2009 Grower Survey

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## Survey summary

<table>
<thead>
<tr>
<th>Survey forms sent</th>
<th>203</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey forms returned</td>
<td>99</td>
</tr>
<tr>
<td>Commercial growers</td>
<td>97</td>
</tr>
<tr>
<td>Mail undelivered</td>
<td>0</td>
</tr>
<tr>
<td>Not a commercial grower</td>
<td>2</td>
</tr>
<tr>
<td>Rate of return</td>
<td>49 %</td>
</tr>
</tbody>
</table>
Non-respondents: established growers

40 growers who provided data in previous surveys did not respond to the 2009 survey

- 132 total acres (~15 % of CO total)
- 132 producing acres

Another ~30 growers have not replied to any of the surveys since 2000.
“Producing area”

- vineyards that were planted prior to 2008
## 2009 Survey results

<table>
<thead>
<tr>
<th></th>
<th>Total vineyard area (acre)</th>
<th>Producing vineyard area (acre)</th>
<th>Average vineyard size (acre)</th>
<th>Total production (t)</th>
<th>Average yield (t/acre)</th>
<th>Average grape price ($/t)</th>
<th>Average picking costs ($/t)</th>
<th>Gross return ($/acre)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wineries</td>
<td>726</td>
<td>670</td>
<td>7.5</td>
<td>1,665</td>
<td>2.5</td>
<td>1,340</td>
<td>236</td>
<td>4,078</td>
</tr>
<tr>
<td>Contract growers</td>
<td>236 (33 %)</td>
<td>213 (32 %)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>490 (67 %)</td>
<td>447 (68 %)</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Colorado grape production by year

Total yield (t)

- 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
Colorado grape growing area by year
Colorado grape yield per acre by variety

Industry goal???
Colorado grape yield per acre by year
Colorado grape yield per acre by county

Yield (t/acre)

- Mesa county
- Delta county
- Other counties
2009 Colorado grape production by variety

- CabFranc
- CabSauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other

Total yield (t)
Colorado grape production by variety (2009)

- Merlot: 20.0%
- Riesling: 14.4%
- Cabernet Sauvignon: 13.3%
- Syrah: 9.4%
- Chardonnay: 9.0%
- Cabernet Franc: 5.3%
- Gewürztraminer: 5.0%
- Viognier: 4.4%
- Pinot Noir: 2.8%
- Pinot Gris: 1.7%
- Other: 14.7%
2009 Colorado grape production by county

- Mesa: 85.8%
- Delta: 8.7%
- Montrose: 3.1%
- Other: 2.4%
Colorado grape growing area by variety

- Cab Franc
- Cab Sauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other
Colorado grape growing area by variety

**Colorado total vineyard area (2009)**

- **Other** 18.1%
- **Merlot** 15.9%
- **Riesling** 12.7%
- **CabSauv** 12.3%
- **Chardonnay** 11.3%
- **Syrah** 6.8%
- **Pinot Noir** 5.7%
- **Gewürztraminer** 5.0%
- **CabFranc** 4.8%
- **Viognier** 4.3%
- **Pinot gris** 3.1%
- **CabFranc** 4.8%
- **Viognier** 4.3%
- **Pinot gris** 3.1%
- **Colorado total vineyard area (2009)**
Colorado total vineyard area by county

- Delta: 17.9%
- Mesa: 68.2%
- Montrose: 5.8%
- Other: 8.1%
Colorado vineyards by planting year

Area (acre)

Best guess; based on all surveys since 2000
Colorado vineyard area, top 10 varieties

Best guess; based on all surveys since 2000
Colorado wine varieties – red & white

Best guess; based on all surveys since 2000
What has been planted?

- Cab Franc
- Cab Sauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other

Area planted (acre)
Total plantings 2005 - 2009

Area planted (acre)
New vineyard area by county

- Delta: 40 acres
- Mesa: 140 acres
- Montrose: 20 acres
- Other: 10 acres

Area planted (acre)
Gross return per acre, 2009

Gross return per acre (2009)

- CabFranc: $4,465
- CabSauv: $4,390
- Chardonnay: $3,467
- Gewürztraminer: $3,187
- Merlot: $5,024
- Pinot gris: $2,256
- Pinot Noir: $3,502
- Riesling: $3,708
- Syrah: $5,163
- Viognier: $3,459
- Average: $4,078
Gross return per acre, 2006-2009

Gross $ per acre by year and variety

- CabFranc
- CabSauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Average
Average gross return per acre, 2000-2009

<table>
<thead>
<tr>
<th>Grape Variety</th>
<th>Gross Return per Acre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cab Franc</td>
<td>$4,172</td>
</tr>
<tr>
<td>Cab Sauv</td>
<td>$3,693</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>$2,715</td>
</tr>
<tr>
<td>Gewürztraminer</td>
<td>$2,079</td>
</tr>
<tr>
<td>Merlot</td>
<td>$4,461</td>
</tr>
<tr>
<td>Pinot Gris</td>
<td>$2,287</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>$2,013</td>
</tr>
<tr>
<td>Riesling</td>
<td>$3,069</td>
</tr>
<tr>
<td>Syrah</td>
<td>$4,024</td>
</tr>
<tr>
<td>Viognier</td>
<td>$4,566</td>
</tr>
<tr>
<td>Average</td>
<td>$3,502</td>
</tr>
</tbody>
</table>
“Guesstimate” of Colorado grape growing area

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total vineyard area (acre)</td>
<td>~1,000</td>
<td>30 %</td>
</tr>
<tr>
<td></td>
<td>Wineries</td>
<td>70 %</td>
</tr>
<tr>
<td></td>
<td>Growers</td>
<td></td>
</tr>
<tr>
<td>Producing vineyard area (acre)</td>
<td>800-850</td>
<td>30 %</td>
</tr>
<tr>
<td></td>
<td>Wineries</td>
<td>70 %</td>
</tr>
<tr>
<td></td>
<td>Growers</td>
<td></td>
</tr>
<tr>
<td>Average vineyard size (acre)</td>
<td>6.5-7.0</td>
<td></td>
</tr>
</tbody>
</table>

Note: This “guesstimate” was prepared from data provided in the 1999 to 2009 surveys. A number of growers never responded to either of those surveys. Taking into account non-respondents, I estimate a total Colorado vineyard area in 2009 of ~1,000 acres.
Acknowledgements

Thanks to

- All growers who responded to the survey
- CWIDB for funding the survey
- Amy Montano, CSU for help with data entry and analysis