MARYLAND GRAPE GROWERS ASSOCIATION 2006 VINEYARD SURVEY SUMMARY

Key Stats:

Total 2006 MGGA Member Database: 294
Total 2006 Wineries: 26 (Includes 1 Vinegar Winery)
Total 2006 Vineyards: 121 (Includes Wineries)
Total 2006 Commercial Growers (Excl wineries): 23

Total Non-Winery Vines: 119,600 (87,300 Commercial)
Total Non-Winery Acres: 190 (121 Commercial)
Total 2006 Tons sold To MD Wineries: 224 Tons

Total Survey Participation Rate: 94%

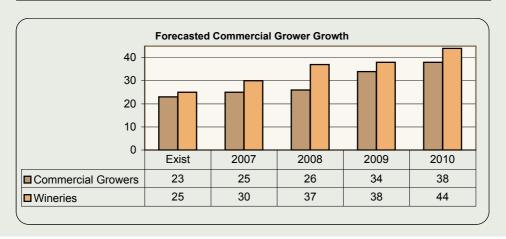
Survey Administration

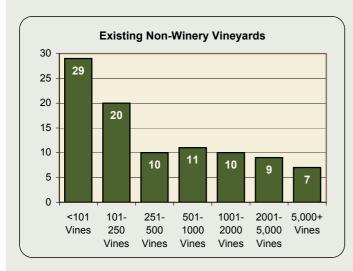
In November 2006, a one-page vineyard survey was mailed to 226 current and previous members of the Maryland Grape Growers Association. The total membership database included 294 individuals, however, only 226 surveys were mailed out because 68 members were determined to be either non-growers (libraries, govt and educational institutions, etc.), or dual members of the same household/vineyard, or out-of-state growers. A second survey was mailed in late December to all non-responders, and an e-mail based survey was also distributed. Of the 226 surveys distributed, the Maryland Winery Association collected and compiled 25 surveys related to the wine grape growing activity of Maryland Wineries. One new winery in the state reported that they grow exclusively for the purposes of making Vinegar, so their results are not included in the winery totals presented throughout the report. In addition to the wineries, 157 non-winery responses were returned. A total of 44 people did not return the survey, but 33 of that number had expired membership, so only 11 current members were silent, resulting in a 94% participation rate (182 out of 193). Since not all members participated, and we can't be sure that all Maryland grape growers belong to the Association, results provided are the best estimate available but probably under-represent the total Maryland grape growing activity. However, we are fairly confident that all of the Maryland Commercial Grower activity has been captured.

Membership

In addition to the 68 confirmed non-growers on the MGGA's roles, 53 members responded that they currently do not grow grapes, but of that number, fifteen have plans to be selling grapes to a Maryland Winery by the year 2010. Many non-commercial growers have test plots and are considering expanding, while others enjoy grape growing as a hobby and have no desire to expand. In total, thirty-four individuals have plans to become Commercial growers by 2010, a 148% increase, however, many of these will be among the 19 people who will be starting a winery by 2010, so their impact on in-state grape availability for wineries could be a wash. When forecasting annual growth by year, on the bottom chart below, new grower counts are decreased by the number of new wineries opening that year. For example, in 2007 there are 7 new Commercial Growers, but 5 new wineries, so the net is two new Commercial Growers in 2007.

Membership Future Plans	Total Responses	Plans to be a Comm. Grower by 2010	Plans to be a Winery by 2010
Currently Don't Grow Grapes	53	15	5
Non-Commercial Grower	73	19	10
Commercial Grower	23	n/a	4
Bonded Winery	26	n/a	n/a
Out of State Grower, etc.	8	n/a	n/a
Grand Total	183	34	19





<u>Statewide Non-Winery Vineyards</u> (Commercial and Non-Commercial)

Survey responses indicate that there are at least 96 individuals that grow grapes in Maryland. The smallest vineyard reported four vines and the largest reported 18,000 vines. Sixty-two percent (59) of the Vineyards have fewer than 500 vines and 18% (26) have more than 1,000 vines. Total Non-Winery vines are 119,600 (190 Acres) of which, 87,300 vines (23 vineyards-121 acres), were deemed commercial, although some may not have reached full maturity to yield a 2006 harvest. In 2007, we anticipate 43,100 additional vine plantings, a 36% increase. The survey reports that five new wineries will be bonded during the year.

