Viticulture, enology and marketing for cold-hardy grapes

Baseline Survey Results

Bill Gartner and Brigid Tuck

University of Minnesota

The Northern Grapes Project is funded by the USDA's Specialty Crops Research Initiative Program of the National Institute for Food and Agriculture, Project #2011-51181-30850

Today's Talk

- History of baseline study
- Economic impact, preliminary results
- Conclusions from baseline study

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BASELINE STUDY HISTORY

Baseline Study

- Developed 2 questionnaires
  - Vineyards
  - Wineries
- Email invites to all lists provided
- Northern Grapes webinars open link
- Based on lists, had an overall response rate of 21%.
- Sent in early spring (March-April)

Baseline Study Reports

- Extrapolated results
- Reports for:
  - Illinois
  - Iowa
  - Michigan
  - Minnesota
  - Nebraska
  - New York

-Dakota's

-Wisconsin

-New England

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ECONOMIC IMPACT

Economic Impact – Wine Vineyards

	Output	Employment	Labor Income
Direct – All Grapes	$45,500,000	4,000	$12,400,000
Total – All Grapes	$81,000,000	6,800	$24,500,000
Total – Cold Hardy Grapes	$34,800,000	4,000	$10,100,000

Economic Impact - Wineries

	Output	Employment	Labor Income
Direct – All Grapes	$243,800,000	5,800	$56,000,000
Total – All Grapes	$421,400,000	9,900	$145,700,000
Total – Cold Hardy Grapes	$194,500,000	4,960	$68,400,000

Economic Impact – Winery Visitors

	Output	Employment	Labor Income
Direct – All Grapes	$106,000,000	1,700	$39,600,000
Total – All Grapes	$219,900,000	2,500	$68,000,000
Total – Cold Hardy Grapes	$113,300,000	1,300	$35,300,000

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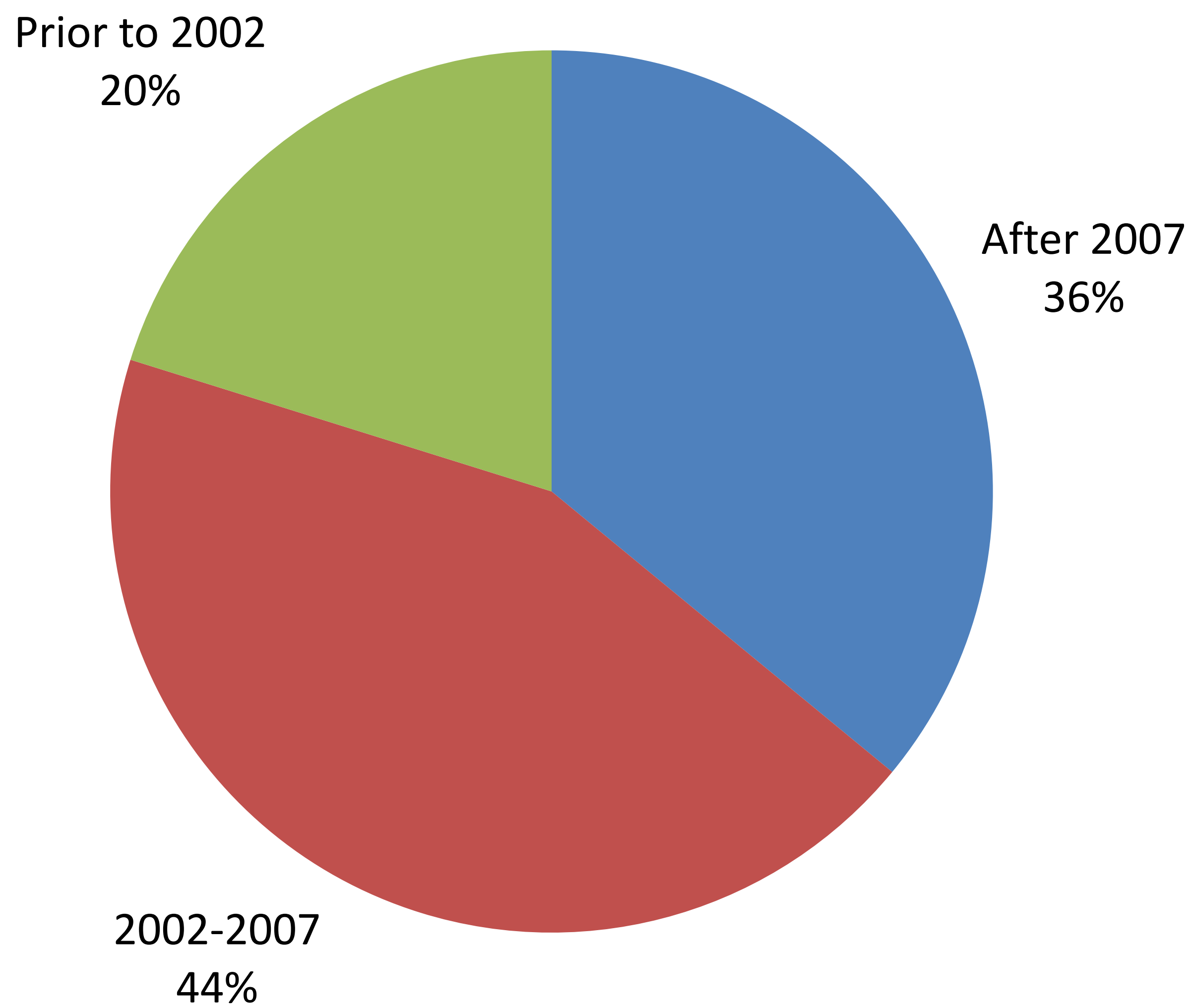
CONCLUSIONS FROM BASELINE SURVEY

