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# 2006 Grower Survey

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# Survey summary

Survey forms sent	166
Survey forms returned	97
Commercial growers	97
Mail undelivered	0
Not a commercial grower	0
Rate of return	58 %

# Non-respondents: established growers

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29 growers who provided data in previous surveys did not respond to the 2006 survey

- 128 total acres (~16 % of CO total)
- 122 producing acres

Another ~20 growers have not replied to any of the surveys since 2000.

# Definition

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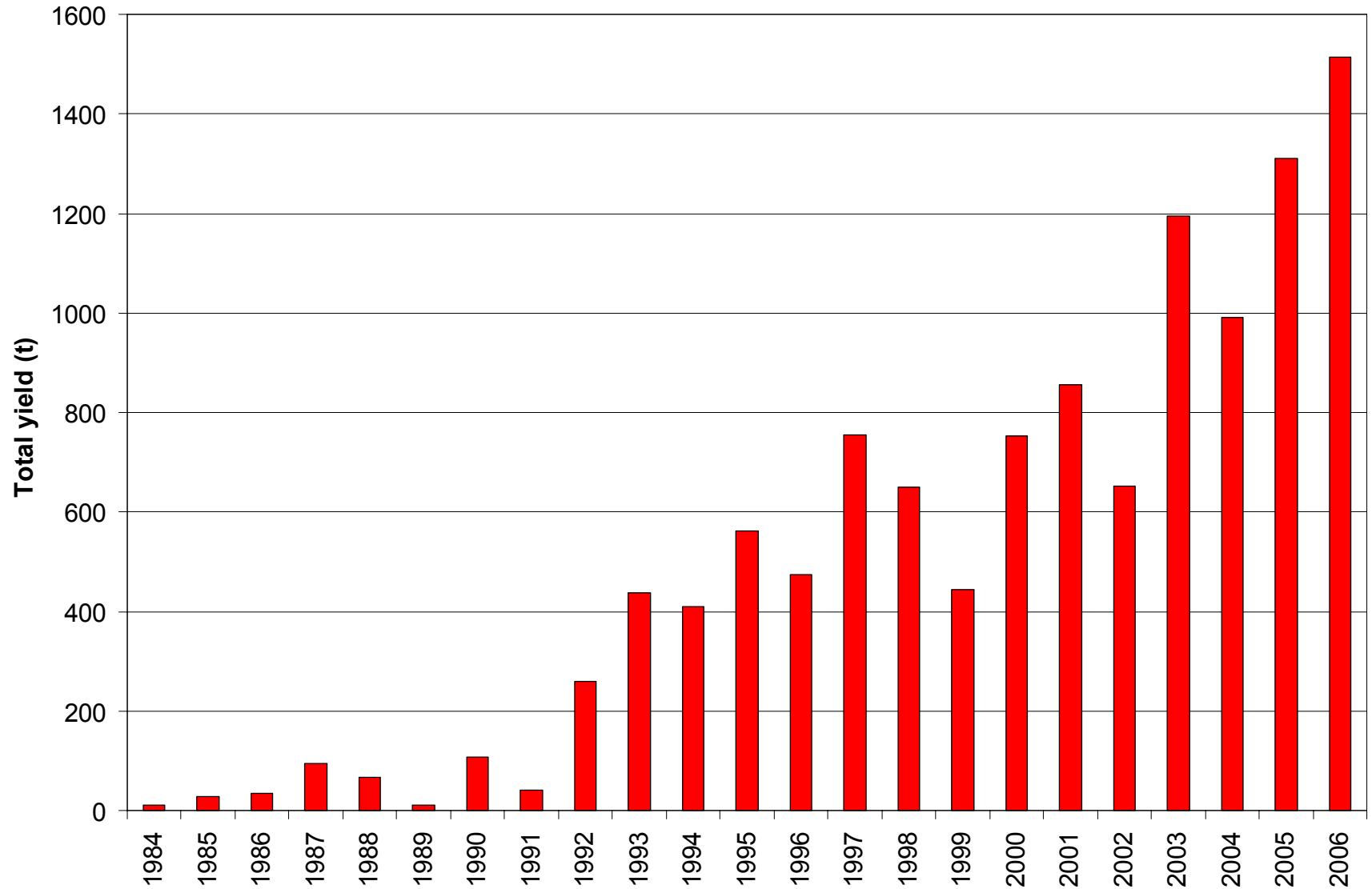
“Producing area”

- vineyards that were planted prior to 2005

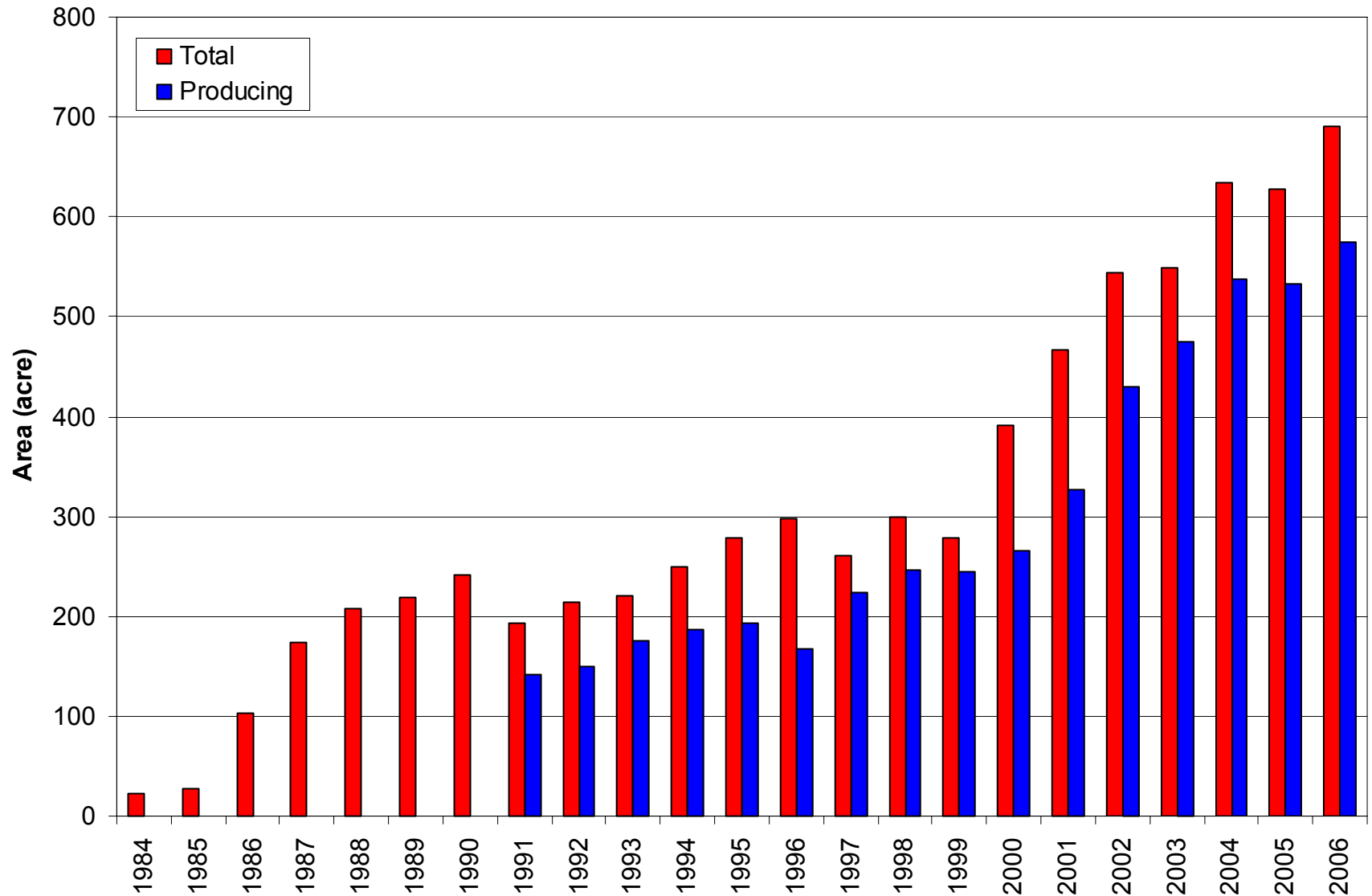
# Survey results

Total vineyard area (acre)	691
Wineries	279 (40 %)
Contract growers	412 (60 %)
Producing vineyard area (acre)	574
Wineries	262 (46 %)
Contract growers	312 (54 %)
Average vineyard size (acre)	7.2
Total production (t)	1,515
Average yield (t/acre)	2.60
Average grape price (\$/t)	1,302
Average picking costs (\$/t)	162
Gross return (\$/acre)	4,170

