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# 2012 Grower Survey

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# Survey summary

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Survey forms sent	168
Survey forms returned	100
Rate of return	60 %

# Non-respondents: established growers

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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.

# Definition

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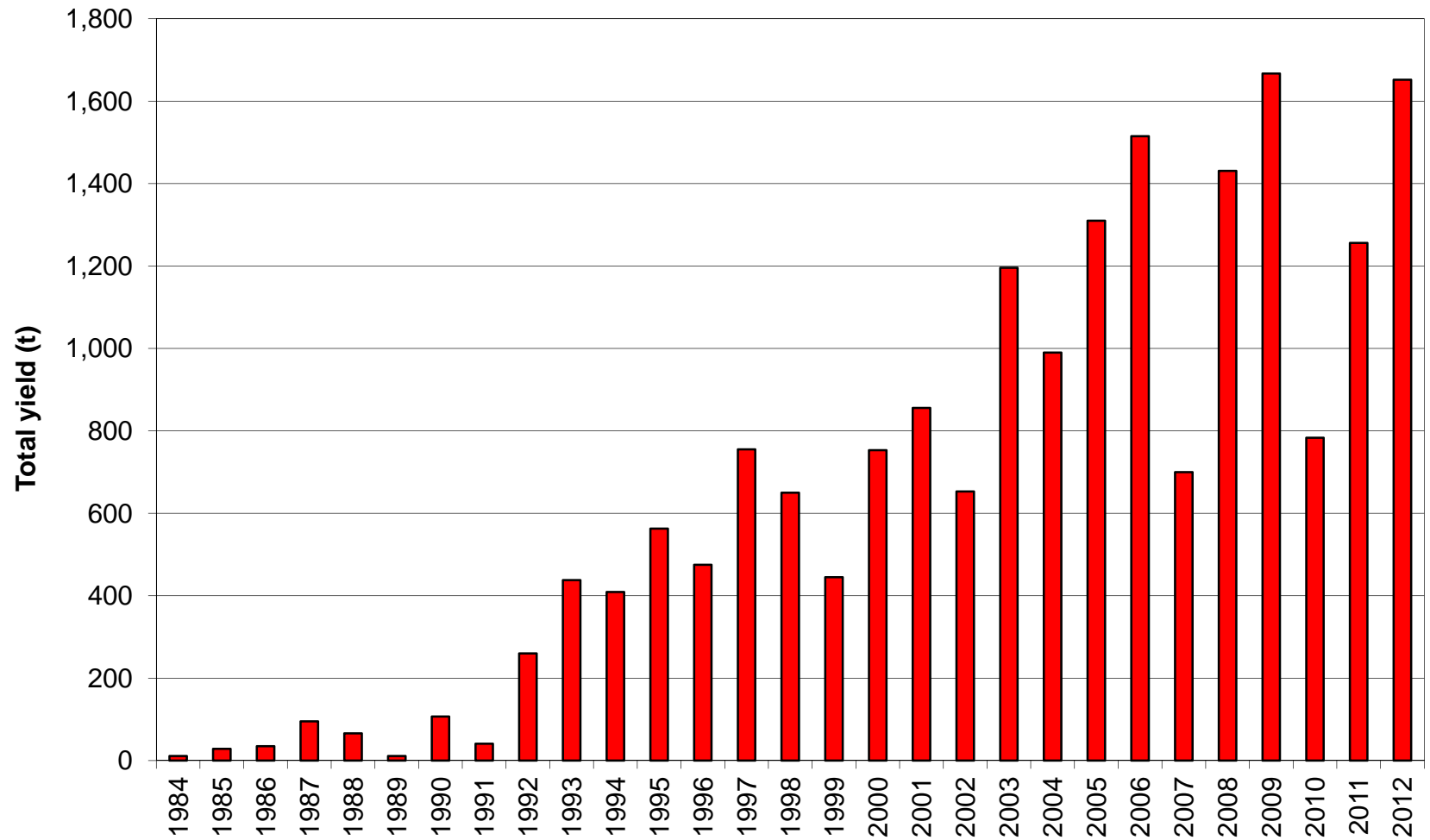
“Producing area”

- vineyards that were planted prior to 2011

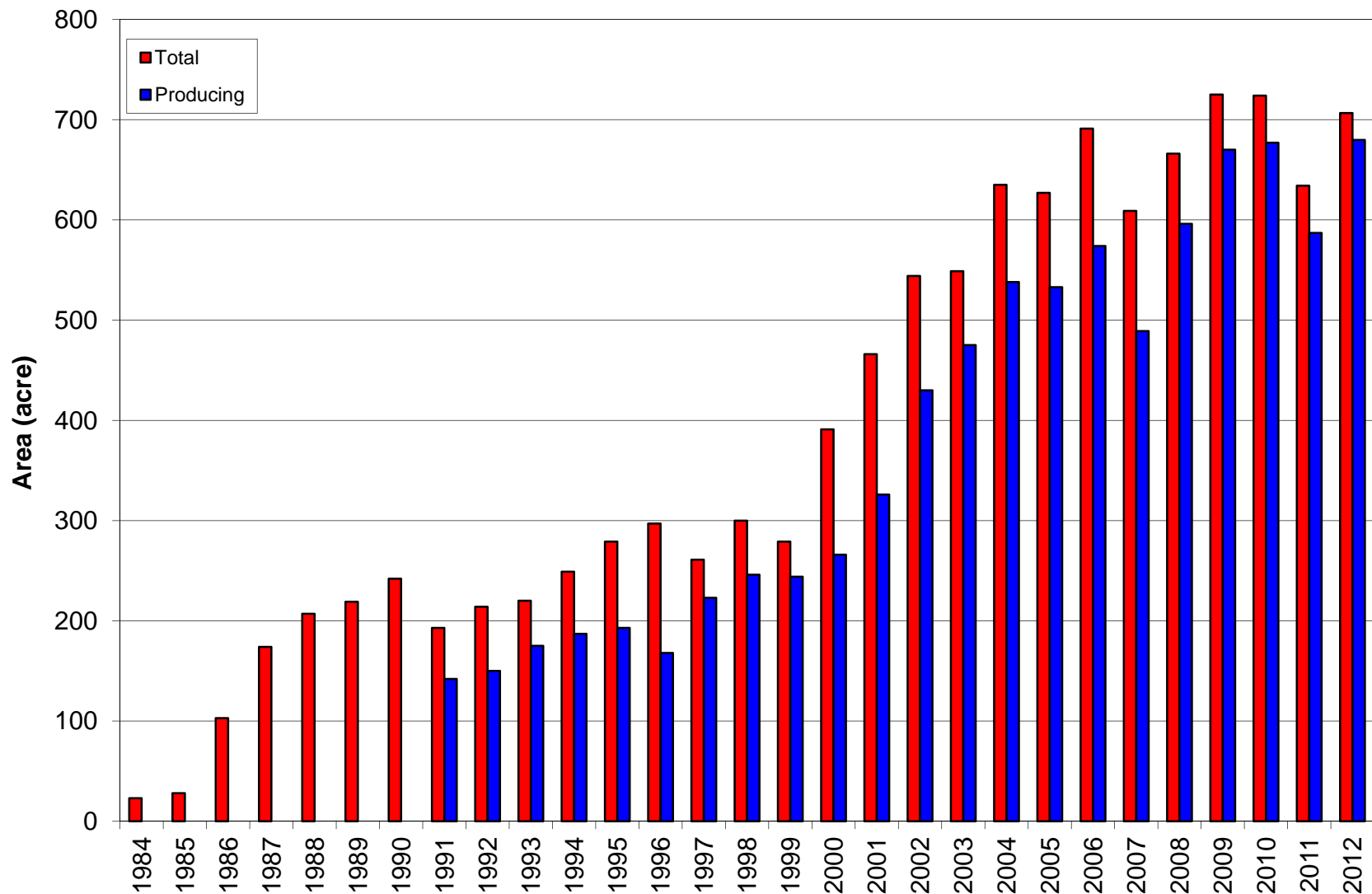
# 2012 Survey results

Total vineyard area (acre)	707
Wineries	280 (40 %)
Contract growers	427 (60 %)
Producing vineyard area (acre)	680
Wineries	268 (40 %)
Contract growers	412 (60 %)
Average vineyard size (acre)	7.1
Total production (t)	1,652
Average yield (t/acre)	2.4
Average grape price (\$/t)	1,480
Average picking costs (\$/t)	225
Gross return (\$/acre)	4,183

