



# ***Agricultural exports, key factor in future growth***

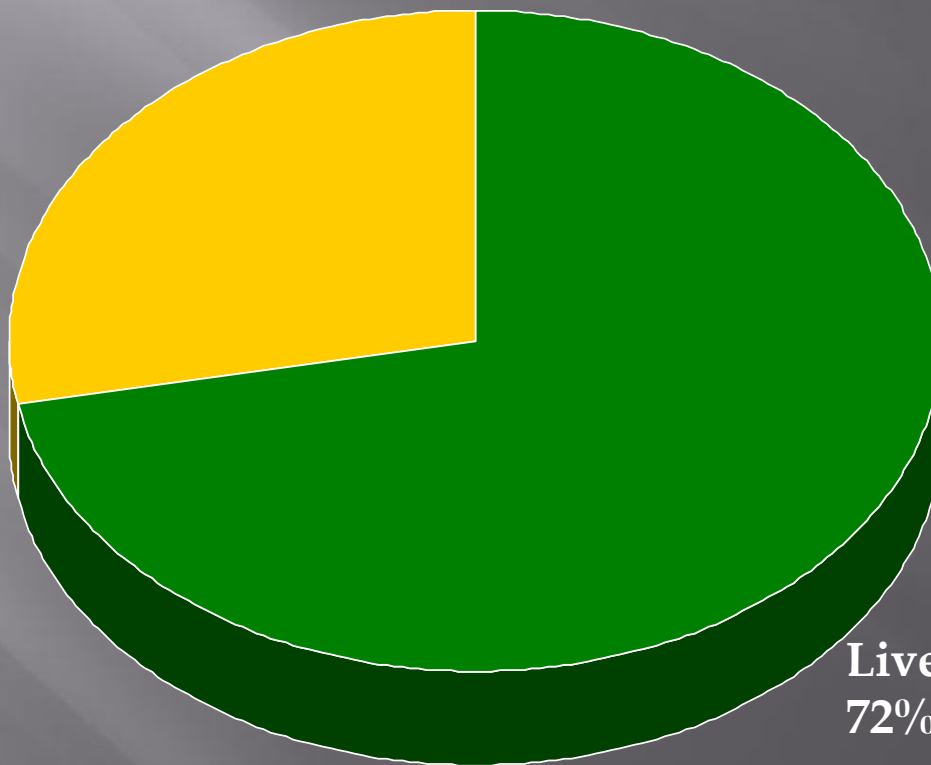
*Markets Division*

WHY ARE EXPORTS  
IMPORTANT TO  
COLORADO'S AGRICULTURAL  
ECONOMY

# Ag's Impact on the State Economy

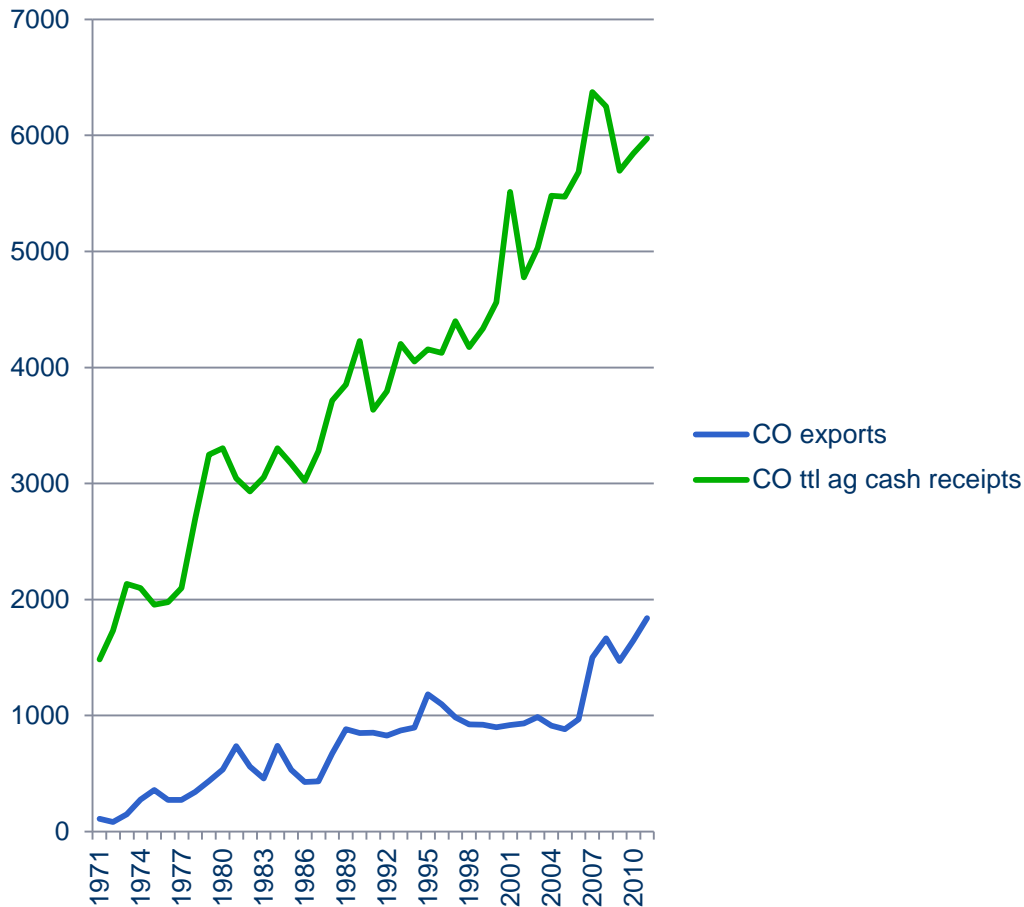
## farm/ranch sales

Crops - 28%  
\$1,585,277,000



Livestock & Products  
72% \$4,061,854,000

# Exports increase in importance to Colorado's agricultural industry



## 1971-2011 Change

- Cash receipts X 3
- Exports X 15

		<b>Cash Receipts (Million \$)</b>
#1	Cattle & calves	3,058
#2	Dairy (milk)	534
#3	Corn for grain	518
#4	Wheat	476
#5	Produce	466
#6	Hay	390
#7	Greenhouse & nursery	277
#8	Poultry & eggs	203
#9	Hogs	176
#10	Sheep & lambs	114
<b>Total for Top 10</b>		<b>\$6,212</b> <b>95.8% of total agricultural cash receipts</b>

# IF CRAFT BEVERAGE INDUSTRY WAS A SINGLE INDUSTRY

		<b>Cash Receipts (Million \$)</b>
#1	Cattle & calves	3,058
#2	Dairy (milk)	534
#3	Corn for grain	518
#4	Wheat	476
#5	Produce	466
#6	Hay	390
	<b>Craft Beverage</b>	<b>321</b>
#7	Greenhouse & nursery	277
#8	Poultry & eggs	203
#9	Hogs	176
#10	Sheep & lambs	114

# Exports

- Finding a market
- Distribution and Sales
- Export assistance