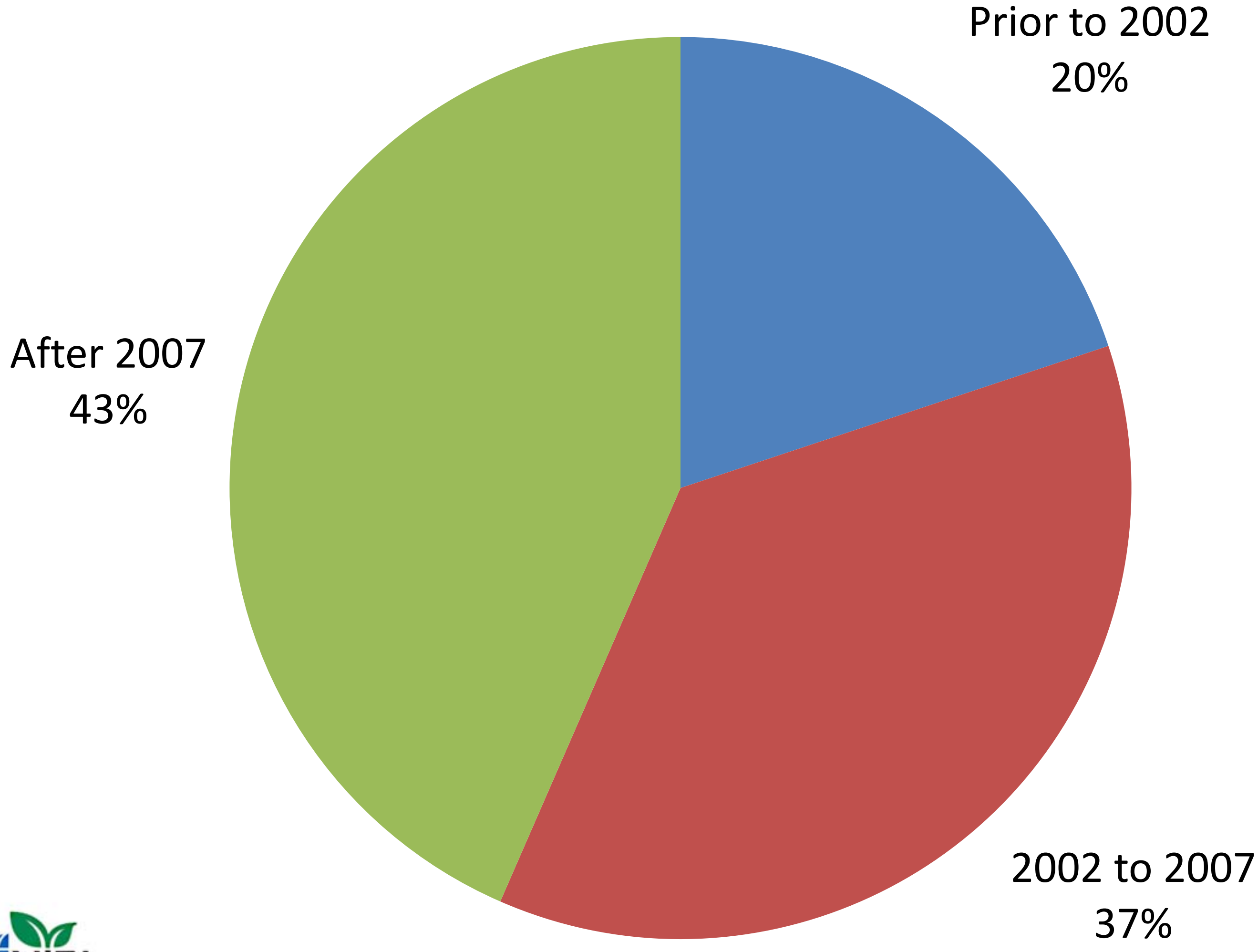
Conclusion 1: Indications Rapid Growth of Vineyards is Diminishing

Year of Vineyard Establishment
n=342



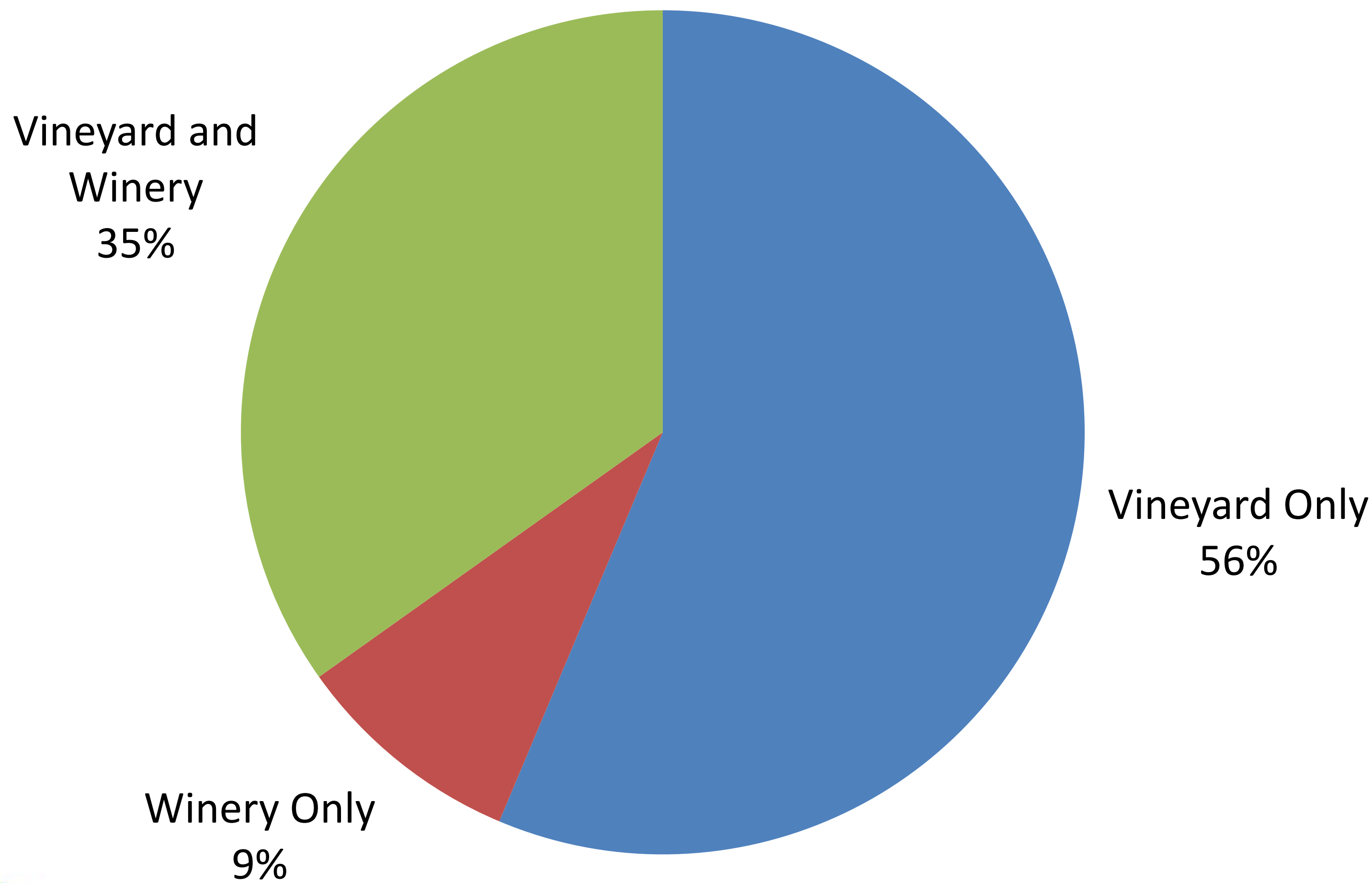
Conclusion 2: Growth in Winery Numbers is Strong

