
2011 Grower Survey

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Survey summary

Survey forms sent	172
Survey forms returned	98
Commercial growers	96
Mail undelivered	2
Rate of return	58 %

Non-respondents: established growers

51 growers who provided data in previous surveys did not yet respond to the 2011 survey

- 180 total acres (~20 % of CO total)

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

Definition

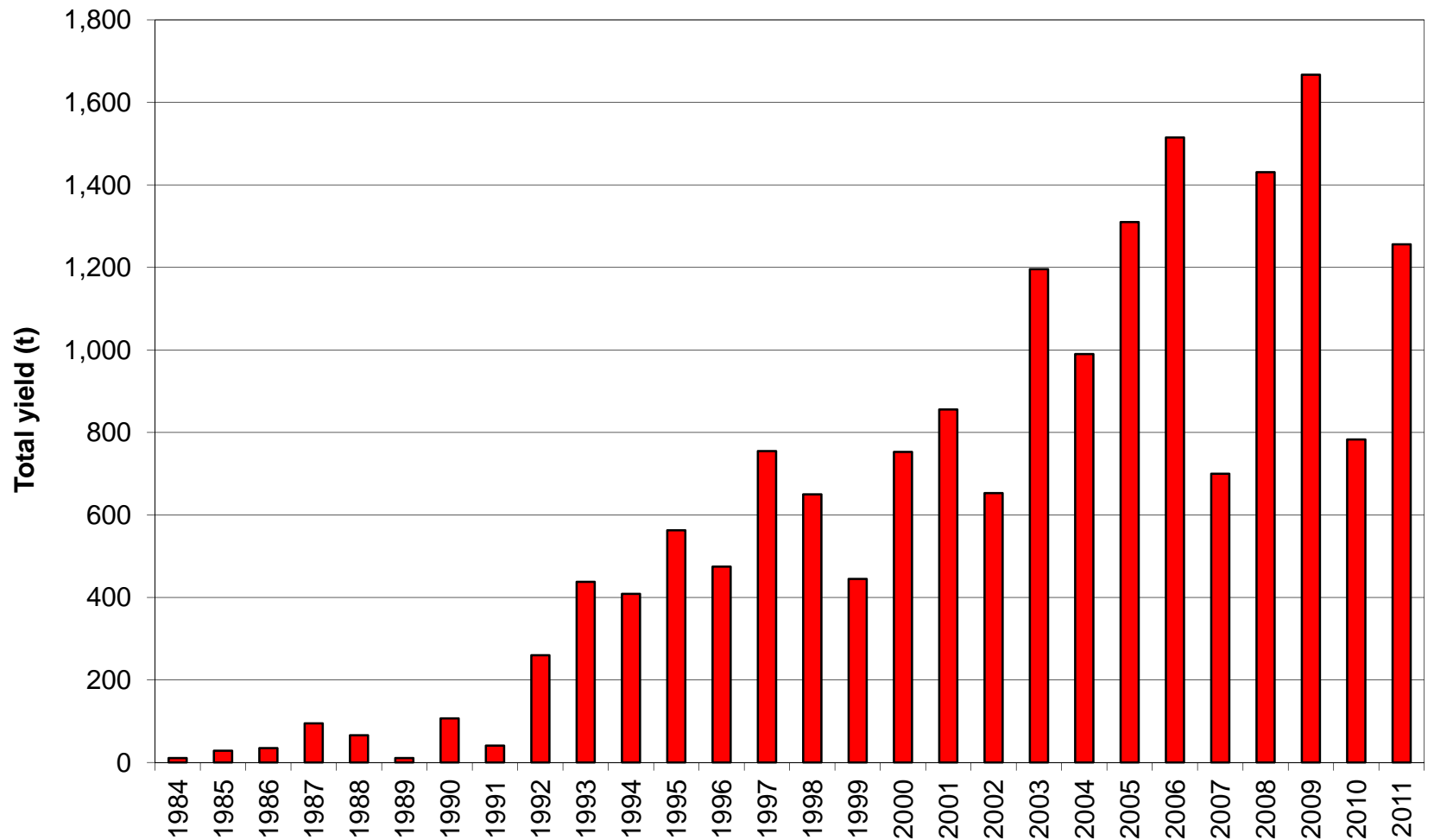
“Producing area”

- vineyards that were planted prior to 2010

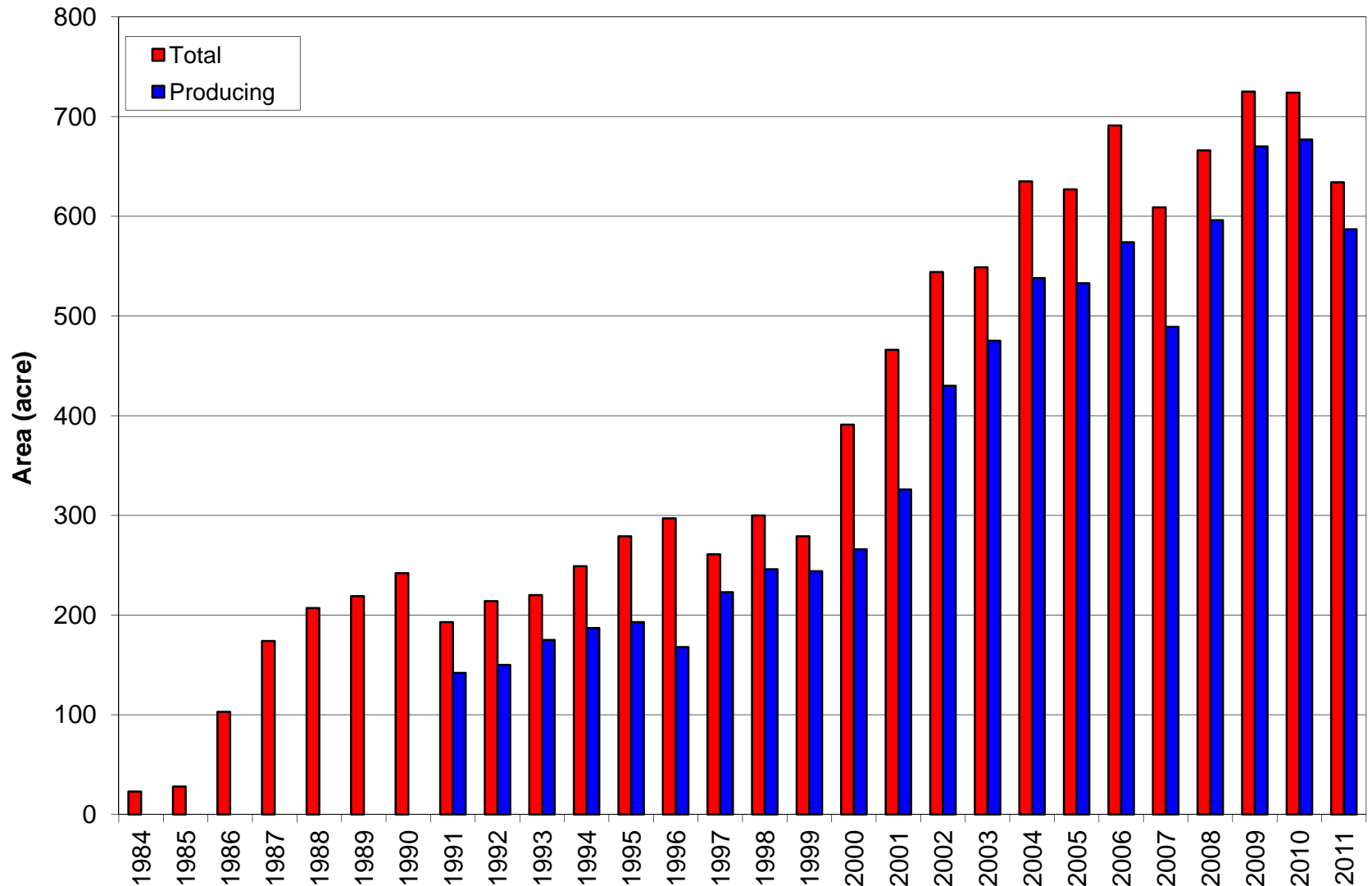
2011 Survey results

Total vineyard area (acre)	628
Wineries	198 (32 %)
Contract growers	430 (68 %)
Producing vineyard area (acre)	590
Wineries	193 (33 %)
Contract growers	397 (67 %)
Average vineyard size (acre)	6.6
Total production (t)	1,256
Average yield (t/acre)	2.13
Average grape price (\$/t)	1,425
Average picking costs (\$/t)	230
Gross return (\$/acre)	3,034