Commercial Growers (Non-Winery)

There were 23 vineyards that sold grapes to Maryland Wineries in 2006. They are located in twelve counties, with Carroll County accounting for more than 38% of the vines. A total of 224 tons were reported sold in 2006 to Maryland Wineries and 17 tons were sold elsewhere (fruit stands, pick-your-own, etc.), resulting in an average yield of approximately two tons per acre, based on total vines (not harvested vines). These 23 vineyards showed growth of 4.4% (vine), 5.9% (acre) and 8.3% harvest tonnage from 2005. They also report 14% (vine) and 13% (acre) growth in 2007. The 2007 growth numbers increase by 34% (vine) and 32% (acre) when you include the data from the seven new 2007 Commercial Growers. Maryland will have 160 Commercial, non-winery Acres (117,000 Vines) by the end of 2007.

			VINE	S				VINEYARD A	ACRES	
County	Total Vines		Current Planted Vines of 7 Growers who will begin to sell in 2007		2007 Total Vines from 28 Comm Growers after 2007 Plantings	Total Acres	Existing Acres Commercial Growers	Current Planted Acres of 7 Growers who will begin to sell in 2007		2007 Total Acres from 28 Comm Growers after 200 Plantings
Anne Arundel	1 979					5,0				
Baltimore	3 826	2 000			2 000	8,1	2,0			2,0
Calvert	3 482	2 700	400	2 200	5 300	7,9	6,0	1,0	3,0	10,0
Caroline	14 450	14 450			14 450	20,0	20,0			20,0
Carroll	36 396	33 958		5 000	38 958	51,5	43,0		5,3	48,3
Cecil	7 911	6 400	1 271	730	8 401	12,6	9,3	2,0	1,0	12,3
Charles	225					0,3				
Dorchester	600					1,5				
Frederick	9 293		4 550		4 550	16,8		7,0		7,0
Harford	6 408	4 800		1 500	6 300	10,5	6,0		2,0	8,0
Howard	1 930	800		0	800	3,3	1,0			1,0
Kent	1 510		1 510	72	1 582	2,8		2,8	0,3	3,0
Montgomery	2 660	2 150		50	2 200	5,6	4,5		0,1	4,6
Prince George's	110					2,3				
Queen Anne's	9 826	8 990	830	3 500	13 320	14,5	13,0	1,5	5,0	19,5
St. Mary's	10 041	3 467	5 400	2 500	11 367	13,8	5,0	5,5	2,5	13,0
Talbot	6 810	6 696			6 696	8,7	8,6			8,6
Washington	1 800	950			950	4,5	2,5			2,5
Worchester	400					1,0				
Grand Total	119 657	87 361	13 961	15 552	116 874	190,5	120,9	19,8	19,1	159,8

^{* 2007} County totals include one grower who will become both a Comm. Grower & Winery in 2007

Commercial Grower Varietals (Non-Winery)

The 224 Commercial tons sold to Maryland wineries in 2006 included 22 varietals, though, seven variatals made up 86% of the total. Nearly half of the Commercial growers grew Vidal Blanc and it represented 21% of the commercial tons sold, followed by Cabernet Sauvignon (17%) Cabernet Franc (11%), Merlot (10%), Chardonnay (10%), Seyval Blanc (8%) and Chambourcin (7%). Vinifera grapes accounted for 58% of the tons sold (Hybrids 42%), with the mix between red and white grapes 54% vs. 46%.