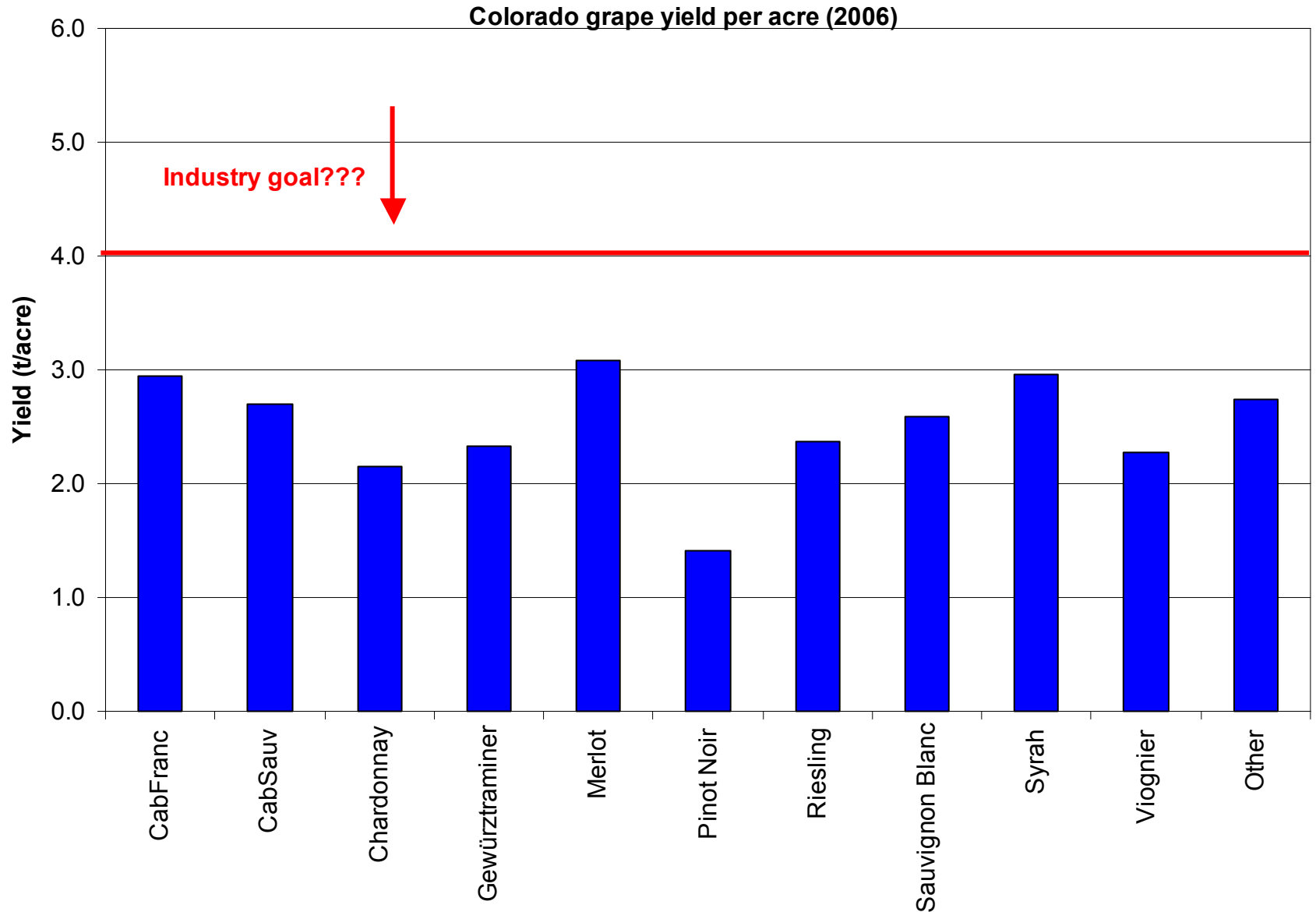
# Colorado grape production by year



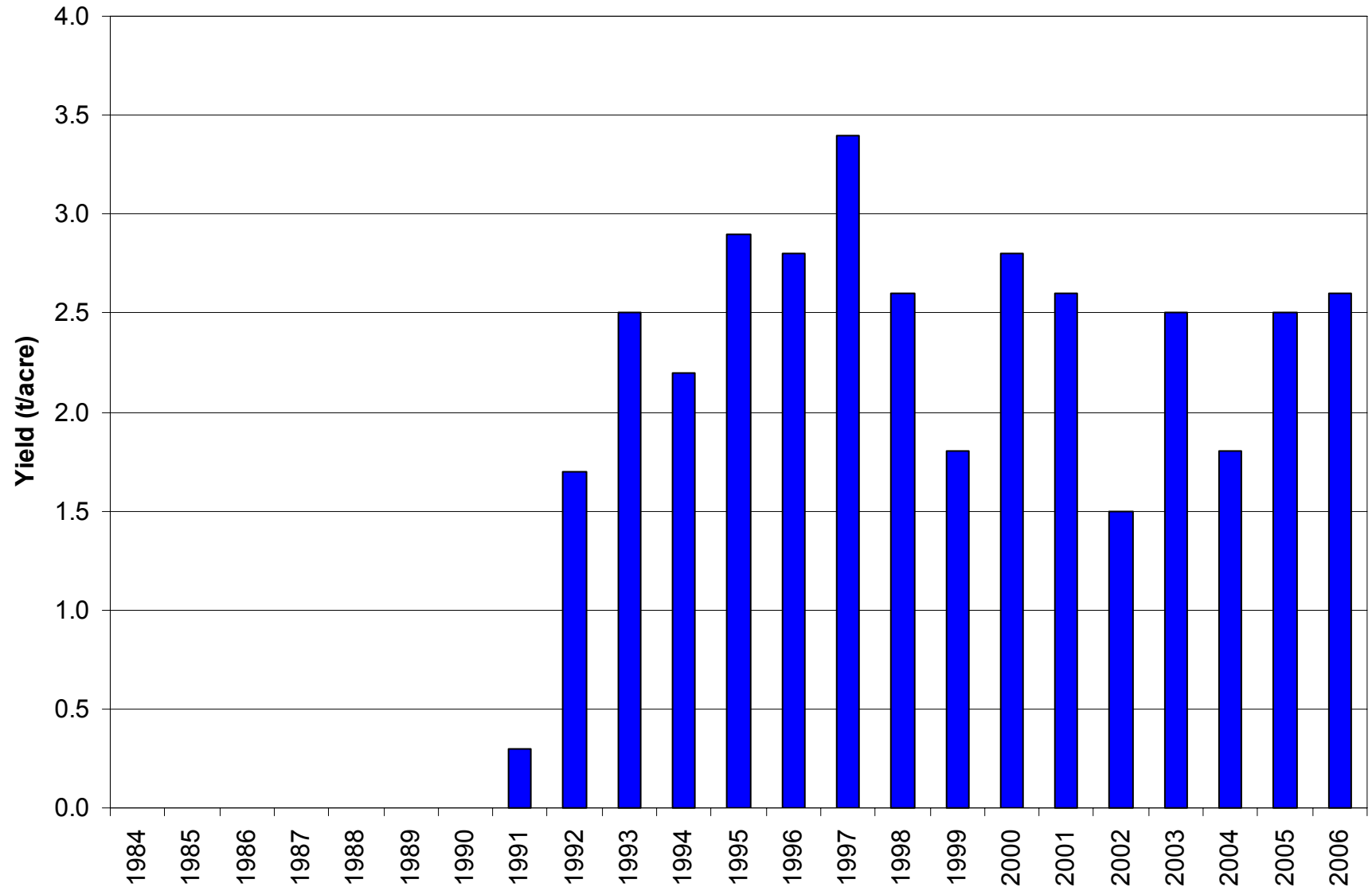
# Colorado grape growing area by year



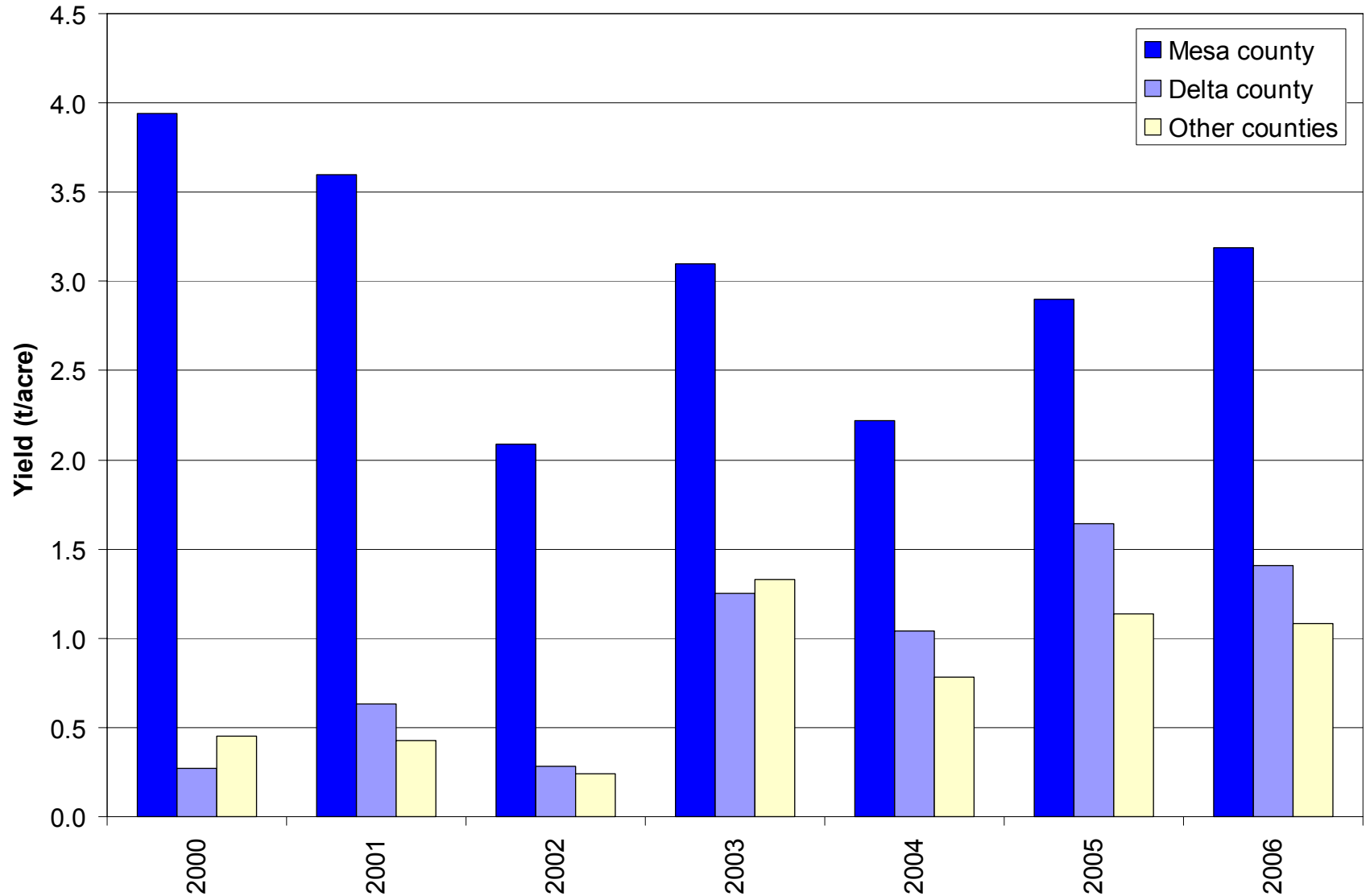
# Colorado grape yield per acre by variety