- Shipping and Logistics

# Colorado's Beverage Industry

Sector	# Ops	# jobs	Eco impact (\$M)
Beer Industry (wages)			\$844
Beer Large	2	2430	
Beer Craft	161	4186	304
Wine	106	571	17.3
Distillery	34	102	
Barley Farms	331	331	41.278
Total Craft Sector	301	4859	\$321.3



# United States Exports Via Colorado January-October

Alcoholic Beverage	U.S Dollar			% Change	
	2010	2011	2012	2011	2012
	825,869	640,756	1,046,016	63.25	
Beer made from Malt	655,946	560,494	800,348	42.79	
Ethyl Alco Etc>80%Alc	0	3,152	143,229	4,444.07	
Ethl Alc/Undnat<80Alc	18,823	2,531	79,189	3,028.76	
Wine of fresh grapes	151,127	74,579	23,250	-68.383	

## Market Forecasts for Alcoholic Drinks by Volume (MN liters)

Geographies	2011	2012	2013	2014	2015	2016
China	55,782	59,005	62,401	65,996	69,722	73,574
USA	28,528	28,335	28,345	28,393	28,508	28,765
Brazil	14,915	15,353	16,017	17,177	17,808	18,751
Russia	13,333	13,232	13,081	12,881	13,058	13,297
Germany	11,847	11,750	11,648	11,541	11,403	11,261
Japan	9,443	9,463	9,467	9,458	9,442	9,423
Mexico	7,143	7,312	7,498	7,783	8,007	8,218
UK	7,077	7,026	6,928	6,892	6,892	6,930
India	4,142	4,602	5,089	5,601	6,132	6,677
S Africa	4,446	4,599	4,717	4,823	4,920	5,009