Year of Winery Establishment
n=191



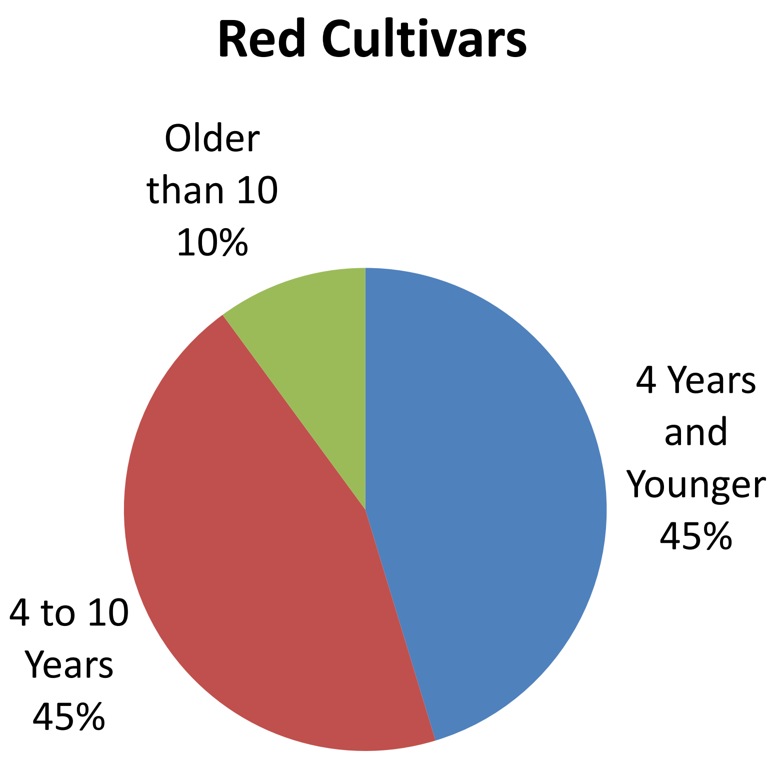
Conclusion 3: Wineries Integrate with Vineyards, but Vineyards Are Likely to Stand Alone