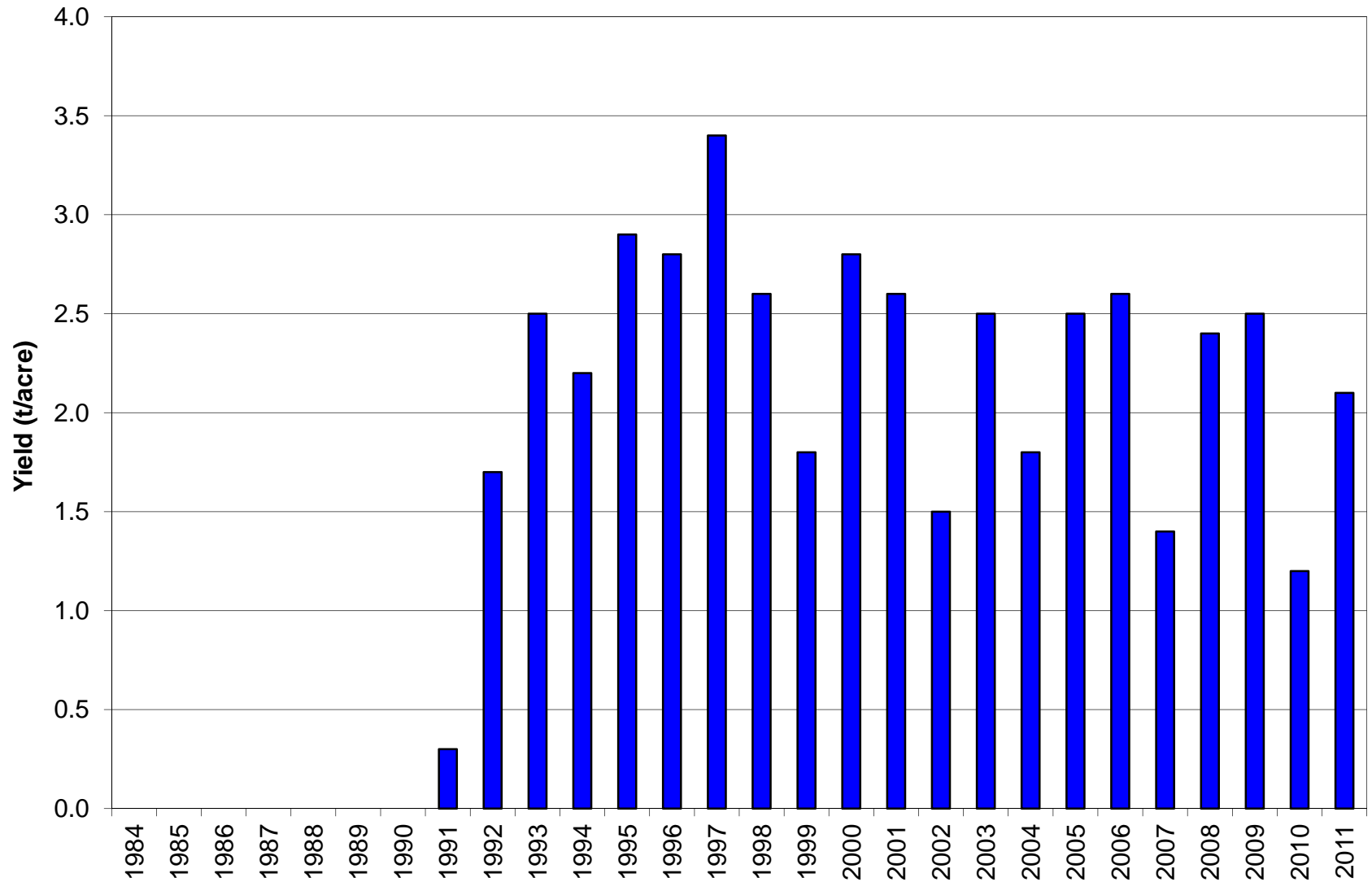
Colorado grape production by year



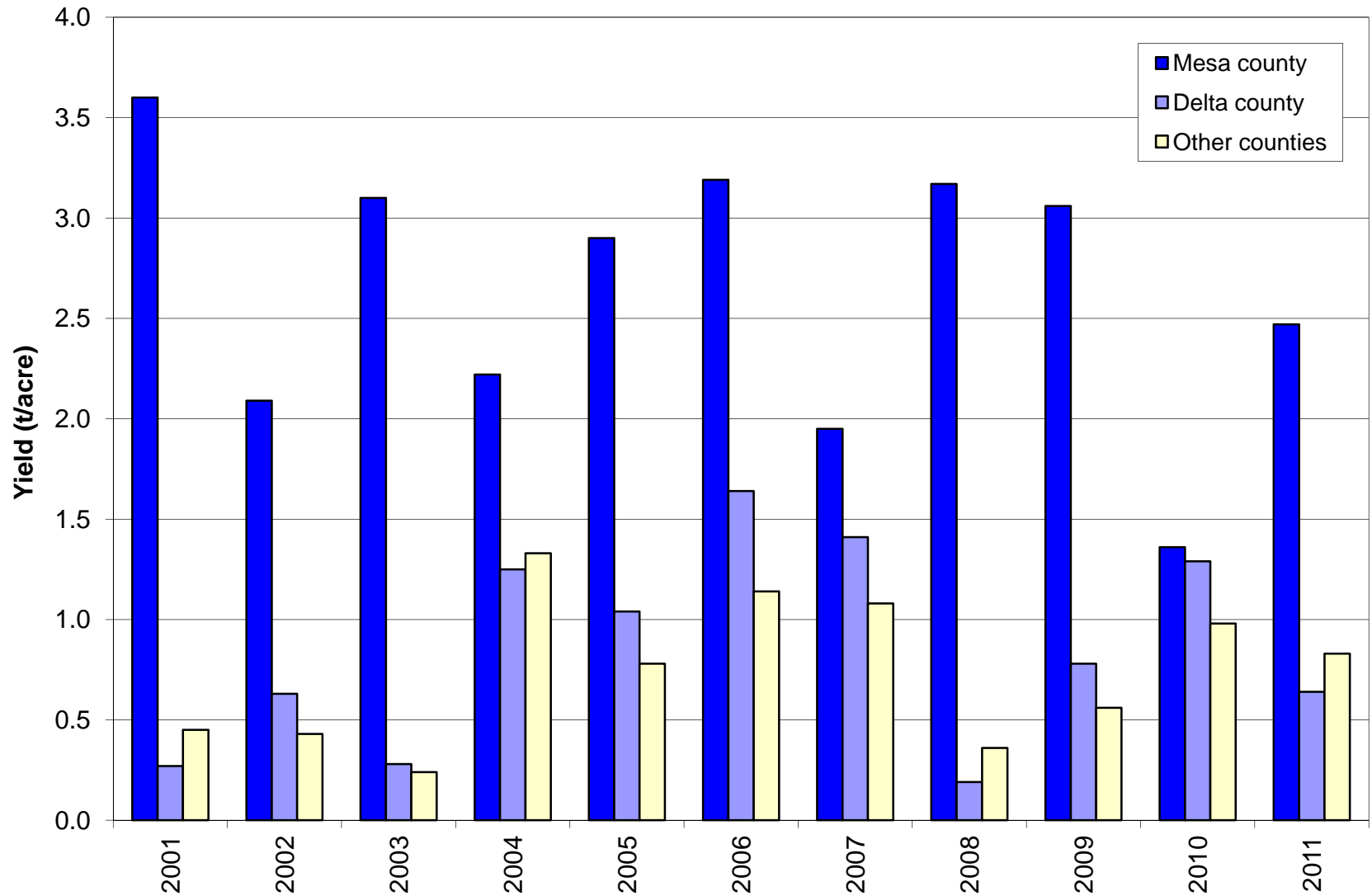
Colorado grape growing area by year



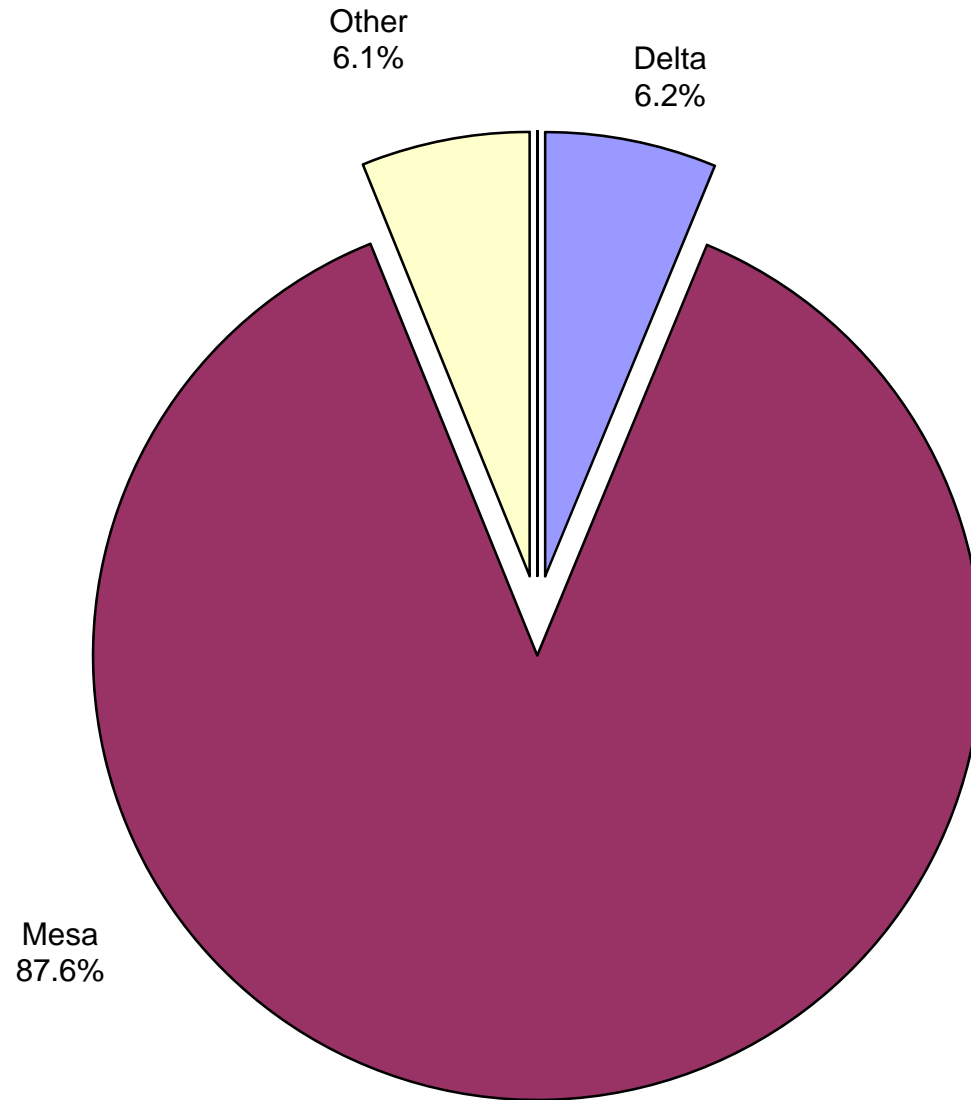