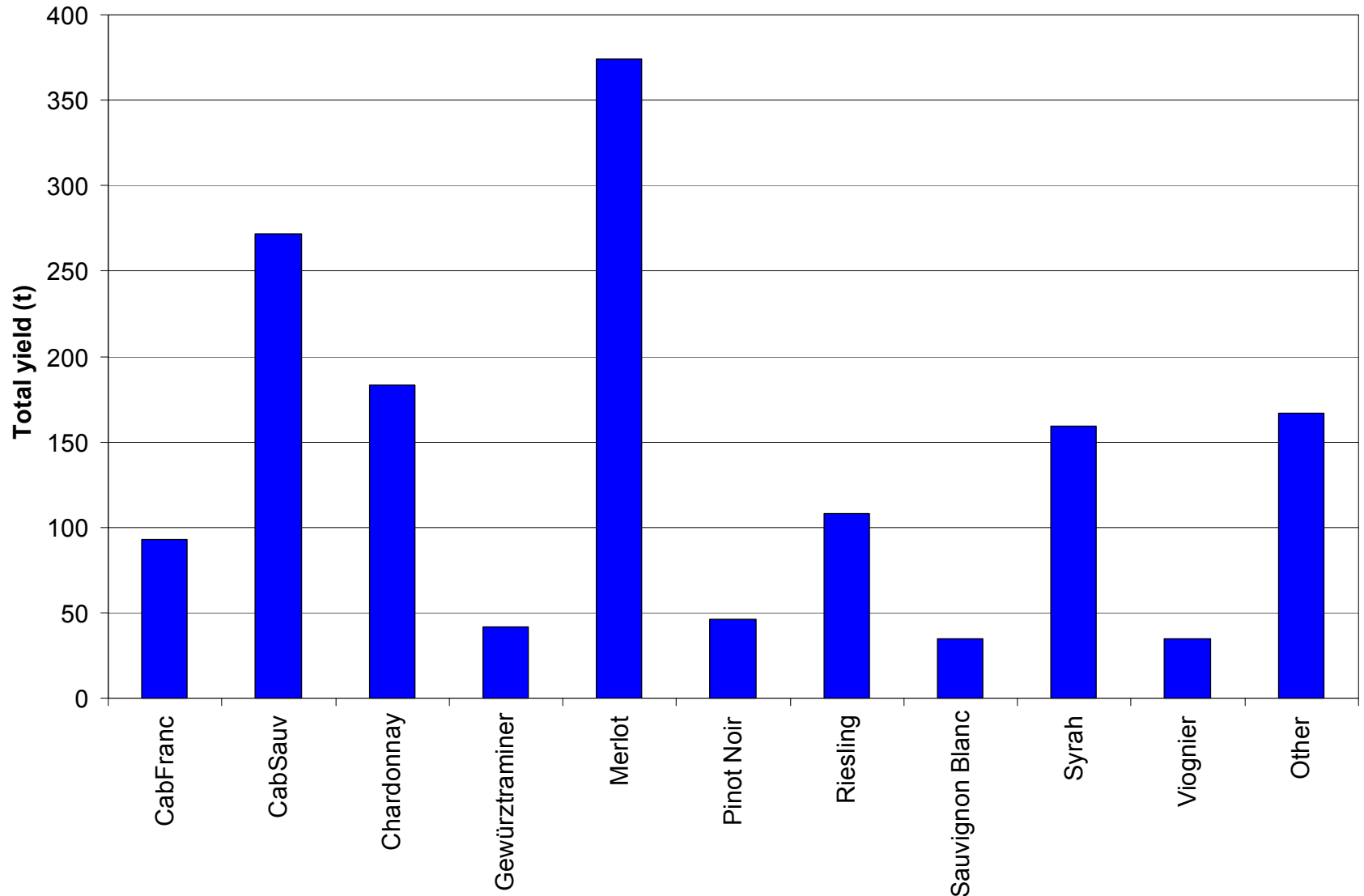
# Colorado grape yield per acre by year



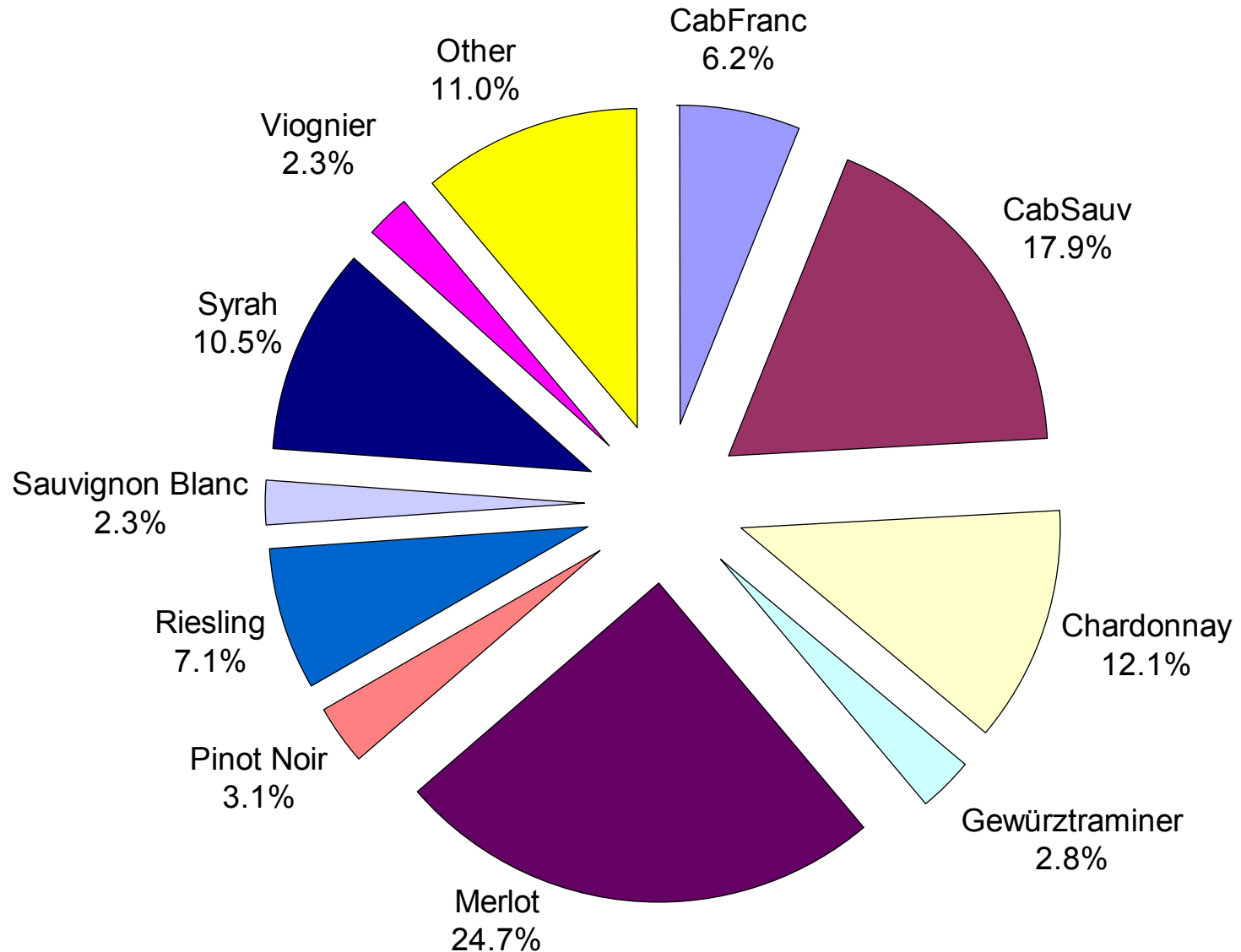
# Colorado grape yield per acre by county



