2010 Grower Survey

Horst Caspari  
Colorado State University  
Western Colorado Research Center  
Grand Junction, CO 81503  
Ph: (970) 434-3264
<table>
<thead>
<tr>
<th>Survey summary</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey forms sent</td>
<td>181</td>
</tr>
<tr>
<td>Survey forms returned</td>
<td></td>
</tr>
<tr>
<td>Commercial growers</td>
<td>107</td>
</tr>
<tr>
<td>Mail undelivered</td>
<td>9</td>
</tr>
<tr>
<td>Not a commercial grower</td>
<td>1</td>
</tr>
<tr>
<td>Rate of return</td>
<td>65 %</td>
</tr>
</tbody>
</table>
Non-respondents: established growers

40 growers who provided data in previous surveys did not respond to the 2010 survey

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

Another ~30 growers have not replied to any of the surveys since 2000.
Definition

“Producing area”

• vineyards that were planted prior to 2009
## 2010 Survey results

<table>
<thead>
<tr>
<th></th>
<th>Total vineyard area (acre)</th>
<th>Wineries</th>
<th>Contract growers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>724</td>
<td>235 (32 %)</td>
<td>489 (68 %)</td>
</tr>
<tr>
<td>Producing vineyard area (acre)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>676</td>
<td>222 (33 %)</td>
<td>454 (67 %)</td>
</tr>
<tr>
<td>Average vineyard size (acre)</td>
<td></td>
<td>6.8</td>
<td></td>
</tr>
<tr>
<td>Total production (t)</td>
<td></td>
<td>783</td>
<td></td>
</tr>
<tr>
<td>Average yield (t/acre)</td>
<td></td>
<td>1.16</td>
<td></td>
</tr>
<tr>
<td>Average grape price ($/t)</td>
<td></td>
<td>1,348</td>
<td></td>
</tr>
<tr>
<td>Average picking costs ($/t)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gross return ($/acre)</td>
<td></td>
<td>1,561</td>
<td></td>
</tr>
</tbody>
</table>
Colorado grape production by year

![Graph showing Colorado grape production by year](Image)
Colorado grape yield per acre by variety

Colorado grape yield per acre (2010)

Yield (t/acre)

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

Industry goal???
Colorado grape yield per acre by year
2010 Colorado grape production by variety

![Graph showing grape production by variety in 2010. The graph displays the total yield (t) for each variety, with 'Other' category having the highest yield.]

- CabFranc
- CabSauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other
Colorado grape production by variety

Colorado grape production (2010)

- Riesling: 18.8%
- CabSauv: 17.1%
- Syrah: 9.4%
- Merlot: 7.9%
- CabFranc: 7.0%
- Chardonnay: 6.3%
- Viognier: 4.8%
- Pinot gris: 2.0%
- Pinot Noir: 1.0%
- Gewürztraminer: 0.6%
- Other: 25.2%

Colorado State University
Knowledge to Go Places
2010 Colorado grape production by county

- Mesa: 79.3%
- Delta: 9.1%
- Other: 10.2%
- Montrose: 1.4%
Colorado grape growing area by variety

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

Area (acre)
Colorado grape growing area by variety

Colorado total vineyard area (2010)

- Merlot: 15.5%
- Riesling: 13.4%
- CabSauv: 12.6%
- Chardonnay: 9.7%
- Syrah: 6.6%
- CabFranc: 5.7%
- Gewürztraminer: 5.4%
- Viognier: 4.3%
- Pinot Noir: 3.7%
- Pinot gris: 3.5%
- Other: 19.6%
Colorado total vineyard area by county

- Delta: 16.7%
- Mesa: 67.1%
- Montrose: 8.4%
- Other: 7.8%
Colorado vineyards by planting year

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 in 2010?

![Bar chart showing the area planted (acre) for various grape varieties.]

- CabFranc: ~4 acres
- CabSauv: ~0 acres
- Chardonnay: ~0 acres
- Gewürztraminer: ~0.1 acres
- Merlot: ~1.5 acres
- Pinot gris: ~0.2 acres
- Pinot Noir: ~0.2 acres
- Riesling: ~0.2 acres
- Syrah: ~0.2 acres
- Viognier: ~0.2 acres
- Other: ~9.5 acres
Total plantings 2006 - 2010
New vineyard area by county

Area planted (acre)

- Delta
- Mesa
- Montrose
- Other

2006-2010
Gross return per acre, 2010

Gross return per acre (2010)

- CabFranc: $2,488
- CabSauv: $2,220
- Chardonnay: $1,101
- Gewürztraminer: $828
- Merlot: $847
- Pinot gris: $894
- Pinot Noir: $1,843
- Riesling: $2,168
- Syrah: $1,728
- Viognier: $1,561
- Average: $1,260

Note: The graph shows the gross return per acre for various grape varieties in 2010.
Gross return per acre, 2007-2010

Gross $ per acre by year and variety

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

Year:
- 2007
- 2008
- 2009
- 2010

Gross $ per acre:
- $1,000
- $2,000
- $3,000
- $4,000
- $5,000
- $6,000
- $7,000
Average gross return per acre, 2000-2010

Gross return per acre (2000-2010)

- Cab Franc: $4,019
- Cab Sauv: $3,559
- Chardonnay: $2,568
- Gewürztraminer: $1,906
- Merlot: $4,131
- Pinot gris: $1,807
- Pinot Noir: $1,912
- Riesling: $2,957
- Syrah: $3,855
- Viognier: $4,308
- Average: $3,326
2010 Grape Grower Survey “Highlights”

- Worst yield per acre since 1991
- Merlot, the state’s leading variety for >10 years, ranks only fourth in production
- Riesling ranks number one in production
- The vineyard area removed exceeds the new area planted
“Guesstimate” of Colorado grape growing area

<table>
<thead>
<tr>
<th></th>
<th>Total vineyard area (acre)</th>
<th>Producing vineyard area (acre)</th>
<th>Average vineyard size (acre)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>~1,000</td>
<td>850-950</td>
<td>6.5-7.0</td>
</tr>
<tr>
<td>Wineries</td>
<td>33 %</td>
<td>33 %</td>
<td></td>
</tr>
<tr>
<td>Growers</td>
<td>67 %</td>
<td>67 %</td>
<td></td>
</tr>
</tbody>
</table>

Note: This “guesstimate” was prepared from data provided in the 1999 to 2010 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 2010 of ~1,000 acres.
Varieties included in “Other” category

Albarino, Aurora, Barbera, Bianca, Brianna, Canadice, Carmenere, Carmine, Catawba, Cayuga white, Chambourcin, Chancellor, Chardonnel, Chenin blanc, Concord, Corot Noir, Counoise, Cynthiana, Dolcetto, Edelweiss, Esprit, Fredonia, French Columbard, Frontenac, Frontenac Gris, Gamay Noir, Graciano, Grenache, Himrod, La Crescent, La Crosse, Lemberger, Leon Millot, Malbec, Marechal Foch, Marquette, Montepulciano, Mourvedre, Muscat blanc, Muscat Hamburg, Muscat Ottonel, Nebbiolo, Noiret, Norton, Orange Muscat, Petit Verdot, Petite Syrah, Pinot Blanc, Pinot Meunier, Primitivo, Rkatsiteli, Rousanne, Sangiovese, Sauvignon Blanc, Semillon, Seyval Blanc, Souzao, St. Croix, St. Laurent, St. Pepin, Tannat, Tempranillo, Tinto Cao, Tinta Madeira, Touriga National, Traminette, Vernaccia, Vidal, Vignoles, Zinfandel, Zweigelt
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