Colorado grape yield per acre by year



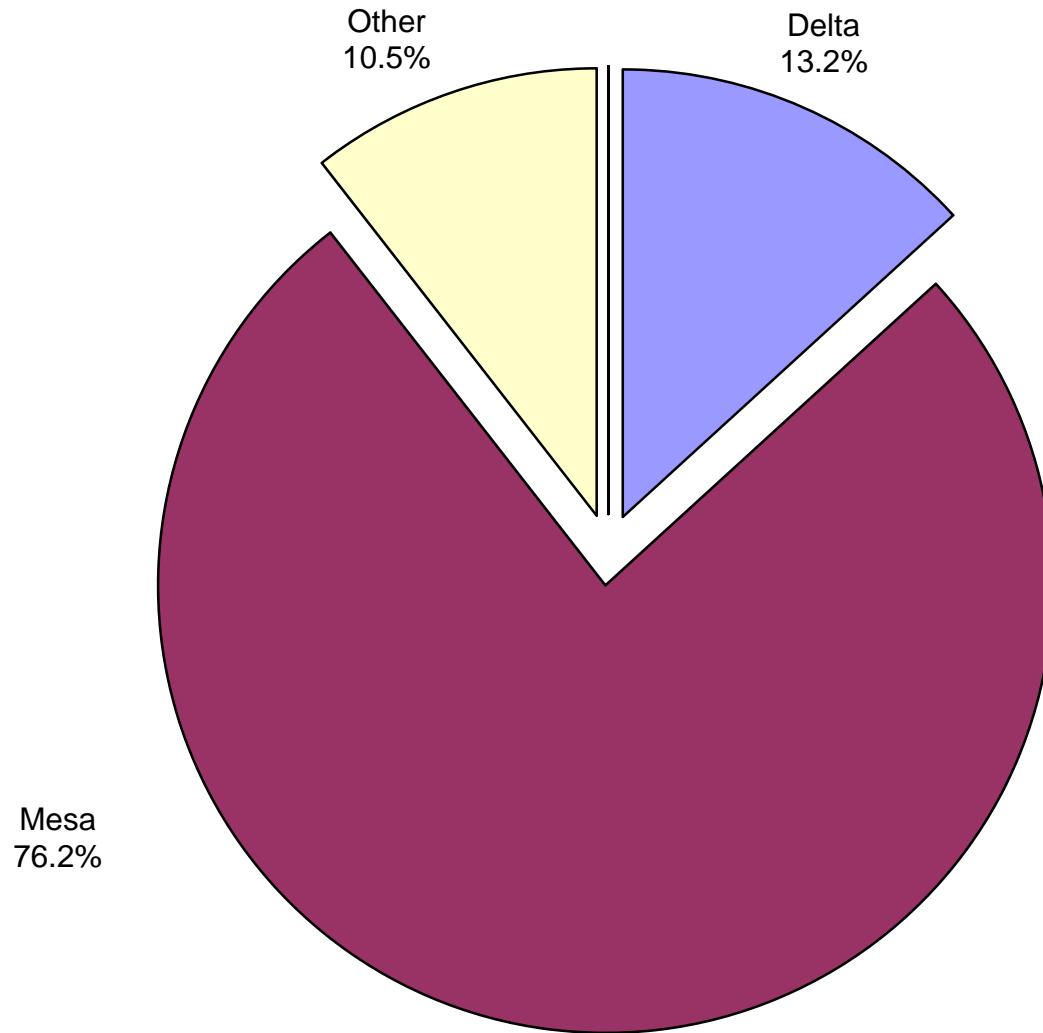
Colorado grape yield per acre by county



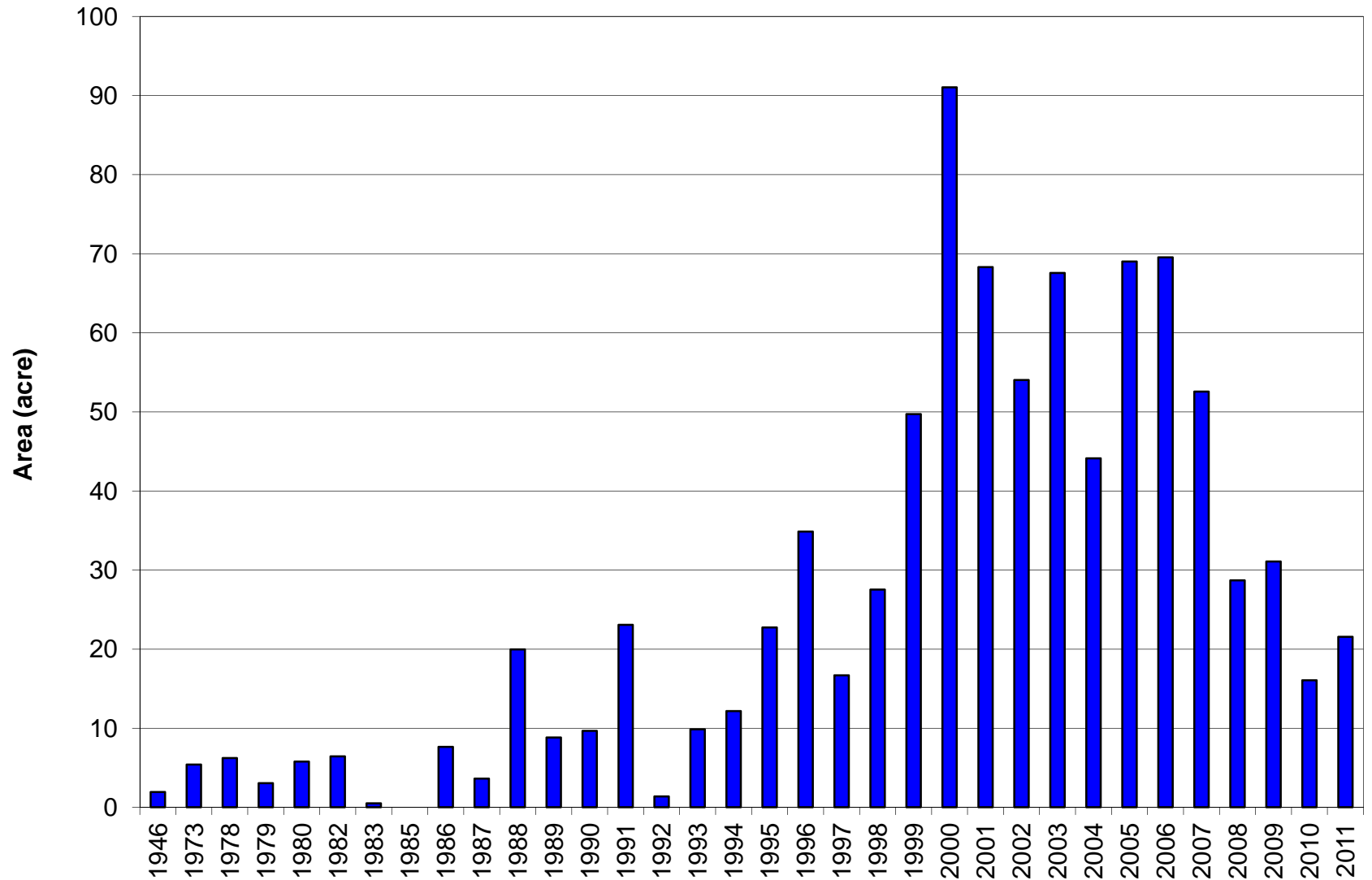
2011 Colorado grape production by county