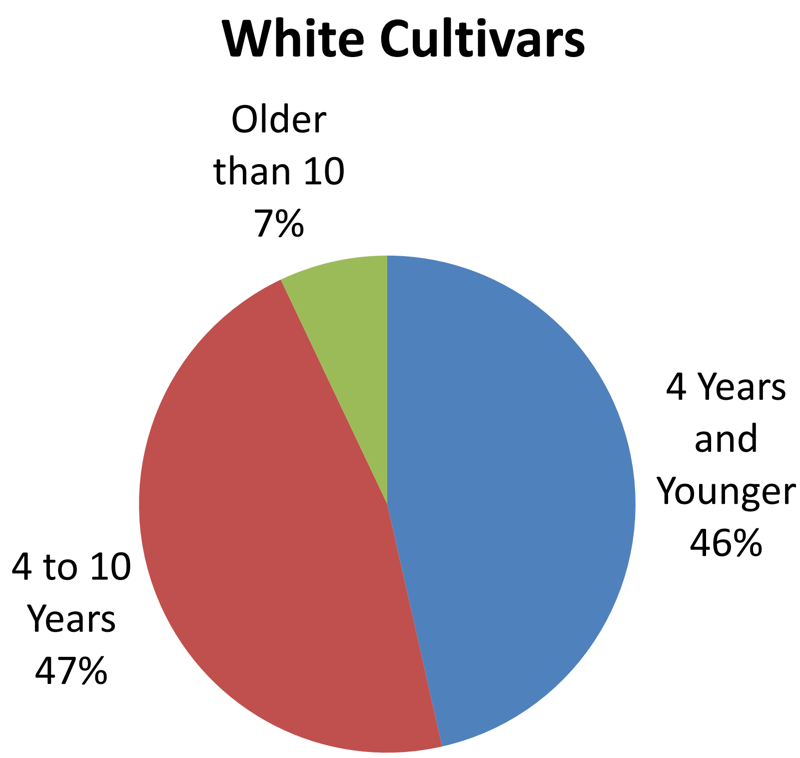
Are You Associated With?
n = 442



Conclusion 4: Rapid Growth in Grapes on Market Will Continue

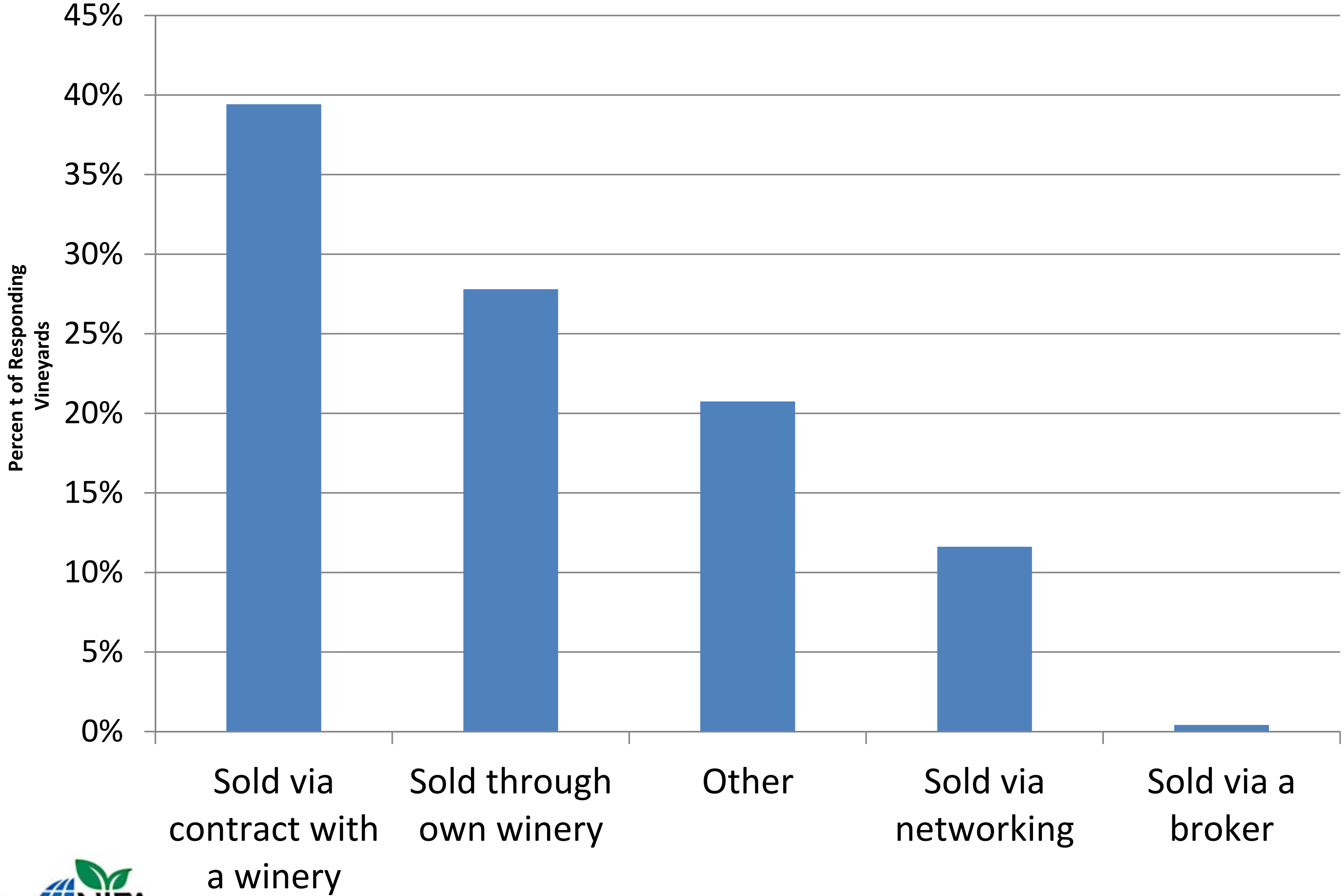
Number of Reported Planted Vines



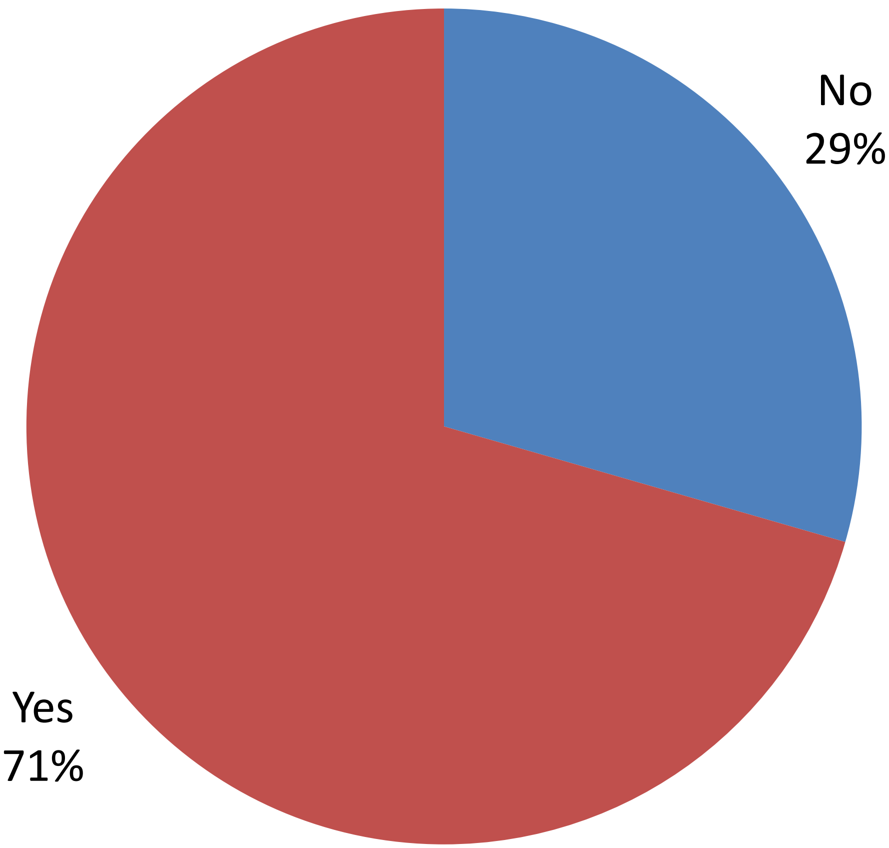