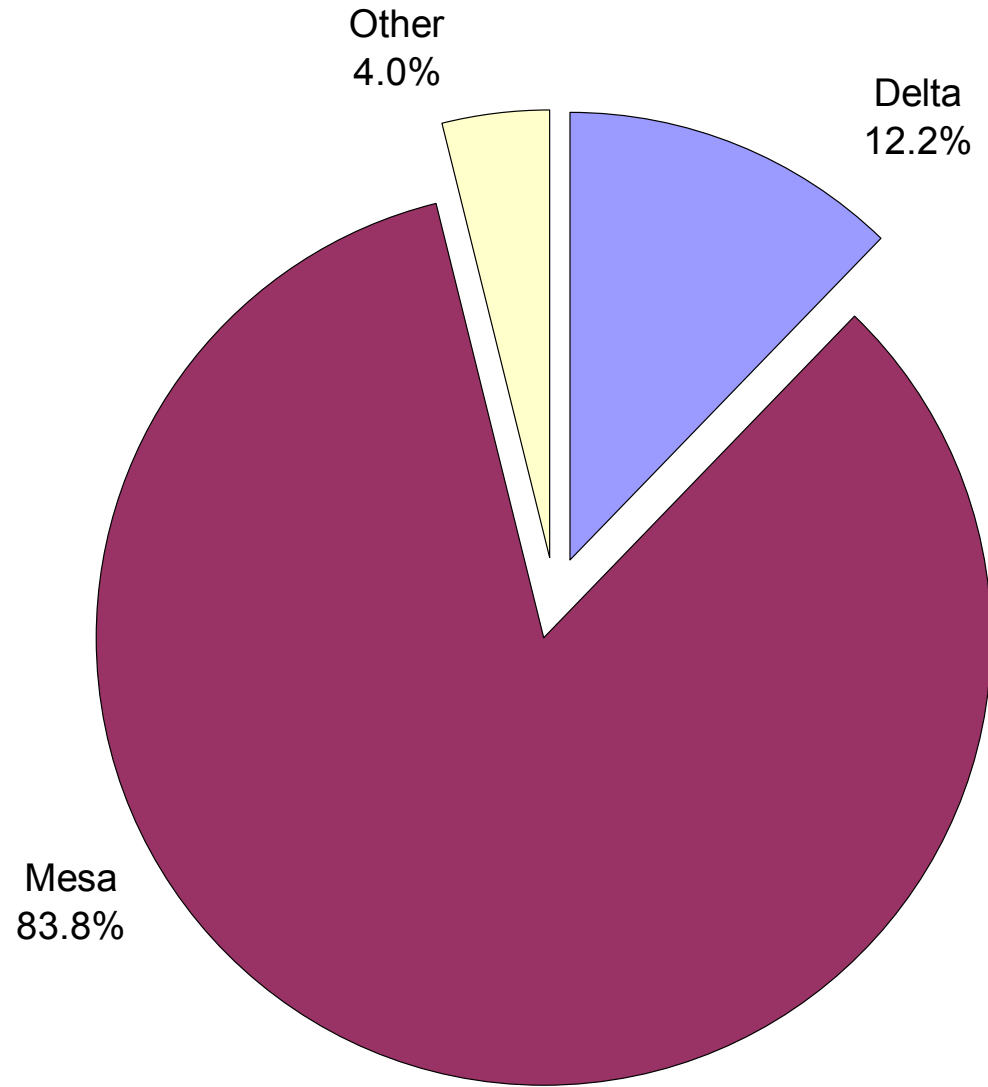
# Colorado grape production by variety



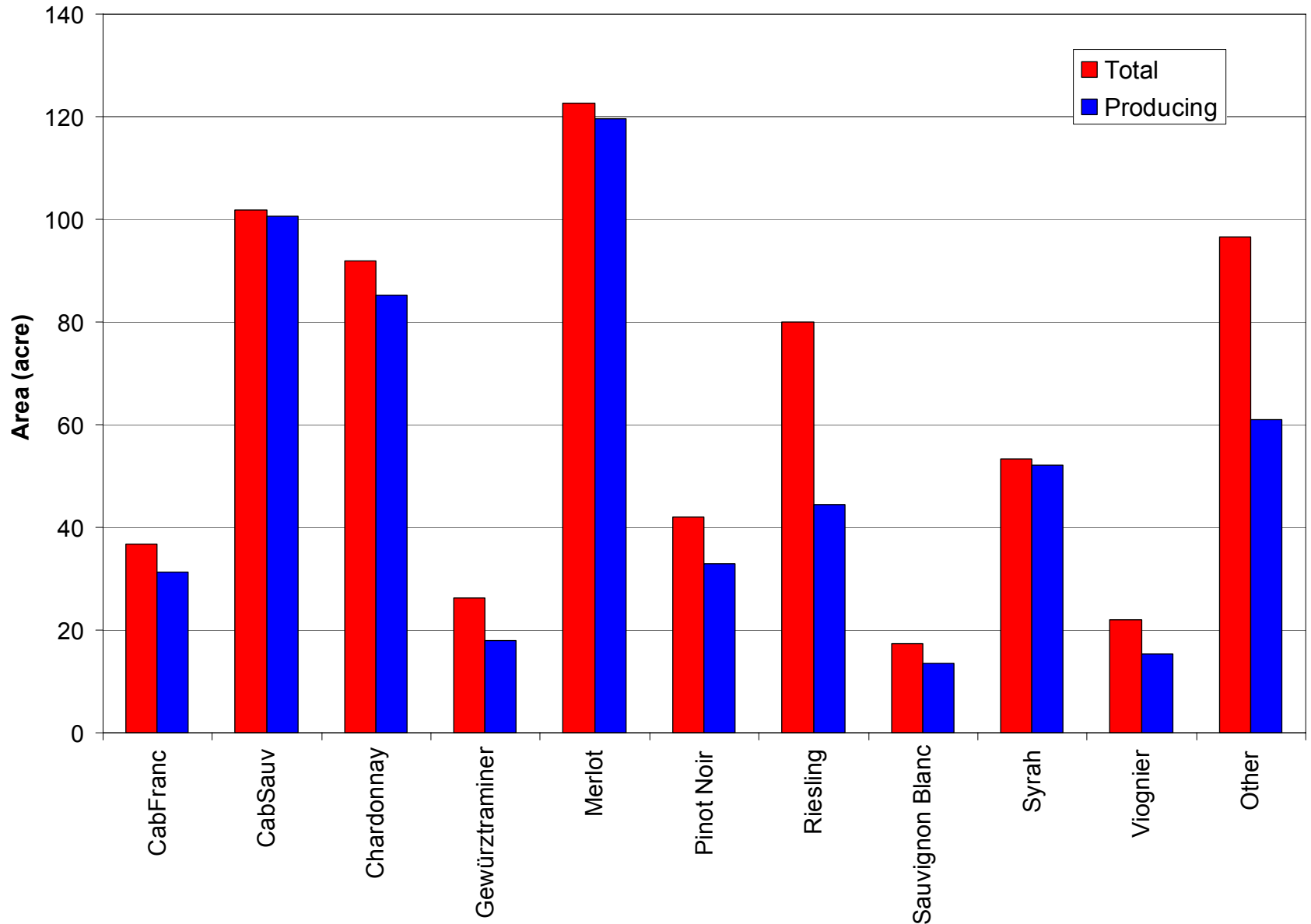
# Colorado grape production by variety



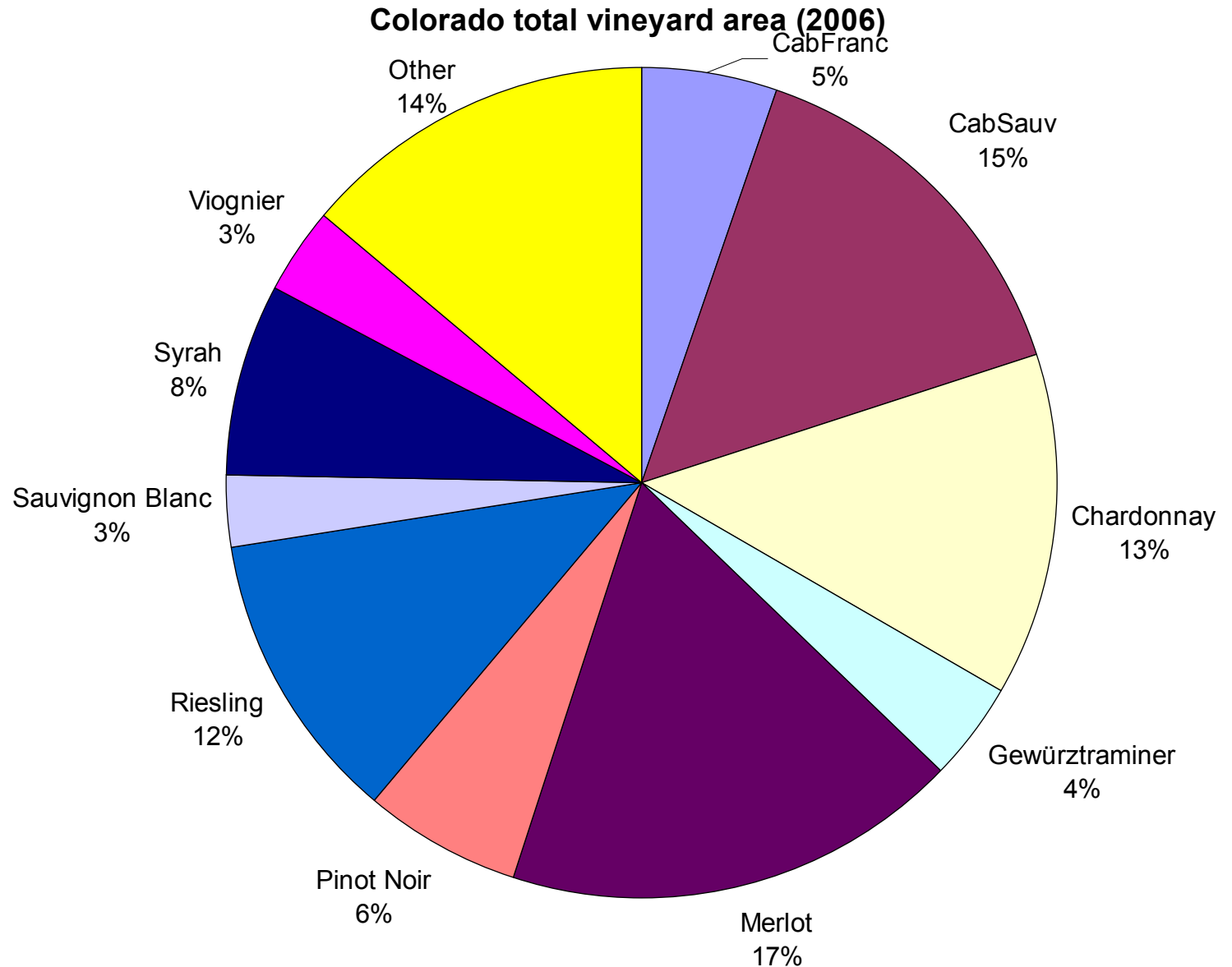
# Colorado grape production by county



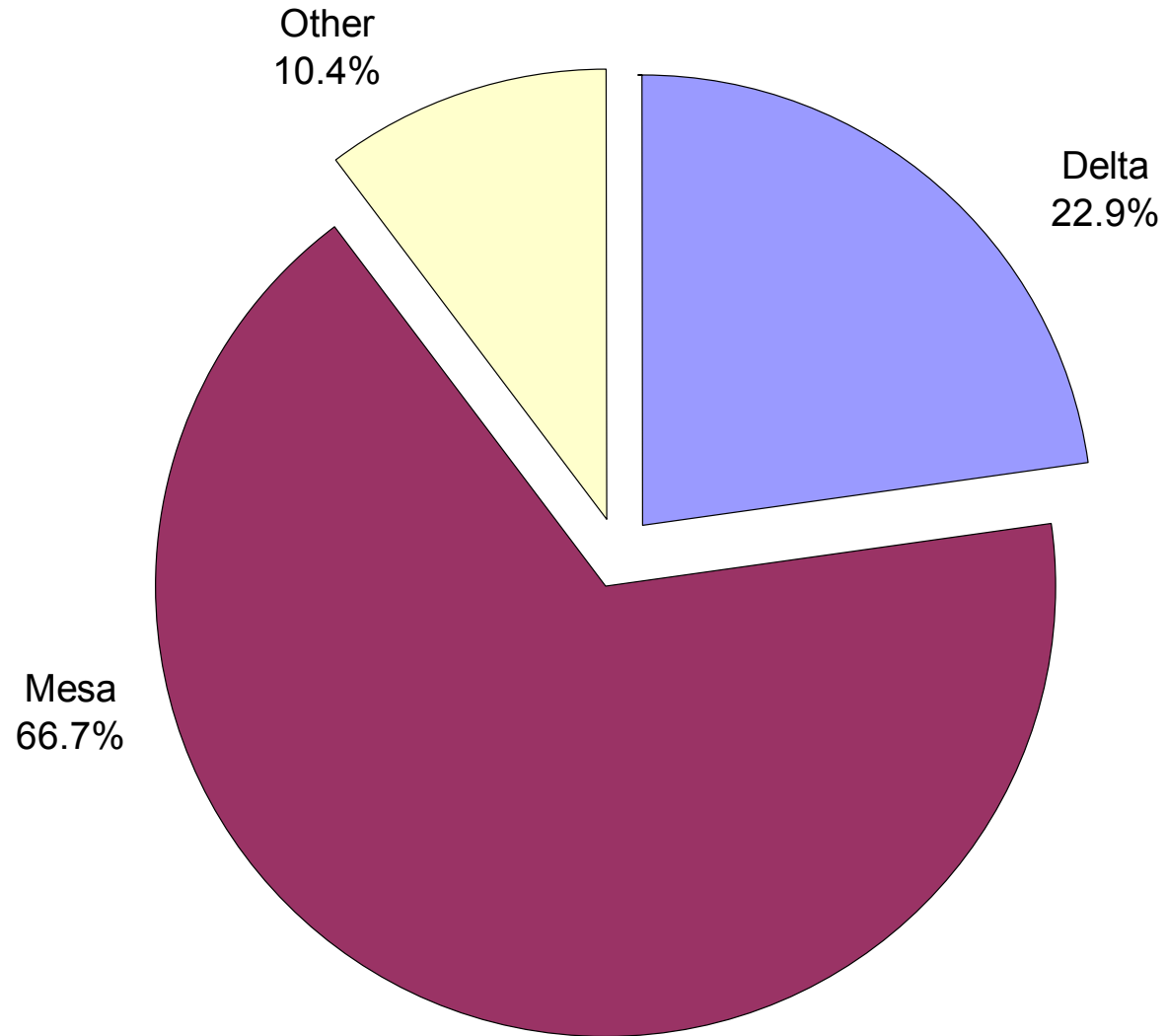
# Colorado grape growing area by variety



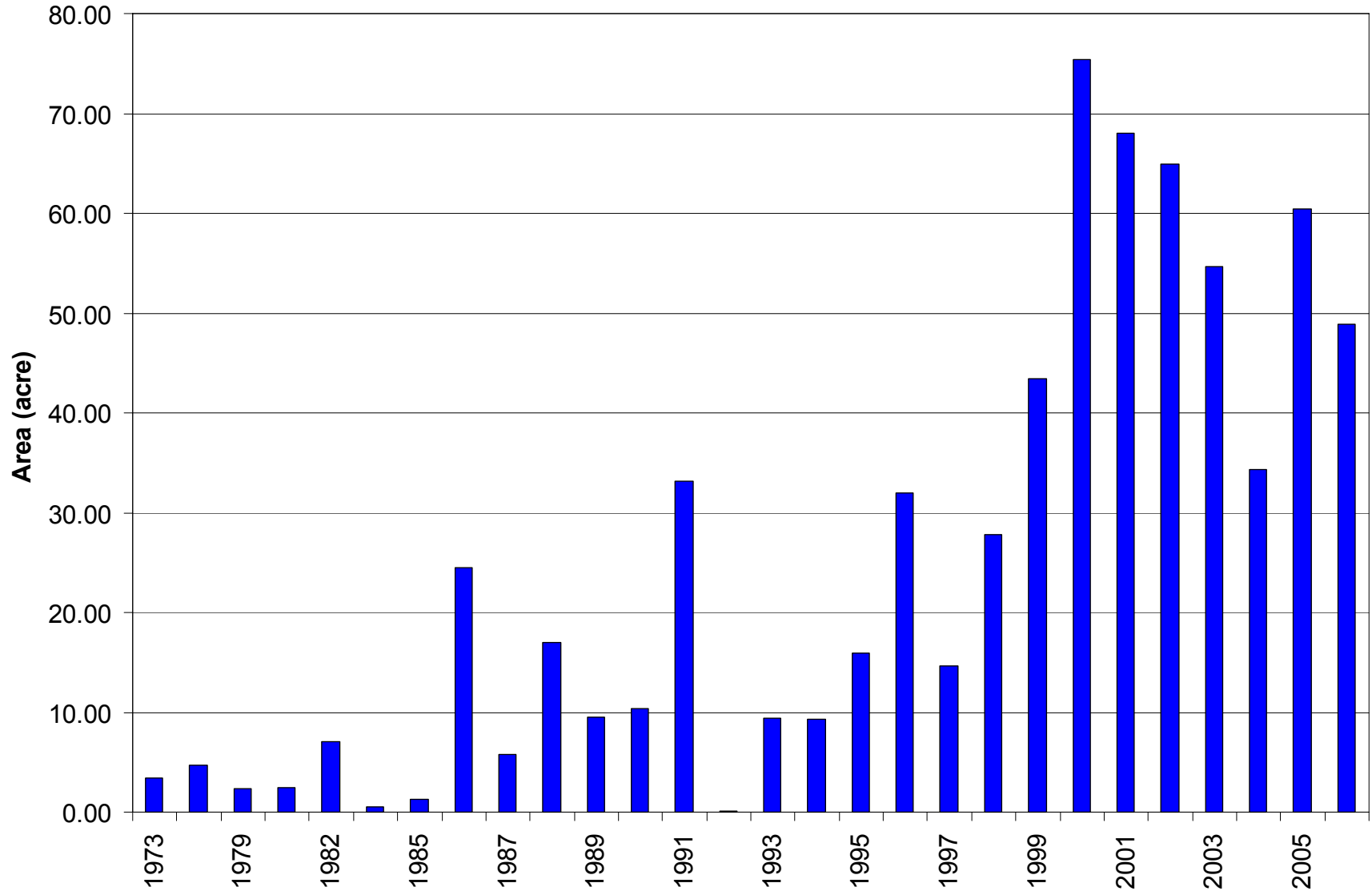
# Colorado grape growing area by variety



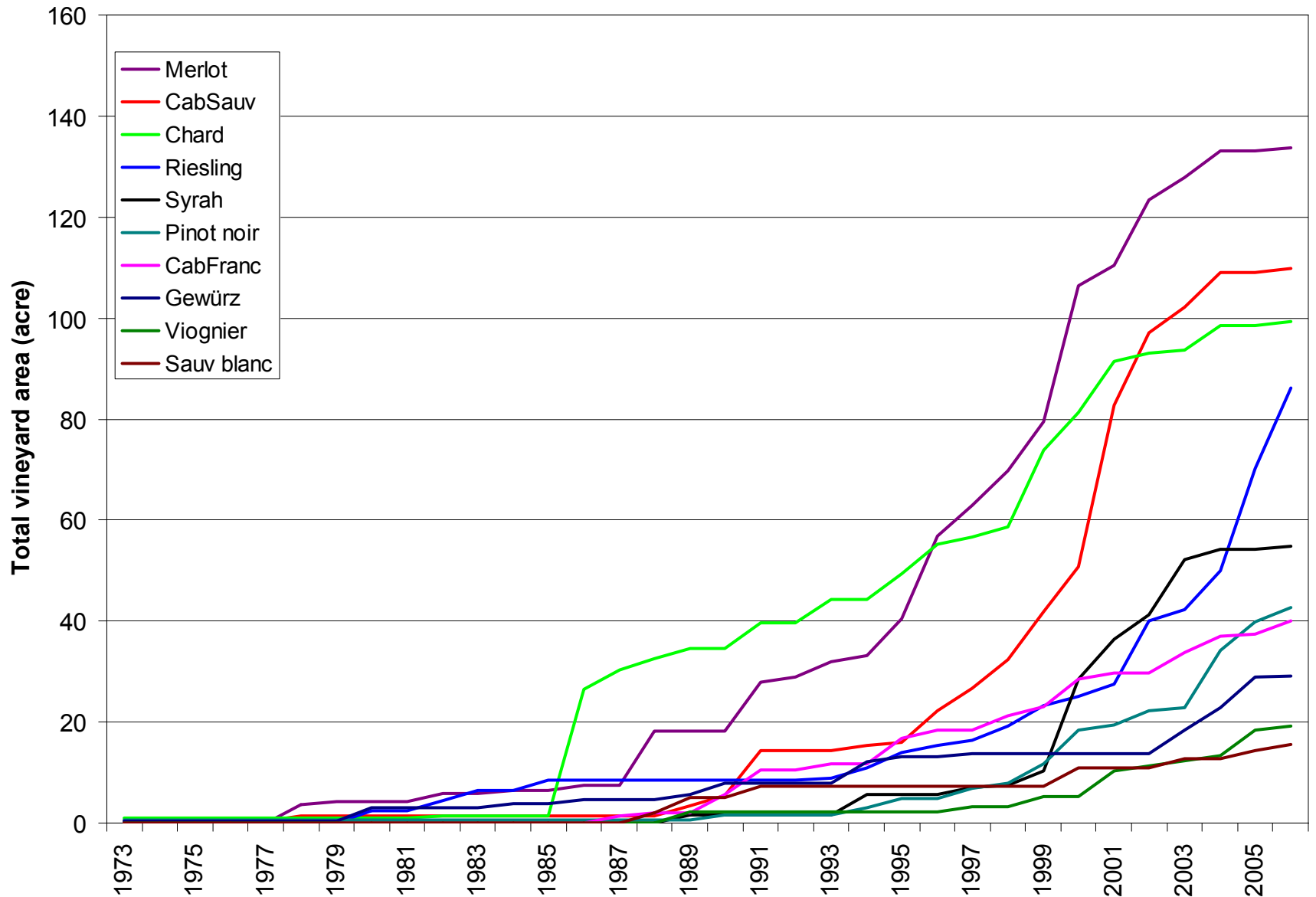
# Colorado total vineyard area by county



