

# SAN ANGELO

Chamber of Commerce  
Economic Development



## THE IMPACT OF **AGRICULTURE** ON THE CONCHO VALLEY



Welcome to the latest edition of the Impact of Agriculture on the Concho Valley. The San Angelo Chamber of Commerce Economic Development Department worked with the staff of the Texas A&M AgriLife Extension Service and the Angelo State University Department of Agriculture to produce this report on the powerful economic impact of our regional agricultural sector.

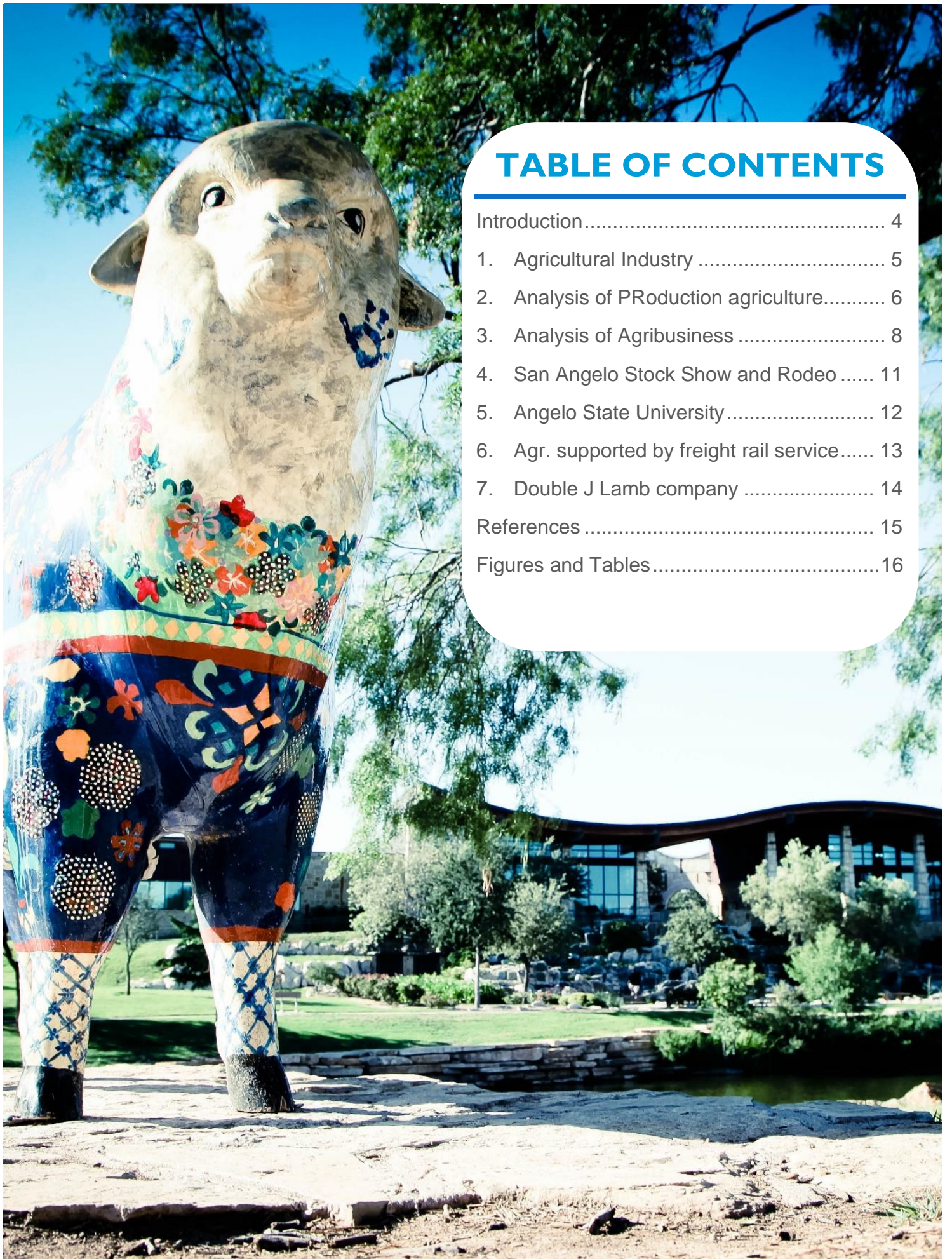
This report was a collaborative project with contributions from the Texas A&M AgriLife Extension office in San Angelo, the Angelo State University Department of Agriculture Management, Instruction and Research Center (ASU-MIR) and the San Angelo Chamber of Commerce.

The agricultural sector of the Concho Valley economy yields approximate \$800 million annually, making this sector the largest single economic driver in the region. The agricultural industry around the trade hub of San Angelo is a complex network of professionals working year-round within a specific market-delivery structure, producing, and delivering food and fiber products to the national and global marketplace. Consumers depend on the science-based, highly technical procedures and expertise of our regional ranchers and farmers for the timely production and delivery of high-quality products.

Concho Valley-based agricultural products are exported to major markets across America and worldwide, providing raw materials that often serve as the platform upon which other final-production economies are based.