Colorado total vineyard area by county

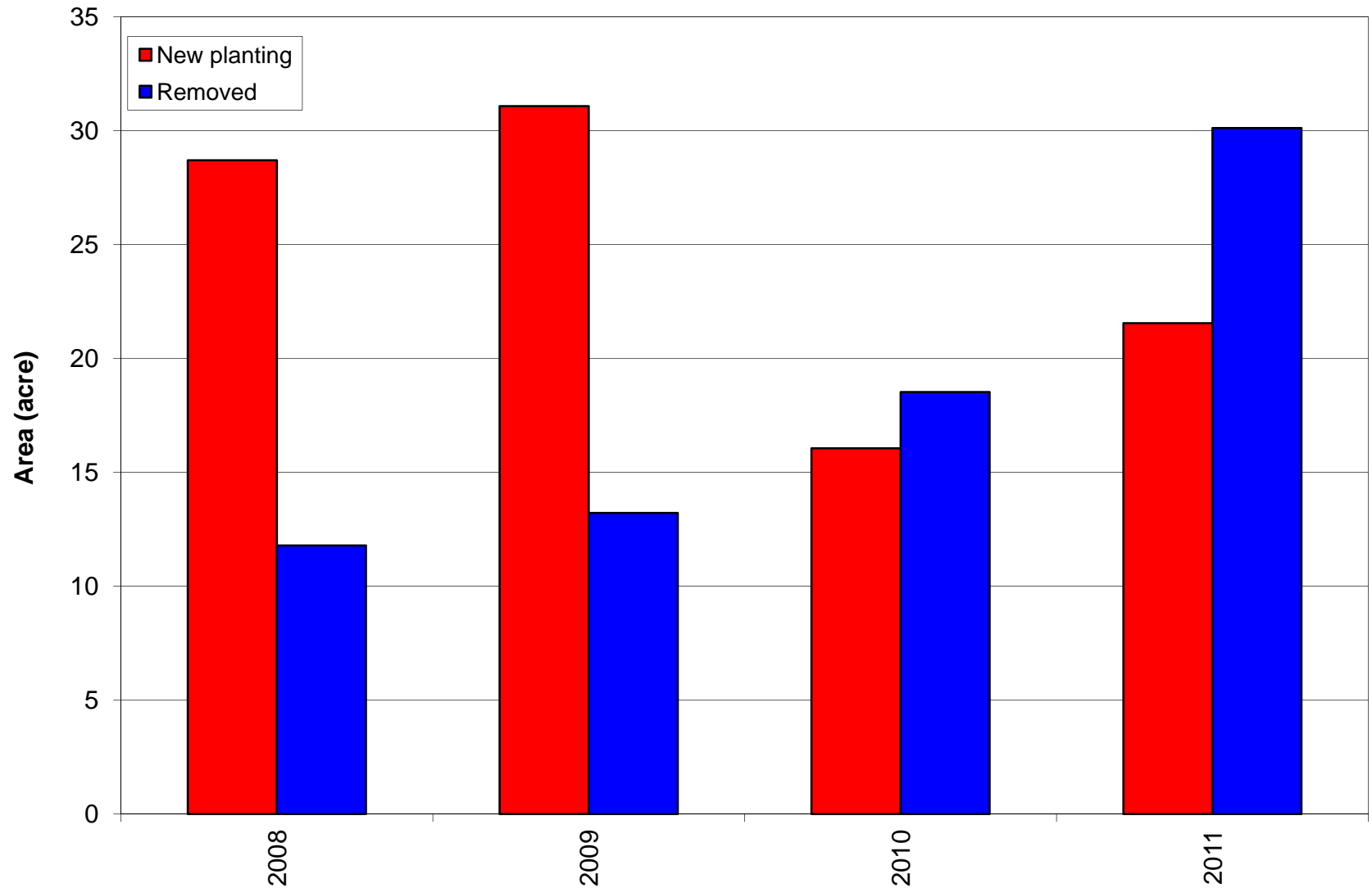


Colorado vineyards by planting year

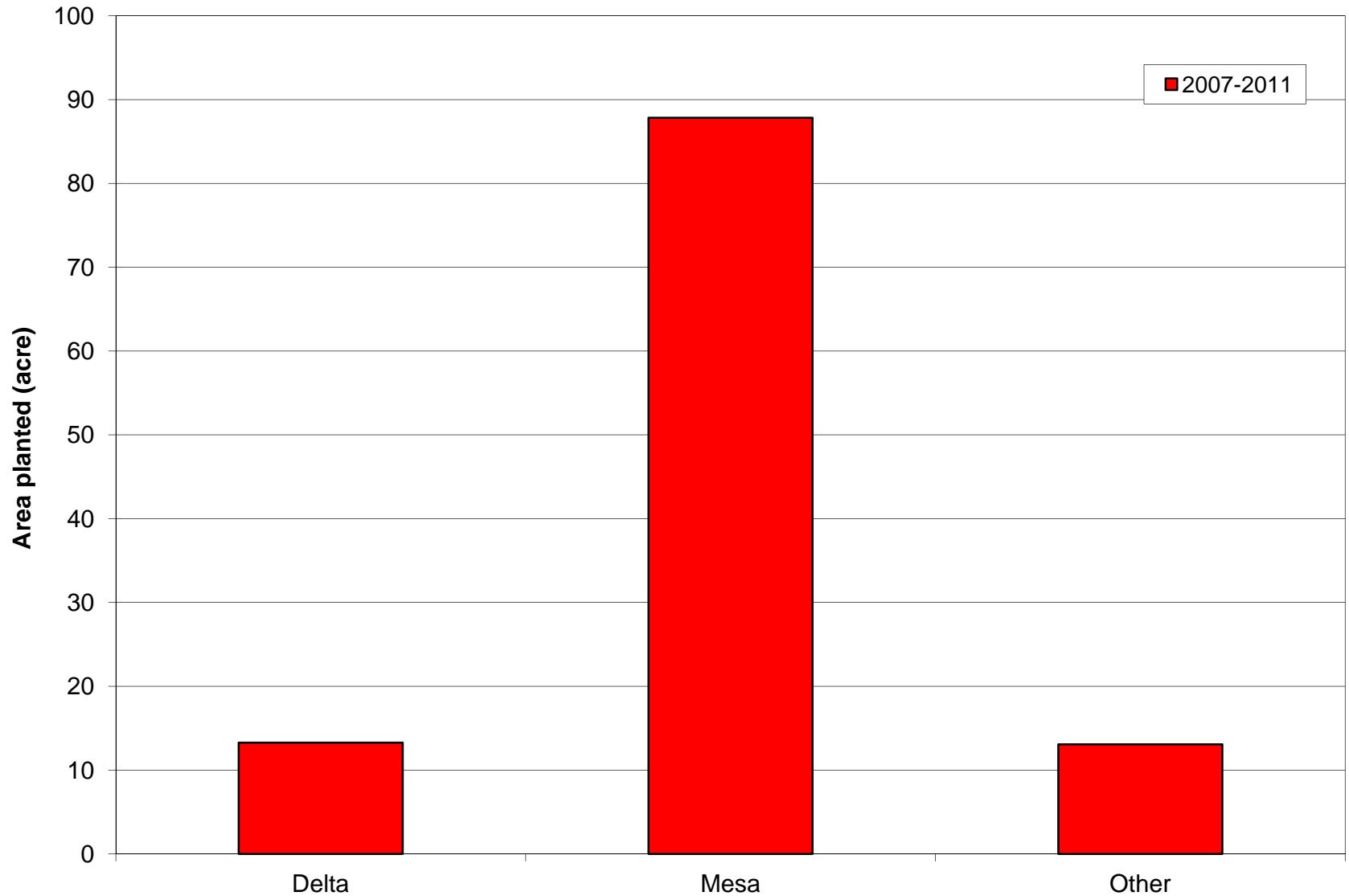


Best guess; based on all surveys since 2000

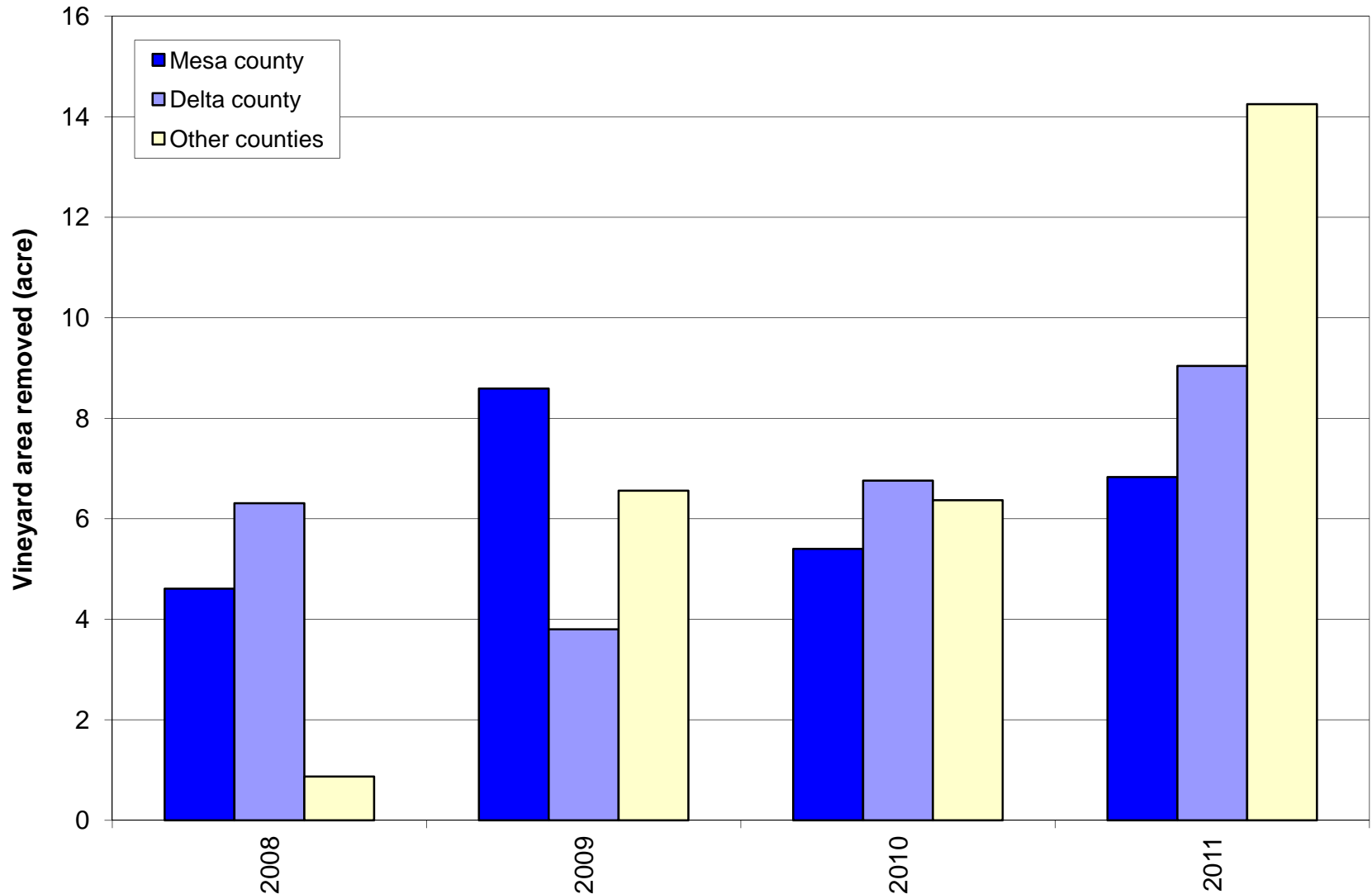
Colorado vineyard area increasing?