Conclusion 5: Wineries and Vineyards Increasing Sophistication in Interactions

Marketing Arrangements
n=241

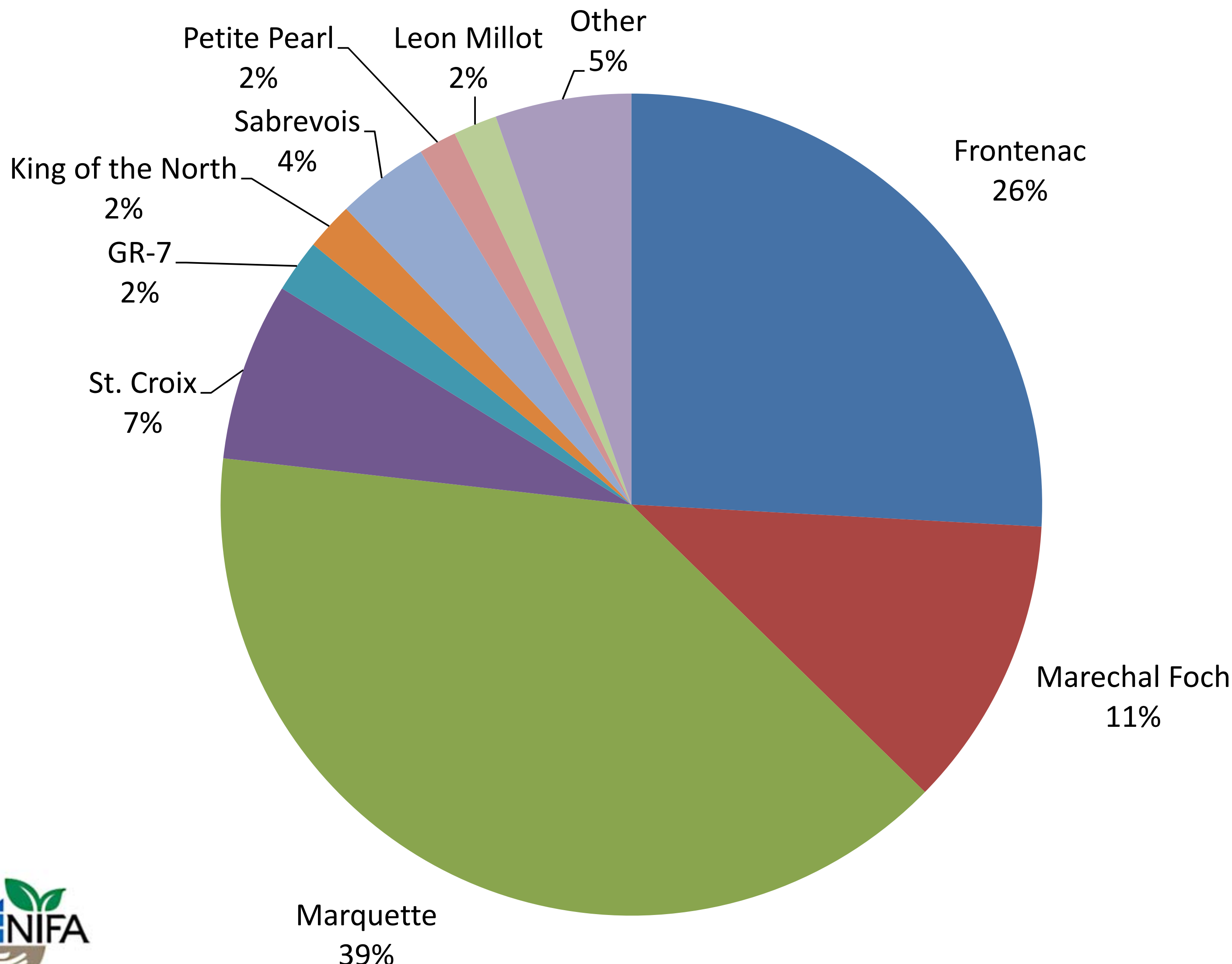


If Sold Via Contract, Was Winery Active in Management Decisions?
n=129



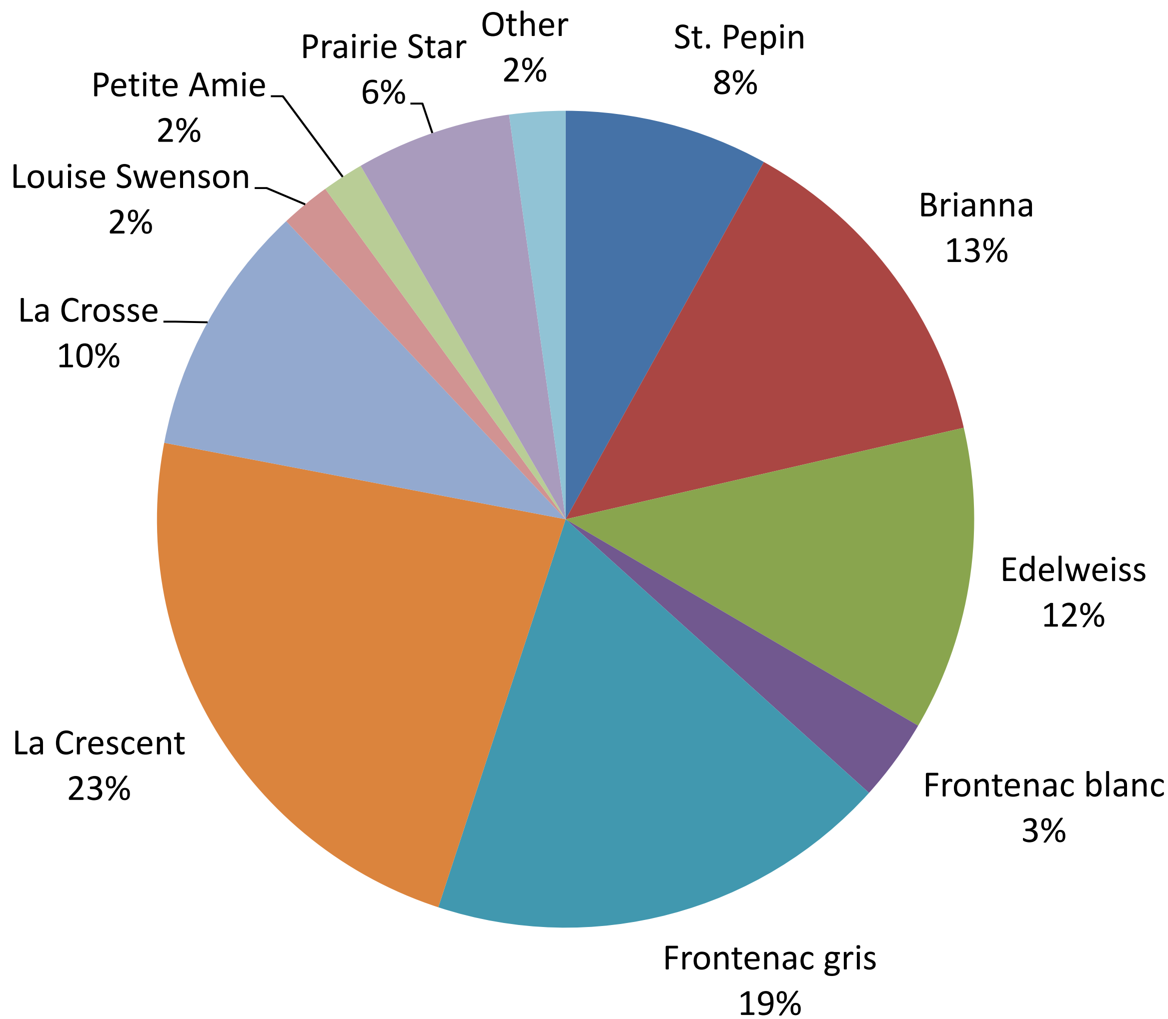
Conclusion 6: Marquette Grape is Wildly Popular