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## INTRODUCTION

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Agriculture, whether it is raising cotton, wheat or grain sorghum, cattle, sheep or goats, developed as an economic mainstay for the Concho Valley with the founding of San Angelo in 1867. Since then, the agricultural industry has changed with the of addition processing, storage and distribution facilities, vertical supply channels, implement dealers and specialized crop and livestock production, marketing and financing consultants, and other service providers. All these entities have changed and evolved with the dramatic and rapid adoption of new technologies, changing consumer preferences and challenging economic conditions.

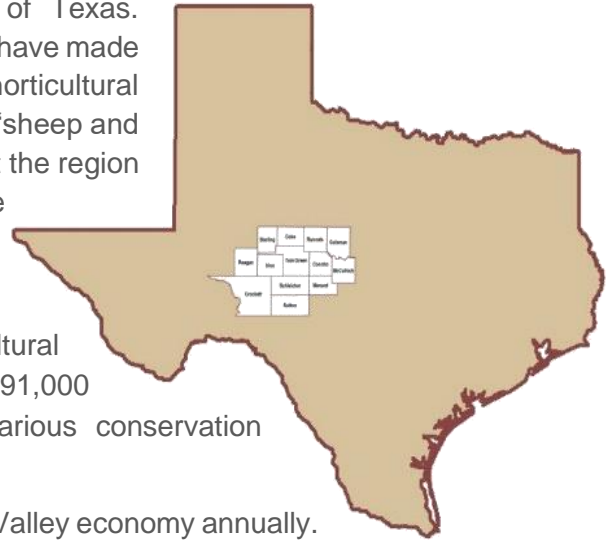
All of this is agribusiness, “a concept of economics which includes all operations involved in the manufacture and distribution of farm supplies; production on the farm; the storage, processing and distribution of farm commodities and items made from them.” This definition, by John H. Davis of the Harvard Business School, has been around for more than six decades, though many people still do not understand the effects agriculture has on their communities, region or lives.

Today, agriculture is contributing more to the citizens of the Concho Valley than ever before, while at the same time, being asked to do even more. Aside from producing basic commodities, agriculture is being expected to provide jobs and economic stability, a tax base for local and county governments and a first-line defense against various food-borne illnesses and other livestock and wildlife diseases. Agriculture and rural lands across the Concho Valley and the rest of America are increasingly being expected to address an ever-widening array of issues, problems and policies from animal rights issues, environmental and climatic concerns, energy production, water and other natural resource conservation measures.

“Providing a safety net for our farmers and ranchers... serves the interests of not only the American producer, but also the American consumer and taxpayer,” said Rep. Mike Conaway, R-Midland, a member of the House Agriculture Committee and a strong advocate of agriculture. Like many people with a rural or West Texas background, Conaway understands the importance of growing grain, fruit, fiber and meat in sustaining Texas and the United State. But for Concho Valley residents and visitors who aren’t involved in direct agricultural production, this summary illustrates those effects and shows how they weave into the daily lives of not only thousands of regional residents, but the millions who eat or wear the end products of the region’s agricultural productivity.

# 1. AGRICULTURAL INDUSTRY

Concho Valley counties included in this economic impact summary are: Coke, Coleman, Concho, Crockett, Irion, McCulloch, Menard, Reagan, Runnels, Schleicher, Sterling, Sutton and Tom Green. The Concho Valley is an agriculturally diversified region of Texas. Weather conditions and areas of available irrigation water have made the area an efficient producer of many agronomic and horticultural crops. The Concho Valley has long been considered the “sheep and goat capital of the U.S.” Rangeland conditions throughout the region are conducive to cattle, sheep and goat production. Native and exotic wildlife species are increasingly providing a significant contribution to the Concho Valley economy.



The Concho Valley consists of 9.4 million acres of agricultural land, with 8.2 million acres of pasture or rangelands, 891,000 acres of crop lands and 52,000 acres enrolled in various conservation programs (USDA-NASS).

Agribusiness contributes over \$815 million to the Concho Valley economy annually. Value-added sales of crops, livestock and insurance indemnities account for 57% of this activity (Figure 1). Production agriculture and related agribusinesses provide an estimated 13,542 jobs with an annual payroll of \$272.8 million. There are an additional 1,512 non-farming/ranching agribusinesses that are not

providing additional jobs for other Concho Valley citizens but are still providing additional economic stability across the region.

Employment estimates do not include federal and state government employees working in agriculture. Farm Program payments received by producers and landowners add another \$40.4 million annually or about 5% of the agricultural economic activity.



*Lonestar Farmer's Cooperative Super Gin – Mereta, Texas*

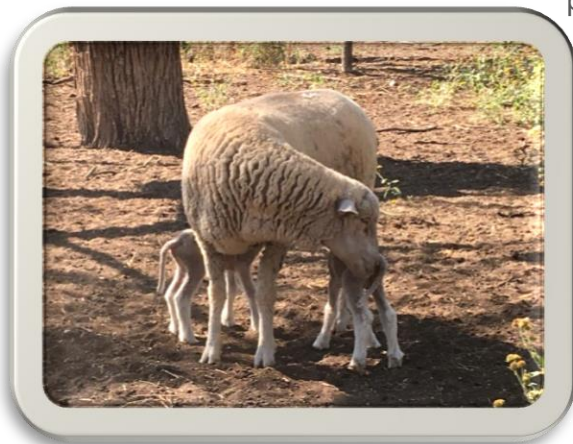
## 2. ANALYSIS OF PRODUCTION AGRICULTURE

The importance of production agriculture in the Concho Valley is tremendous. Annual cash receipts for crops, value-added livestock and livestock products totals \$467.9 million (Table 1.) The semi-arid climate which averages 18.2 inches of rainfall per year and long growing season allow for a wide range of crops to be grown, though cotton is responsible for the most economic impact in the region at \$138.9 million. Wheat and hay and forage crops are the second and third most valuable crops respectively in the region. Each year, crop production generates nearly \$205 million in value of farm production in the Concho Valley and \$359 million in economic output across the region (Table 2).