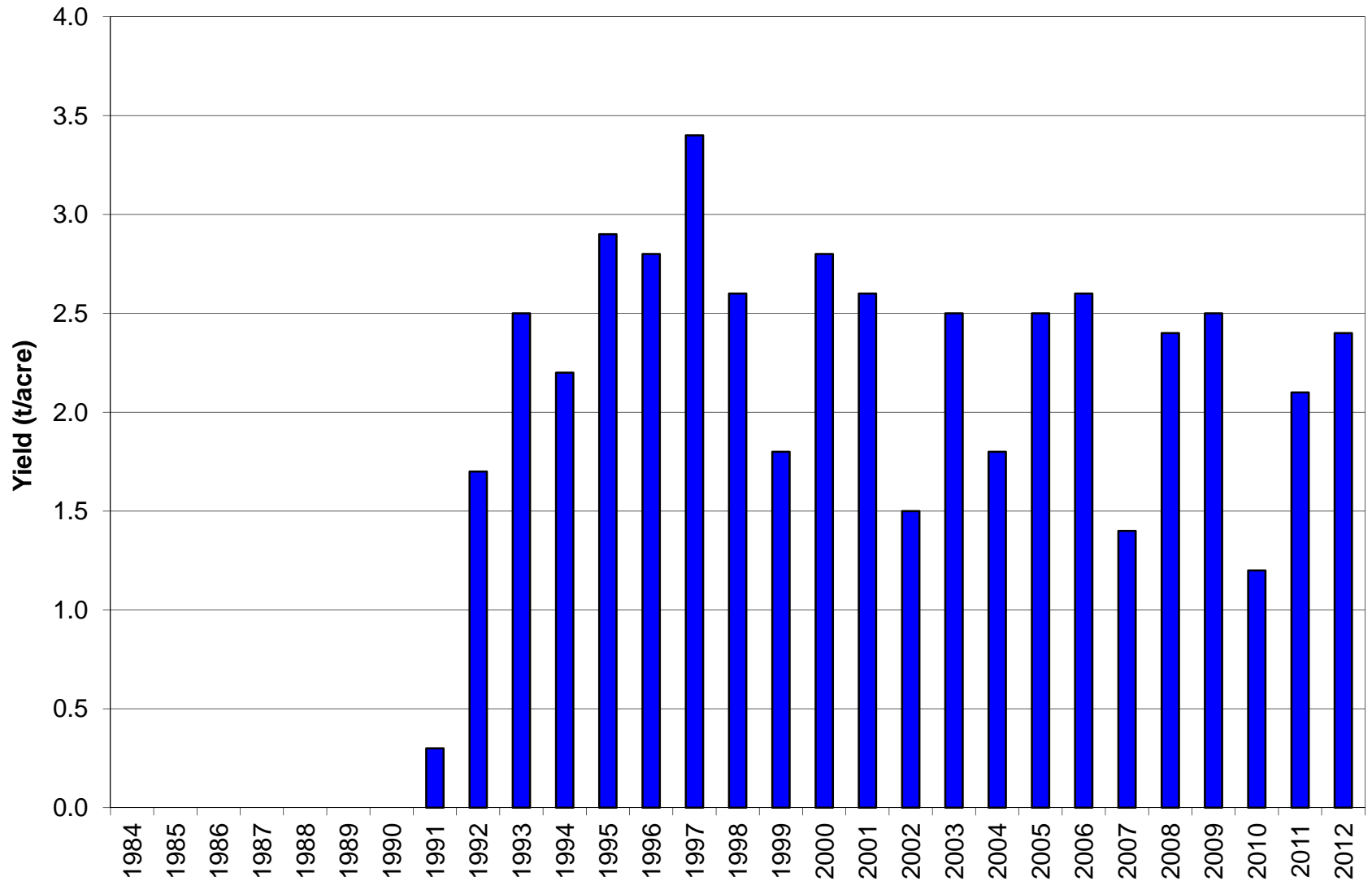
# Colorado grape production by year



# Colorado grape growing area by year

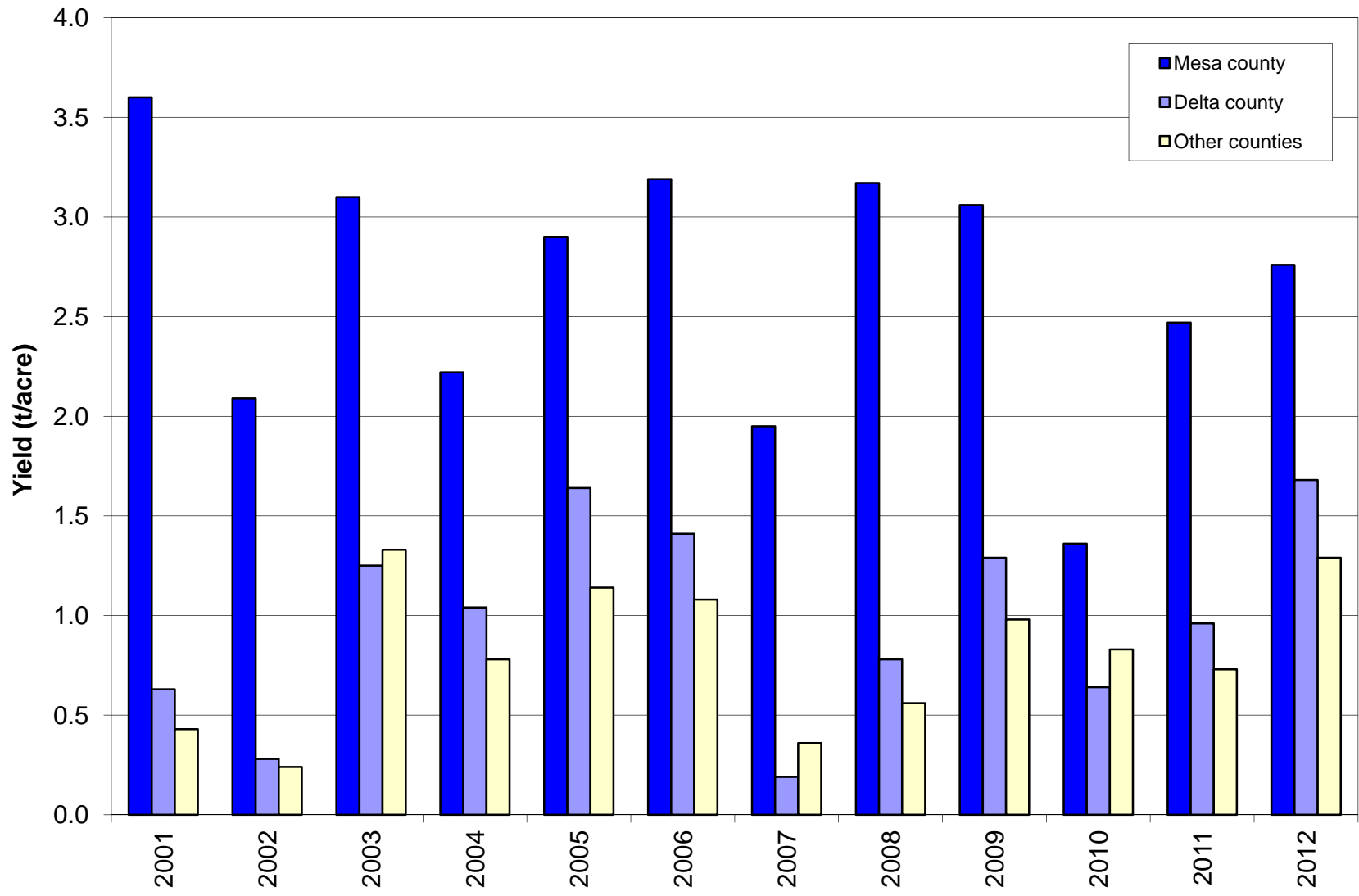


# Colorado grape yield per acre by year

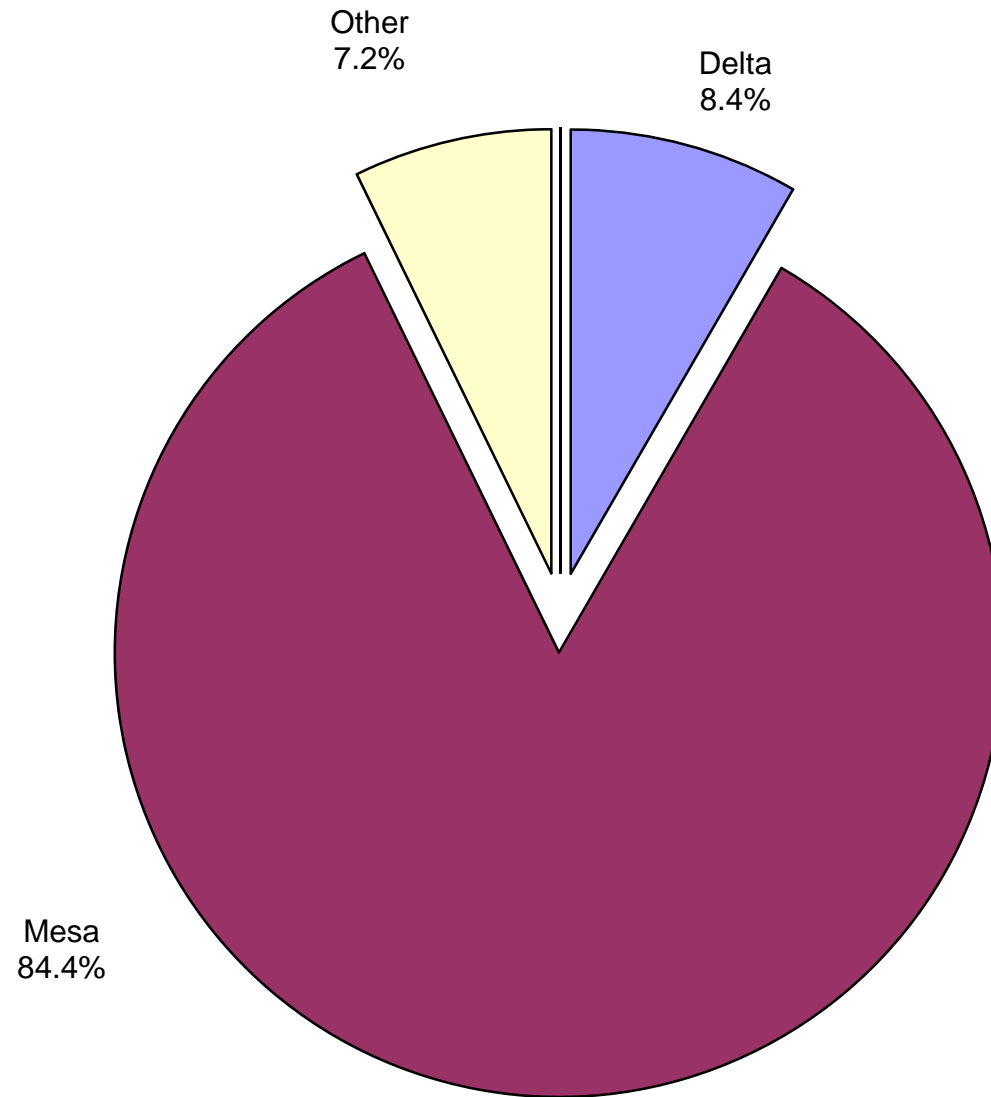




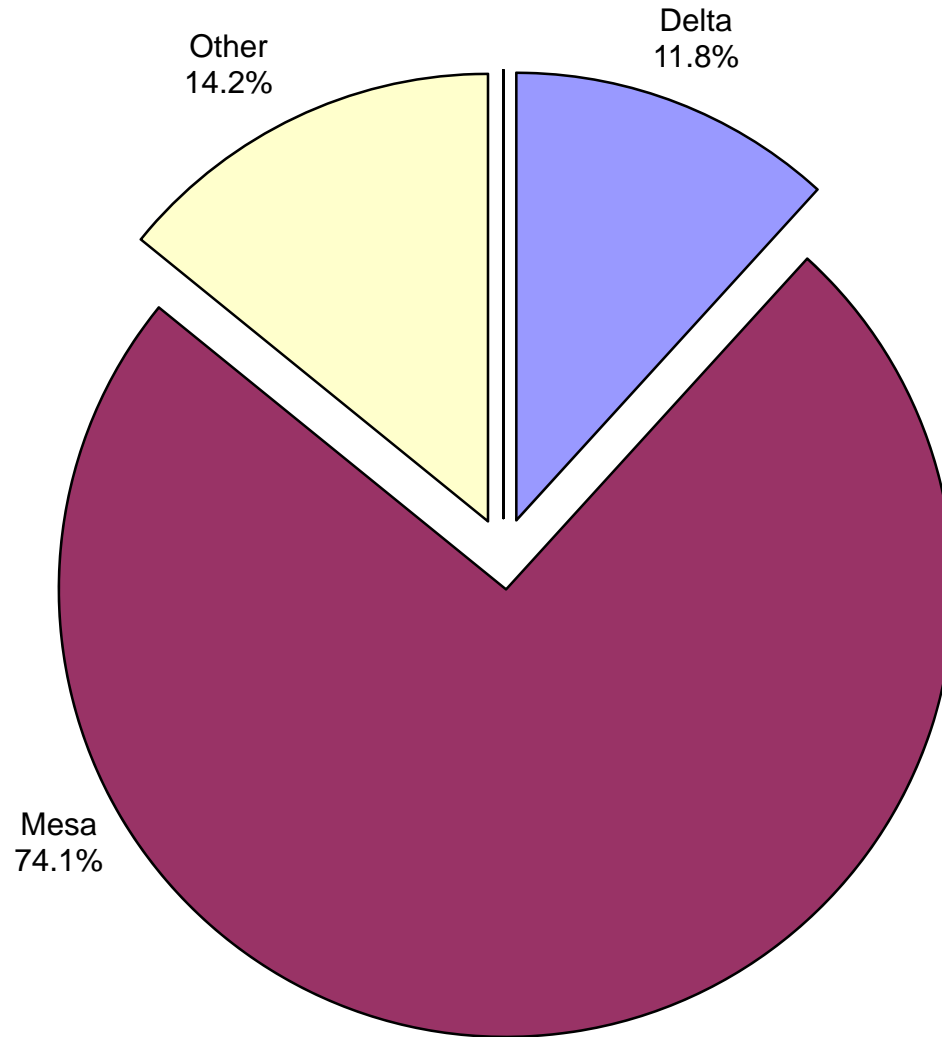
# Colorado grape yield per acre by county