2006	2006 Varietals Sold by Maryland Commercial Vineyards to Maryland Wineries									
Winery Data is			Comr	nercial Noi	n-Winery Gro	Statewide Varietal Information				
Excluded from this Chart	Type	Color	Commercial Growers	Tons Sold to Md Wineries	Vines Grown by those Growers	Estimated Acreage of Above	Total Vines of this Varieties	2006 Statewide # Plantings	Largest Single Planting	Statewide 200+ Vine Plantings
Cabernet Sauvignon	V	R	8	38	14 850	21,2	19 533	41	4 600	16
Vidal Blanc	Н	W	10	48	12 008	17,2	12 617	31	2 800	8
Merlot	V	R	8	24	11 063	18,1	16 785	33	5 000	13
Chardonnay	٧	W	8	24	9 870	16,4	13 508	36	2 835	12
Cabernet Franc	٧	R	7	25	6 054	8,6	9 596	42	2 800	13
Chambourcin	Н	R	5	15	5 014	7,2	7 266	38	2 800	8
Seyval Blanc	Н	W	3	17	4 080	5,8	5 372	25	2 000	4
Sauvignon Blanc	٧	W	1	3	2 835	4,1	2 835	1	2 835	1
Sangiovese	٧	R	3	10	2 515	4,8	3 647	10	1 665	3
Pinot Noir	٧	R	2	5	2 353	3,9	2 743	7	1 853	3
Vignoles	Н	W	1	7	1 668	2,4	1 774	2	1 668	1
Traminette	Н	W	1	0	1 430	2,0	1 777	7	1 050	3
Chancellor	Н	R	2	2	930	1,3	1 160	7	530	2
Temprenillo	٧	R	1	1	667	1,0	667	1	667	1
Pinot Gris	٧	W	2	2	550	2,0	4 186	9	2 030	5
DeChaunac	Н	R	1	1	300	0,4	309	2	300	1
Cayuga	Н	W	1	2	150	0,2	639	10	300	1
Petit Verdot	٧	R	1	0	120	0,2	136	4	120	0
Villard Blanc	Н	W	1	1	200	0,3	413	6	200	1
Gamay Noir	٧	R	1	0	21	0,0	37	2	21	0

VARIETAL	SUMMARY	FOR NON-	WINERY V	INES
		2007 New	Total 2007	
Variety	2006 Vines	Vines	Vines	% Increase
Cabernet Sauvignon	19 533	2 759	22 292	14,1%
Merlot	16 785	3 197	19 982	19,0%
Chardonnay	13 508	2 006	15 514	14,9%
Vidal Blanc	12 617	2 687	15 304	21,3%
Cabernet Franc	9 596	2 165	11 761	22,6%
Chambourcin	7 266	10 604	17 870	145,9%
Seyval Blanc	5 372	3 477	8 849	64,7%
Pinot Gris	4 186	8	4 194	0,2%
Sangiovese	3 647	150	3 797	4,1%
Sauvignon Blanc	2 835	100	2 835	3,5%
Pinot Noir	2 743	6	2 749	0,2%
Traminette	1 777	3 002	4 779	168,9%
Vignoles	1 774		1 774	0,0%
Chancellor	1 160	2	1 162	0,2%
Barbera	1 084	3 900	4 984	359,8%
Montepulciano	1 000		1 000	0,0%
Syrah/Shiraz	724	75	799	10,4%
Tempranillo	667		667	0,0%
Cayuga	639	250	889	39,1%
Viognier	496		496	0,0%
Villard Nior	459		459	0,0%
Villard Blanc	413		413	0,0%
Mourvedre	365		365	0,0%
Gewurztraminer	325		325	0,0%
Riesling	320	27	347	8,4%
DeChaunac	309		309	0,0%
Noiret	300	105	405	35,0%
Landot	240		240	0,0%
Concord	206	4	210	1,9%
Frontenac	184		184	0,0%
Lemberger	156		156	0,0%
Nebbiolo	155	100	255	64,5%
Foch	147		147	0,0%
Petit Verdot	136	1 025	1 161	753,7%
Zinfandel	100	500	600	500,0%
Reliance	62		62	0,0%
Semillon	61	250	311	409,8%
Chardonnel	51		51	0,0%
Norton	45		45	0,0%
Rayon d' Or	40		40	0,0%
Golden Muscat	39		39	0,0%
Gamay Noir	37		37	0,0%
Roussanne	36		36	0,0%
Chelois	35		35	0,0%
Niagra	31		31	0,0%
Swenson Red	27		27	0,0%
Pinot Blanc	26		26	0,0%