Total Reported Planted Vines, Red Varieties



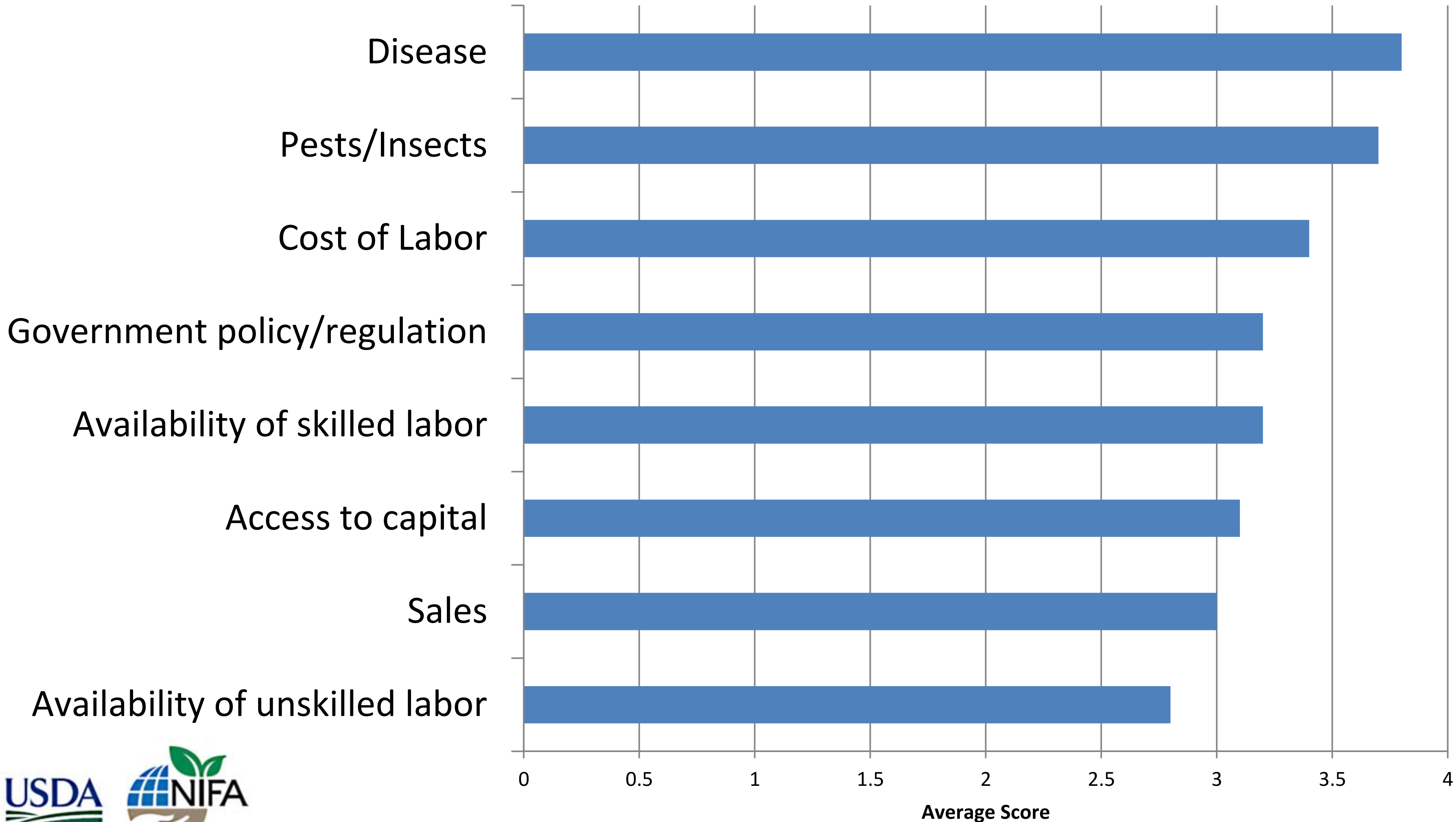
Conclusion 7: No Clear Favorite in the White Varietals

Total Reported Planted Vines, White Varieties



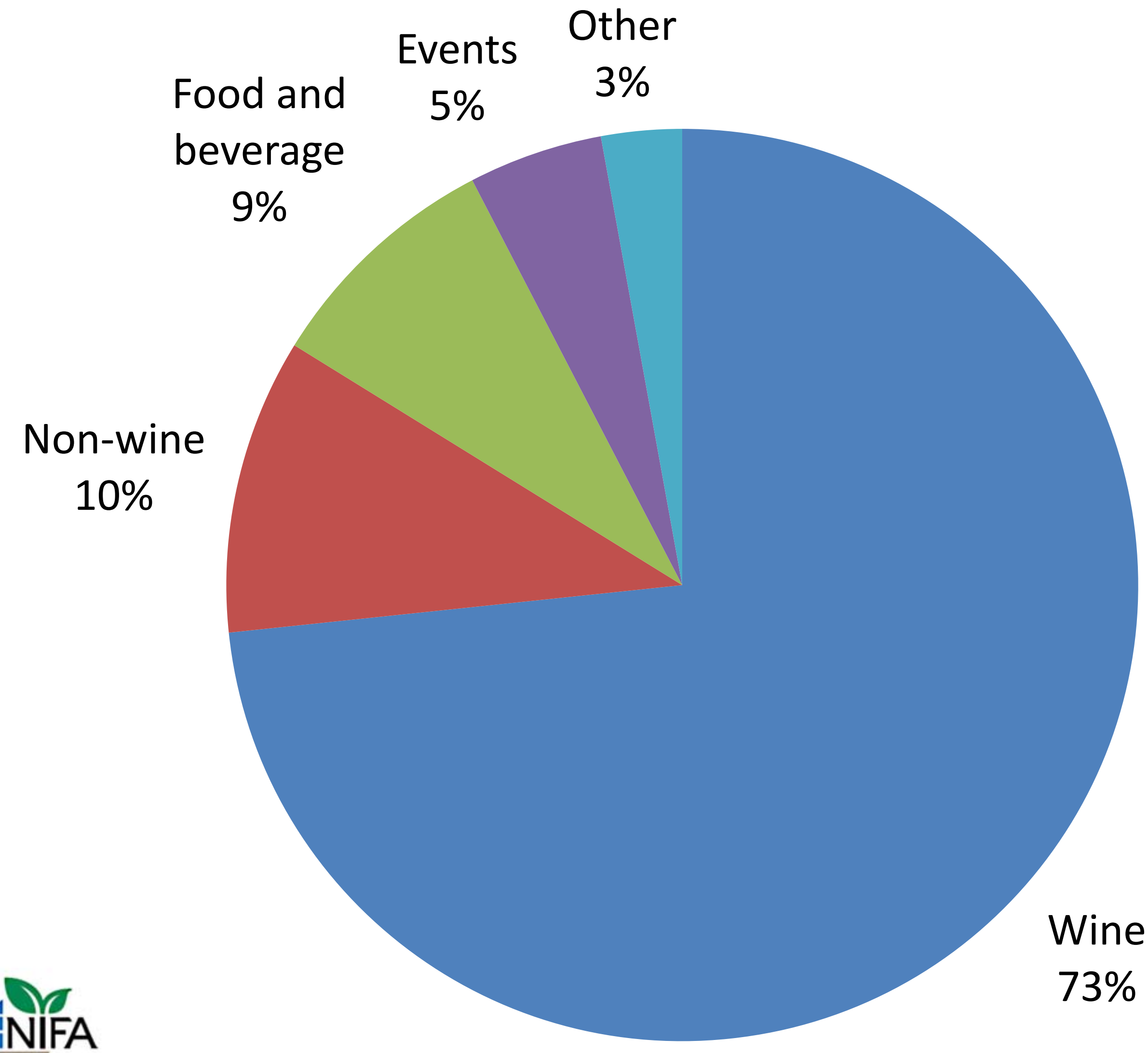
Conclusion 8: Vineyard Management Issues Worry Grape Growers

