Survey Summary

Survey numbers

- Survey forms send: 165
- Survey forms returned: 91 (158 vineyards)
- Rate of Return: 55 %
Survey Summary

Non-respondents

10 growers who provided information in 2014 have yet to respond.

• ~30 acres (~3-5 % of total CO area)

There are likely another 100+ acres that are not covered in this or previous surveys.
2015 Colorado Grape Grower Survey

Definition

“Producing area”

• vineyards of producing age (≥3 years old)

• vineyards planted prior to 2014
### 2015 Colorado Grape Grower Survey

<table>
<thead>
<tr>
<th><strong>Total vineyard area (acre)</strong></th>
<th>689</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wineries</td>
<td>272 (40 %)</td>
</tr>
<tr>
<td>Contract growers</td>
<td>417 (60 %)</td>
</tr>
<tr>
<td><strong>Producing vineyard area (acre)</strong></td>
<td>614</td>
</tr>
<tr>
<td>Wineries</td>
<td>260 (42 %)</td>
</tr>
<tr>
<td>Contract growers</td>
<td>354 (58 %)</td>
</tr>
<tr>
<td><strong>Average vineyard holding (acre)</strong></td>
<td>7.7</td>
</tr>
<tr>
<td><strong>Median vineyard holding (acre)</strong></td>
<td>2.5</td>
</tr>
<tr>
<td><strong>Total production (t)</strong></td>
<td>2,036</td>
</tr>
<tr>
<td><strong>Average yield (t/acre)</strong></td>
<td>3.3</td>
</tr>
<tr>
<td><strong>Average grape price ($/t)</strong></td>
<td>$1,636</td>
</tr>
<tr>
<td><strong>Average picking costs ($/t)</strong></td>
<td>$281</td>
</tr>
<tr>
<td><strong>Gross revenue ($/acre)</strong></td>
<td>$6,956</td>
</tr>
</tbody>
</table>
Colorado grape production by year

Total yield (t)

- 1984
- 1985
- 1986
- 1987
- 1988
- 1989
- 1990
- 1991
- 1992
- 1993
- 1994
- 1995
- 1996
- 1997
- 1998
- 1999
- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013
- 2014
- 2015
Colorado grape yield per acre & year
Colorado grape yield by county & year
Colorado grape production by county

- Mesa: 88.1%
- Delta: 7.2%
- Other: 4.7%
Colorado grape production by variety

- Cab Franc
- Cab Sauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other
Colorado vineyard area by year
Colorado vineyard area by county

- Mesa: 73.0%
- Delta: 13.1%
- Other: 13.9%
Colorado vineyard area by variety

<table>
<thead>
<tr>
<th>Variety</th>
<th>Total</th>
<th>Producing</th>
</tr>
</thead>
<tbody>
<tr>
<td>CabFranc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CabSauv</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chardonnay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gewürztraminer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merlot</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pinot gris</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pinot Noir</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Riesling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Syrah</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Viognier</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Changes in vineyard area, 2011-2015

Vineyard area (acre)

- Planted 2011-2015
- Removed 2011-2015

- CabFranc
- CabSauv
- Chardonnay
- Gewürztraminer
- Merlot
- Pinot gris
- Pinot Noir
- Riesling
- Syrah
- Viognier
- Other
2015 Colorado Grape Grower Survey

Most popular varieties (2011-2015)

- >10 acres planted
  - Cabernet Franc, Chambourcin

- 5-10 acres planted
  - Aromella, Baco noir, Malbec, Marquette, Norton (and maybe Cabernet Sauvignon, Noiret, Traminette)
2015 Colorado Grape Grower Survey

Most popular varieties (2011-2015)

- 46% of new plantings are varieties of *Vitis vinifera*
- 54% of new plantings are non-*vinifera* varieties
• Minimal cold temperature injuries

• Record production of >2,000 ton

• Second-highest per-acre yield (3.32 ton/acre)

• Nearly identical production of Riesling & Merlot

• Four varieties (Riesling, Merlot, Cabernet Sauvignon, Cabernet Franc) account for ~50 % of total production
• Vineyard area is expanding again, although still slightly down on 2009

• Non-vinifera varieties now account for 20% of Colorado’s total grape area

• The trend to replace cold-tender varieties of Vitis vinifera with cold-hardy, resistant varieties continued in 2015
Thank you

- To all the growers who have responded to the survey
- CWIDB for funding the survey