## Survey summary

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey forms sent</td>
<td>168</td>
</tr>
<tr>
<td>Survey forms returned</td>
<td>100</td>
</tr>
<tr>
<td>Rate of return</td>
<td>60 %</td>
</tr>
</tbody>
</table>
Non-respondents: established growers

36 growers who provided data in previous surveys did not yet respond to the 2012 survey

- ~128 total acres (~15 % of CO total)

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

- vineyards that were planted prior to 2011
## 2012 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></td>
<td>707</td>
<td>680</td>
<td>7.1</td>
<td>1,652</td>
<td>2.4</td>
<td>1,480</td>
<td>225</td>
<td>4,183</td>
</tr>
<tr>
<td>Wineries</td>
<td>280 (40 %)</td>
<td>268 (40 %)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract growers</td>
<td>427 (60 %)</td>
<td>412 (60 %)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Colorado grape production by year

Total yield (t)

Colorado grape yield per acre by year
Colorado grape yield per acre by county

Yield (t/acre)

- Mesa county
- Delta county
- Other counties

Year
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012

Yield: 0.0 to 4.0
2012 Colorado grape production by county

- Mesa: 84.4%
- Delta: 8.4%
- Other: 7.2%
Colorado total vineyard area by county

- Mesa: 74.1%
- Delta: 11.8%
- Other: 14.2%
Colorado vineyards by planting year

Best guess; based on all surveys since 2000
Is Colorado’s vineyard area shrinking?

![Bar chart showing area (acre) for new planting and removed for each year from 2008 to 2012.]
New vineyard plantings by county

Area planted (acre)

- Delta
- Mesa
- Other

2008-2012
Vineyard area removed by county

- Mesa county
- Delta county
- Other counties

<table>
<thead>
<tr>
<th>Year</th>
<th>Mesa county</th>
<th>Delta county</th>
<th>Other counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>4.5</td>
<td>6.2</td>
<td>1.0</td>
</tr>
<tr>
<td>2009</td>
<td>8.7</td>
<td>4.3</td>
<td>2.0</td>
</tr>
<tr>
<td>2010</td>
<td>5.8</td>
<td>6.9</td>
<td>1.1</td>
</tr>
<tr>
<td>2011</td>
<td>7.3</td>
<td>8.5</td>
<td>2.9</td>
</tr>
<tr>
<td>2012</td>
<td>4.4</td>
<td>5.6</td>
<td>1.5</td>
</tr>
</tbody>
</table>
Vineyard area planted or removed by county

- **Delta**: New - 10, Removed - 37
- **Mesa**: New - 65, Removed - 29
- **Other**: New - 15, Removed - 30
2012 Colorado grape production by variety
Colorado grape production by variety (2012)

- Riesling: 11.3%
- Merlot: 18.0%
- CabSauv: 10.7%
- CabFranc: 7.4%
- Chardonnay: 6.8%
- Syrah: 6.7%
- Gewürztraminer: 6.3%
- Pinot Noir: 3.6%
- Viognier: 4.0%
- Other: 25.2%
Colorado grape yield per acre by variety

Colorado grape yield per acre (2012)

Industry goal???
Colorado grape growing area by variety

[Bar chart showing area (acre) for various grape varieties, including CabFranc, CabSauv, Chardonnay, Gewürztraminer, Merlot, Pinot gris, Pinot Noir, Riesling, Syrah, Viognier, and Other.]

Total and producing areas are indicated for each variety.
Colorado grape growing area by variety

- **Other**: 23.2%
- **Merlot**: 15.2%
- **CabSauv**: 12.0%
- **Riesling**: 11.2%
- **Chardonnay**: 10.0%
- **Syrah**: 6.3%
- **CabFranc**: 6.3%
- **Gewürztraminer**: 4.6%
- **Pinot Noir**: 4.1%
- **Viognier**: 3.9%
- **Pinot gris**: 3.1%
- **Pinot Noir**: 4.1%
- **Viognier**: 3.9%
- **Gewürztraminer**: 4.6%
- **CabFranc**: 6.3%
- **Syrah**: 6.3%
- **Chardonnay**: 10.0%
- **Riesling**: 11.2%
- **CabSauv**: 12.0%

*Colorado total vineyard area (2012)*
Colorado vineyard area, top 10 varieties

Best guess; based on all surveys since 2000
What has been planted in 2012?