- **Livestock Production**

Livestock and livestock products include animals, fowl, fish and animal products (wool, mohair and dairy products). Though the Concho Valley is considered the sheep and goat capital of the U.S., cow-calf and stocker operations generate considerably more revenue for the Concho Valley. Beef production is second only to cotton production with \$128.1 million in annual sales in the Concho Valley. Collectively, livestock operations generate another \$202.7 million in annual sales and \$284.4 million in regional economic output.

Texas is the largest sheep producer in the U.S. with 15% of the domestic ewe flock (445,000 head). Only California, Wyoming and Utah have more sheep than the 13 counties that comprise the Concho Valley (Figure 2). In recent years Texas has seen a dramatic shift towards several breeds of shedding or “hair” sheep, which do not produce wool. These sheep have proven to be popular to both producers and consumers.



As a result, Texas' influence on the U.S. wool market has diminished slightly. Texas now produces

approximately 7% of the U.S. wool, and only seven states produce more wool than the Concho Valley (Figure 3). Texas has 37% of all meat and other goats in the U.S. and produces more goats than the next 12 states combined (Table 3). The Concho Valley itself produces more goats than any other state.



- **Land Access Fees**

Concho Valley rangelands vary from flat prairie towards the region's west to rough canyon country to the south. This varied topography is matched by its diverse plant and wildlife communities. Fees paid for access to these privately held resources are likewise varied. Hunting fees are being paid for access to Concho Valley lands for the purposes of hunting deer, antelope and other native and exotic small game, predators such as bobcats, coyotes and mountain lions, and birds such as dove, quail and

turkey. Other access fees are being collected for fishing, bird watching, photography, star gazing, mountain biking and hiking and a number of other natural resource-based activities. These fees are generating an increasingly important revenue stream to landowners and managers and ultimately the entire Concho Valley economy (Figure 4).

- **Impact Analysis**

The direct value of agricultural production and access fees is not the only benefit to the regional or local economies. Many production dollars are paid to local suppliers for both goods and services for the materials necessary for commercial production. Farmers and ranchers also spend part of their income within the region. Similarly, employees of these suppliers buy business supplies and spend wages and profits within the local economy, creating a multiplier effect across the region. The original \$508 million contribution to the Concho Valley economy from direct agricultural production leads to a region wide economic output of estimated to be \$747.6 million (Table 2).

Total output values are smaller than cash receipts for some government payments. Government payments support both commodity production and the incomes of farmer-households and landowners. This analysis assumes the disaster, conservation, and federal farm program safety net payments serve primarily as an income support as opposed to increasing commodity production. Thus, these payments are treated as changes to household income. Local recipients may also spend a substantial portion of payments outside of the Concho Valley region on investments as well as other goods and services. Reducing the total output associated with these payments. Payments received by non-resident landowners also will reduce the total output values for these government payments listed in Table 2.



### 3. ANALYSIS OF AGRIBUSINESS

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Data collected by the U.S. Census Bureau and the National Agricultural Statistics service indicates there are over 15,000 people working in jobs or operating businesses directly related to agriculture in the Concho Valley. This excludes various federal and state government employees. Texas County Business pattern data and the 2017 Census of Agriculture show that Concho Valley Agribusinesses inject \$272.8 million in payroll into the regional economy annually. Self-employed agribusiness operators generate an additional \$34.3 million of economic activity. These agribusinesses are not directly involved in production agriculture, as those numbers are already included in Table 2, but are involved in delivering goods and services to Concho Valley farmers and ranchers or are otherwise engaged in value-added activities.

- **Stewards of Land, Natural Resources and Texas Heritage**

The conservation and preservation of West Central Texas natural resources is not only in the best fiscal interest of agribusiness/landowners and managers, but also indicates the level of commitment to the environment and issues that affect all of society.

- **Renewable Energy**

Texas has become a national and global leader in the development of renewable or green energy sources. Texas and the Concho Valley have made large investments in wind and, more recently, solar energy and the infrastructure to deliver this energy to the nation’s power grid, Figure 5 illustrates the Concho Valley’s development of wind-energy resources since 1999. Several large solar energy projects are currently under construction. Estimates of total electrical generating capacity of these projects are not yet available.



- **Agribusiness Support**

There are a number of private organizations and government agencies that provide vital support for the agribusiness industry but were not included in this publication.