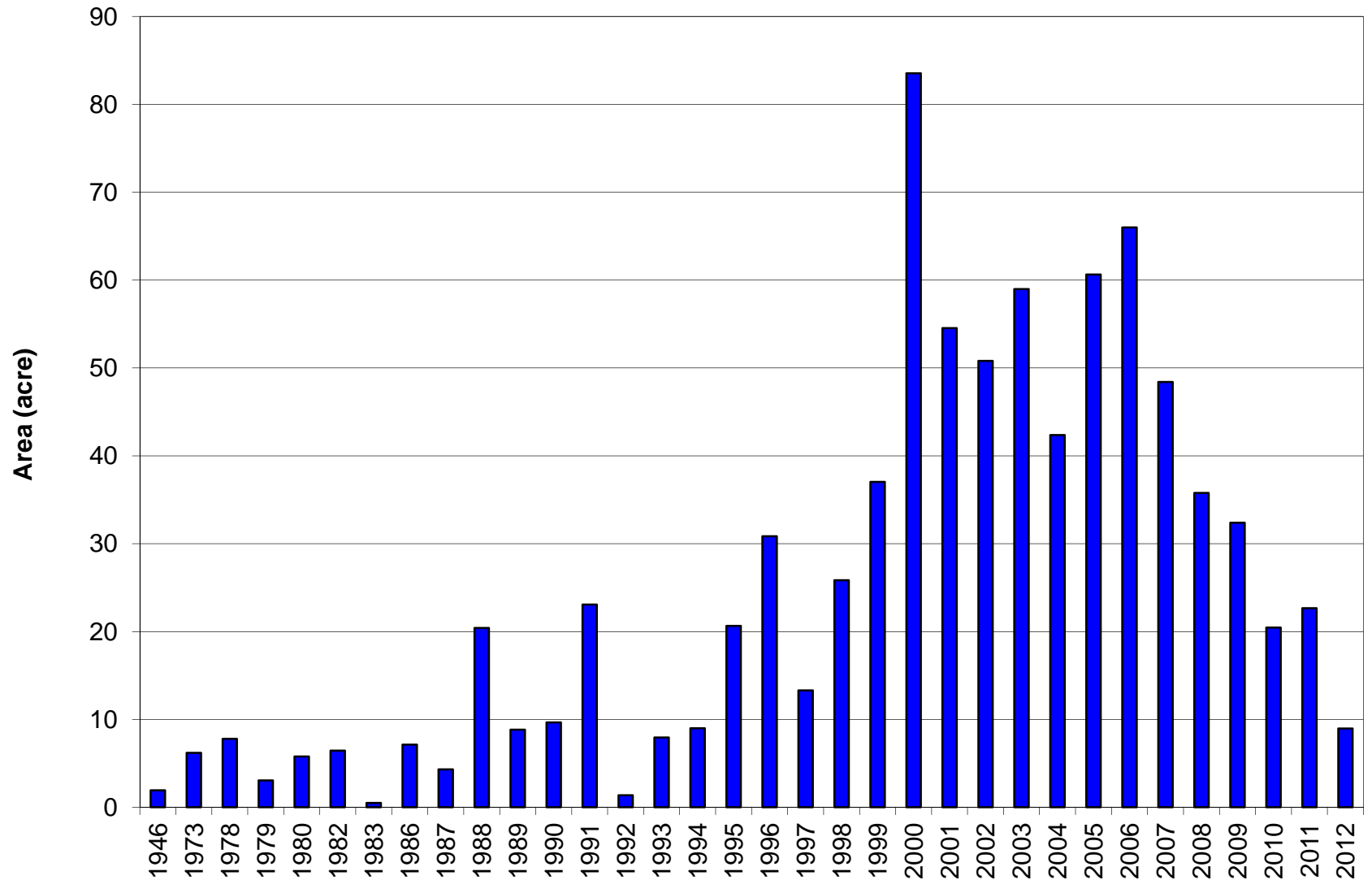
# 2012 Colorado grape production by county