Small counts of Himrod, Alden, Grenache, Chouchillon, Primitivo, Petite Sirah, Marsanne, Valient, Steuben, Hibernal, Muscat Ottonel, Catawba, Caco, Bianca, Dolcetto, Malvasia, Fredonia, Touriga Nacional, Mars, Rosabelle & Interlaken were also reported.

<u>Statewide Non-Winery Vineyards</u> (Commercial and Non-Commercial)

We're seeing a total 2007 vine count increase of 36% for total non-winery growers. This would be expected, considering that there are an additional 34 vineyards anticipating commercial harvests at some point during the following three years. The top four varietals grown are Cabernet Sauvignon, Merlot, Chardonnay and Vidal Blanc, but by 2007 Vidal Blanc will fall off that list, replaced by Chambourcin. Varietals with the largest 2007 percent increase include Petit Verdot, Zinfandel, Semillon, Barbera, Traminette and Chambourcin. We have record of seventy-four different varietals grown in the state.

Maryland Wineries

There are 26 Maryland Wineries, but one grows grapes and currants for Vinegar production, so their numbers are excluded. In 2006, the 25 wine producing Wineries grew 241 acres of grapes, or approximately 176,000 vines, throughout twelve counties. The wineries harvested 432 tons of grapes and report purchasing 248 tons from Maryland Wineries. There is a 24 ton variance (11%) between what Commercial Growers report (224 tons) and what Wineries report, but there was a lot of estimating involved throughout the survey process, so that variance is probably the result of survey estimate errors. The total Maryland tons used (bought and grown) was 680, yielding a winery shortfall of 1.3 tons purchased outside the state for every ton grown in Maryland. The wineries report that they are most in-need of the following varieties; Cabernet Sauvignon, Merlot, Chardonnay, Cabernet Franc, Pinot Noir, Syrah, Concord, Seyval Blanc and Vidal Blanc. The survey results indicate that in 2007 there will be significant plantings of each of these varieties, except Pinot Noir, Syrah and Concord.