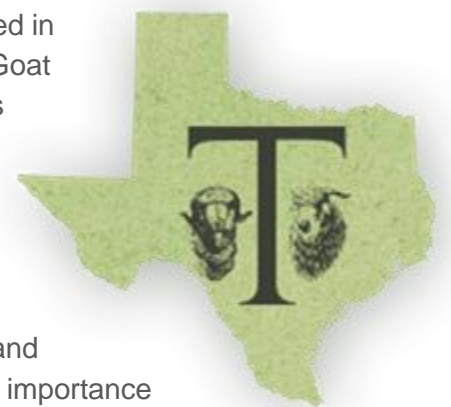
- **Texas A&M AgriLife Extension Service** has county offices in each of the 13 Concho Valley counties. Texas A&M AgriLife Extension provides technical assistance and educational programs in agriculture and natural resources, family and community health, community resources and economic development and youth development. The mission of Texas A&M AgriLife Extension is “to provide quality, relevant outreach and continuing educational programs and services to the people of Texas.” The educational programs conducted by







Texas A&M AgriLife Extension are as diverse as the communities of the Concho Valley. 4-H provides learning opportunities for the youth in the Concho Valley and teaches life skills that lead to productive citizens. From the applied research and educational programs addressing the current needs of the agricultural community, to health and wellness programs in diabetes management, Texas A&M AgriLife Extension's programs reflect their mission of improving lives for all Texans.


- **Texas A&M AgriLife Research and Extension Center – San Angelo** and two research stations are where scientists develop technologies that enhance sustainable utilization of rangelands by sheep, goats, cattle and wildlife. The Sonora Experiment Station in Sutton County sprawls across 3,462 acres of native rangeland and celebrated its 100th anniversary of research in 2016. The Texas Range Station in Crockett and Irion counties allows research on 3,161 acres of rangeland. The charge of these two research stations is to study diseases, breeding and management of sheep and goats under range conditions. Other research activities include rangeland hydrology, white-tailed deer and domestic livestock interactions, ecology and biology of juniper and other woody plants, using prickly pear cactus and juniper as forage, and practical prescribed fire management.
- **Texas A&M Bill Sims Wool and Mohair Research Laboratory** is now the nation's largest commercial wool testing lab. One of just two academic wool labs in the country, AgriLife Research's lab transitioned in 2021 to accommodate the testing needs of the domestic wool trade after the closure of the sole U.S. testing facility in 2020. Partnering with the American Sheep Industry Association, ASI, the San Angelo lab added additional state of the art equipment in order to service the entire commercial wool testing needs of the U.S., eliminating the need for American producers to send their samples overseas for analysis. The lab also offers fiber testing services to the cashmere goat and alpaca industries.
- **Texas Sheep and Goat Raisers Association** was established in 1915 to combat livestock theft. The Texas Sheep and Goat Raisers Association, TSGRA, promotes and advocates production agriculture throughout Texas and the United States. The association seeks out as well as offers reference material for resource loan programs that help the wool, mohair, and meat producers. TSGRA also works with Texas A&M AgriLife Research and Extension and other agencies to provide educational opportunities for new and established producers and teach future generations about the importance of sheep and goats to agriculture and our economy. As the oldest sheep and goat producer's association in the U.S. and representing the largest sheep and goat producing State, TSGRA members have a voice in the laws and regulations of their industry and offer collective input that is taken to Austin and Washington, D.C., to fight for the rights of Texas ranchers and landowners.



- **Southern Rolling Plains Cotton Growers Association, SRPCGA**, was established over 25 years ago to support the cotton industry in 11 counties of the Concho Valley and surrounding region, which includes over 200,000 acres of cotton planted each year. SRPCGA has played a vital role in improving cotton production conditions across Texas. The Concho Valley was first to be eradicated of the boll weevil in Texas and was instrumental in finding a way to mitigate cotton root rot. SRPCGA continues to support policy and research efforts that improve the cotton industry throughout the supply chain. The grower leadership of SRPCGA works to represent the cotton industry of the Concho Valley from local the local level to international trade meetings.


- **U.S. Department of Agriculture** includes the **Farm Services Agency (FSA)** and the **Natural Resources Conservation Service (NRCS)** which administer federal farm programs and offer technical assistance in soil, water and range management. The **Agricultural Marketing Service (AMS)** also has a market reporter that provides necessary marketing data and reports from the livestock auction in San Angelo, Texas.
- **Livestock Breed Associations, Commodity Groups and other Agricultural Advocacy Groups** includes the Mohair Council of America and American Boer Goat Association, both are organizations that support research and help promote their members' Commodities and have a large footprint across the Concho Valley. The Texas Farm Bureau promotes agriculture and property rights and has offices in nearly every county in the Concho Valley.


- **Agricultural publications**, including *The Livestock Weekly* and *Ranch and Rural Living* magazine, bring current and important industry information to producers throughout the state and nation.


- **Chambers of Commerce and Economic Development Corporations** are located throughout the Concho Valley and have a keen interest in assisting existing agribusiness and recruiting new firms to their communities.