Area planted (acre)
Total plantings 2008 - 2012
Gross return per acre, 2012

Gross return per acre (2012)

<table>
<thead>
<tr>
<th>Grape</th>
<th>Gross Return per Acre</th>
</tr>
</thead>
<tbody>
<tr>
<td>CabFranc</td>
<td>$3,913</td>
</tr>
<tr>
<td>CabSauv</td>
<td>$4,014</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>$3,774</td>
</tr>
<tr>
<td>Gewürztraminer</td>
<td>$4,728</td>
</tr>
<tr>
<td>Merlot</td>
<td>$5,181</td>
</tr>
<tr>
<td>Pinot gris</td>
<td>$3,747</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>$4,963</td>
</tr>
<tr>
<td>Riesling</td>
<td>$3,475</td>
</tr>
<tr>
<td>Syrah</td>
<td>$4,950</td>
</tr>
<tr>
<td>Viognier</td>
<td>$3,787</td>
</tr>
<tr>
<td>Average</td>
<td>$4,215</td>
</tr>
</tbody>
</table>
Gross return per acre, 2009-2012

Gross $ per acre by year and variety

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

2009
2010
2011
2012
Average gross return per acre, 2000-2012

Gross return per acre (2000-2012)

<table>
<thead>
<tr>
<th>Variety</th>
<th>Average Gross Return per Acre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cab Franc</td>
<td>$4,020</td>
</tr>
<tr>
<td>Cab Sauv</td>
<td>$3,679</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>$2,609</td>
</tr>
<tr>
<td>Gewürztraminer</td>
<td>$2,071</td>
</tr>
<tr>
<td>Merlot</td>
<td>$4,084</td>
</tr>
<tr>
<td>Pinot gris</td>
<td>$2,077</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>$2,165</td>
</tr>
<tr>
<td>Riesling</td>
<td>$3,047</td>
</tr>
<tr>
<td>Syrah</td>
<td>$3,893</td>
</tr>
<tr>
<td>Viognier</td>
<td>$4,221</td>
</tr>
<tr>
<td>Average</td>
<td>$3,384</td>
</tr>
</tbody>
</table>

Sample graph showing the gross return per acre for various grape varieties from 2000 to 2012.
2012 Grape Grower Survey “Highlights”

- Recovered from 2009 winter damage

- Merlot, the state’s leading variety, retakes first place in production

- Mediocre performance by Cabernet Sauvignon and Riesling

- Pinot noir and Gewürztraminer did well

- The vineyard area removed exceeds the new area planted – two years in a row
“Guesstimate” of Colorado grape growing area

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total vineyard area (acre)</td>
<td>~1,000</td>
<td>~1,000</td>
<td>~1,000</td>
</tr>
<tr>
<td></td>
<td>Wineries</td>
<td>Wineries</td>
<td>Growers</td>
</tr>
<tr>
<td></td>
<td>40 %</td>
<td>40 %</td>
<td>60 %</td>
</tr>
<tr>
<td></td>
<td>Growers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>60 %</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Producing vineyard area (acre)</td>
<td>950</td>
<td>950</td>
<td>950</td>
</tr>
<tr>
<td></td>
<td>Wineries</td>
<td>Wineries</td>
<td>Growers</td>
</tr>
<tr>
<td></td>
<td>40 %</td>
<td>40 %</td>
<td>60 %</td>
</tr>
<tr>
<td></td>
<td>Growers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>60 %</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average vineyard size (acre)</td>
<td>7.5-8.0</td>
<td>7.5-8.0</td>
<td>7.5-8.0</td>
</tr>
</tbody>
</table>

Note: This “guesstimate” was prepared from data provided in the 1999 to 2012 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 2012 of ~1,000 acres.
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,
Isabella, 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