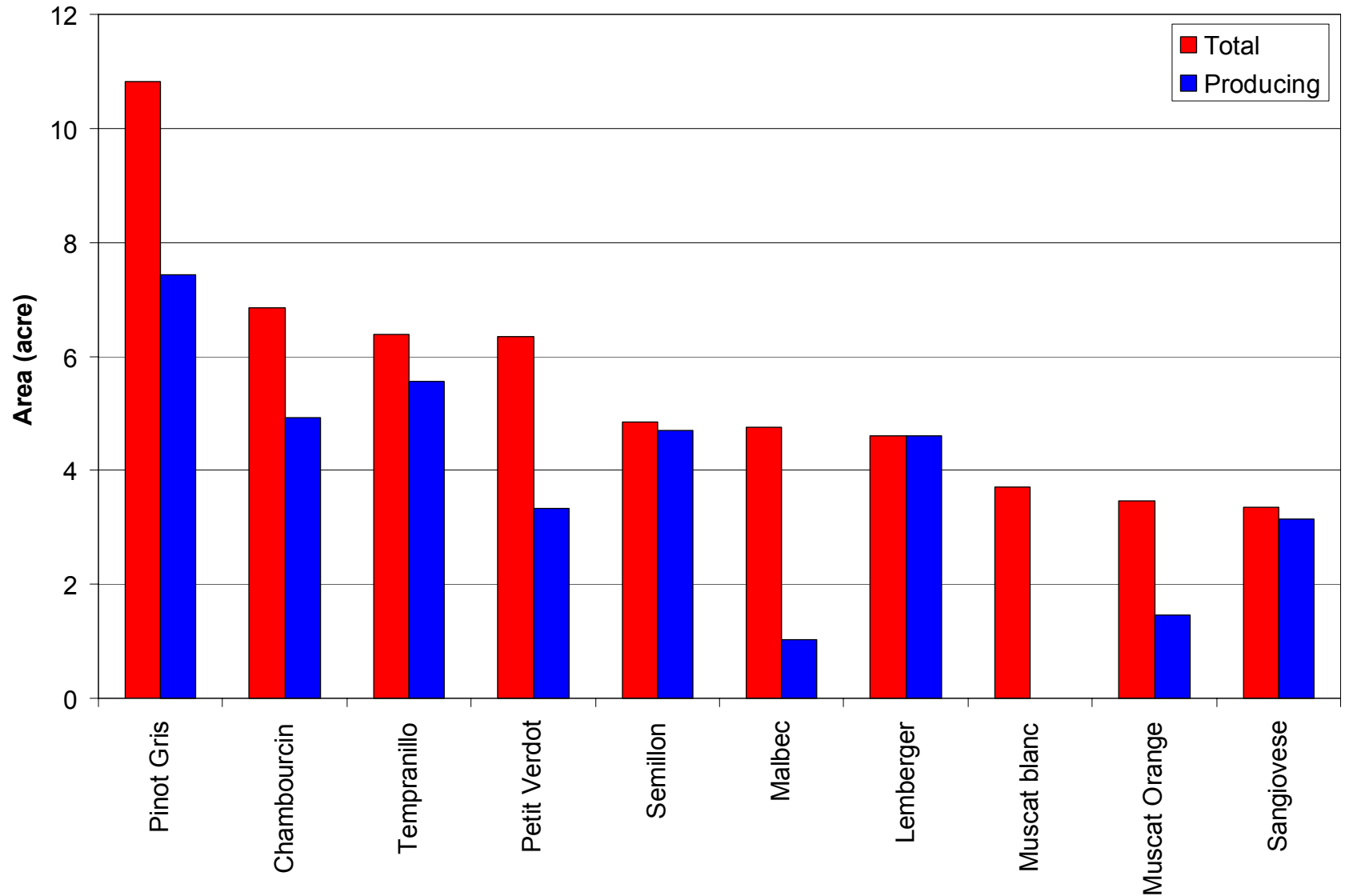
# Colorado vineyards by planting year



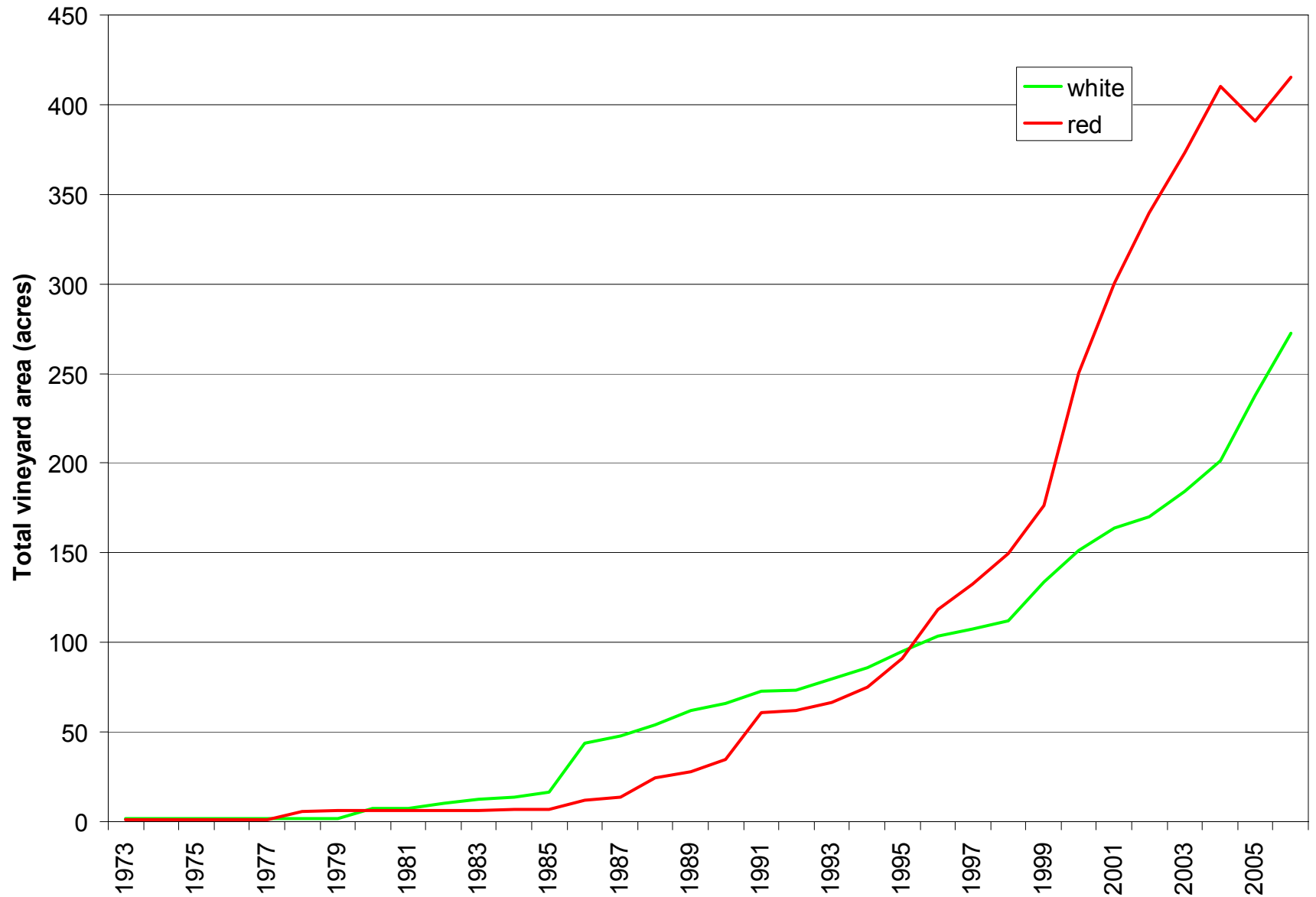
# Colorado vineyard area, top 10 varieties



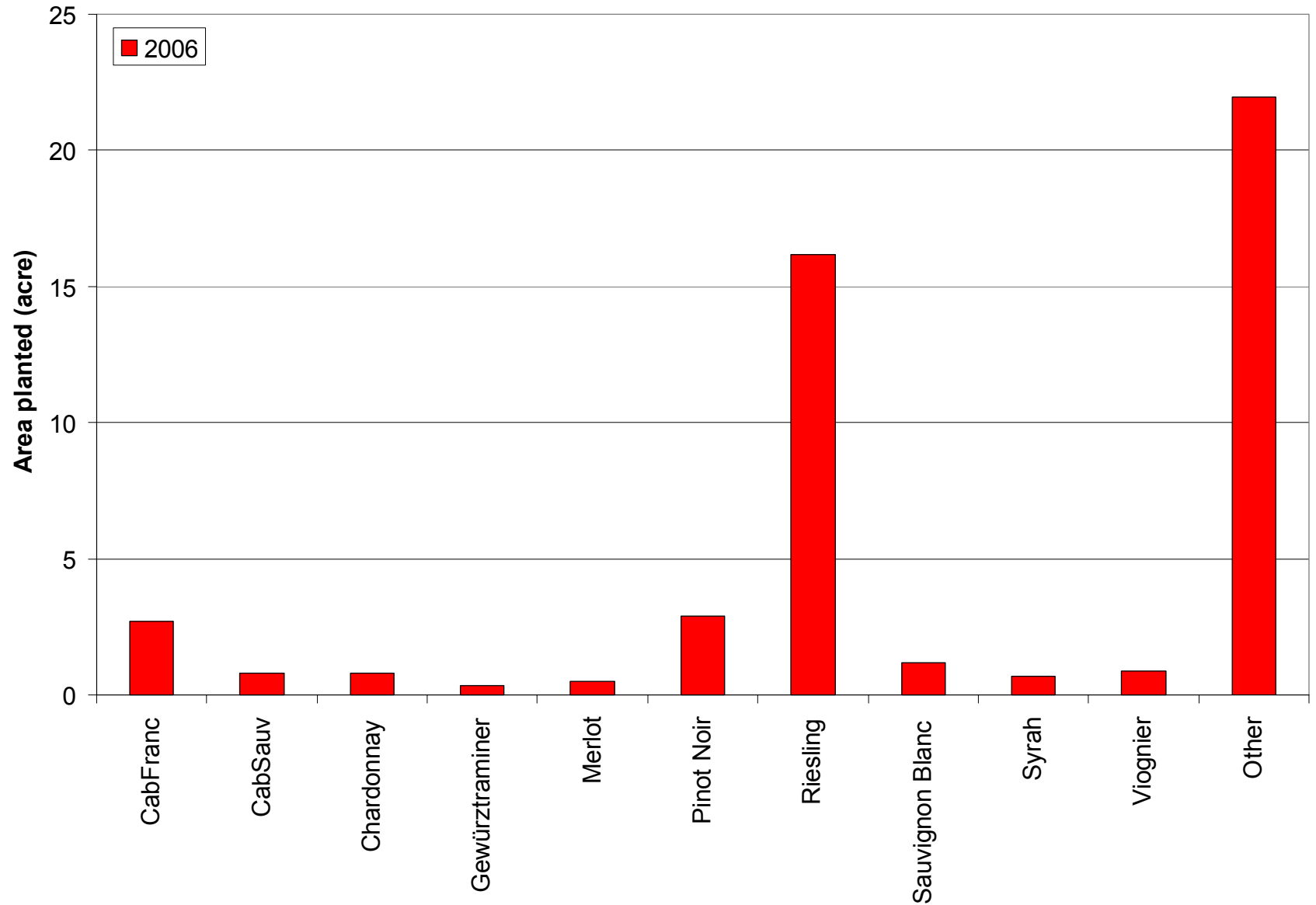
# Colorado vineyard area – top 10 minor varieties