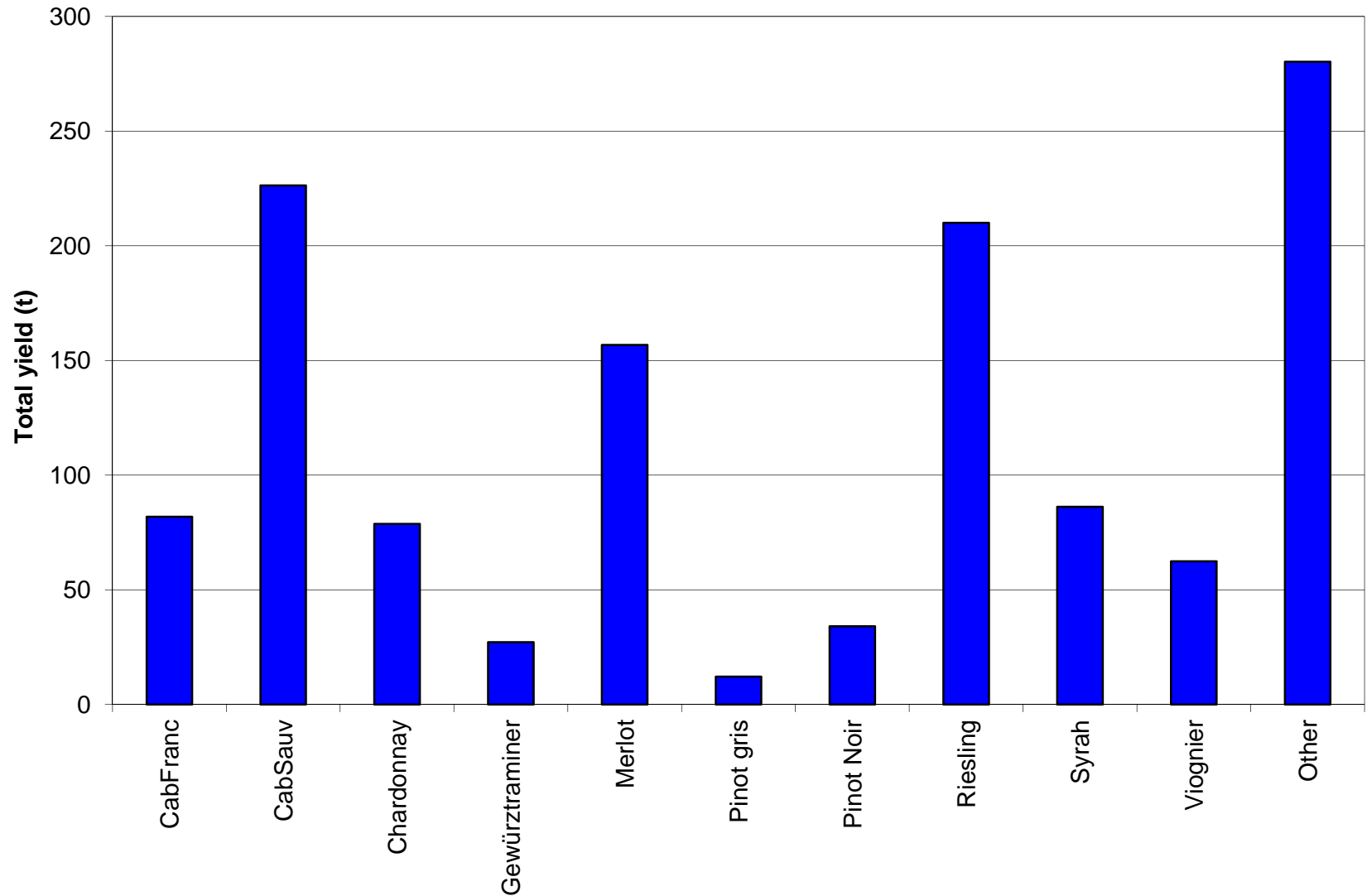
New vineyard plantings by county



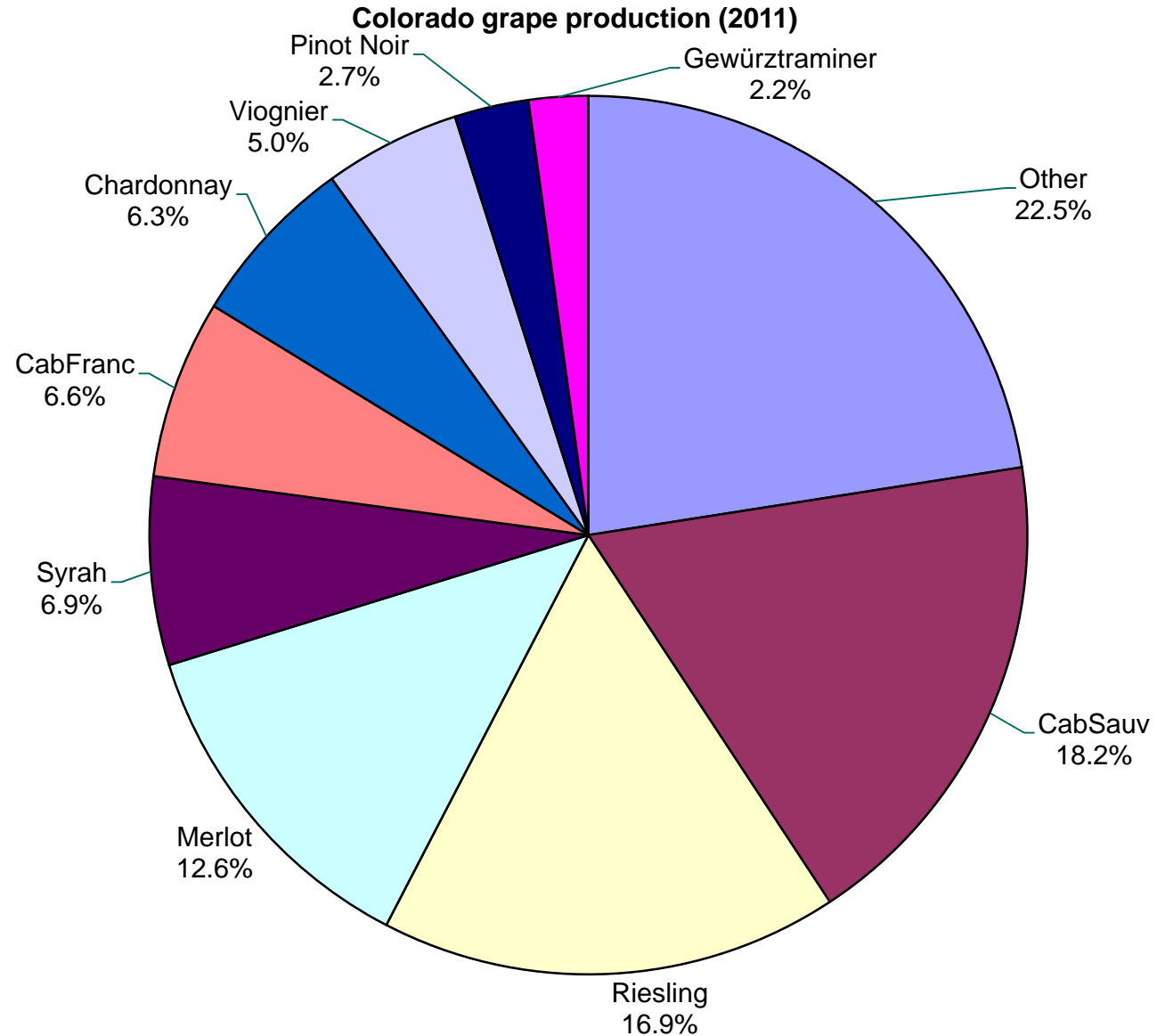
Vineyard area removed by county



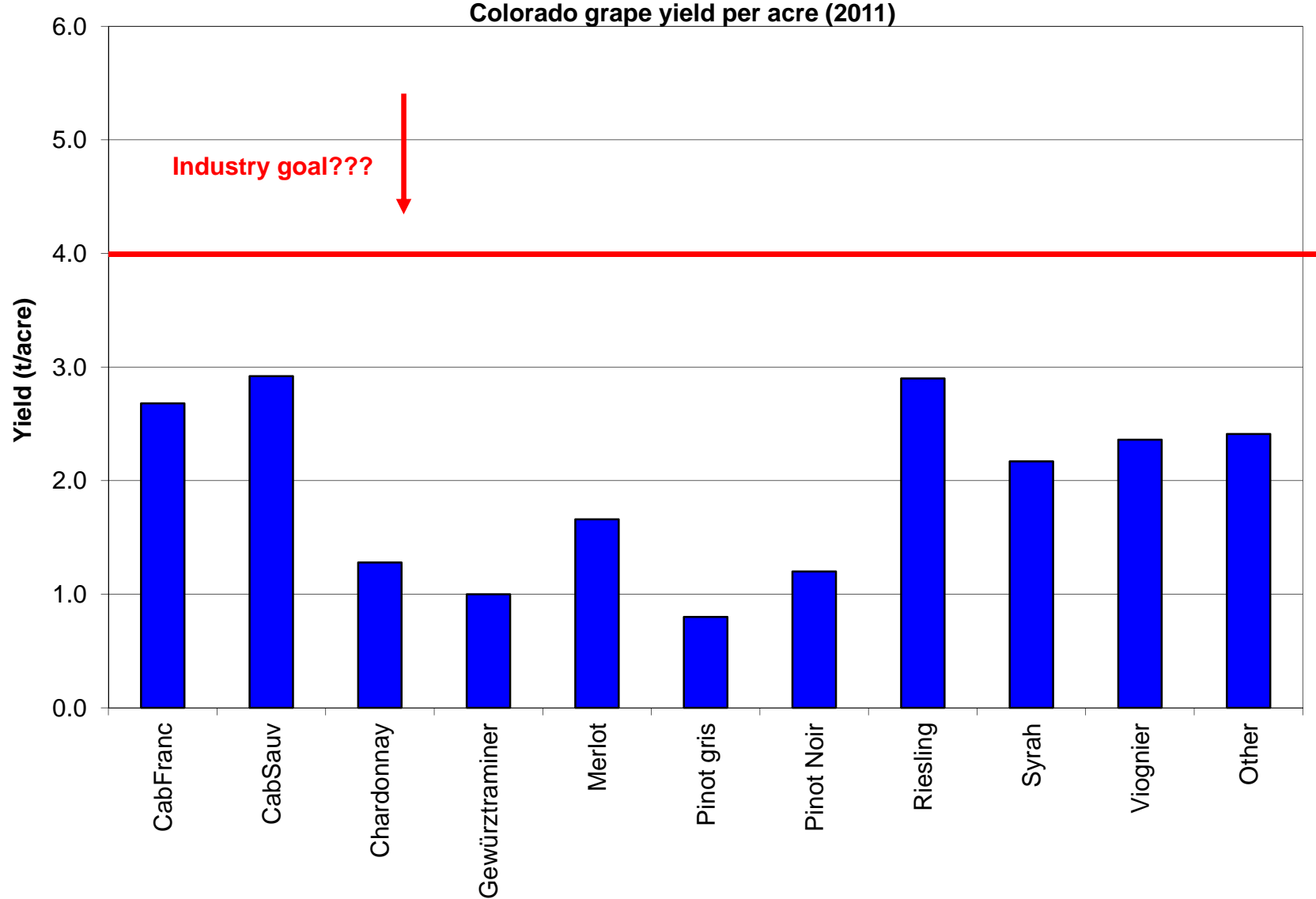
2011 Colorado grape production by variety