# Colorado total vineyard area by county

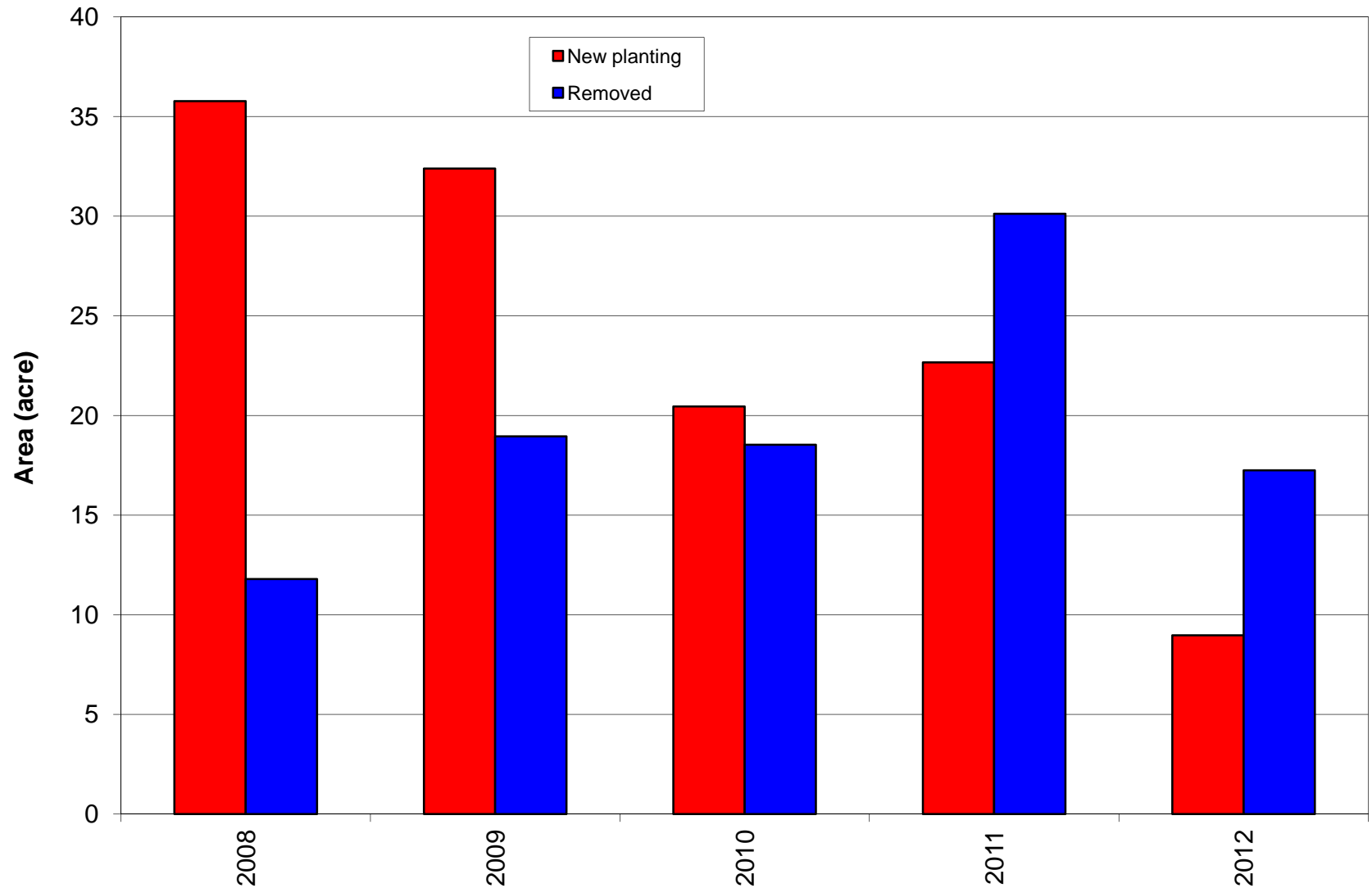


# Colorado vineyards by planting year

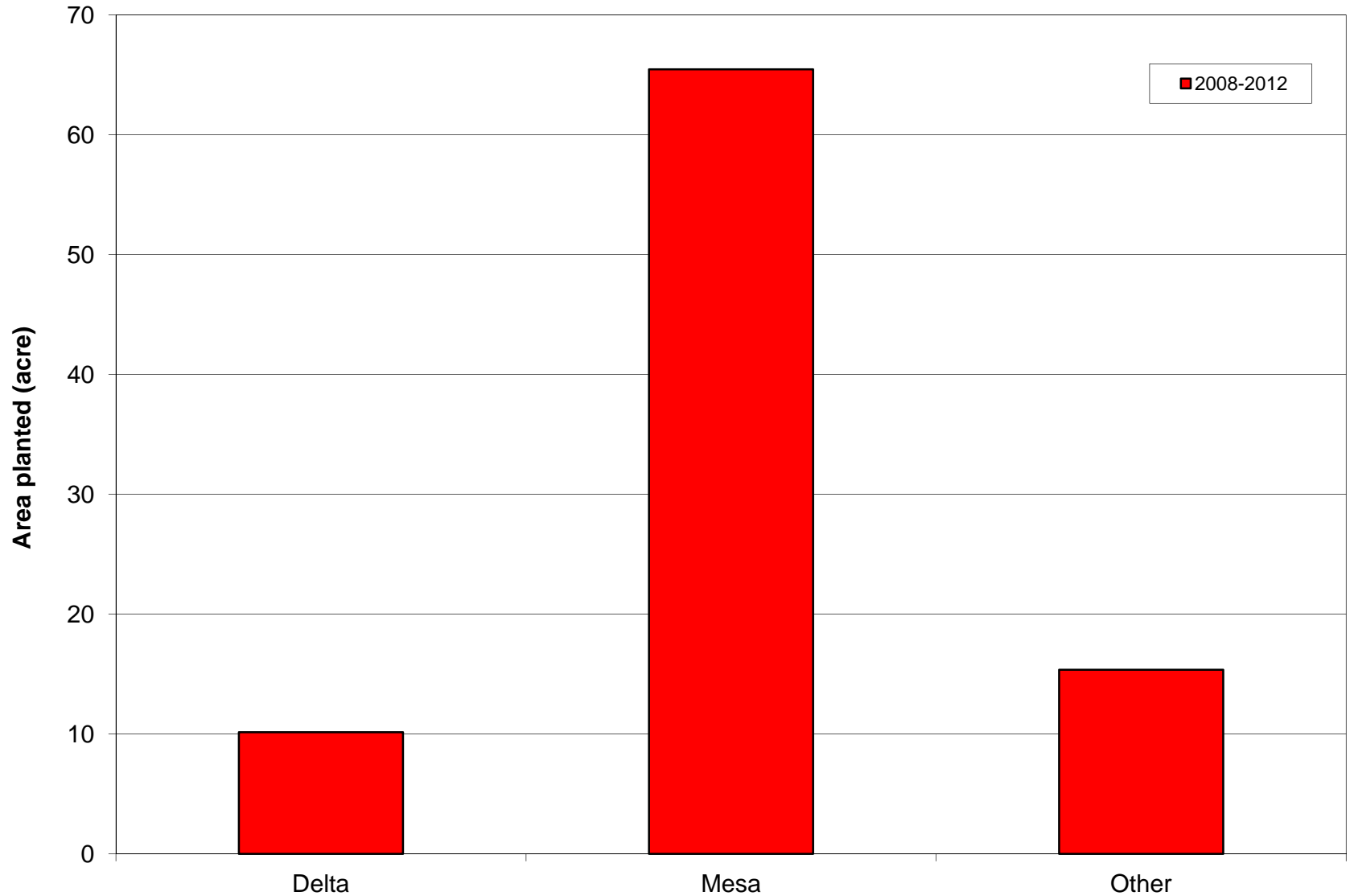


Best guess; based on all surveys since 2000

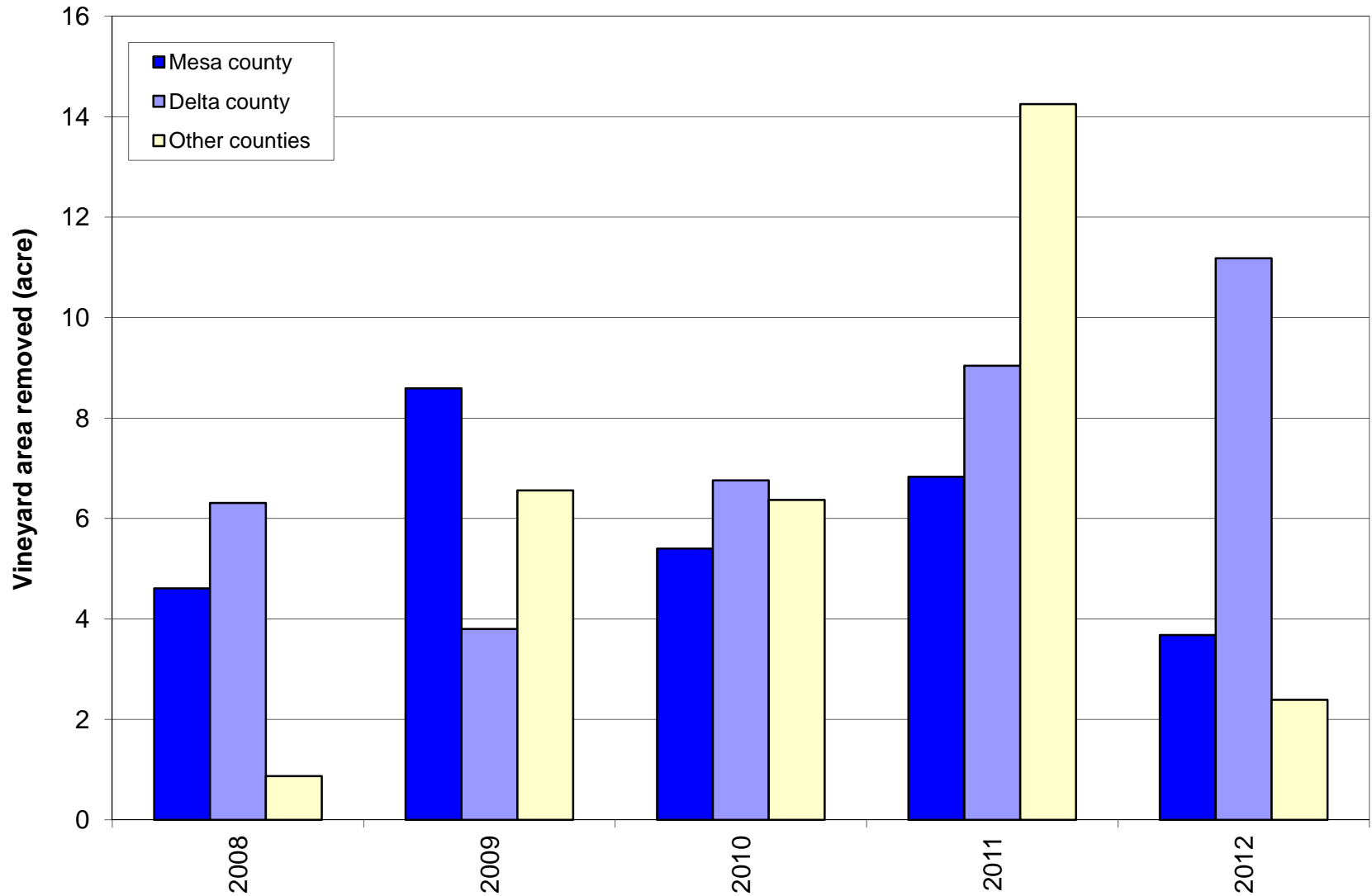
# Is Colorado's vineyard area shrinking?



