2014 Grower Survey

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Survey summary

<table>
<thead>
<tr>
<th>Survey forms sent</th>
<th>150</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey forms returned</td>
<td>87</td>
</tr>
<tr>
<td>Rate of return</td>
<td>58%</td>
</tr>
</tbody>
</table>
Non-respondents: established growers

16 growers who provided data for the 2013 survey did not respond to the 2014 survey

- ~80 total acres (~10 % of CO total area)

Another ~30 growers have not replied to any of the surveys since 2009.
Definition

“Producing area”

- vineyards that were planted prior to 2013
<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>675</td>
<td>256 (38 %)</td>
<td>419 (62 %)</td>
</tr>
<tr>
<td>Producing vineyard area (acre)</td>
<td>605</td>
<td>243 (40 %)</td>
<td>362 (60 %)</td>
</tr>
<tr>
<td>Average vineyard holding (acre)</td>
<td>7.9</td>
<td></td>
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<tr>
<td>Median vineyard holding (acre)</td>
<td>2.9</td>
<td></td>
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<tr>
<td>Total production (t)</td>
<td>683</td>
<td></td>
<td></td>
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<tr>
<td>Average yield (t/acre)</td>
<td>1.1</td>
<td></td>
<td></td>
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<tr>
<td>Average grape price ($/t)</td>
<td>1,596</td>
<td></td>
<td></td>
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<tr>
<td>Average picking costs ($/t)</td>
<td>$270</td>
<td></td>
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<tr>
<td>Gross revenue ($/acre)</td>
<td>1,803</td>
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</tbody>
</table>
Colorado grape yield per acre by year
2014 Colorado grape production by county

Mesa 83.9%

Delta 10.1%

Other 6.0%
2014 Colorado grape production by variety

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

![Graph showing grape yield by variety with CabFranc, CabSauv, Chardonnay, Gewürztraminer, Merlot, Pinot gris, Pinot Noir, Riesling, Syrah, Viognier, and Other varieties. The graph includes an Industry goal marker.](image-url)
Colorado total vineyard area by county

- Mesa: 74.3%
- Delta: 11.6%
- Other: 14.0%
New plantings / removals by variety

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

Vineyard area (acre)

Planted 2010-2014
Removed 2010-2014
Colorado vineyard area by variety, 2014

- Cab Franc
- Cab Sauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other
2014 Grape Grower Survey “Highlights”

- Significant cold temperature damage (Dec 2013)
- Lowest total grape production since 2007
- Lowest per-acre yield since 1991
- Riesling accounted for 25% of the total grape production, more than twice that of the second-ranked variety
2014 Grape Grower Survey “Highlights”

- Total vineyard acreage is down ~5-10 % compared to 2009
- Vineyard area for most of the leading varieties has declined
- Cabernet Franc appears to be the only major variety with an increase in acreage
Cold-hardy, resistant varieties now account for more than 10% of the vineyard area.

The trend of replacing cold-tender Vitis vinifera varieties with cold-hardy, resistant varieties is continuing in 2015.
Colorado vineyard area, top 10 varieties

Best guess; based on all surveys since 2000
2014 Acknowledgements

Thanks to

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