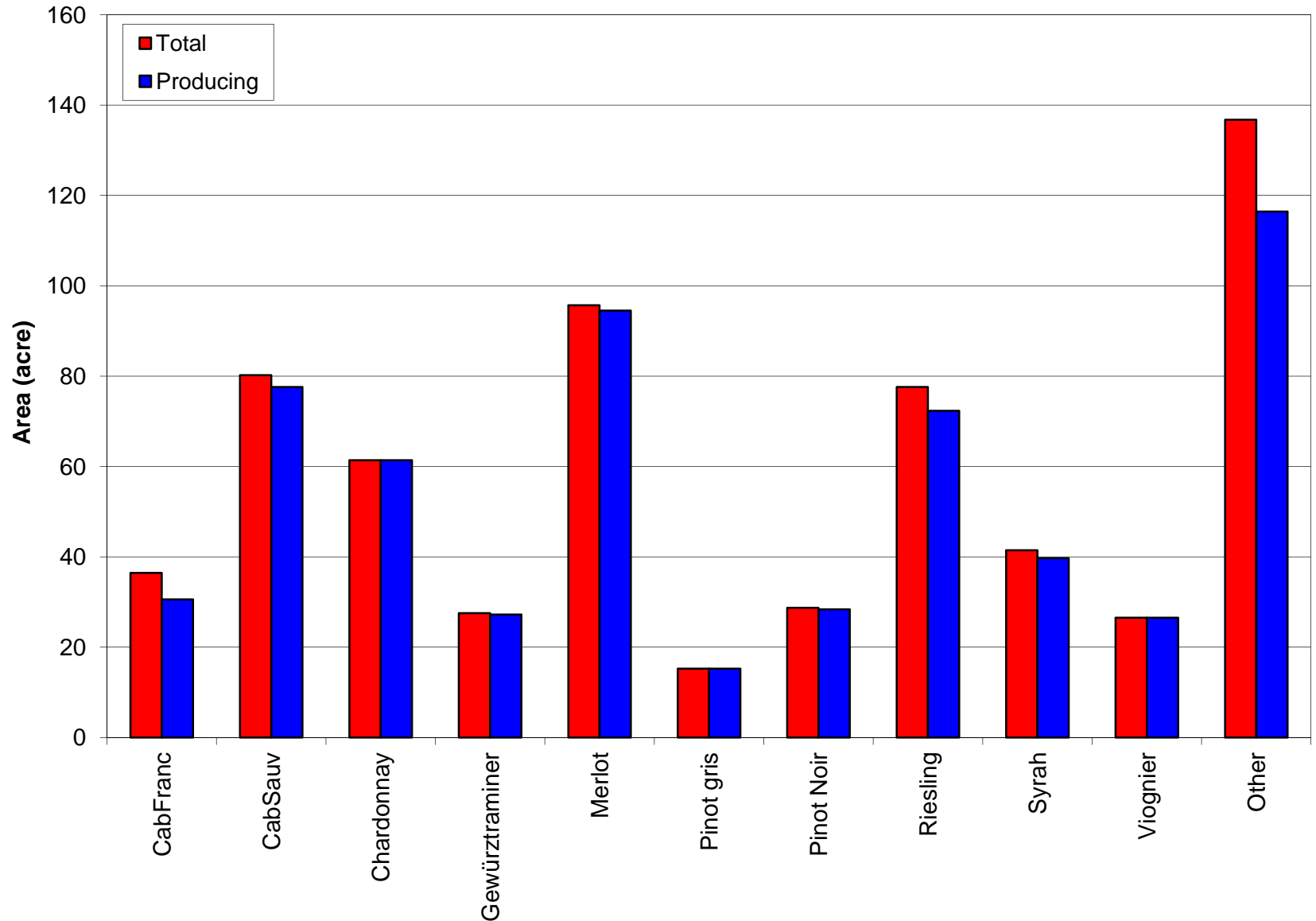
Colorado grape production by variety



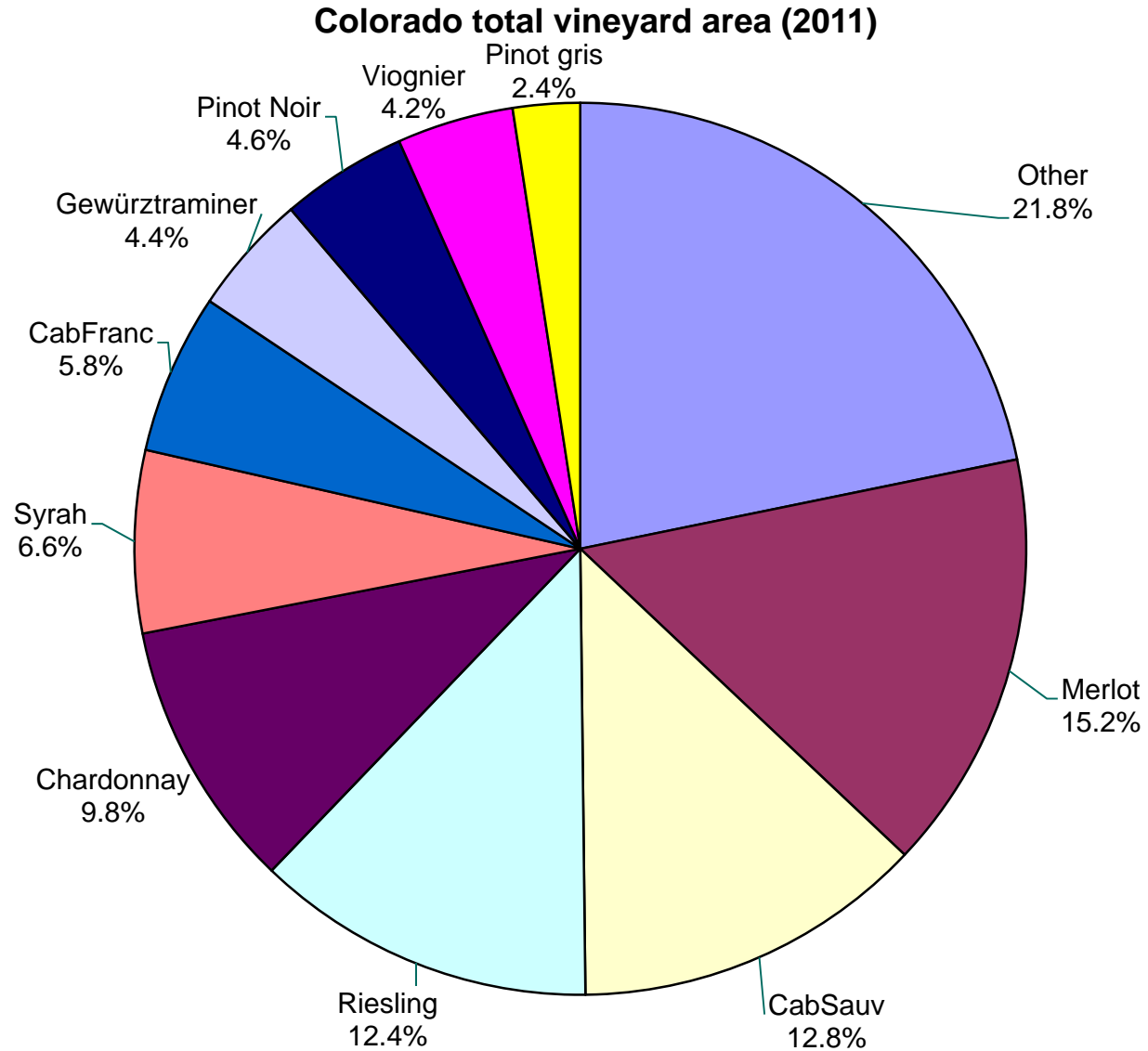
Colorado grape yield per acre by variety