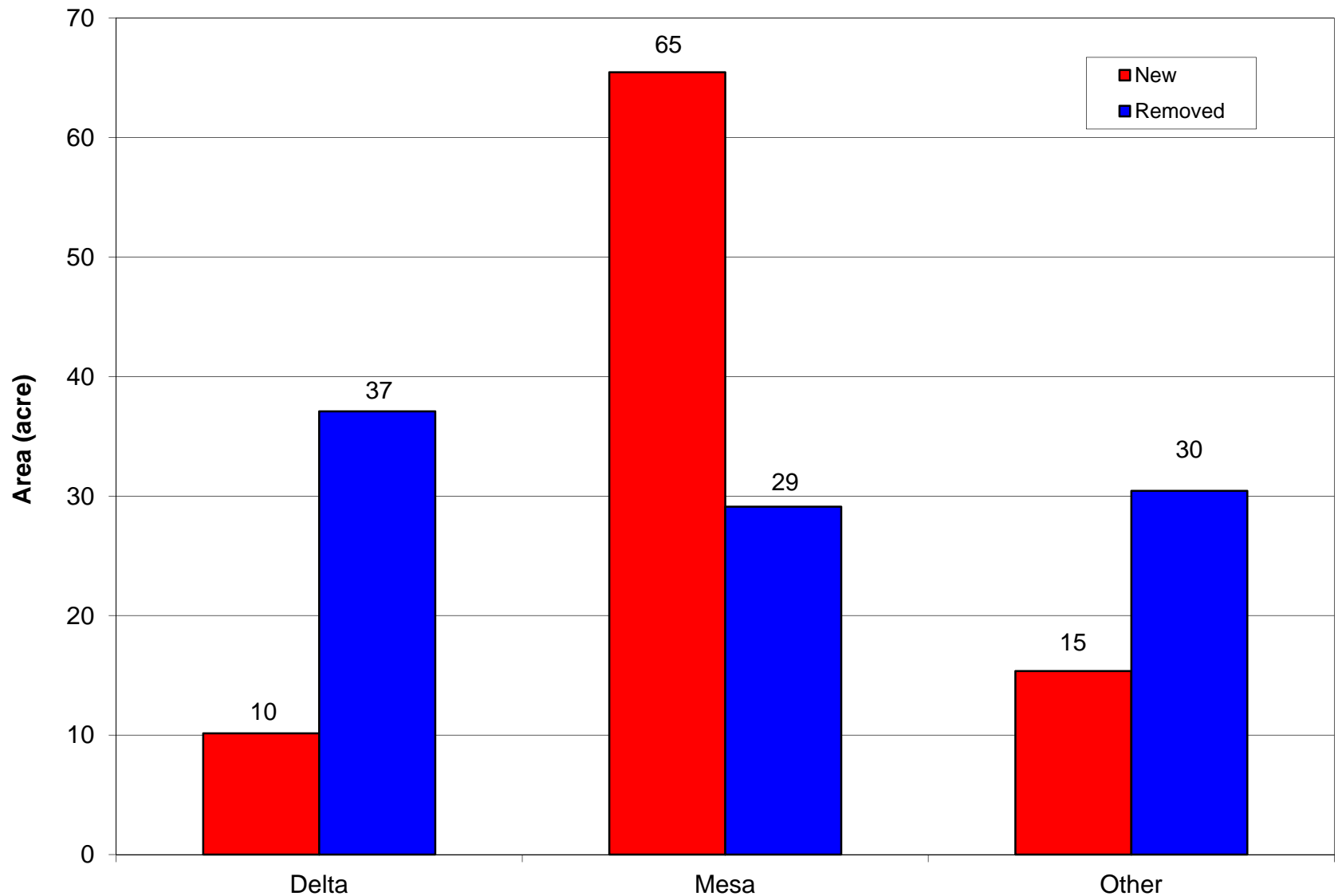
# New vineyard plantings by county



# Vineyard area removed by county

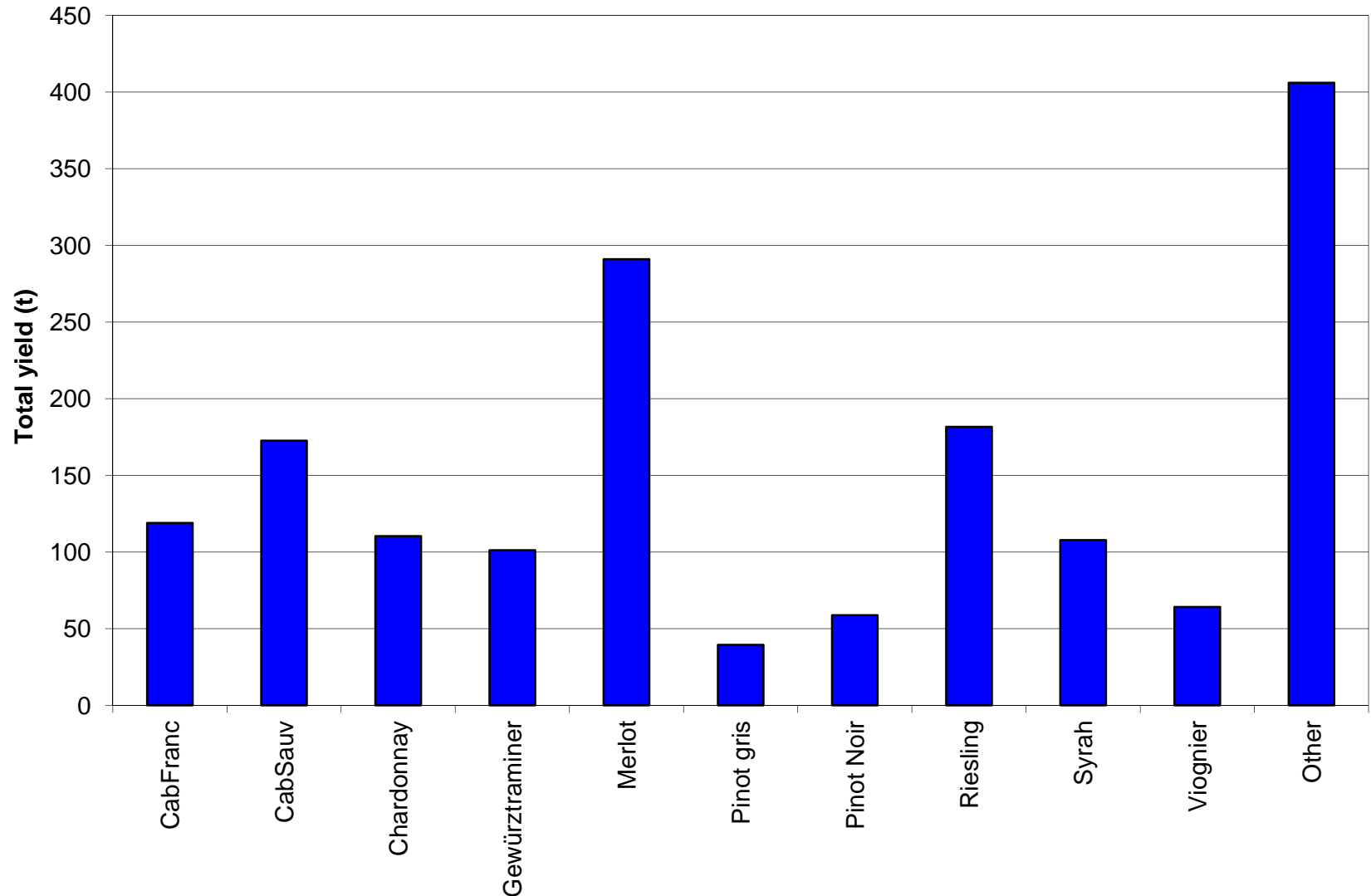


# Vineyard area planted or removed by county

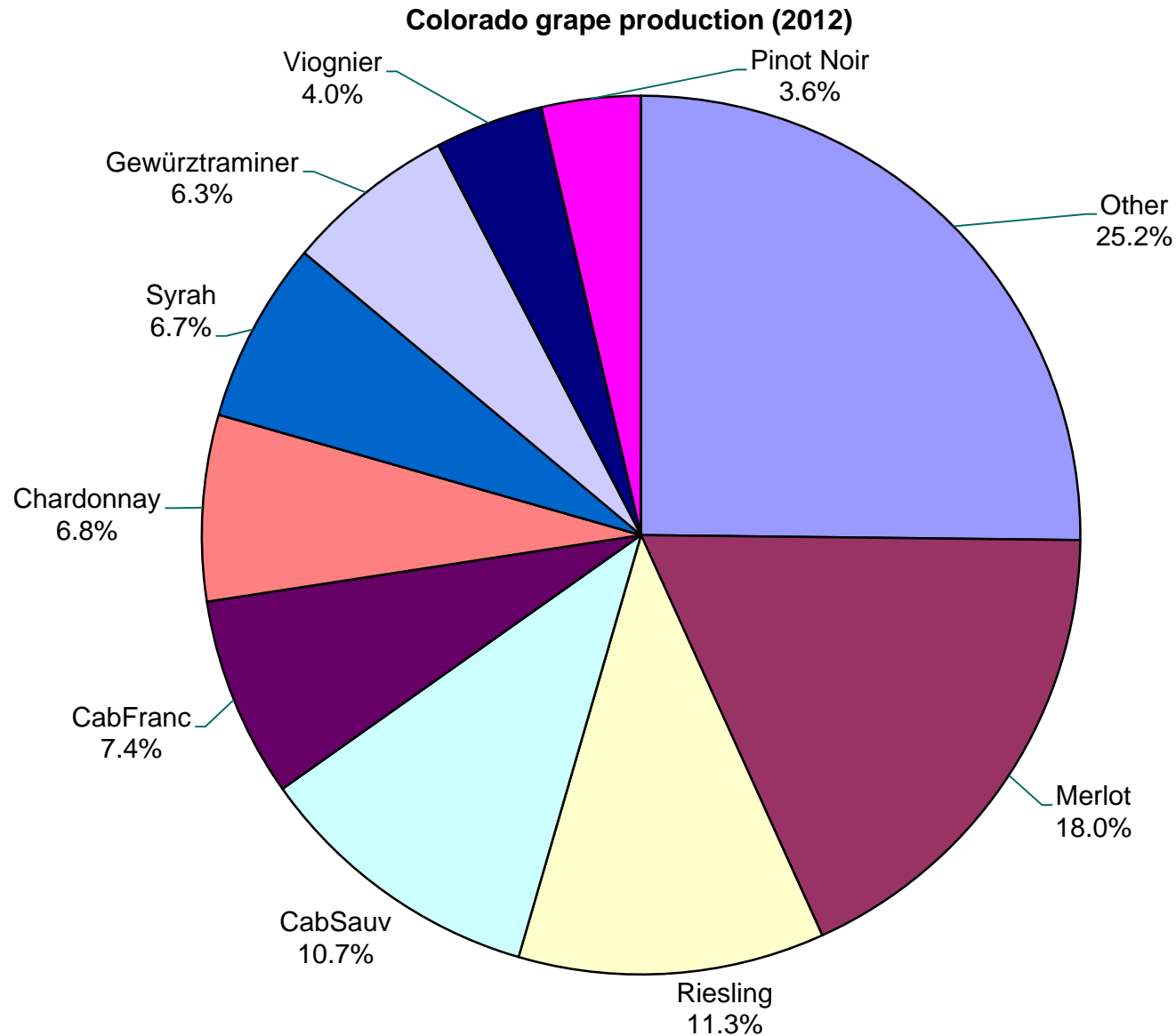




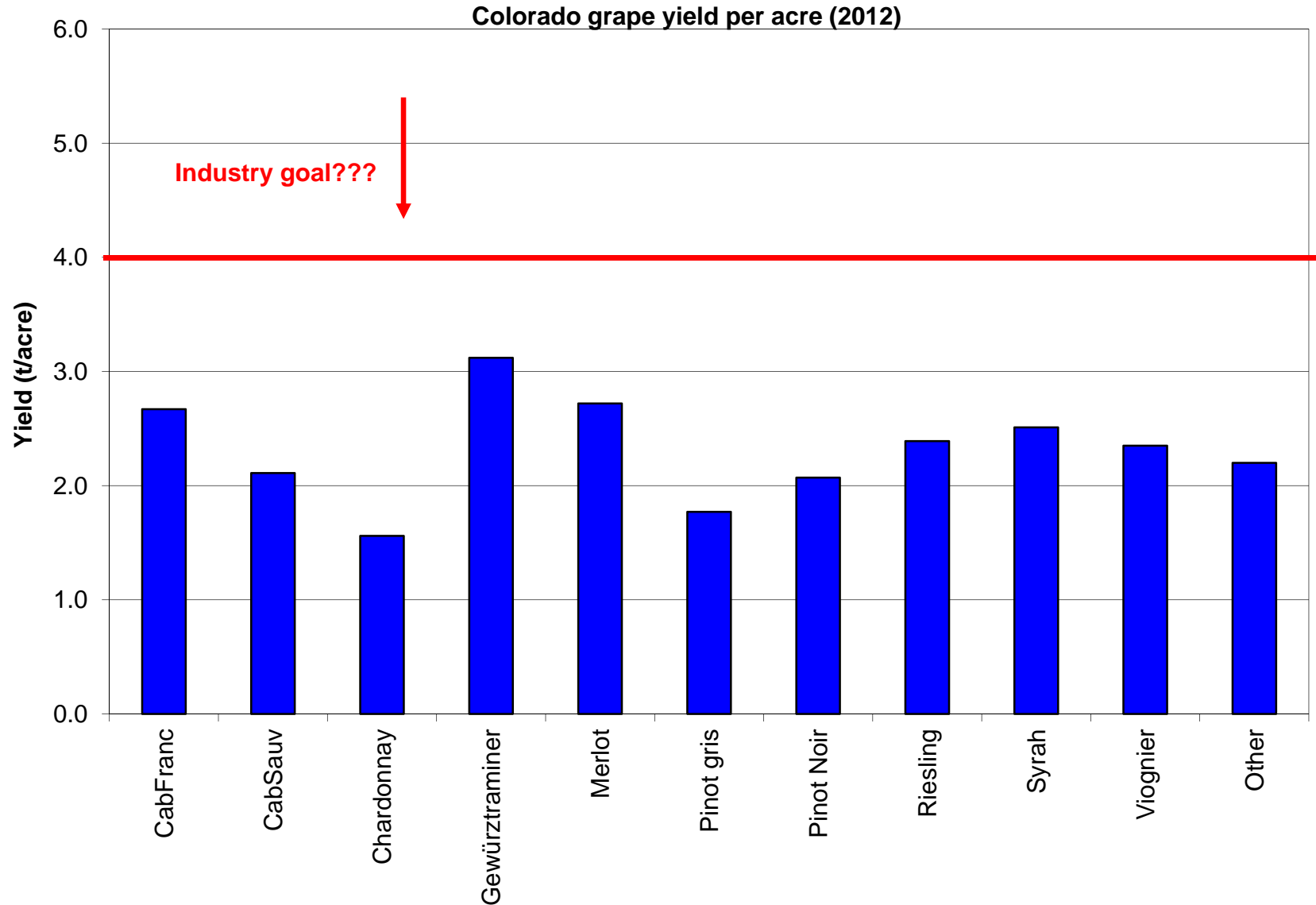
# 2012 Colorado grape production by variety