The Following is a Challenge to the Growth and Development of my Vineyard n=300 (1=Strongly Disagree, 5 = Strongly Agree)

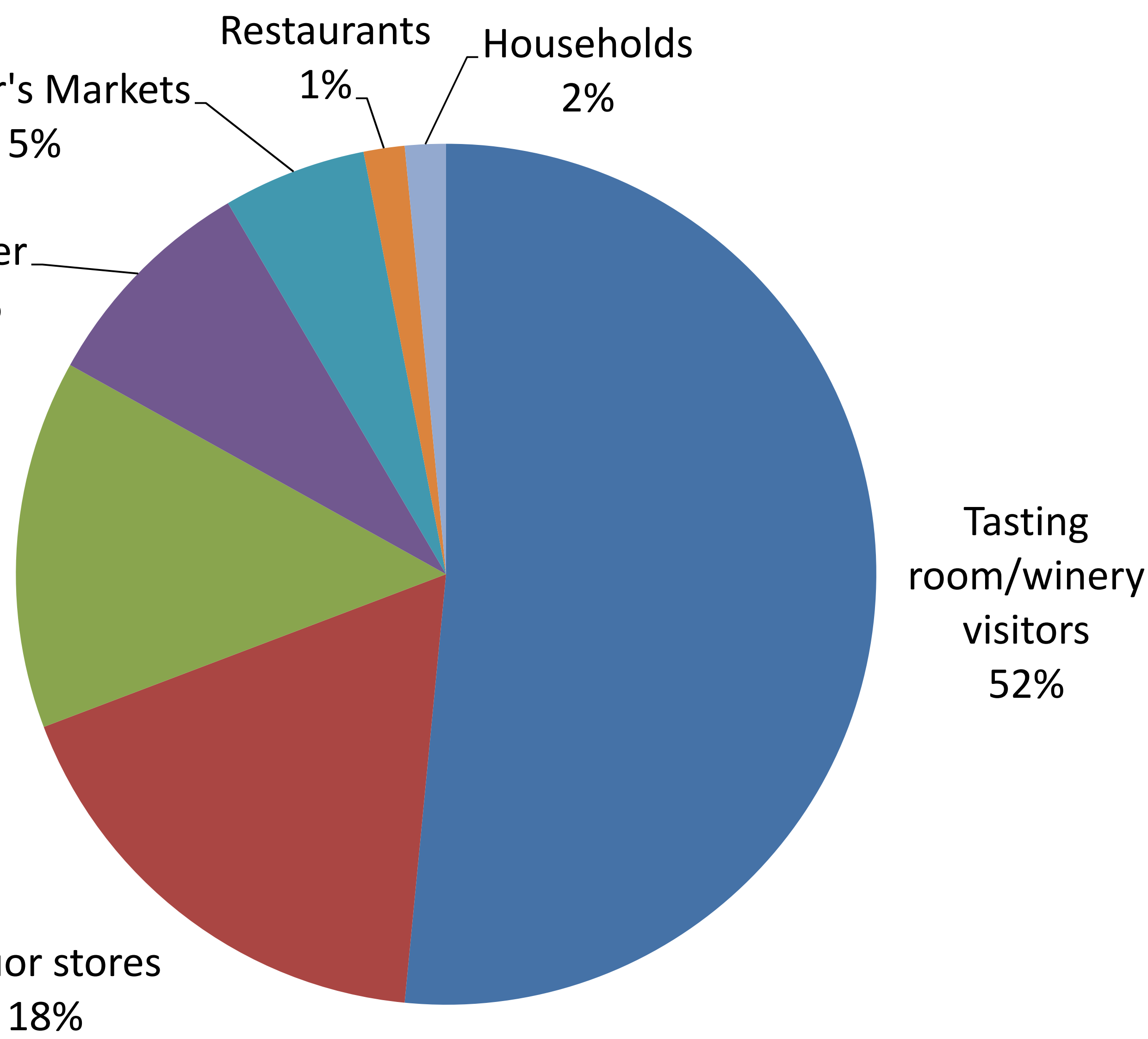


Conclusion 9: Untapped Market Potential Exists for Wineries

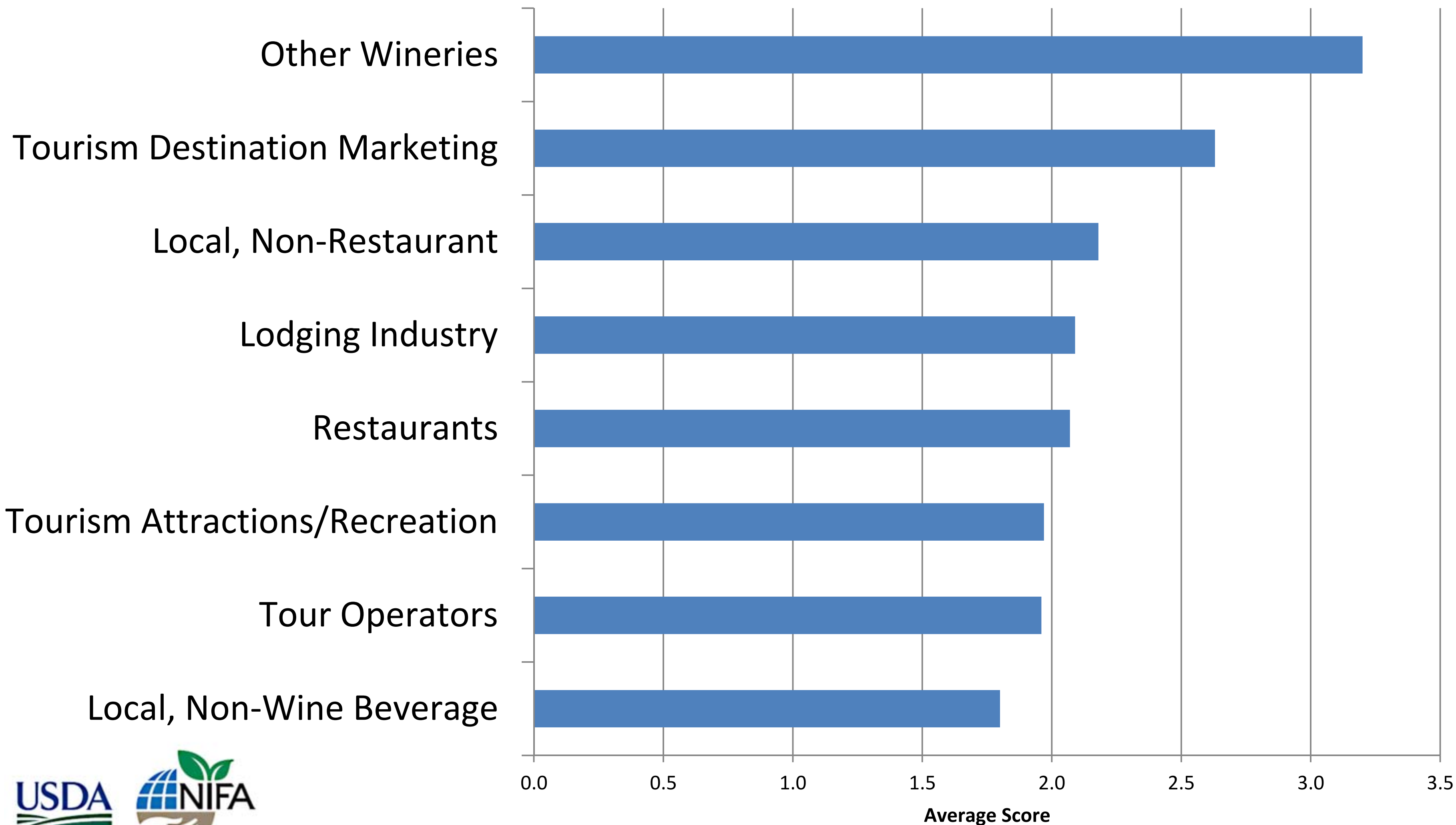
Winery Sales by Category



Percent of Wine Sales
n=130



Extent of Collaboration (1=None, 5 = Great Deal) n=134