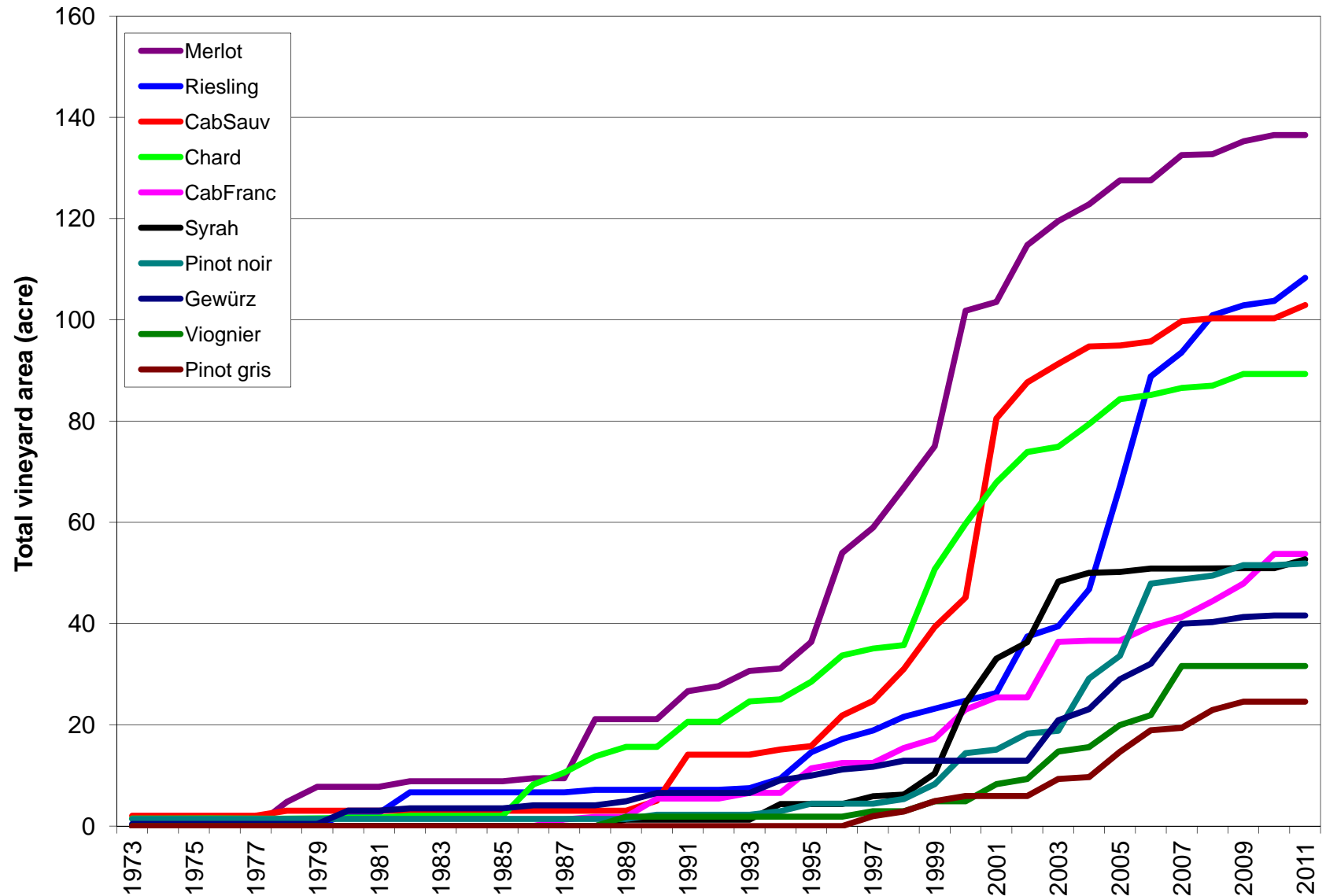
Colorado grape growing area by variety



Colorado grape growing area by variety

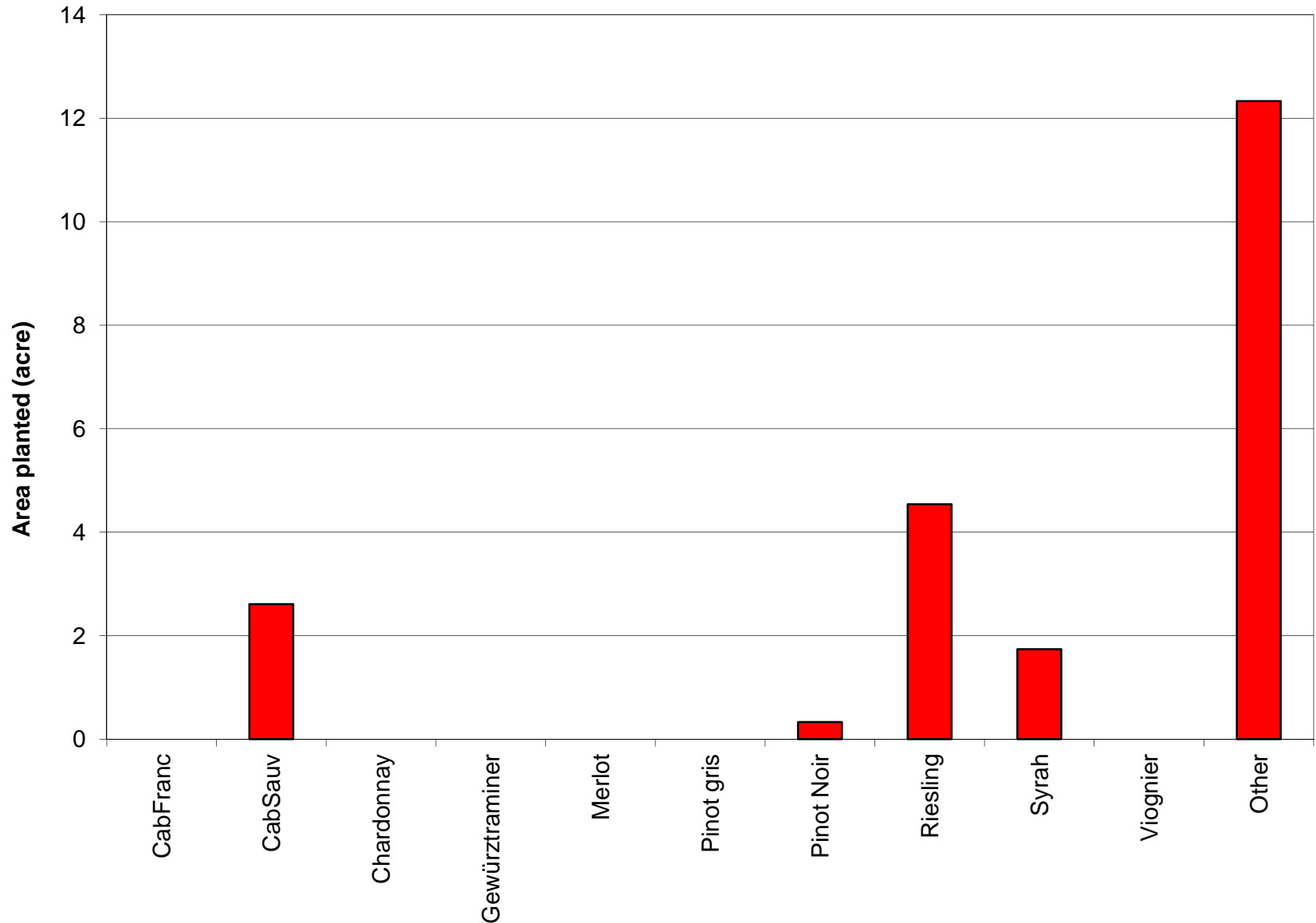


Colorado vineyard area, top 10 varieties

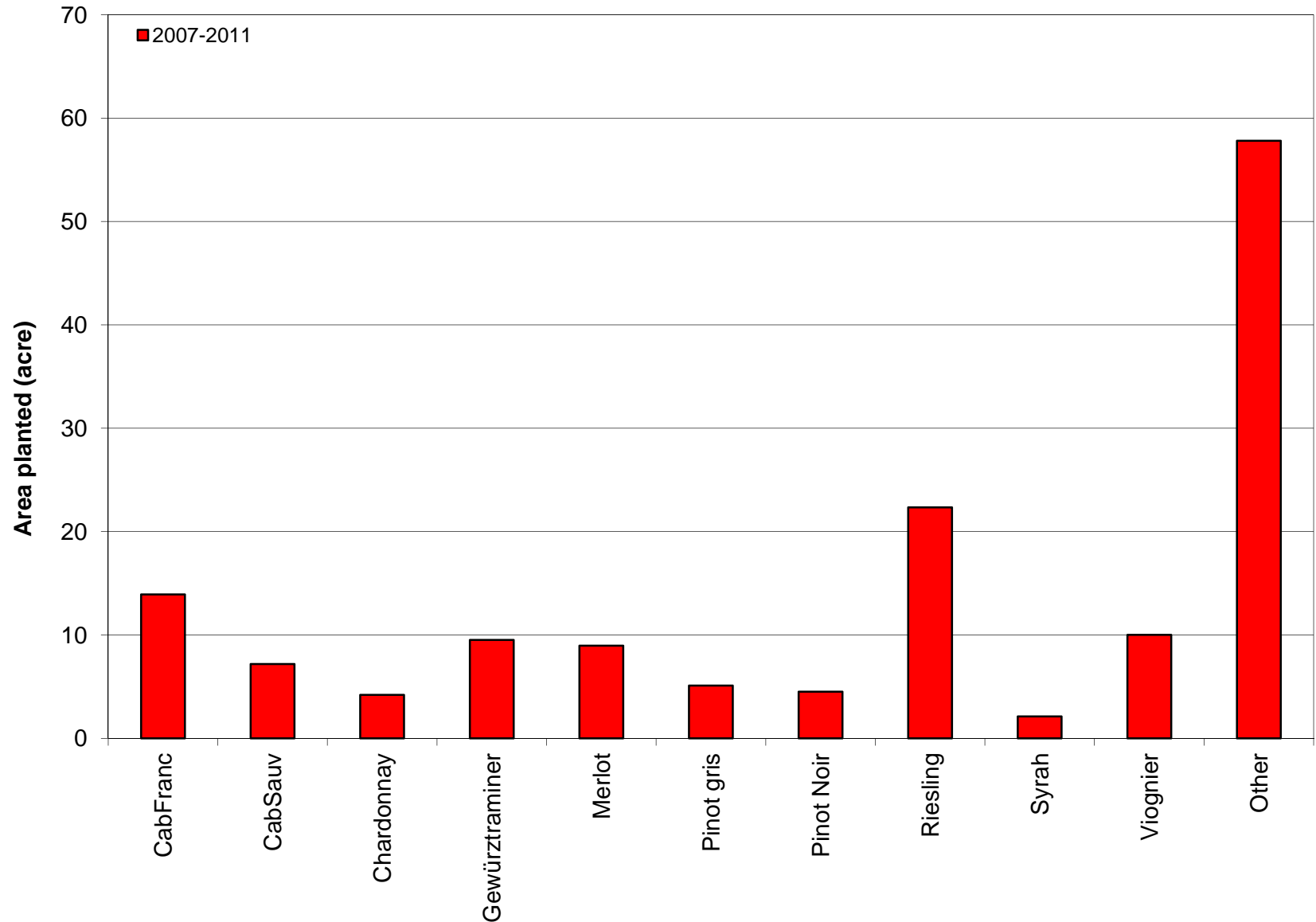


Best guess; based on all surveys since 2000

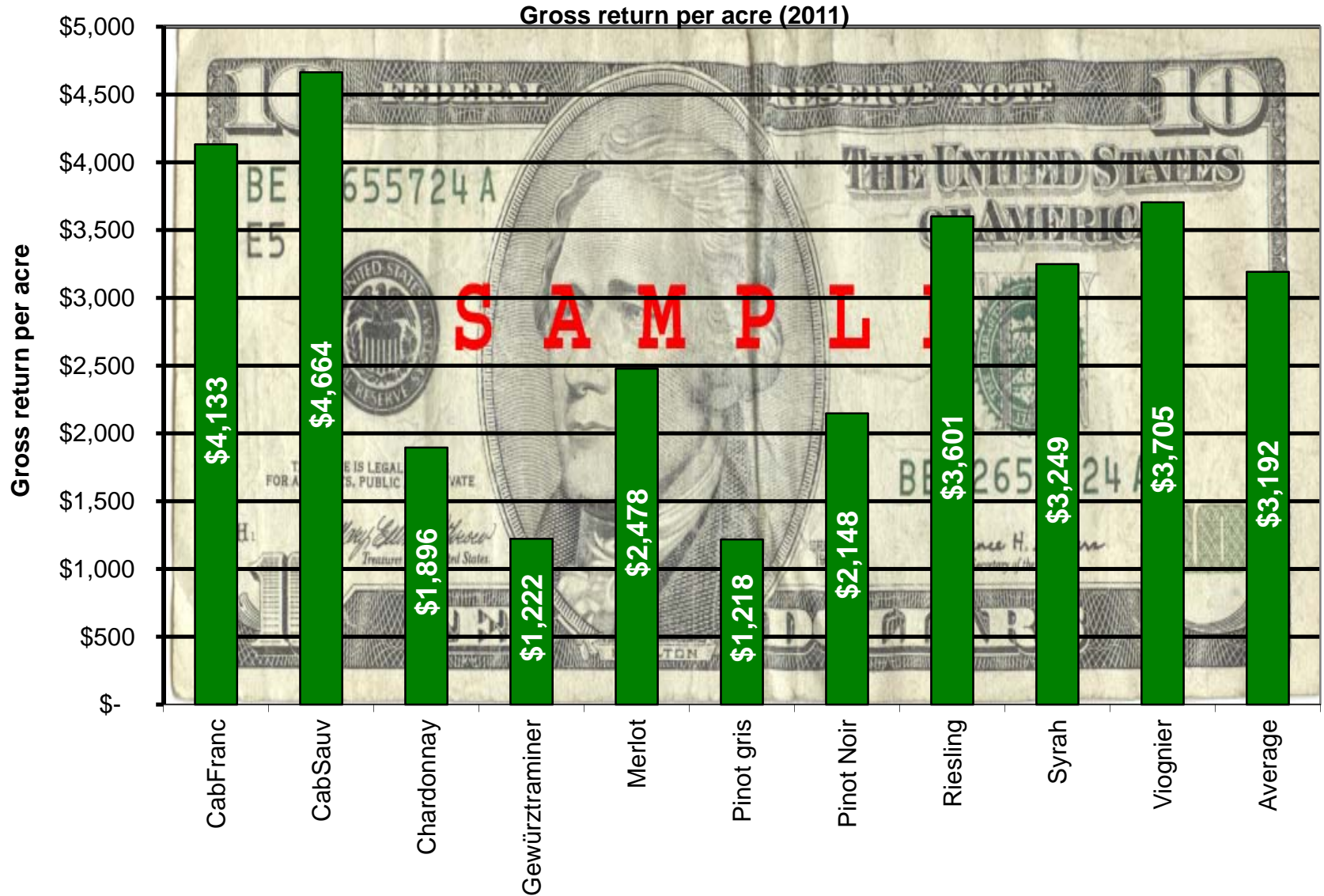
What has been planted in 2011?