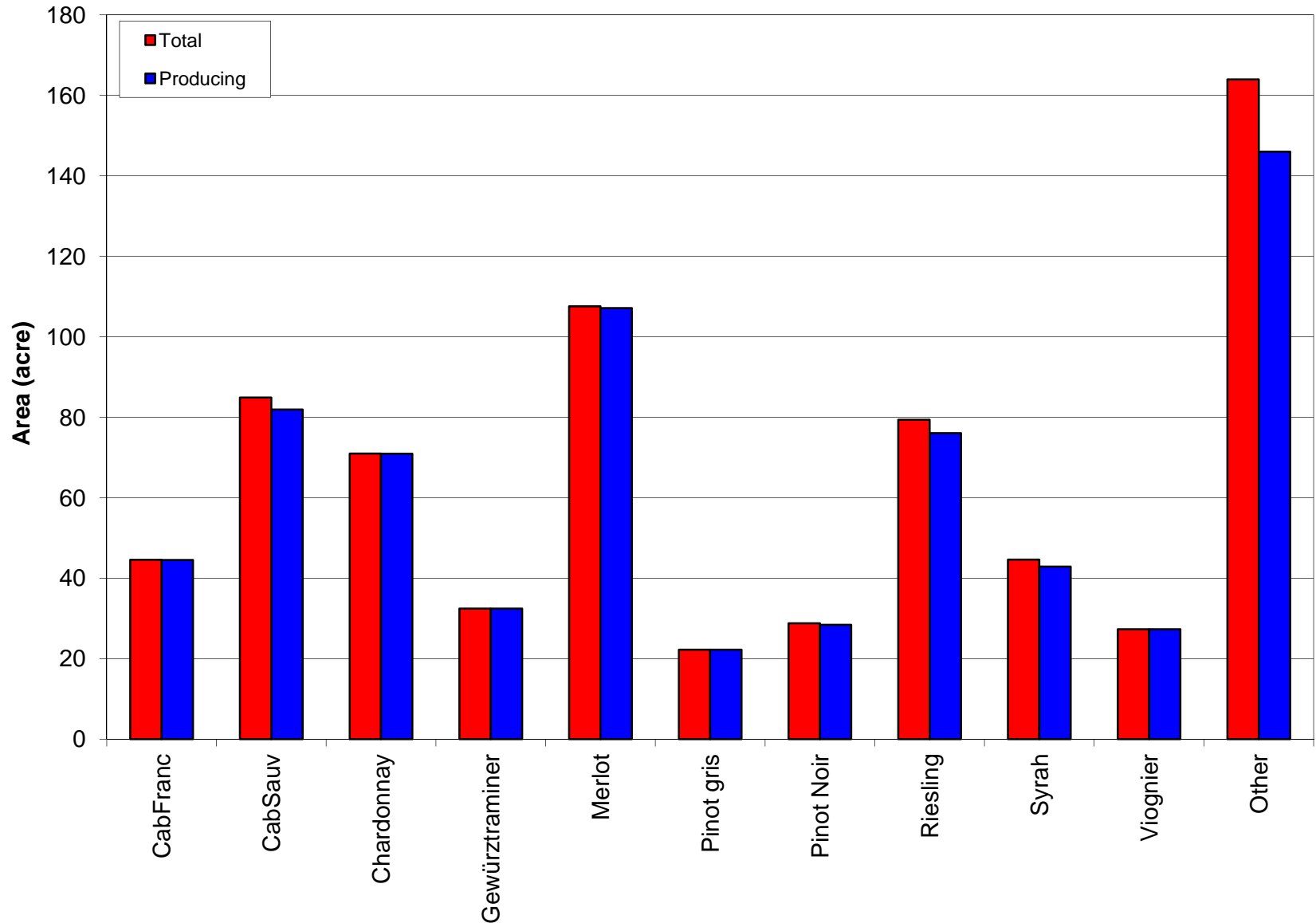
# Colorado grape production by variety



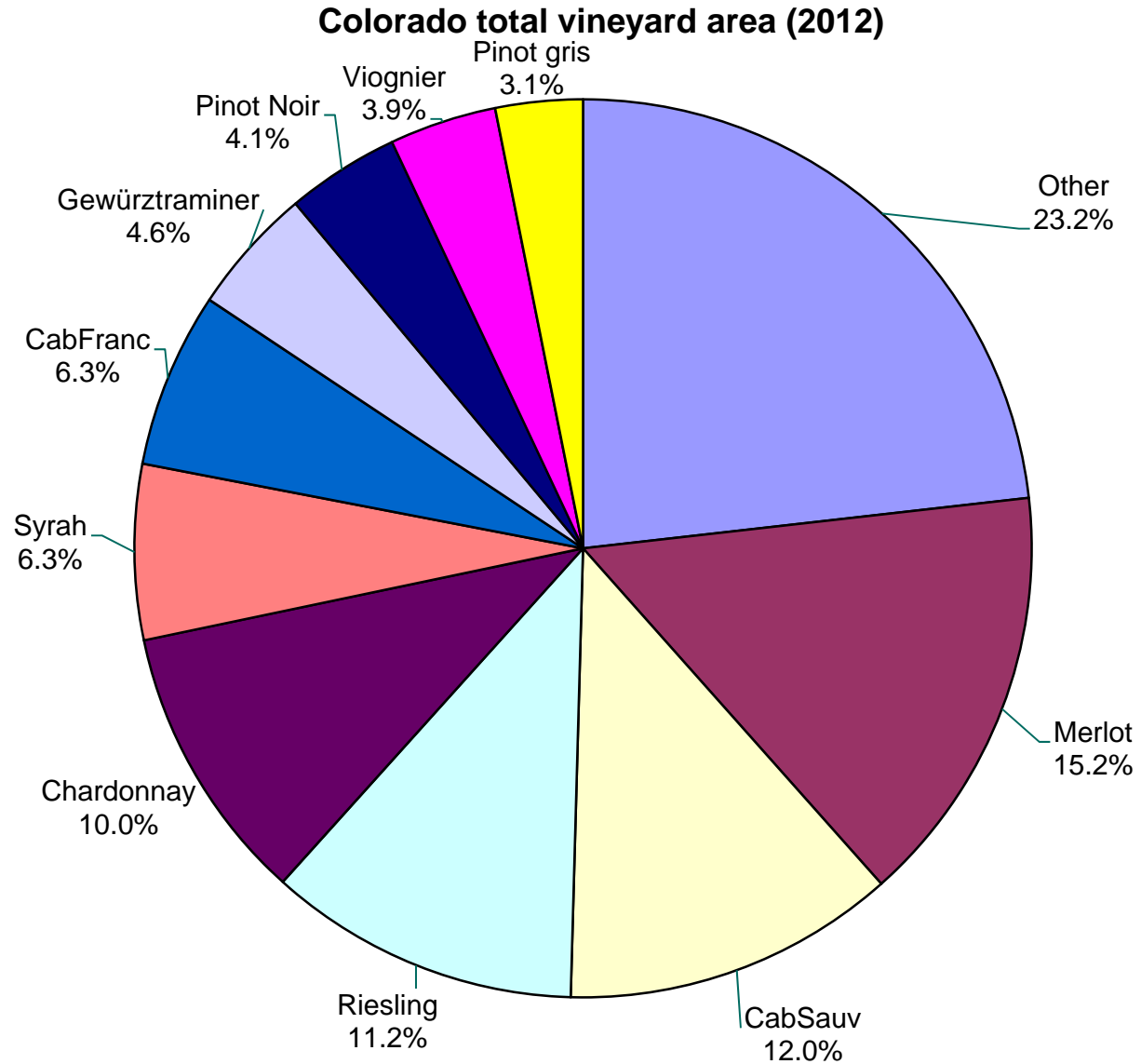
# Colorado grape yield per acre by variety



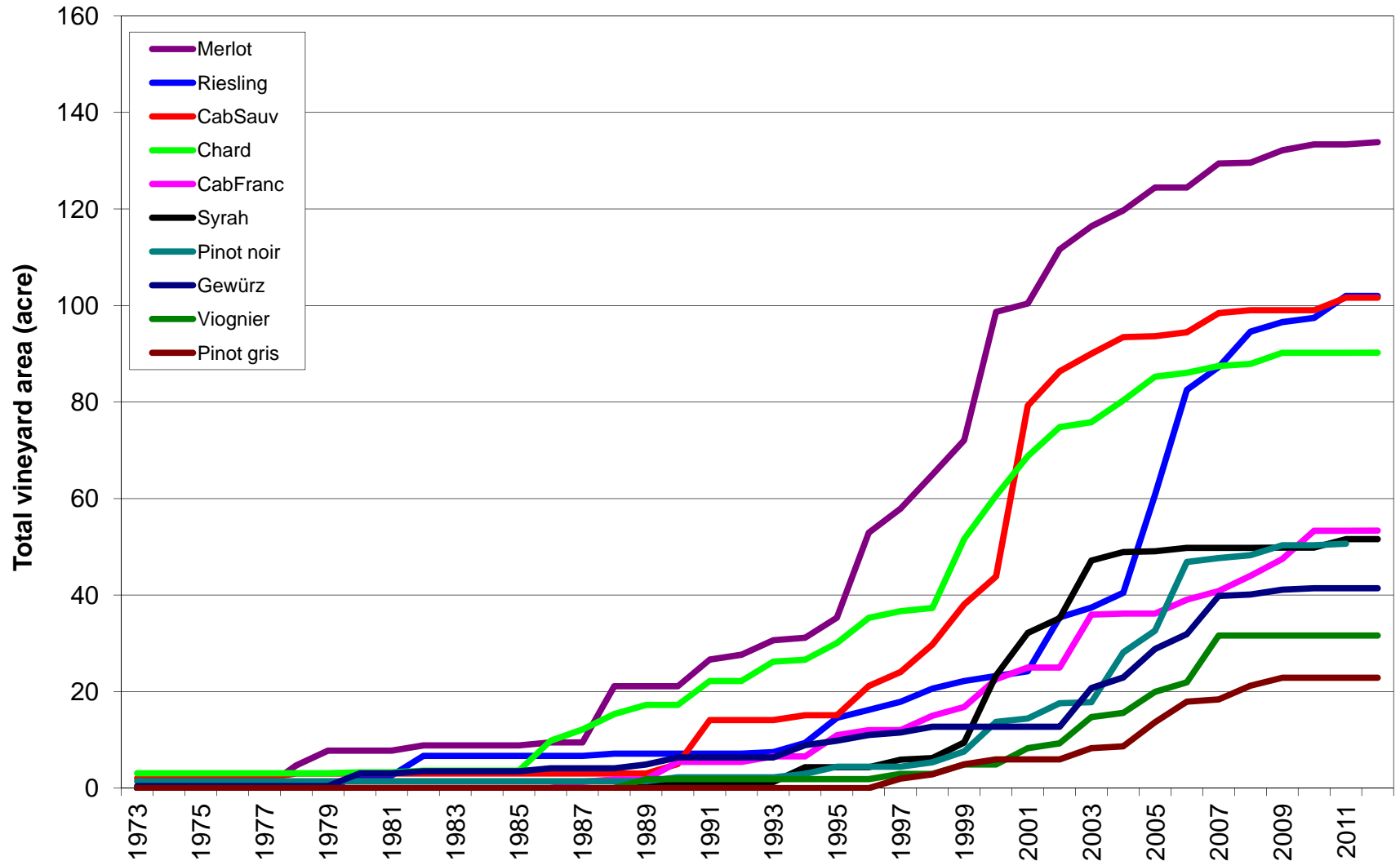
# Colorado grape growing area by variety