## 4. SAN ANGELO STOCK SHOW AND RODEO

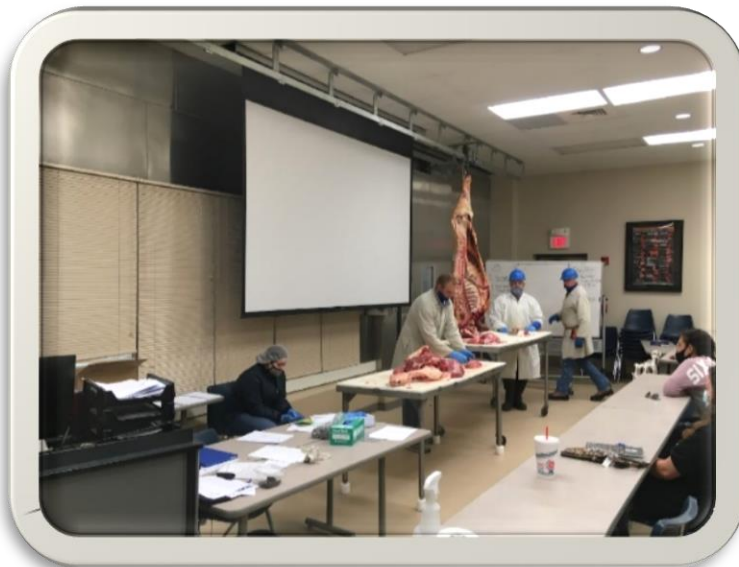
In 2022, the San Angelo Stock Show and Rodeo Association will celebrate its 90th anniversary. The annual Stock Show and Rodeo is held during the last two weeks in February and attracts the state's highest quality livestock as well as the nation's top professional cowboys. Along with the livestock shows and rodeo performances, other attractions during the event include an arts and crafts competition, commercial exhibits, a midway carnival, and an educational children's area. The San Angelo Stock Show and Rodeo is one of the largest of its kind in the nation. A major highlight is the Junior Livestock Show, which attracts young people from across the state who bring their top livestock projects to compete for recognition and a place in the premium sale. Regional businesses support the sale by reaching deep into their pockets to reward the young peoples' hard work. The San Angelo Stock Show and Rodeo Association provides numerous scholarships to students attending accredited Texas universities, colleges, or technical schools.



The San Angelo Stock Show and Rodeo Association is responsible for many more events than just the Stock Show and Rodeo, including the Wrangler Roping Fiesta held annually in October, a sanctioned NRHA reining event known as the September Slide, the AQHA sanctioned Silver Spur Circuit shows held in January and October, and a jackpot junior livestock show known as the Fall Spectacular held in November. These events all draw in contestants and spectators from not only Texas but from states across the whole nation as well. The San Angelo Stock Show and Rodeo Association also rents many of the buildings and facilities on the fairgrounds to outside events that draw large crowds to West Texas. In all, the San Angelo Stock Show and Rodeo Association brings an estimated \$36 million into the regional economy.

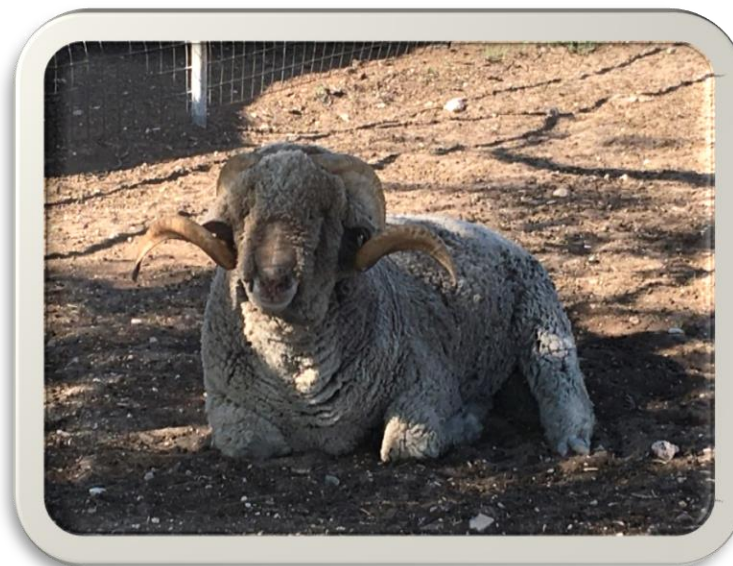
## 5. ANGELO STATE UNIVERSITY

Established in 1928, the local college became a state college in 1965 and was re-named Angelo State University in 1969 to reflect its status as a respected four-year state university. Today, ASU is a member of the Texas Tech University System and boasts an enrollment of over 10,000 students. ASU offers programs leading to 46 undergraduate, one doctoral and 28 master's degrees with more than 100 majors and concentrations. Agriculture remains one of ASU's premier undergraduate and graduate programs.



ASU's Management Instruction and Research, MIR, Center comprises 6,000 acres of range and farmland that serves as a "laboratory" for agricultural students. Facilities at the site include the Food Safety and Product Development Laboratory, the Mayer-Rousselot Agriculture Education Training Center, the G. Leon Holland Arena and a 2,800-square-foot greenhouse. ASU's Agriculture Department offers seven undergraduate degree plans and two master's degree plans. The agriculture department also maintains cooperative programs with Texas Tech University and Texas A&M University. Find more information

about the agriculture department at ASU at <https://www.angelo.edu/dept/agriculture/>



## 6. AGRICULTURE SUPPORTED BY FREIGHT RAIL SERVICE

The Concho Valley has been supported historically by the South Orient Railroad network that carried agricultural cargoes from San Angelo to major processing and distribution centers throughout North America. The South Orient Railroad runs a 391-mile route from Presidio, Texas on the Mexico border to Coleman, Texas, where the line is then interchanged to service by BNSF, the largest Class-1 rail freight carrier in the United States. The San Angelo Chamber of Commerce and the City of San Angelo Development Corporation worked together to create a 180-acre, multi-commodity rail freight cargo facility that is designed to serve all freight types for Industrial and Agricultural operations, both imports and exports.