MARY	MARYLAND STATEWIDE VARIETAL SUMMARY								
	Non-W	/inery	Win	ery		Grand	d Total		
		2007		2007	Total	Ttl 2007	Total		
	2006	New	2006	New	2006	New	2007	%	
Variety	Vines	Vines	Vines	Vines	Vines	Vines	Vines	Increase	
TOTAL REPORTED	119 657	43 149	176 000	16 730	295 657	59 879	355 536	20,3%	
Cabernet Sauvignon	19 533	2 759	21 971	2 875	41 504	5 634	47 138	13,6%	
Chardonnay	13 508	2 006	27 350	1 275	40 858	3 281	44 139	8,0%	
Merlot	16 785	3 197	10 657		27 442	3 197	30 639	11,7%	
Cabernet Franc	9 596	2 165	13 978	2 475	23 574	4 640	28 214	19,7%	
Vidal Blanc	12 617	2 687	8 306	450	20 923	3 137	24 060	15,0%	
Chambourcin	7 266	10 604	6 742		14 008	10 604	24 612	75,7%	
Seyval Blanc	5 372	3 477	7 341	1 400	12 713	4 877	17 590	38,4%	
Pinot Gris	4 186	8	8 112		12 298	8	12 306	0,1%	
Pinot Noir	2 743	6	2 250		4 993	6	4 999	0,1%	
Sangiovese	3 647	150	1 164		4 811	150	4 961	3,1%	
Guwirztraminer	325		4 150		4 475	0	4 475	0,0%	
Syrah/Shiraz	724	75	3 173		3 897	75	3 972	1,9%	
Sauvignon Blanc	2 835	100	200		3 035	100	3 135	3,3%	
Petit Verdot	136	1 025	2 650		2 786	1 025	3 811	36,8%	
Vignoles	1 774		100		1 874	0	1 874	0,0%	
Traminette	1 777	3 002		400	1 777	3 402	5 179	191,4%	
Chancellor	1 160	2	503		1 663	2	1 665	0,1%	
Viognier	496		960		1 456	0	1 456	0,0%	
Cayuga	639	250	499		1 138	250	1 388	22,0%	
Barbera	1 084	3 900		1 275	1 084	5 175	6 259	477,4%	
Montepulciano	1 000				1 000	0	1 000	0,0%	
Foch	147		638		785	0	785	0,0%	
Temprenillo	667				667	0	667	0,0%	
Riesling	320	27	343		663	27	690	4,1%	
Reliance	62		537		599	0	599	0,0%	
Malbec			508	2 055	508	2 055	2 563	404,5%	
Concord	206	4	290		496	4	500	0,8%	
Villard Nior	459				459	0	459	0,0%	
Villard Blanc	413				413	0	413	0,0%	
Mouvedre	365				365	0	365	0,0%	
Lemberger	156		200		356	0	356	0,0%	
Frontinac	184		150		334	0	334	0,0%	
DeChaunac	309				309	0	309	0,0%	
Noiret	300	105			300	105	405	35,0%	
Landot	240				240	0	240	0,0%	
Nebbiolo	155	100			155	100	255	64,5%	
Zinfandel	100	500			100	500	600	500,0%	
Semillon	61	250			61	250	311	409,8%	
Misc. or Undeclared	8 310	6 750	53 228	4 525	61 538	11 275	72 813		
Wineries also grow Albar	ino, Cataw	ba, Isabe	ella, Malva	sia & Mu	scat in sm	all numbers	;		
	Wineries also grow Albarino, Catawba, Isabella, Malvasia & Muscat in small numbers								

2006		ACRES			VINES			
MARYLAND	Non-				Non-			
VINEYARDS	Commercial	Commercial	Winery	Total	Commercial	Commercial	Winery	Total
Total	69,6	120,9	241,5	431,9	32 296	87 361	176 397	296 054
Anne Arundel	5,0		16,0	21,0	1 979		8 666	10 645
Baltimore	6,1	2,0	56,8	64,9	1 826	2 000	39 760	43 586
Calvert	1,9	6,0	6,6	14,5	782	2 700	4 900	8 382
Caroline		20,0		20,0	0	14 450		14 450
Carroll	8,5	43,0	1,3	52,8	2 438	33 958	1 175	37 571
Cecil	3,3	9,3	7,0	19,6	1 511	6 400	1 805	9 716
Charles	0,3			0,3	225			225
Dorchester	1,5			1,5	600			600
Frederick	16,8		107,3	124,1	9 293		75 110	84 403
Garrett	0,0		2,0	2,0	0		1 150	1 150
Harford	4,5	6,0	19,5	30,0	1 608	4 800	15 050	21 458
Howard	2,3	1,0		3,3	1 130	800		1 930
Kent	2,8			2,8	1 510			1 510
Montgomery	1,1	4,5	10,2	15,8	510	2 150	18 994	21 654
Prince George's	2,3			2,3	110			110
Queen Anne's	1,5	13,0	6,1	20,6	836	8 990	3 260	13 086
St. Mary's	8,8	5,0		13,8	6 574	3 467		10 041
Talbot	0,1	8,6	4,2	12,9	114	6 696	4 000	10 810
Washington	2,0	2,5		4,5	850	950		1 800
Wicomico			4,5	4,5	0		2 527	2 527
Worchester	1,0			1,0	400			400

Summary

This was the first M.G.G.A. Survey conducted since 2001. While there is a significant shortfall in Maryland Grape production to be able to meet Winery demand, there has been tremendous growth during the last five years. The number of vineyards in Maryland has grown by 61% and total vines & acreage have more than doubled, but at the same time, the number of wineries has doubled and projections show that 14 of the 34 respondents who report they will be a new Commercial grower by 2010 also report that they will be opening a winery by 2010.