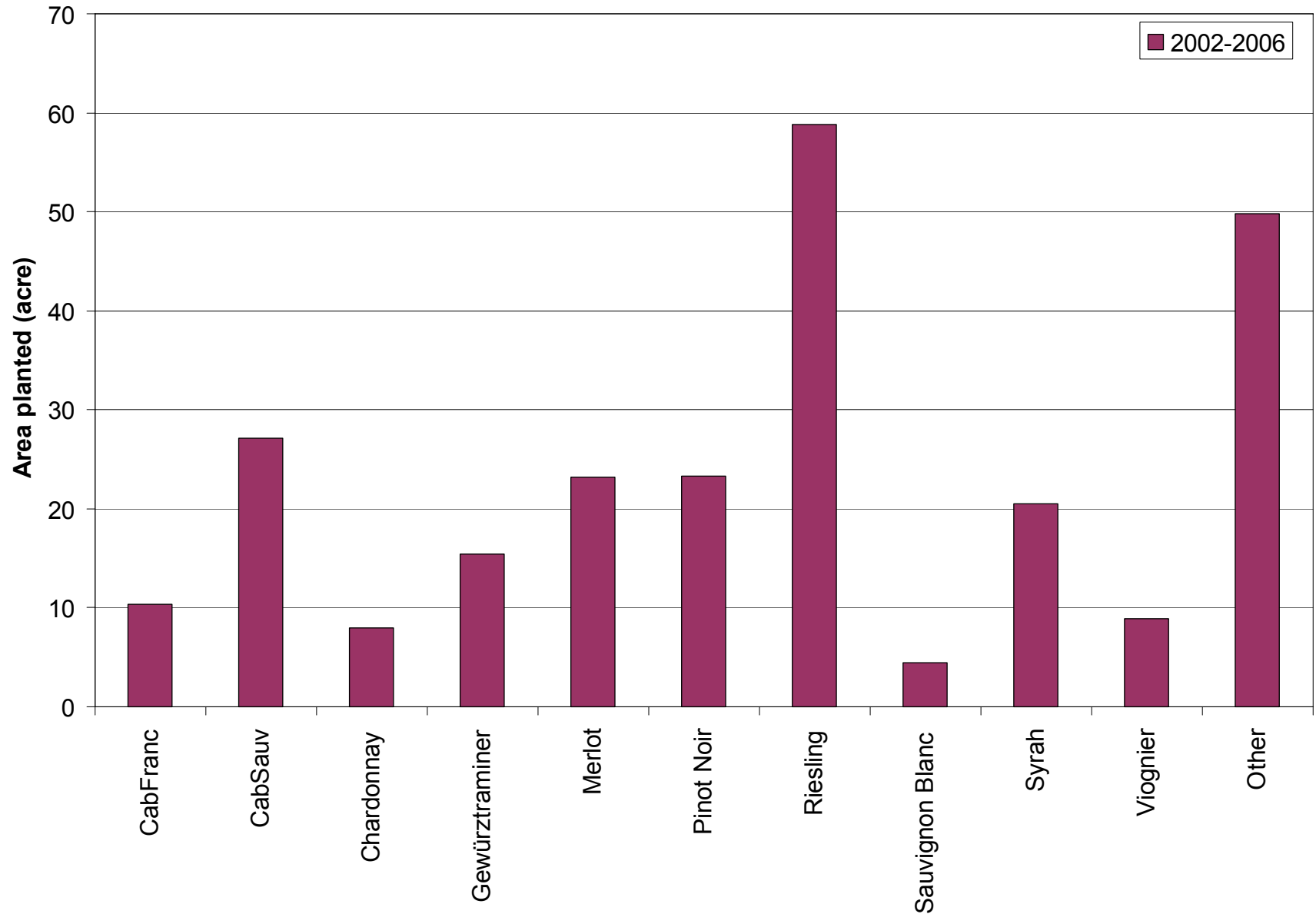
# Colorado wine varieties – red & white



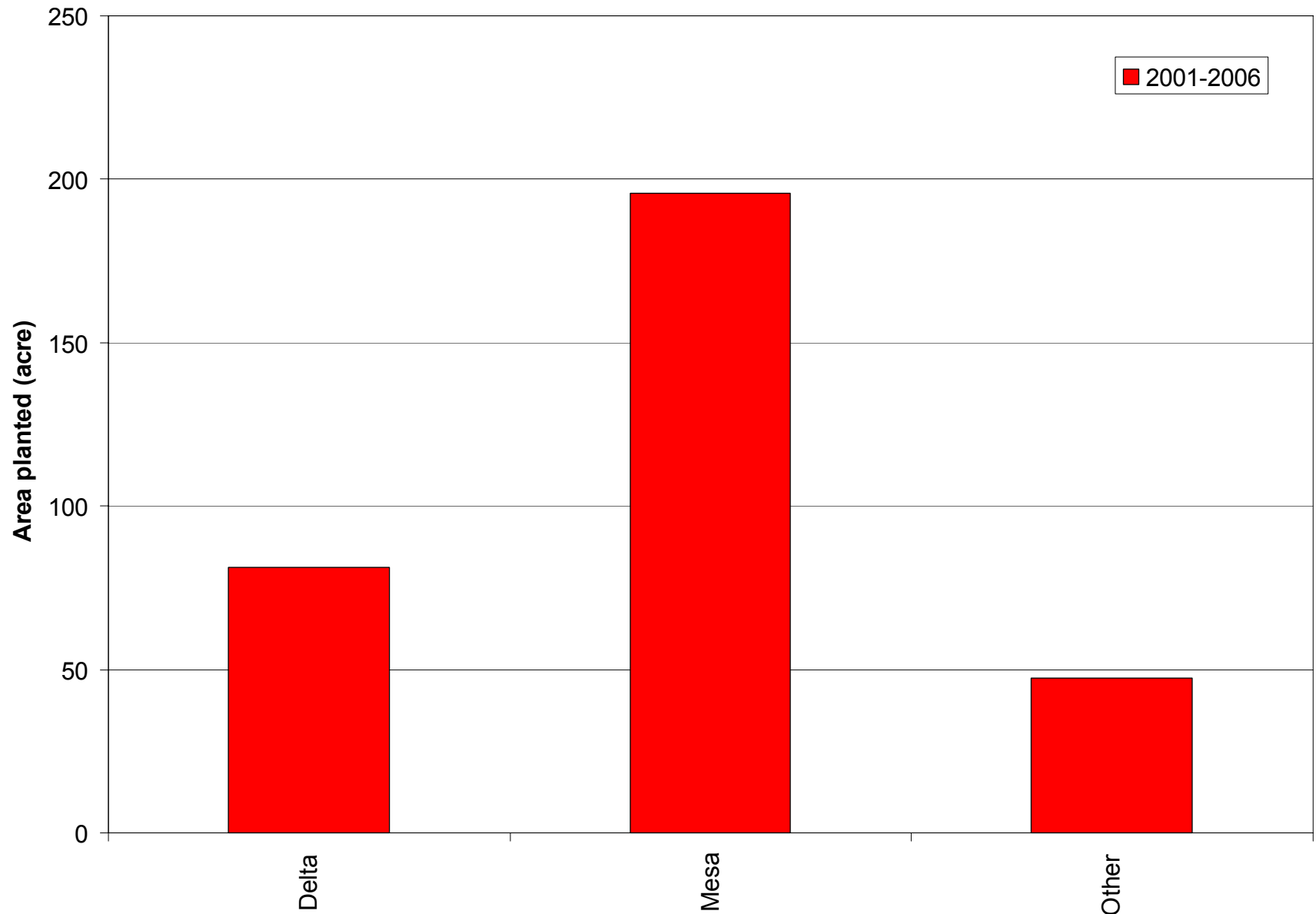
# What has been planted?