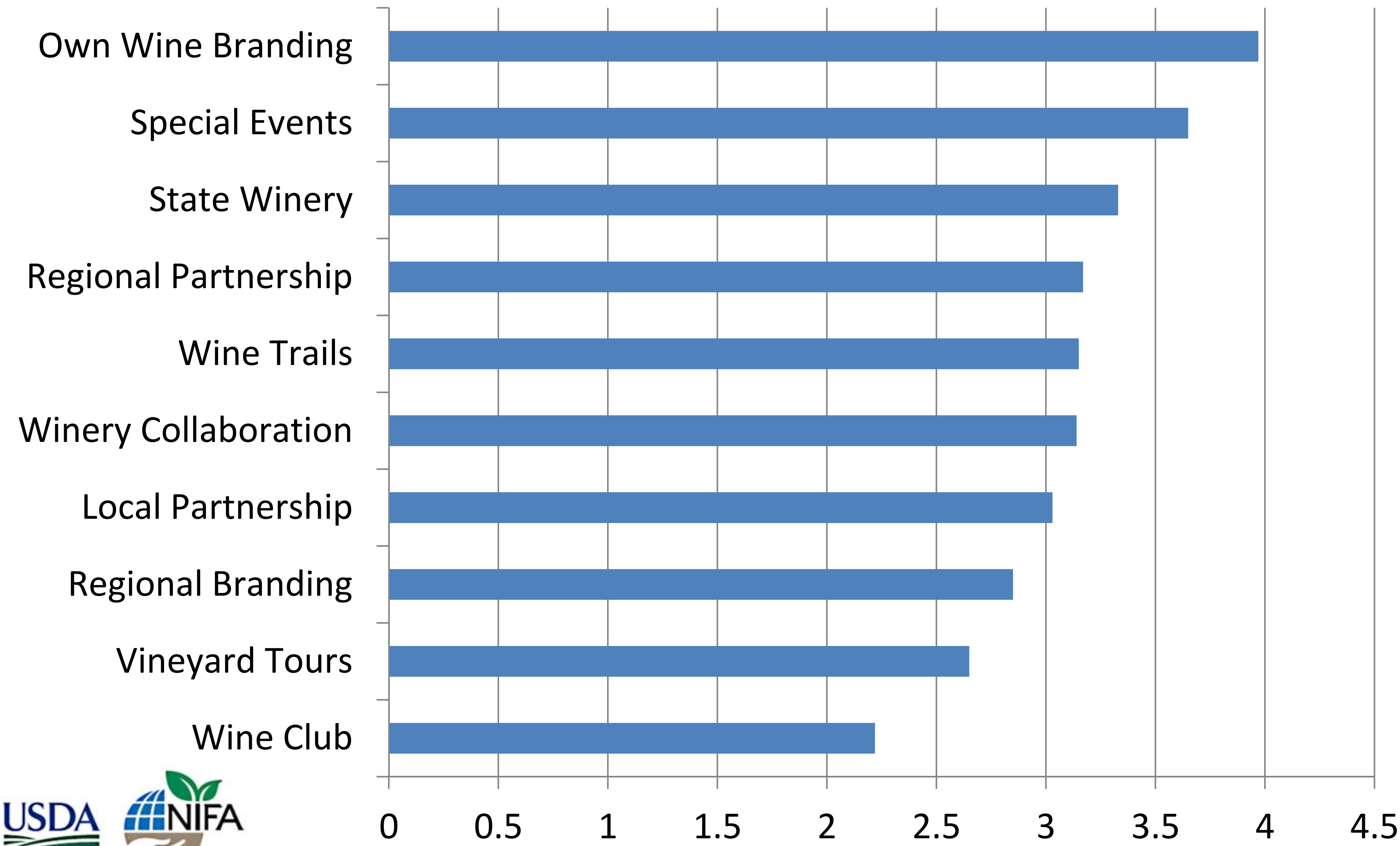


Conclusion 10: Own Wine Branding is Considered Key

Importance in Overall Marketing Strategy

(1 = Unimportant, 5 = Very Important):

n=135



Conclusion 11: Wineries Worry About Government Policies and Sales

The Following is a Challenge to the Growth and Development of My Winery

(1=Strongly Disagree, 5= Strongly Agree)

n=134

Thank You!

Questions?