- **San Angelo International Intermodal Rail Port**



The San Angelo Rail Park is a multi-modal, multi-commodity rail port that will serve the industrial, agricultural and agribusiness sectors of the Concho Valley economy. This new rail park is designed to service all agricultural sectors with commodity lanes for grains, oils, proteins and fibers. All types of freight cars and containers will be available to our regional farm and ranch enterprises. Significant efficiencies and freight savings will be delivered to our agricultural producers who will be able to ship large volumes of product directly to major distribution hubs, trade centers, interconnecting rail ports and maritime ports for exports and imports.



## 7. DOUBLE J LAMB COMPANY

Double J Lamb of Greeley, Colorado, purchased the former Ranchers Lamb facility on City Farm Road in 2020, resulting in a revitalized lamb industry and lamb processing sector in the Concho Valley. The facility is operated by Double J Lamb and will process approximately 200,000 head of lamb annually. This plant will

revitalize the lamb and goat industry in the

Concho Valley,

making the lamb and goat sector more economically viable and sustainable long term. The facility will process lambs from the Concho Valley, the Western Range of Colorado, and other western U.S. ranching areas.



**DOUBLE J  
LAMB**

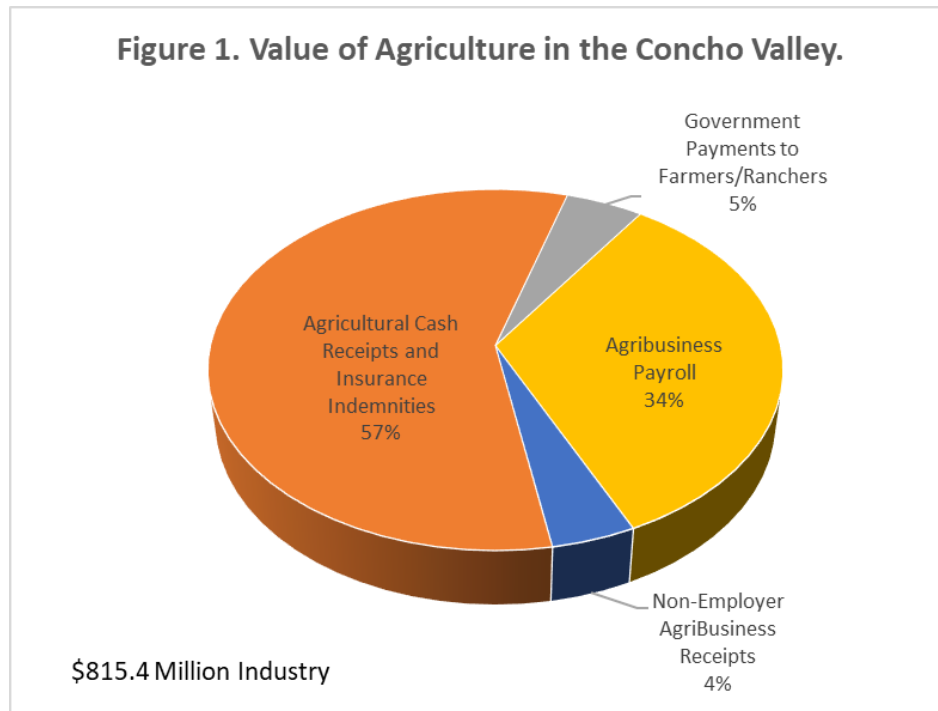


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## FIGURES and TABLES



**Table 1.**

<b>Annual Total Agricultural Cash Receipts, Insurance Indemnities, Government Payments, Agribusiness Payroll and Non-Employer Business Receipts, Concho Valley 2014-2017</b>	
Agricultural Cash Receipts and Insurance Indemnities	\$467,908,400
Government Payments to Farmers/Ranchers	\$40,372,290
Agribusiness Payroll	\$272,844,142
Non-Employer AgriBusiness Receipts	\$34,290,291
<b>Total:</b>	<b>\$815,415,123</b>



