2018 Survey Highlights

Taking into account non-respondents:

- Largest grape production on record
- Fourth year in a row with >2,000 ton production
- Highest average yield per acre on record
- At least 350 ton (~15%) not utilized
Survey Summary

Survey numbers

• Survey forms send: 101
• Survey forms returned: 79 (132 vineyard sites)
• Rate of Return: 79 %
Survey Summary

Non-respondents

15 growers who provided information in 2017 have not yet responded.

- 34 acres (~4 % of total CO area)
- 75 tons in 2017 (~4 % of 2017 production)

There are likely another 200+ acres that are not covered in this or previous surveys.
Definition

“Producing area”

• vineyards of producing age (≥3 years old)

• vineyards planted prior to 2017

2018 Colorado Grape Grower Survey
## 2018 Colorado Grape Grower Survey

<table>
<thead>
<tr>
<th>Total vineyard area (acre)</th>
<th>601</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wineries</td>
<td>248 (42 %)</td>
</tr>
<tr>
<td>Contract growers</td>
<td>353 (58 %)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Producing vineyard area (acre)</th>
<th>584</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wineries</td>
<td>245 (42 %)</td>
</tr>
<tr>
<td>Contract growers</td>
<td>339 (58 %)</td>
</tr>
</tbody>
</table>

| Average vineyard holding (acre)             | 7.6 |
| Median vineyard holding (acre)              | 2.9 |
| Total production (t)                        | 2,261 |
| Average yield (t/acre)                      | 3.87 |
| Average grape price ($/t)                   | $1,675 |
| Average grape revenue ($/acre)              | $7,441 |
Number of survey responses and number of vineyards
Acres reported by survey year

Area (acre)

- Total
- Producing

Legend:
- Total
- Producing

Year:
- 1984
- 1985
- 1986
- 1987
- 1988
- 1989
- 1990
- 1991
- 1992
- 1993
- 1994
- 1995
- 1996
- 1997
- 1998
- 1999
- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013
- 2014
- 2015
- 2016
- 2017
- 2018
Colorado grape production by year
Colorado grape yield per acre & year

Yield (t/acre)
Colorado grape yield by county & year

Yield (t/acre)

- Mesa county
- Delta county
- Other counties
Colorado grape production by county

- Mesa: 91.7%
- Delta: 4.1%
- Other: 4.2%
Colorado grape production by variety

- CabFranc
- CabSauv
- Chambourcin
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other/Unknown
Colorado grape yield per acre & variety

Colorado grape yield per acre (2018)

Yield (t/acre)

- CabFranc
- CabSauv
- Chambourcin
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other/Unknown

Industry goal???
Colorado vineyard area by county

- Mesa: 76.8%
- Delta: 12.2%
- Other: 11.1%
2018 Colorado Grape Grower Survey

Most planted varieties in 2018

Cabernet franc and Cabernet Sauvignon

Very few new plantings (<10 acres)

Acres removed = acres planted???
Most popular varieties (2018)

• ~90% of new plantings are varieties of *Vitis vinifera*

• ~10% of new plantings are non-*vinifera* varieties
2018 Colorado Grape Grower Survey

Impressions

- There was a large surplus of grapes, with overall winery demand and grower supply much more out of balance than in the previous three years

- Non-utilized crop was around 350 to 400 ton, compared to about 50 ton in 2017

- Grape prices for all major varieties were very close to 2017 values, but the overall average price was down 2.6 %
2018 Colorado Grape Grower Survey

Thank you

• All the growers who have responded to the survey

• CWIDB for funding the survey
Questions?

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