
Denver (303) 623-2535

Teller County
Cripple Creek (719) 689-2552

Washington County
Akron (970) 345-2287

Weld County
Greeley (970) 304-6535

Yuma County
Wray (970) 332-4151

Colorado Agricultural and Rural Leadership (CARL) Program

Agriculture must develop leaders capable of communicating the issues of agriculture to the greater population and at the same time, be insightful and forward thinking leaders within their own industries. The Colorado Agricultural and Rural Leadership program is a two year, interactive travel/study program dedicated to producing graduates with the vision and commitment to lead change and ensure the sustainability of Colorado's agricultural economies and rural communities. CARL program graduates hold a growing number of positions of major responsibility at local, state and national levels.

Assistance and encouragement to new participants will be provided by alumni of former participants of the CARL program, the Colorado Department of Agriculture and several farm, ranch, and agricultural organizations and agencies. For more information on the program, contact Dr. Jim Heird, CARL director and associate dean of the College of Agricultural Sciences at (970) 491-6274, or see: http://www.agsci.colostate.edu/carl/

Colorado Agricultural Leadership Associates

Colorado Agricultural Leadership Associates is a private, non-profit organization formed to promote unity and cooperation among the Colorado Agricultural Leadership program graduates, Colorado Agricultural and Rural Leadership Program graduates, and other agricultural leadership programs. The purpose of the organization is to:

- Promote and initiate continuing education programs for members on issues of importance to Colorado's agricultural industry;
- Work on programs that enhance the general public's understanding of Colorado's agricultural industry;
- Promote and encourage members on a nonpartisan, non-discriminatory basis to attain leadership positions of importance to Colorado agriculture and rural communities.

Associate members have been instrumental in establishing the Colorado Agricultural Outlook Forum and Colorado-Russia Agricultural Group, and conducting community outreach meetings throughout Colorado. Contact Nelson Martin, 6532 WCR 50 Johnstown, CO 80534, 800-333-7929, or, nmartin@ranch-way.com, for more information.

2007 Colorado Agricultural Outlook Forum Organization

The Colorado Agricultural Outlook Forum (CAOF) reorganized after the 2004 Forum, and is now working to establish Colorado Non-Profit organization with 501(c)(3) status. The operation of the CAOF is directed by a nine- member board of trustees with three members each representing the Colorado Department of Agriculture, Colorado State University Cooperative Extension, and the Colorado Agricultural Leadership Associates - the three organizations behind the concept of the CAOF. The board of trustees solicits and receives important advice and recommendations about the focus, content and speakers for each forum from a steering committee of representatives of the primary state agricultural organizations and commodity groups. The steering committee also provides invaluable assistance in the actual presentation of the forum each year.

Colorado Agricultural Outlook Forum Board of Trustees

Nelson Martin, president
Pete Eggleston, vice president
Angela Cue, secretary/treasurer
Rebecca Cooper
Tony Frank
Marc Johnson
John Stulp
Scott Stump

Colorado State University

Colorado State University is one of the nation's most respected land-grant institutions with extensive teaching, research and outreach programs that support useful economic development through job, technology and wealth creation as well as quality of life for all people. CSU is a recognized academic leader in fundamental research in a number of fields critical to all people, including agriculture, energy and environment, water resources, atmospheric science, infectious disease prevention, biomedicine, cancer and advanced technology. As Colorado's land-grant institution, the University utilizes its Cooperative Extension system of county offices to provide links between the University and citizens in such areas as agriculture, natural resources, nutrition, consumer and family education and 4-H Youth development.

Colorado State University is consistently ranked as one of the nation's top universities in a variety of categories and disciplines. What sets CSU education apart from the others is that at CSU, world-class faculty members with an internationally-recognized reputation work on global problems with emerging young researchers.

- CSU is ranked in the top tier among public and private doctoral universities in the 2006 *U.S. News and World Report* "America's Best Colleges and Universities."
- The *Princeton Review* lists CSU among the best in the nation.
- The Templeton Foundation lists CSU on its "Honor Roll of Institutions that Build Character."
- The College of Agriculture is consistently ranked in the top 10 in the nation.

Colorado State University is committed to the vision that achieving our mission in research, teaching, and service will depend on our ability to build strategic partnerships both internally and externally, in Colorado and around the world. We are committed to building a network of strategic partnerships that leverage our intellectual assets with those of other institutions.

Colorado Department of Agriculture

With 30,500 farms and ranches across the state, Colorado agriculture helps feed the nation and the world, provides wildlife habitats, protects the environment and fuels the state economy. Our agricultural industry-including inputs, production, processing, and marketing- generates more than 105,000 jobs and contributes nearly $16 billion to Colorado's economy each year. With our largest markets in Mexico, Canada, Japan and Taiwan, Colorado farmers and ranchers exported Colorado food products valued at $882 million in 2005.

The mission of the Department of Agriculture is to strengthen and advance Colorado's agriculture industry; ensure a safe, high quality, and sustainable food supply; and protect consumers, the environment, and natural resources.

The Department of Agriculture was created as an agency of state government in 1949, although its historical roots date back to before the turn of the century. More than 275 employees perform a wide array of services for consumers, farmers and ranchers throughout the state. Under the direction of Commissioner Don Ament, the Colorado Department of Agriculture is proud to serve Colorado citizens through seven divisions: Animal Industry, Brand Inspection, Colorado State Fair, Conservation Services, Inspection and Consumer Services, Markets, and Plant Industry.

Colorado Department of Agriculture
700 Kipling St., Suite 4000
Lakewood, CO 80215
(303) 239-4100
www.ag.state.co.us

COLORADO
DEPARTMENT OF
AGRICULTURE