**Table 2. Average Annual Value of Agricultural Cash Receipts, Concho Valley, 2014-2017.**

Crops	Value (\$1,000)	Percent of State Total	Concho Valley Economic Impact (\$1,000)
Cotton	\$138,890	4.6%	\$247,416
Wheat	\$38,055	6.4%	\$64,693
Hay and Ensilage	\$10,971	0.6%	\$19,146
G. Sorghum	\$7,657	1.1%	\$13,017
Corn	\$2,955	0.2%	\$5,023
Pecans	\$2,175	1.4%	\$4,190
Melons and Vegetables	\$1,750	0.4%	\$2,382
Other Crops	\$577	0.0%	\$1,007
Barley	\$535	16.6%	\$910
Oats	\$326	1.1%	\$555
Sesame	\$263	1.2%	\$220
Grapes	\$210	0.7%	\$362
Sunflowers	\$207	0.5%	\$173
Canola	\$144	10.3%	\$120
Nursery Crops	\$75	0.0%	\$129
Timber & Christmas trees	\$13	0.0%	\$21
Other Ag. Related	\$7	0.0%	\$11
<b>Total Crops</b>	<b>\$204,809</b>		<b>\$359,375</b>
<b>Livestock &amp; Livestock Products</b>			
Cow/Calf & Stockers	\$128,108	2.3%	\$188,007
Goats	\$26,690	22.5%	\$30,398
Sheep	\$21,664	34.0%	\$24,673
Milk	\$11,326	0.6%	\$20,355
Fed Beef	\$10,735	0.4%	\$15,754
Wool & Mohair	\$3,484	53.0%	\$3,968
Milk Cows	\$576	0.2%	\$1,036
Other Animals (Horses)	\$150	0.1%	\$170
Poultry	\$9	0.0%	\$15
Hogs	\$6	0.0%	\$7
Other Livestock Products	\$2	0.0%	\$2
<b>Total Livestock</b>	<b>\$202,751</b>		<b>\$284,385</b>
<b>Ag Related Government Pymts</b>			
Disaster Payments	\$22,159	7.0%	\$18,733
Federal Farm Safety Net Payments	\$13,906	2.6%	\$11,756
Pasture Rainfall Insurance	\$3,044	5.2%	\$4,467
Conservation Payments	\$1,263	1.1%	\$1,068
<b>Total Ag Related</b>	<b>\$40,372</b>		<b>\$36,023</b>
<b>Land Access Fees</b>			
Hunting and Fishing	\$59,617	9.7%	\$66,664
Other Recreation	\$732	0.3%	\$1,179
<b>Total Access Fees</b>	<b>\$60,349</b>		<b>\$67,843</b>
<b>Total Agriculture Related Receipts</b>	<b>\$508,281</b>		<b>\$747,626</b>

Figure 2. U.S. Ewe Inventory

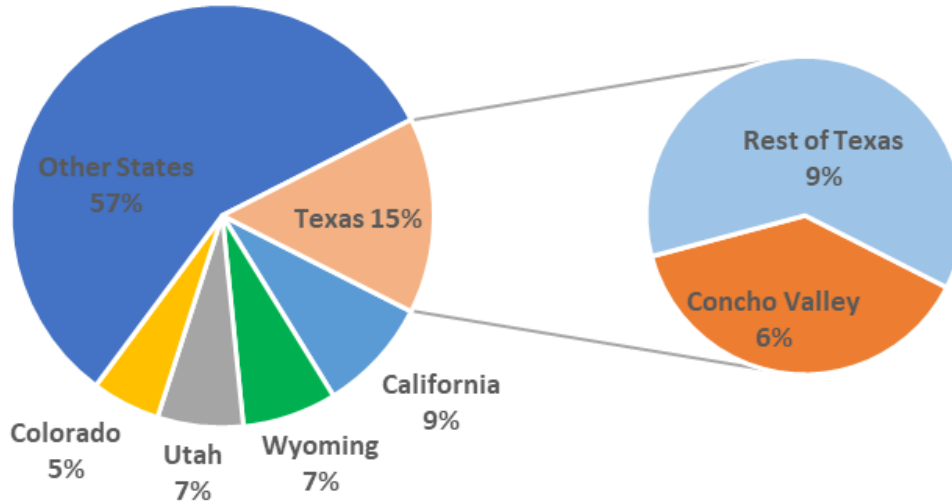
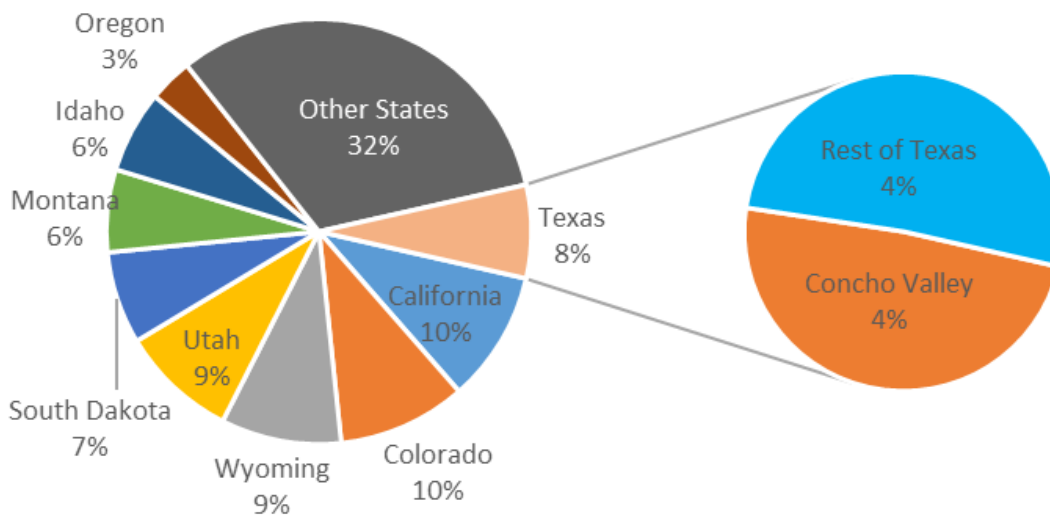


Figure 3. U.S. Wool Production



**Table 3. Top Thirteen Goat Producing States.**

Rank	State	Meat and other Goat Inventory, Head	
1	Texas	765,000	Next 12 States Combined  729,000
2	Tennessee	100,000	
3	California	87,000	
4	Oklahoma	84,000	
5	Missouri	75,000	
6	Georgia	60,000	
7	Kentucky	57,000	
8	Alabama	46,000	
9	Florida	46,000	
10	North Carolina	45,000	
11	Kansas	43,000	
12	Ohio	43,000	
13	Virginia	43,000	