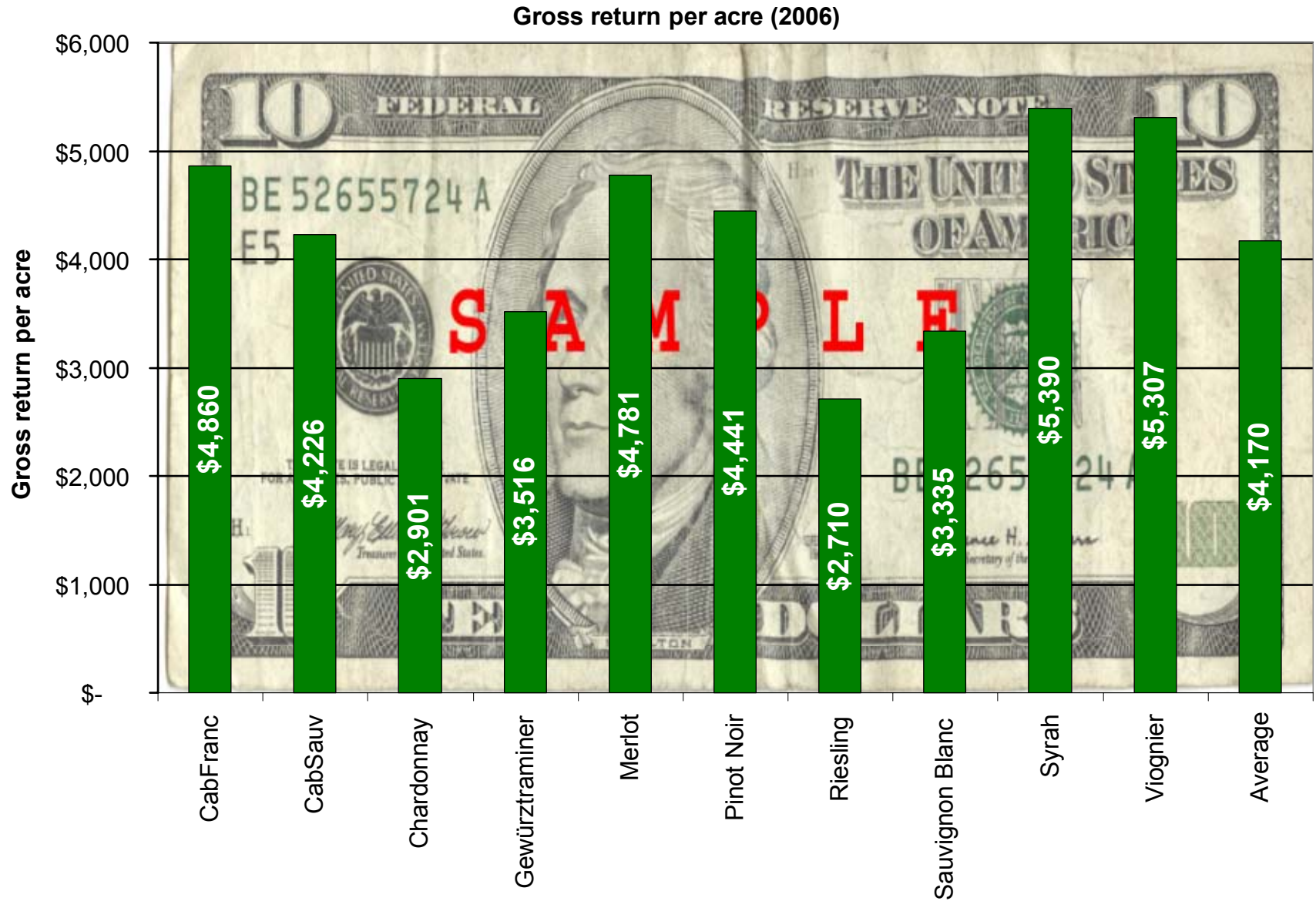
# Total plantings 2002 - 2006



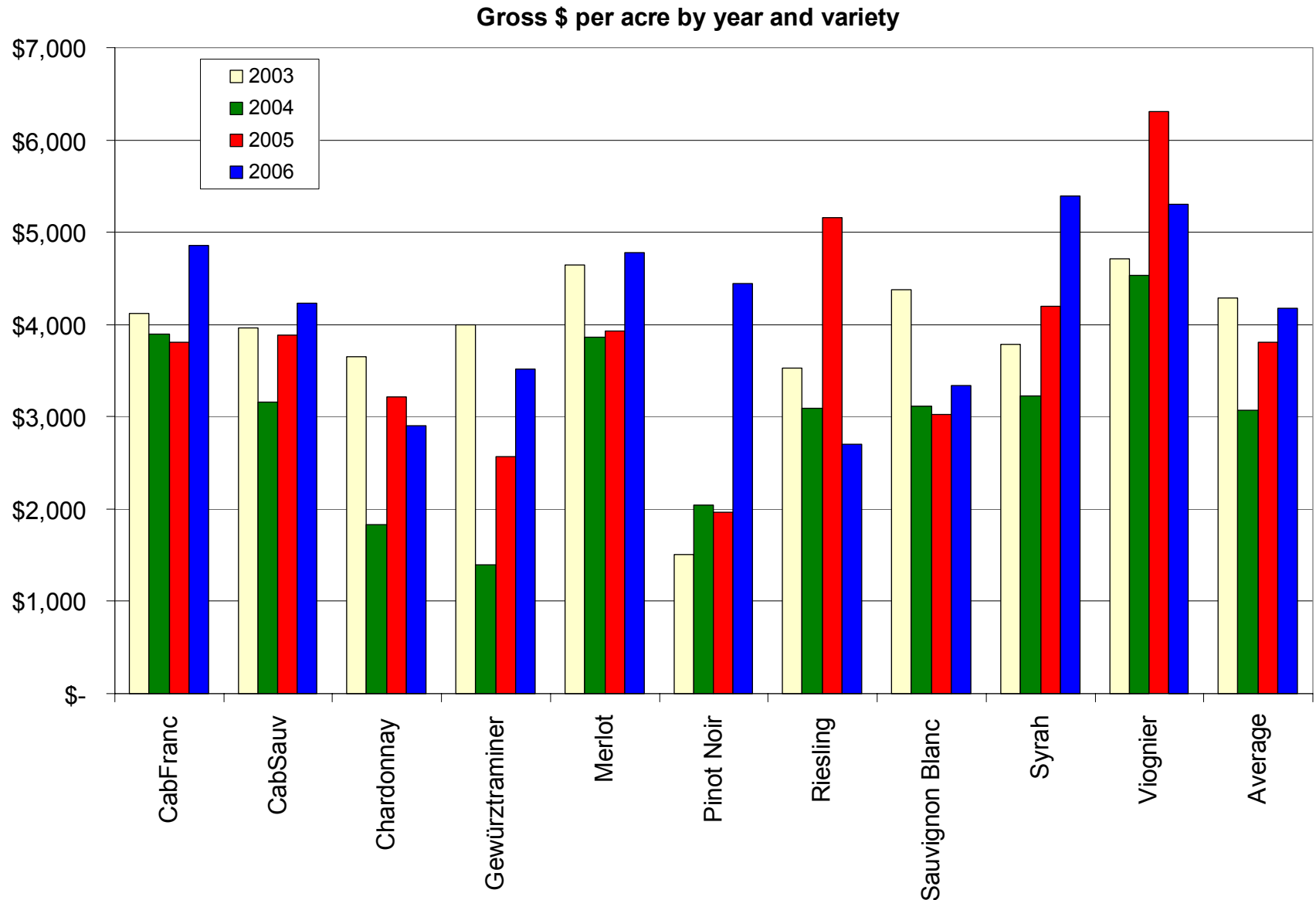
# New vineyard area by county



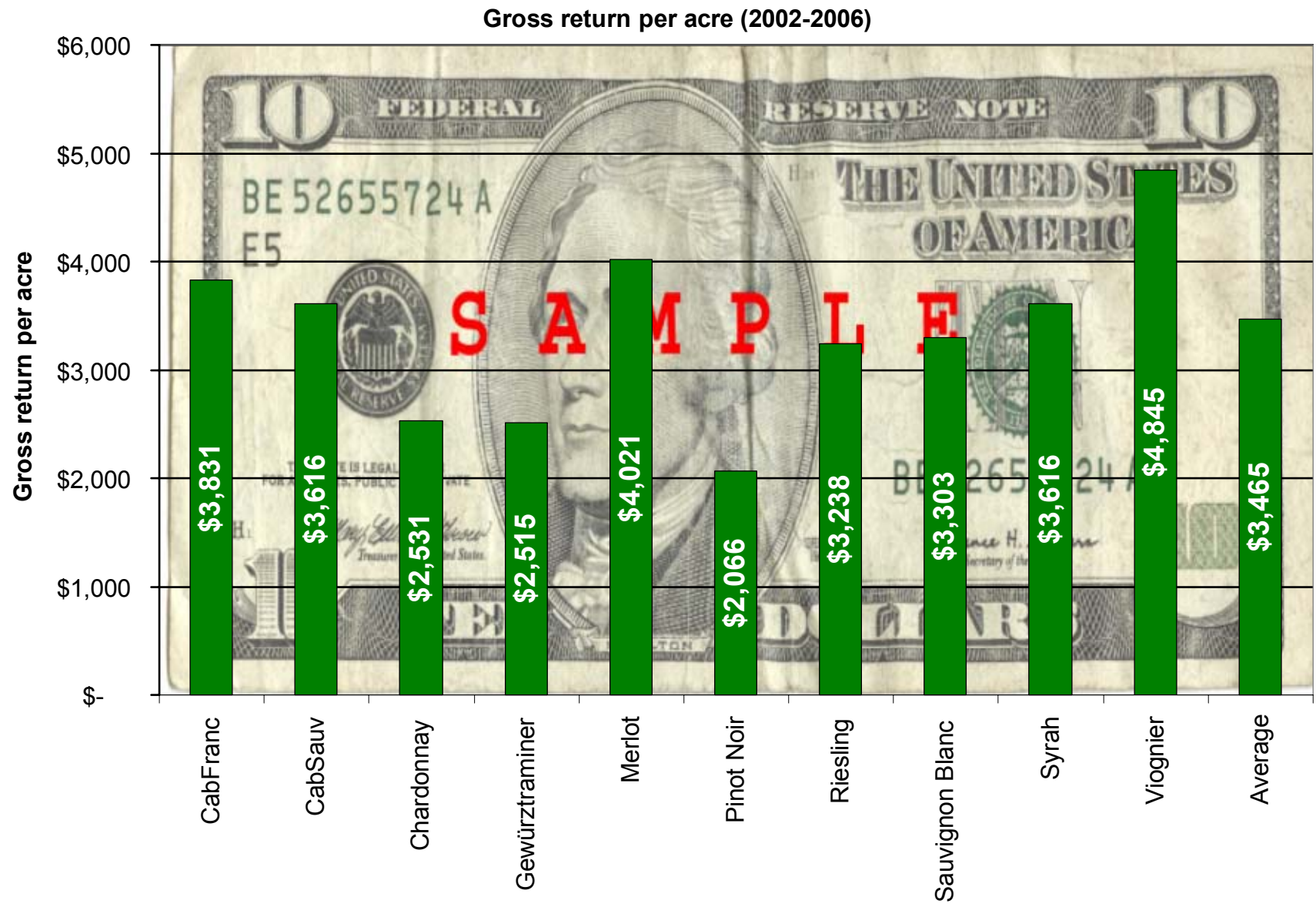
# Gross return per acre, 2006



# Gross return per acre, 2003-2006



# Average gross return per acre, 2002-2006

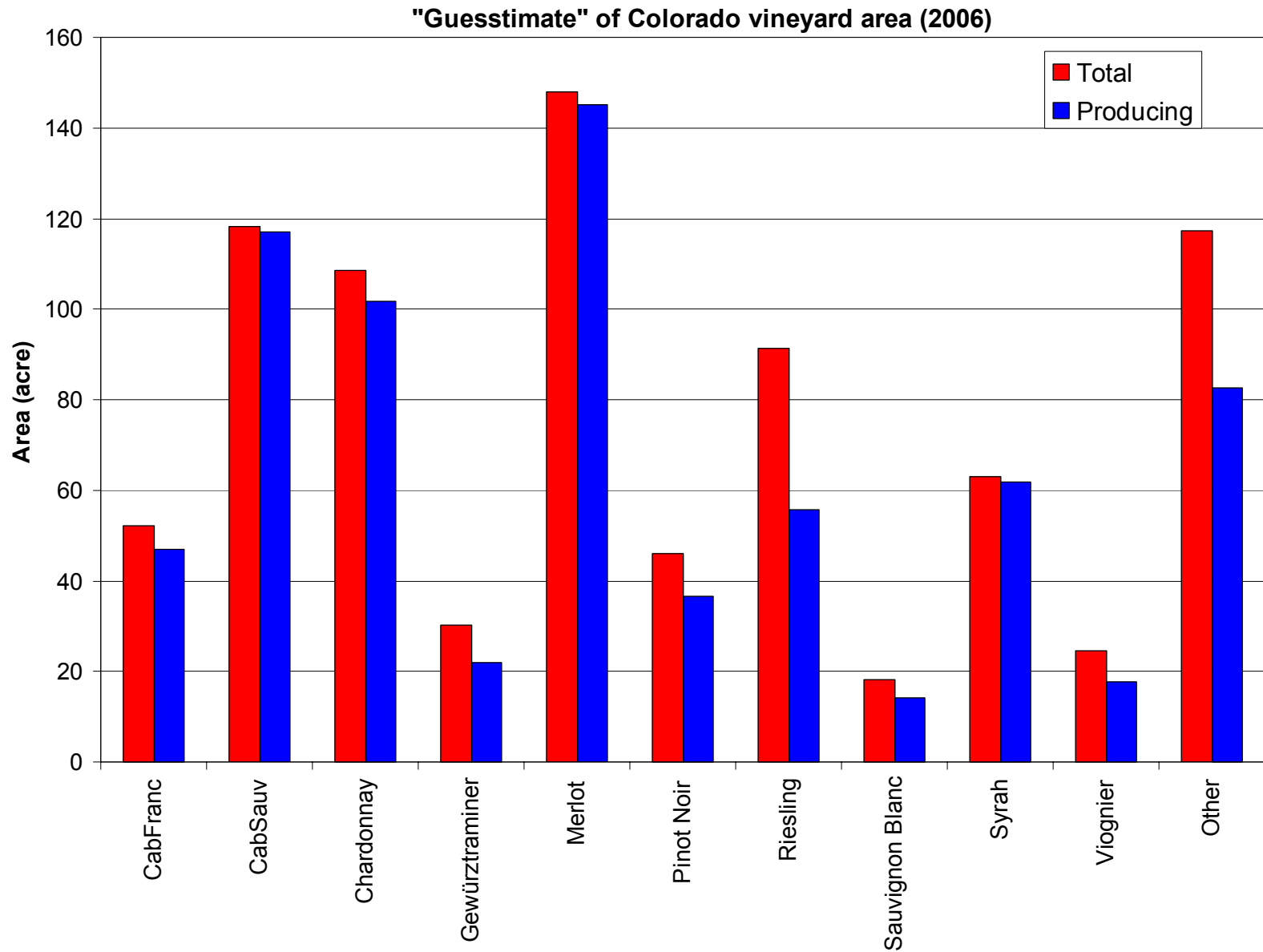


# “Guesstimate” of Colorado grape growing area

Total vineyard area (acre)	820-880
Wineries	43 %
Growers	57 %
Producing vineyard area (acre)	710
Wineries	46 %
Growers	54 %
Average vineyard size (acre)	7.2

Note: This “guesstimate” was prepared from data provided in the 1999 to 2006 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 2006 of 820-880 acres.