# Colorado grape growing area by variety

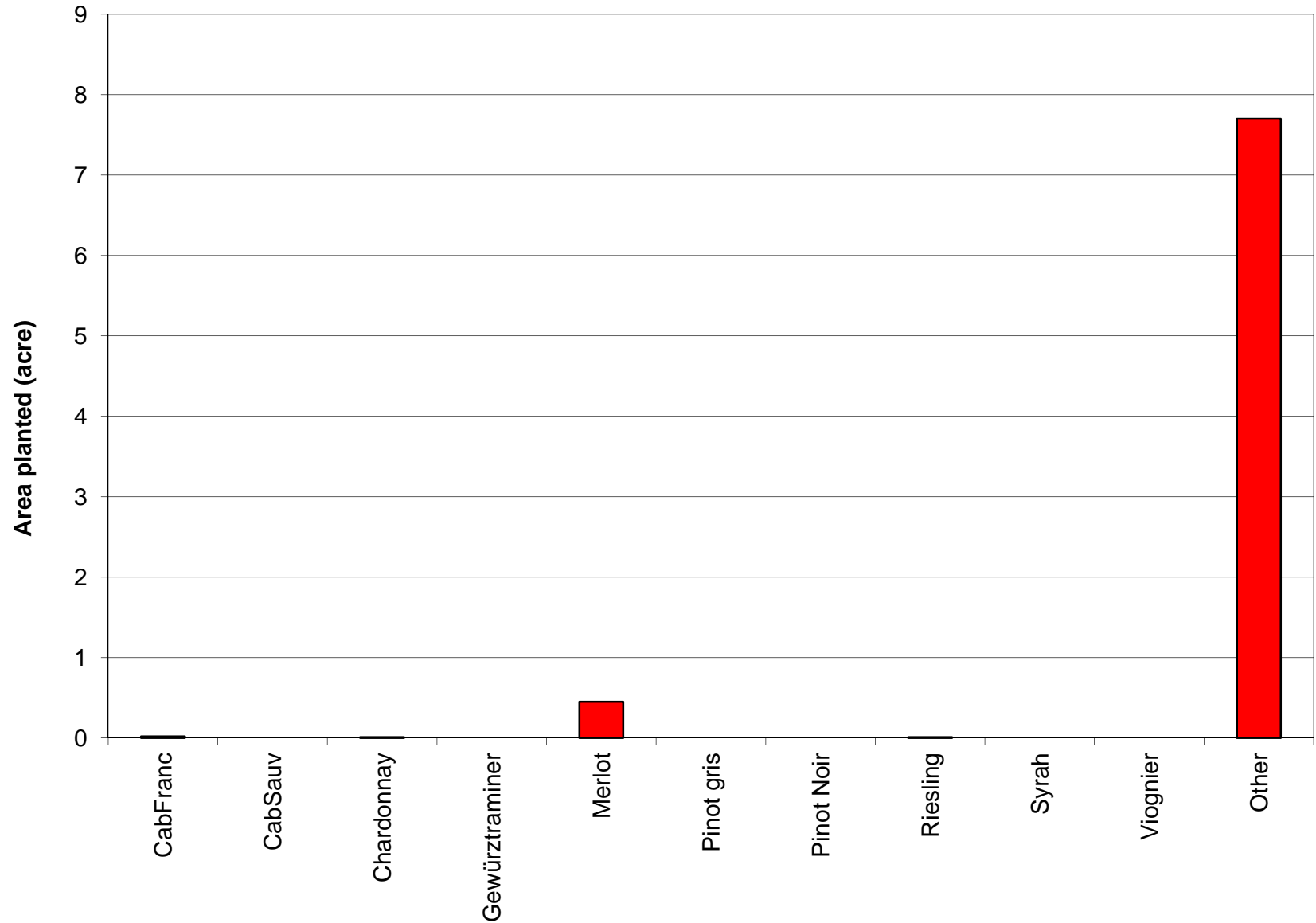


# Colorado vineyard area, top 10 varieties

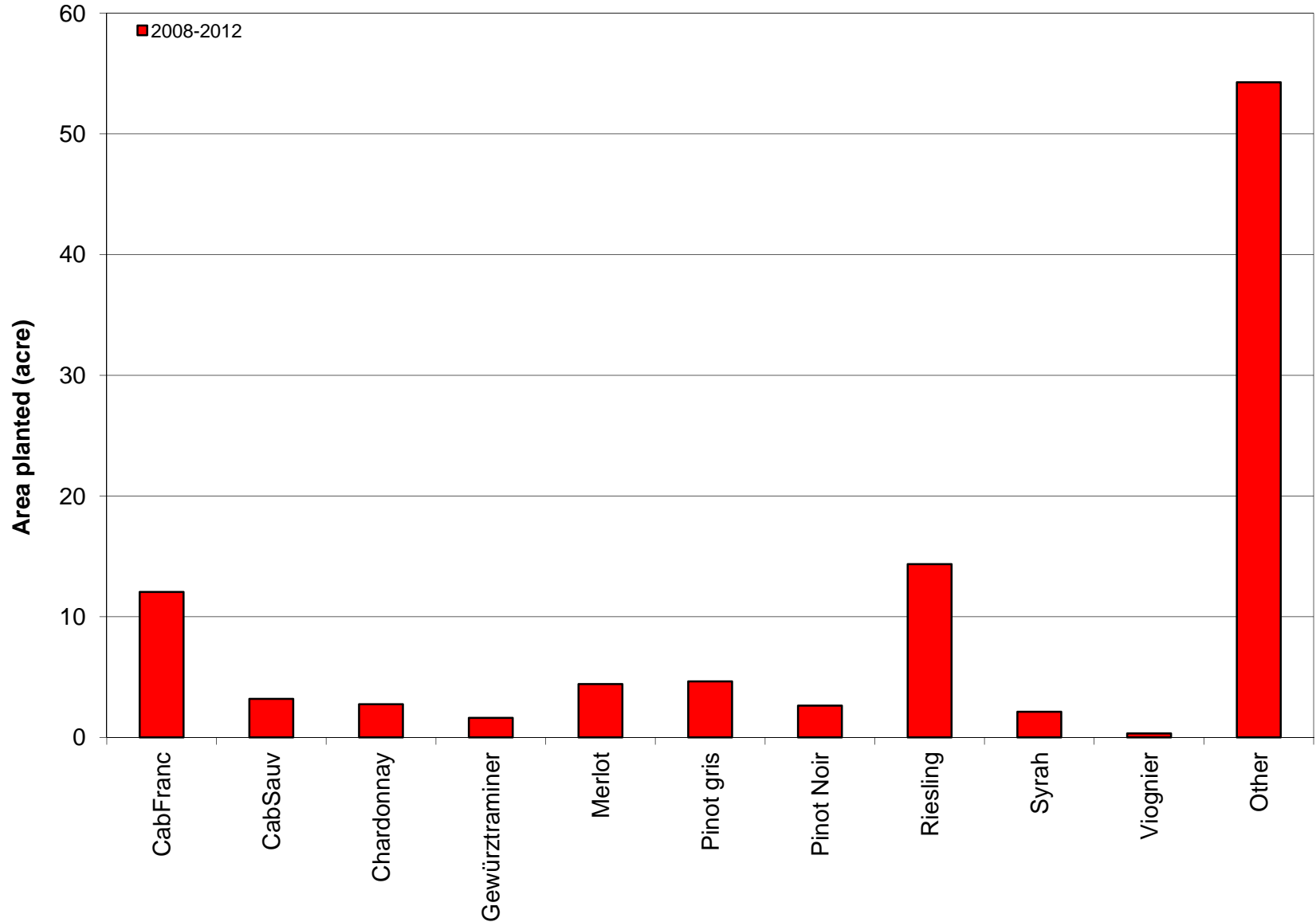


Best guess; based on all surveys since 2000

# What has been planted in 2012?

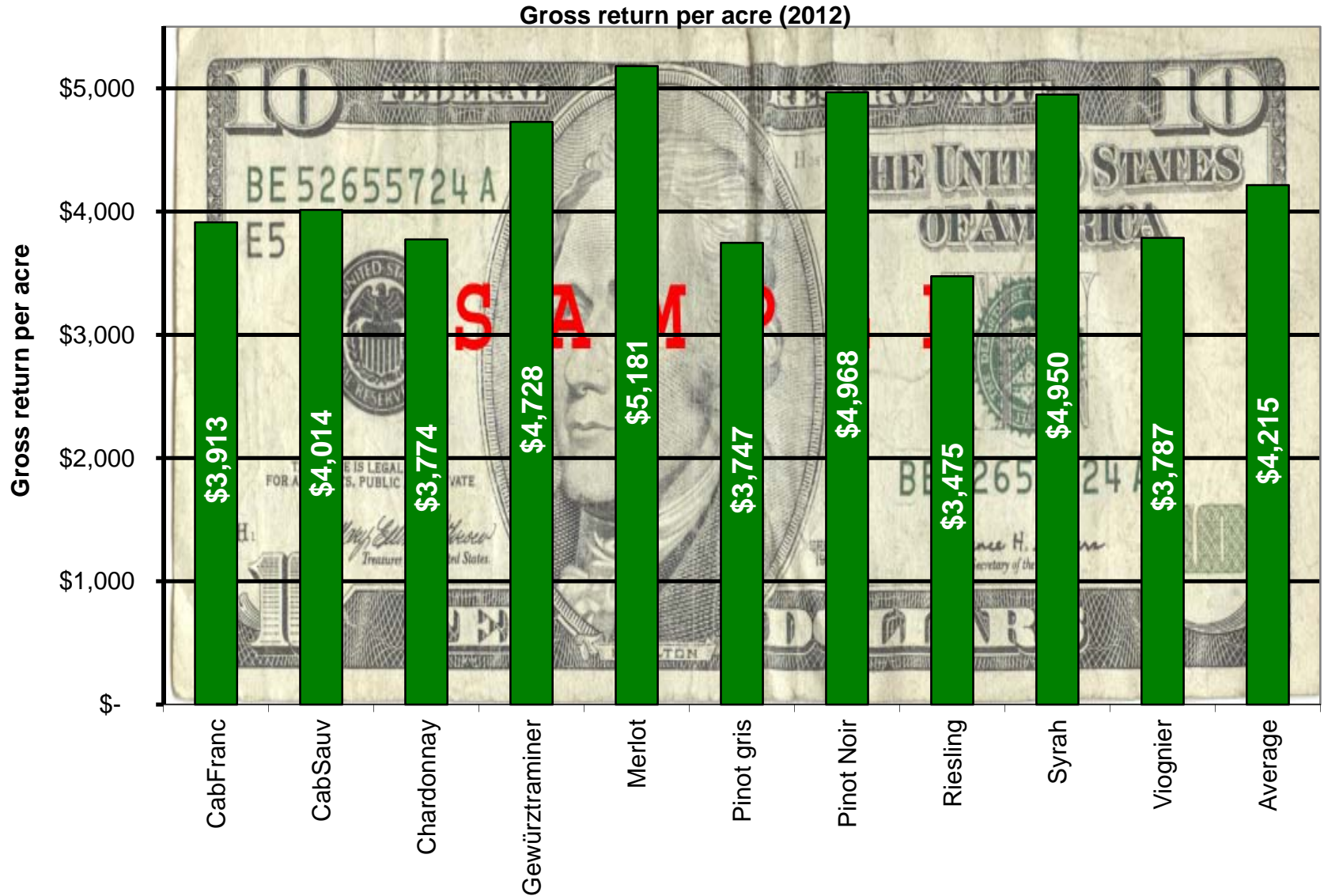


# Total plantings 2008 - 2012

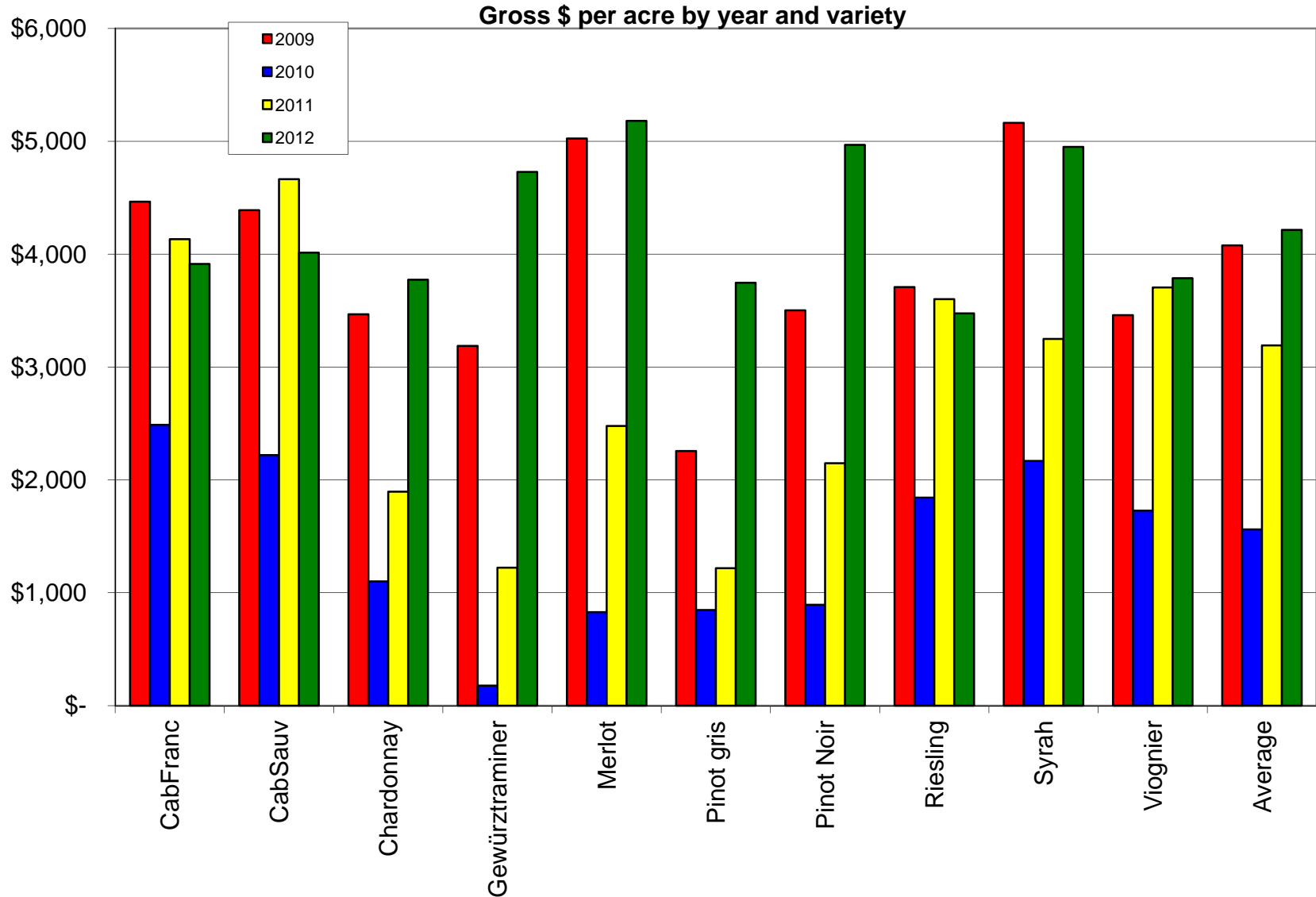




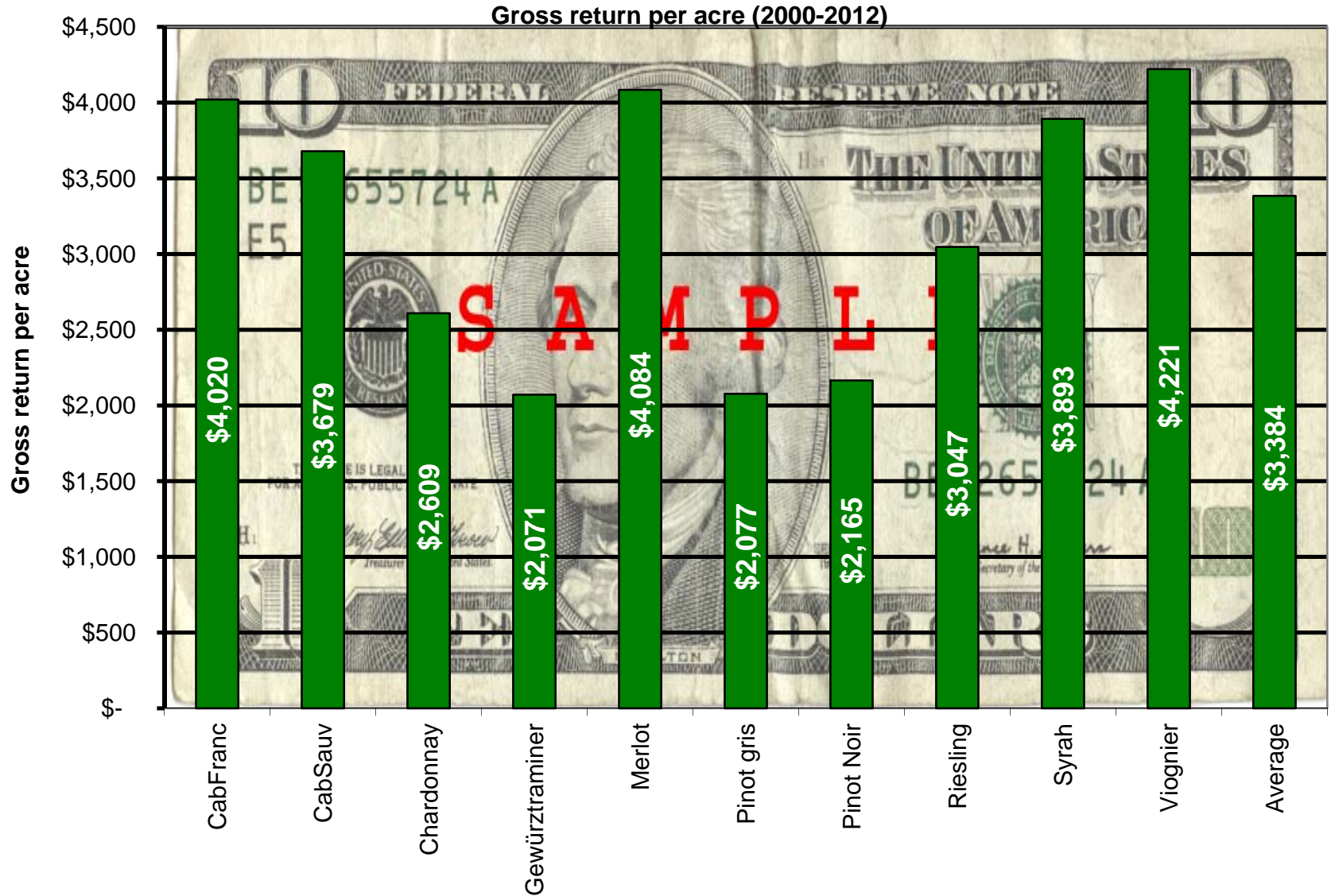
# Gross return per acre, 2012



# Gross return per acre, 2009-2012



# Average gross return per acre, 2000-2012



# 2012 Grape Grower Survey “Highlights”

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- 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

Total vineyard area (acre)	~1,000
Wineries	40 %
Growers	60 %
Producing vineyard area (acre)	950
Wineries	40 %
Growers	60 %
Average vineyard size (acre)	7.5-8.0

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.

# Varieties included in “Other” category

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Albarino, Aurora, Barbera, Bianca, Brianna, Cabernet  
Crimson, Canadice, Carmenere, Carmine, Catawba, Cayuga  
White, Chambourcin, Chancellor, Chardone1, 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

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Thanks to

- All growers who responded to the survey
- CWIDB for funding the survey