MA	RYLAND	GRAPE	INDUST	RY GROW	/TH
	2001	2006	2007 Forecast	2006 Percent Increase from 2001	2007 Percent Increase from 2006
Vineyards	75	121	130	61,3%	7,4%
Vines	141 686	295 657	355 536	108,7%	20,3%
Acres	212	431	513	103,3%	19,0%

The last question on the survey asked "What additional services would you like to see the MGGA offer to assist you?". About half of the surveys included a comment - many elaborated on their current situation, personal grape growing successes and challenges and others spoke more specifically about MGGA's role. The list below summarizes those comments related to MGGA's role.

Wh	at additional services would you like to see the MGGA offer to assist you?
1	"OJT" for rookies and class to aid in helping people pass chemical exam
2	All current services are great. I plan on attending future workshops!
3	Basic info-chart of # of sunshine hours required to ripen various grapes
4	Beginner Grower Seminars
5	More close-up photos of trellis systems & Pruning
6	Clearly Defined Spray program & more examples of what's normal (canopy, etc)
7	Clinics on Commercialization
8	Connecting commercial growers with wineries for cooperative ventures-MD Grape industry does not have enough large vineyards that own
	their own machinery (hedgers, leaf pullers, wire spinners, netting machines, spaders, compost spreaders, etc.)
9	Education on disease, parasite and predator control
10	For the hobbyist-some tips on best variety for home growing - Have had lots of problems w/ diseases
11	Grant Writing Course
	Help finding Insurance Company for Pick-Your-Own Liability
13	Help with planning and regulations to start a winery
14	Hold a "New Technique" or "New Idea" Session
15	How to get started - how to deal with wildlife, etc.
16	I feel MGGA is doing all it can-it provides a tremendous service, communication network & educational resource. Vital & I'd be lost without it!
17	Individual planning of additional vines & Acres of Vineyard, Individual assistance with disease control
_	Info on soil samples and site locations
	Keep Joe Fiola doing the great job he is doing
	Keep State Government Under Control-Bring MD Wine Industry Up to speed with other States
	Links to suggested sprays/schedules for different regions/varieties, employment opportunities/work wanted by area
	MGGA does a nice job. I had serious wind damage from Ernesto.
	Winery Establishment Laws need to be simplified- should focus on shipping laws
	More definitive variety recommendations, Active & Structured lobbying strategy
_	More of the Same
-	More on what to do in the field & how that effects the wine in the bottle - and the whole wine making process
27	Need Workers! MGGA/MD Wineries must work with all to champion educational feeder of viticulture (see detailed notes)
28	Newsletter should have annual review from UofMD on Varietal success in MD
29	Offer Odd Varieties of individual grapevines from around the world for test-plot experimentation-similar climates like Spain/Hungary.
30	Pesticide and Weed Control
	Predictable, on-site visitation by State Viticulturist/Pathologist several times during the growing season to help spot potential problems
32	early. I.e. nutrition, pathology, canopy management.
33	More info/research on Winter-kill, crown gall, lack of production
	Source of Clean Vines
35	Spray Clinic & info on New Chemicals for late season problems (Stylet/Neem/Wasp sprays)
36	Tell Members about Equip Suppliers (GW Kent-winemaking, Southern States-Sprayers, and Alternatives to Sulfites (experimenting
27	w/Hydrogen Peroxide this year) also Alternative - Mag Oxide and Captan/Imidan.
37	Varietal Research for Eastern Shore Red, Maryland Labor Crew essential Variety Character, Farm Credit is a good source for funding
39 40	Very Useful at Present Vineyard Consultant
41	Organized Visit to a Commercial Winery
-	We appreciate status reports on the fall out in MD from the Supreme Court & results of varietal research
	Web Forum, Site Visits
-	Where to purchase quality vines. How to make wine for home use only.
	Wine Testing Lab
_	Winemaking Seminar, Spray Schedule Info, Clinics during growing season (thinning, hedging, timing)
47	Winery Development
_	Grant Assistance
	3-3-1