# “Guesstimate” of Colorado Vineyard Area

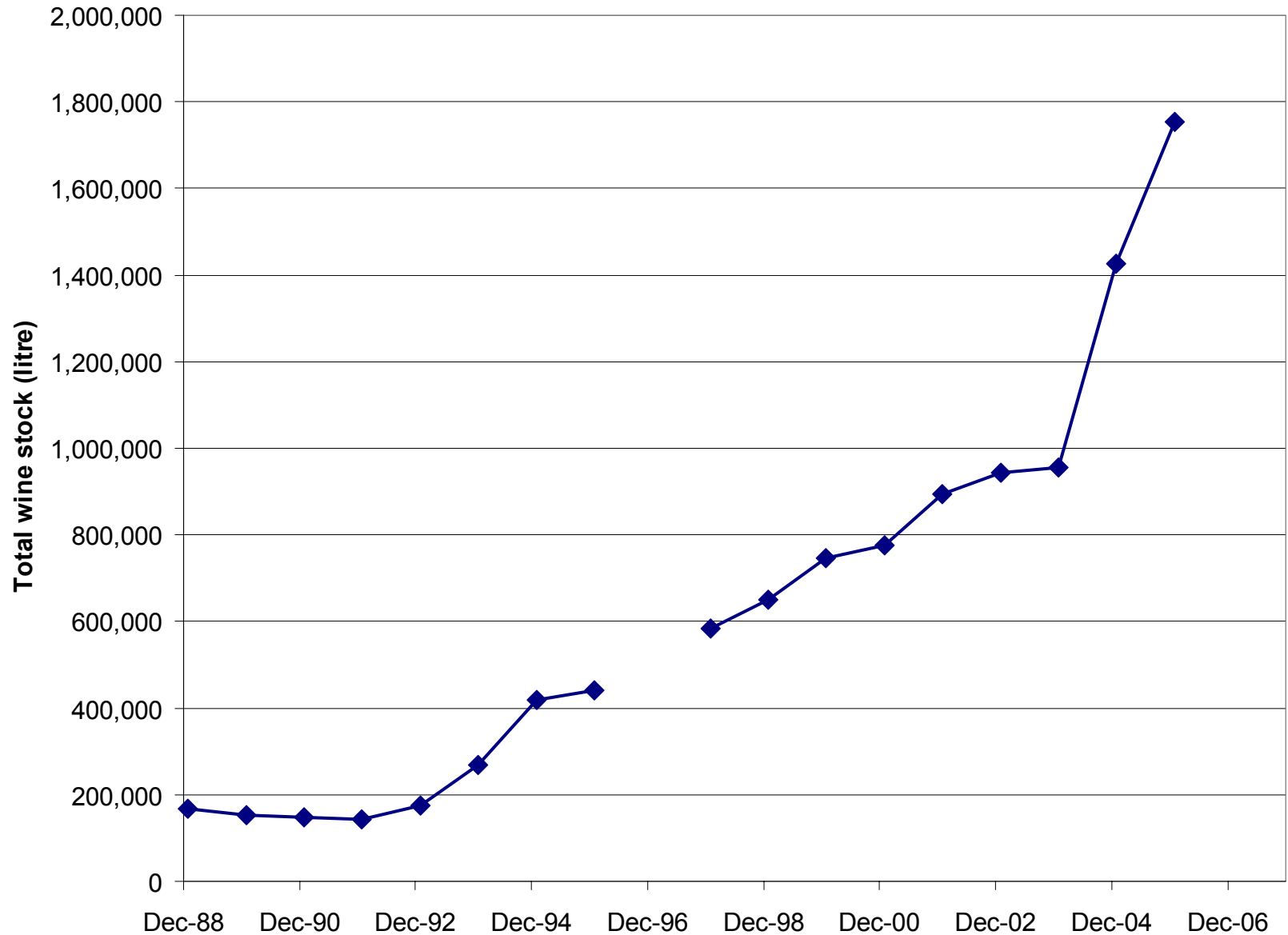


# Looking ahead for 2007 – the bad news

In 2007, we will have

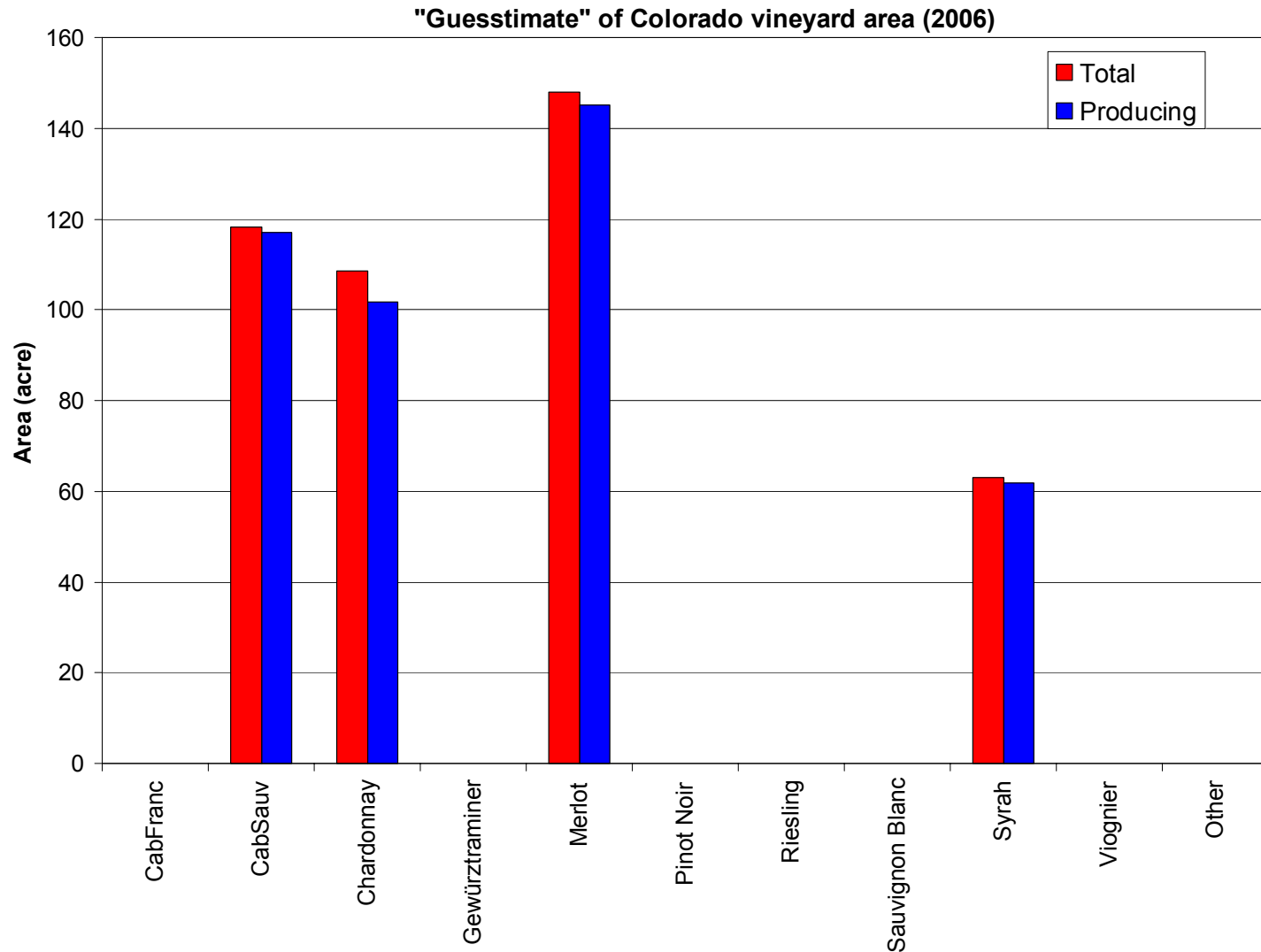
- >700 acres in production
- At a moderate 2.5 t/acre we will have ~1,800 tons
- BUT, not all of the grapes produced in 2006 found a home (when production was ~1,600 tons)
- Colorado wine sales totaled ~820,000 liters from July 2005 to June 2006 (equivalent to ~1,350 tons of grapes)
- Wines sales will need to continue to grow at a faster rate than vineyard plantings to keep pace with the increasing grape production

# Wine inventory is on the rise



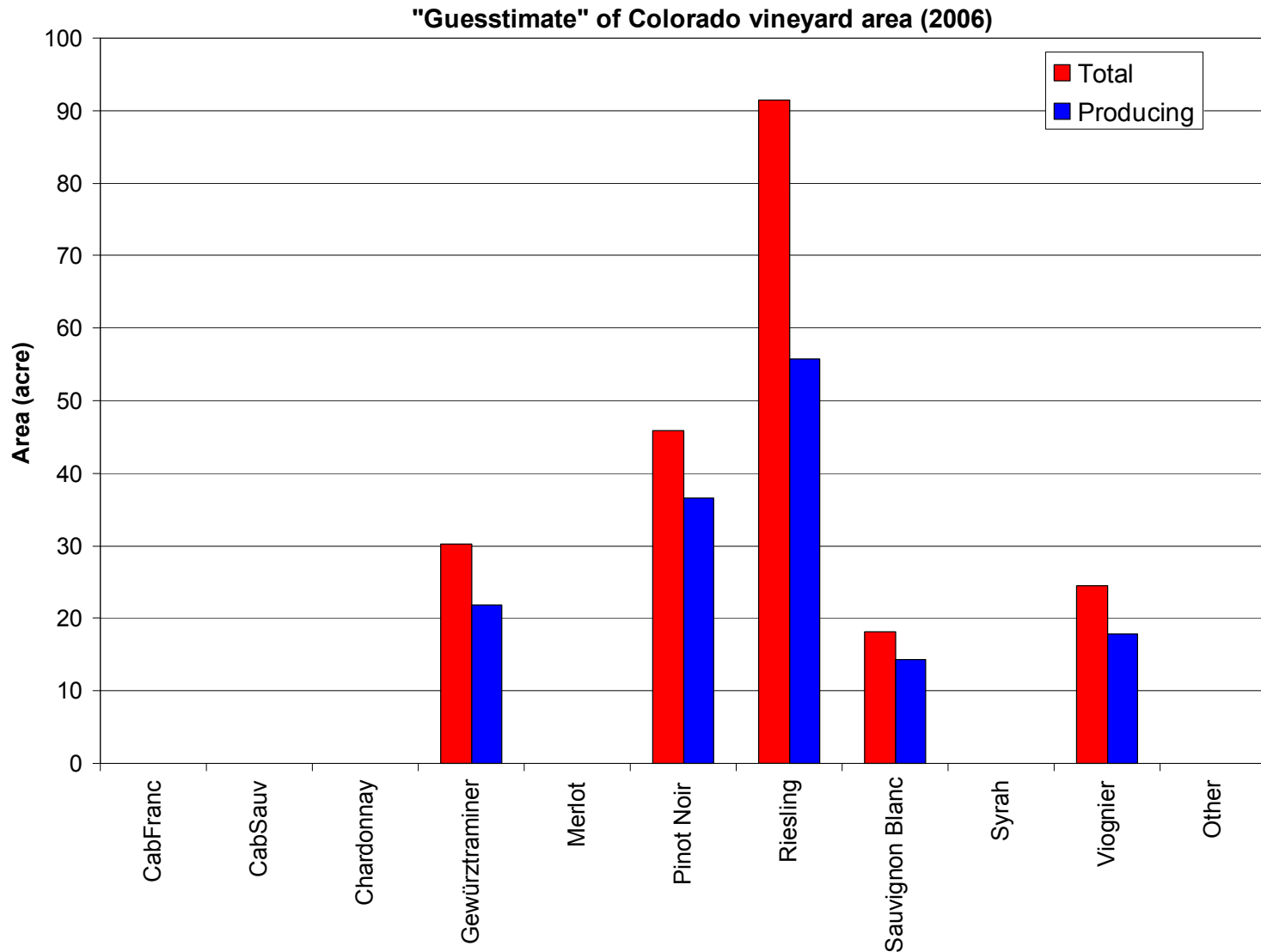
# Looking ahead for 2007 – the good news

Acreeage of the top 4 producing varieties is stable



# Looking ahead for 2007 – the good news

Increase in production from varieties in high demand



# Looking ahead for 2007 – the good news

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- Trend that new acres are contracted to a winery
- Sales of Colorado wine continue to grow (>15% pa)
- We will not have a new record crop in 2007
  - Mesa county crop down ~25 % (~1,000 ton)
  - Delta county crop down ~50 % (<100 ton)

# Acknowledgements

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Thanks to

- All growers who responded to the survey
- CWIDB for funding the survey
- Christa Hawk & Amy Montano, CSU for help with data entry, analysis, and presentation