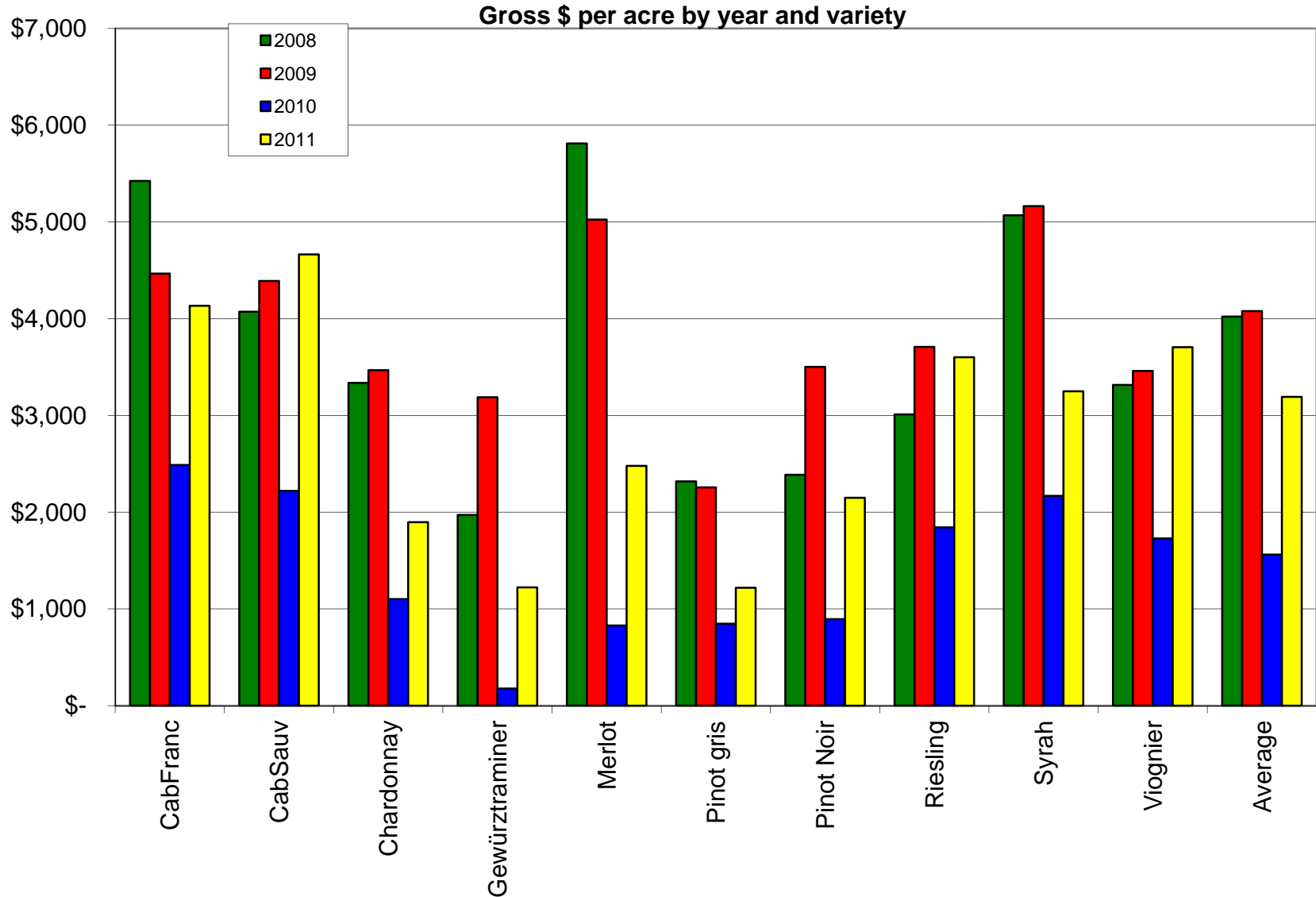
Total plantings 2007 - 2011



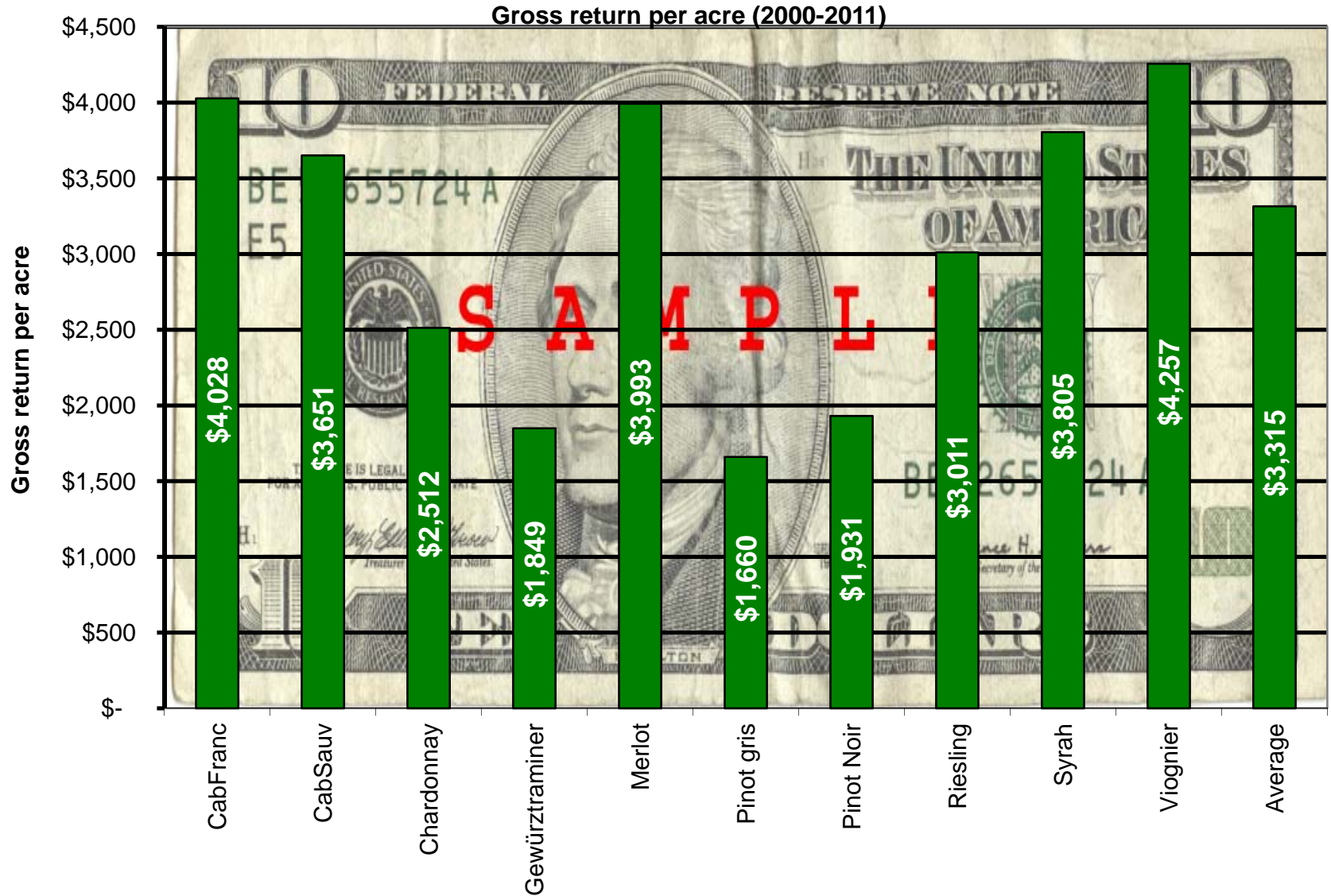
Gross return per acre, 2011



Gross return per acre, 2008-2011



Average gross return per acre, 2000-2011



2011 Grape Grower Survey “Highlights”

- Incomplete recovery from 2009 winter damage
- Merlot, the state’s leading variety, ranks only third in production
- Cabernet Sauvignon ranks number one in production, with Riesling second
- The vineyard area removed exceeds the new area planted – the second year in a row
- Some growers are downsizing or exiting the industry

“Guesstimate” of Colorado grape growing area

Total vineyard area (acre)	~1,000
Wineries	33 %
Growers	67 %
Producing vineyard area (acre)	850-950
Wineries	33 %
Growers	67 %
Average vineyard size (acre)	6.5-7.0

Note: This “guesstimate” was prepared from data provided in the 1999 to 2011 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 2011 of ~1,000 acres.

Varieties included in “Other” category

Albarino, Aurora, Barbera, Bianca, Brianna, Cabernet
Crimson, Canadice, Carmenere, Carmine, Catawba, Cayuga
White, Chambourcin, Chancellor, Chardonel, 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