**Table 4. Concho Valley AgriBusiness, 2017**

	<u>Firms with Employees</u>		<u>Firms without Employees</u>	
	<b>Number of Employees</b>	<b>Annual Payroll (\$1,000)</b>	<b>Number of Establishments</b>	<b>Gross Receipts (\$1,000)</b>
Agricultural Services	334	\$12,009	185	\$4,745
Mining	14	\$239	13	\$65
Manufacturing	1,320	\$55,594	92	\$3,372
Retail Trade	1,673	\$45,520	252	\$6,791
Food Service	5,959	\$90,342	295	\$6,212
Wholesale Trade	465	\$21,647	40	\$1,939
Transportation, Warehousing & Storage	114	\$5,345	52	\$2,462
Finance and Insurance	208	\$9,190	39	\$1,459
Real Estate	94	\$2,713	126	\$7,246
Farm and Ranch	<u>3,361</u>	<u>\$30,246</u>	<u>416</u>	<u>N/A</u>
Total	13,542	\$272,844	1,510	\$34,290

Figure 4. Concho Land Access Fees, 2008-2017

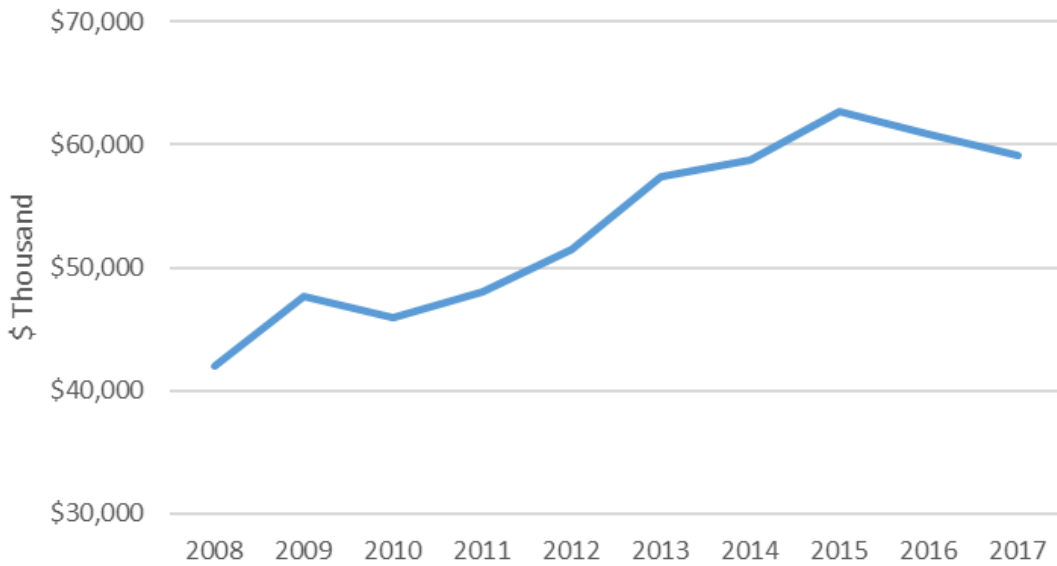
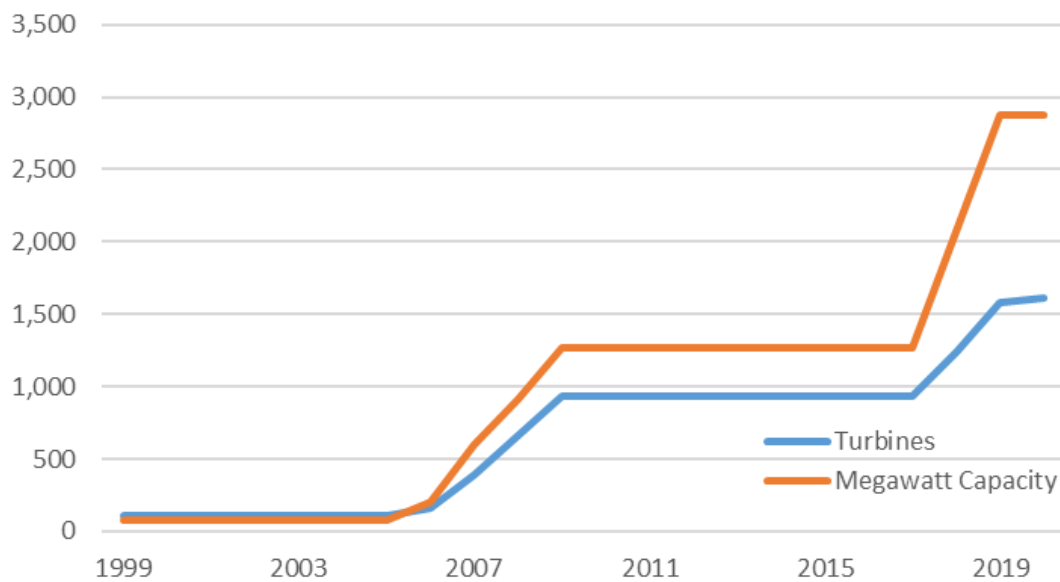


Figure 5. Concho Valley Wind Energy; 1999-2020



Source: USGS-U.S. Wind Turbine Database