## Market Forecast for Wine by Volume (MN liters)

Geographies	2011	2012	2013	2014	2015	2016
China	3,872	4,333	4,839	5,374	5,932	6,529
USA	2,725	2,765	2,818	2,870	2,942	2,977
France	2,470	2,468	2,466	2,467	2,470	2,465
Italy	2,488	2,446	2,405	2,375	2,355	2,336
Germany	2,111	2,098	2,086	2,072	2,056	2,039
Russia	1,309	1,365	1,434	1,516	1,608	1,678
UK	1,397	1,382	1,357	1,340	1,329	1,321
Argentina	1,000	997	995	994	994	996
Spain	999	972	952	934	918	904
Japan	861	857	853	849	845	843

# Market Forecast for Beer by Volume (MN liters)

Geographies	2011	2012	2013	2014	2015	2016
China	47,540	50,083	52,742	55,556	58,460	61,433
USA	23,494	23,209	23,125	23,085	23,107	23,269
Brazil	13,266	13,687	14,323	15,425	16,038	16,942
Russia	9,959	9,860	9,662	9,413	9,532	9,734
Germany	8,598	8,515	8,426	8,337	8,220	8,101
Mexico	6,709	6,865	7,037	7,308	7,517	7,713
Japan	6,725	6,732	6,736	6,721	6,706	6,690
S Africa	3,551	3,645	3,762	3,799	3,863	3,923
UK	4,299	4,205	4,070	3,989	3,938	3,921
Vietnam	2,595	2,852	3,079	3,296	3,505	3,700

## Market Forecast for Spirits (MN liters)

Geographies	2011	2012	2013	2014	2015	2016
China	4,367,646	4,587,151	4,818,054	5,064,004	5,327,559	5,609,765
India	2,215,789	2,459,878	2,719,753	2,989,219	3,265,304	3,544,240
USA	1,719,070	1,742,764	1,768,722	1,796,170	1,824,447	1,855,589
Russia	1,734,940	1,687,167	1,656,717	1,610,964	1,560,252	1,515,105
S Korea	1,244,562	1,258,694	1,278,082	1,308,392	1,349,129	1,401,102
Brazil	1,119,070	1,111,020	1,107,904	1,129,231	1,119,765	1,124,213
Japan	1,077,506	1,073,739	1,073,592	1,073,211	1,072,300	1,071,836
Philippines	799,282	834,628	864,648	891,372	917,191	941,788
Thailand	683,594	704,789	724,917	744,332	762,558	780,119
Ukraine	499,714	505,664	507,656	511,275	516,341	519,977

# EXPORT ASSISTANCE

- ❖ Beer      National Beer Association / Colorado Brewers Guild
- ❖ Spirits DISCUS / Colorado Distillers Guild
- ❖ OEDIT
- ❖ WUSATA
- ❖ Colorado Department of Agriculture



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# Domestic trade shows with funding support available for beverage industry

- ▣ • Americas Food & Beverage Show & Conference
- ▣ • Duty Free Show of the Americas
- ▣ • In Flight (IFSA Annual Conference & Exhibition)
- ▣ • NASFT/Fancy Food Show - Summer
- ▣ • NASFT/Fancy Food Show - Winter
- ▣ • National Restaurant Association (NRA)
- ▣ • Natural Products Exposition - East
- ▣ • Natural Products Exposition - West
- ▣ • Nightclub & Bar Beverage and Food, Convention and Trade Show
- ▣ • World Wine Market Show



# IWBS



**Join the Colorado Pavilion at International Wine, Spirits & Beer Event at the NRA Show in Chicago**

**Colorado is creating a Colorado Showcase for our wine, spirits and beer industry. Here's an opportunity to showcase your products as part of Colorado's 250 company beverage industry.**

**May 19-20, 2013  
Chicago, Illinois**