

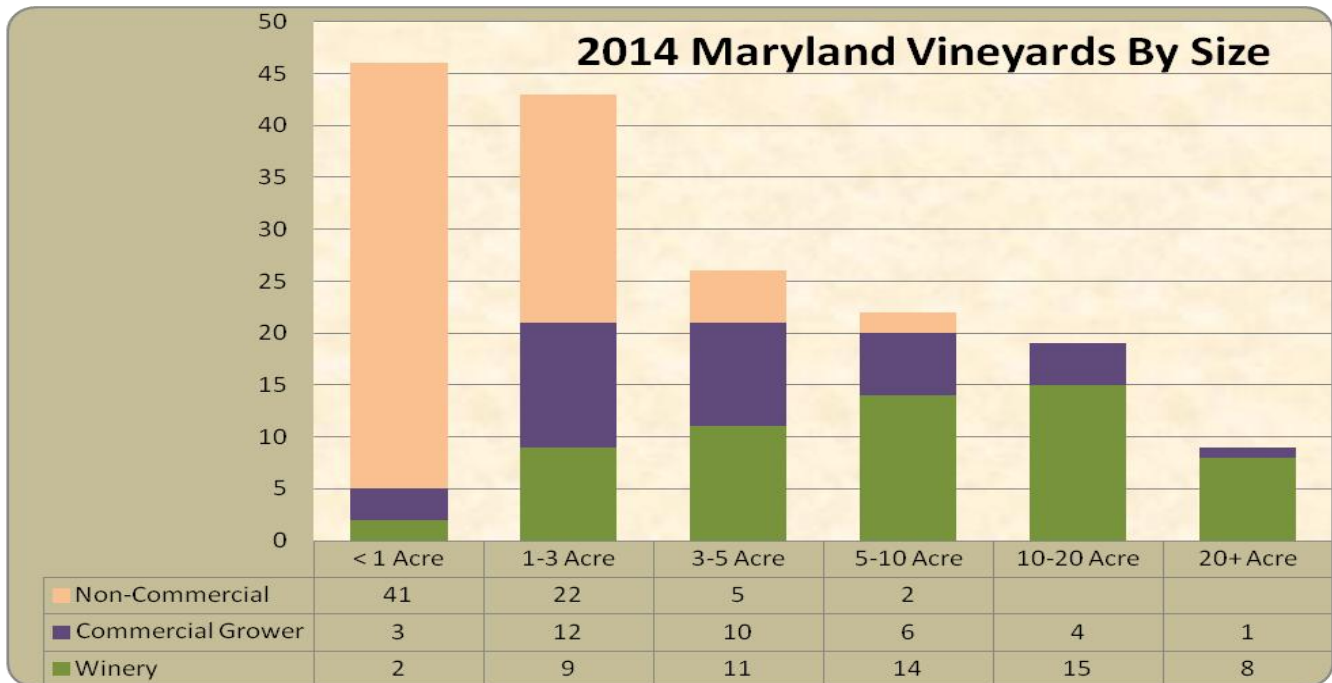
## The 2014 Maryland Vineyard Survey

The 2014 Maryland Vineyard survey was distributed in April, 2015 to approximately 250 Maryland Grape Grower and Maryland Winery Association members. Growers were asked to report on their 2014 harvest year. Of the membership, 201 individuals responded, representing 79% of the total group. This survey was particularly focused on determining the degree to which wineries were able to either produce or secure Maryland grown grapes to meet their wine production needs. Because of this, a greater effort (follow-up phone calls, emails, etc.) was extended on securing responses from each of the 71 wineries. All but five of the wineries participated in the survey and logical estimates were used to incorporate their missing data into the totals.

Results indicate that the industry is continuing to grow at a rapid rate. In the last four years, 25 new Maryland wineries have opened and there's been an increase in the number of commercial grape growers (individuals who sell grapes to wineries but do not own a winery). During that four year period there was a 43% increase in Maryland vineyard acreage and an 84% increase in grape production.

<b>MARYLAND GRAPE INDUSTRY GROWTH</b>					
	<b>2001</b>	<b>2006</b>	<b>2008</b>	<b>2010</b>	<b>2014</b>
Total Vineyards	75	121	132	150	165
Commercial (Non-Winery) Vineyards	Not Available	23	22	29	36
Wineries	12	26	33	46	71
Vineyard Acres	212	431	535	601	858
Total Maryland Harvest Tons	Not Available	656	637	949	1748

In 2008 and 2009 the number of commercial plantings grew substantially as a result of available funding from the Maryland Capital Assistance Grant. In 2010 there were 34 vineyards that had five or more acres, by 2014 that figure jumped to 50. This shift towards larger vineyards is reflected in the 2014 average of 5.2 acres per vineyard, up from 4 acres in 2010, and the increase from 1.6 tons per acre to 2 tons per acre. In 2014, Wineries averaged 2.2 tons per acre with an average vineyard size of 10.2 acres. Ninety percent (90%) of winery acreage is in full production and commercial growers had 76% of their acreage in production. Growers report an additional 107 acres will be planted in spring of 2015, 46 by wineries.



Over the next two years, the survey suggests the addition of 34 new wineries and 15 more commercial grape growers, some which will become wineries. Of the 34 individuals who plan on opening a winery, seven currently sell grapes to wineries, twelve anticipate being able to sell grapes within the next two years and six do not plan on growing grapes. If projections are met, there will be over 100 Maryland wineries by the end of 2017.

Membership Future Plans	Grand Total	Plan to be a Commercial Grower by 2017	Plan to be a Winery by 2017
Currently Don't Grow Grapes	29	0	6
Non-Commercial Grower	70	15	21
Commercial Grower	36	n/a	7
Bonded Winery	71	n/a	n/a
<b>Grand Total</b>	<b>201</b>	<b>15</b>	<b>34</b>

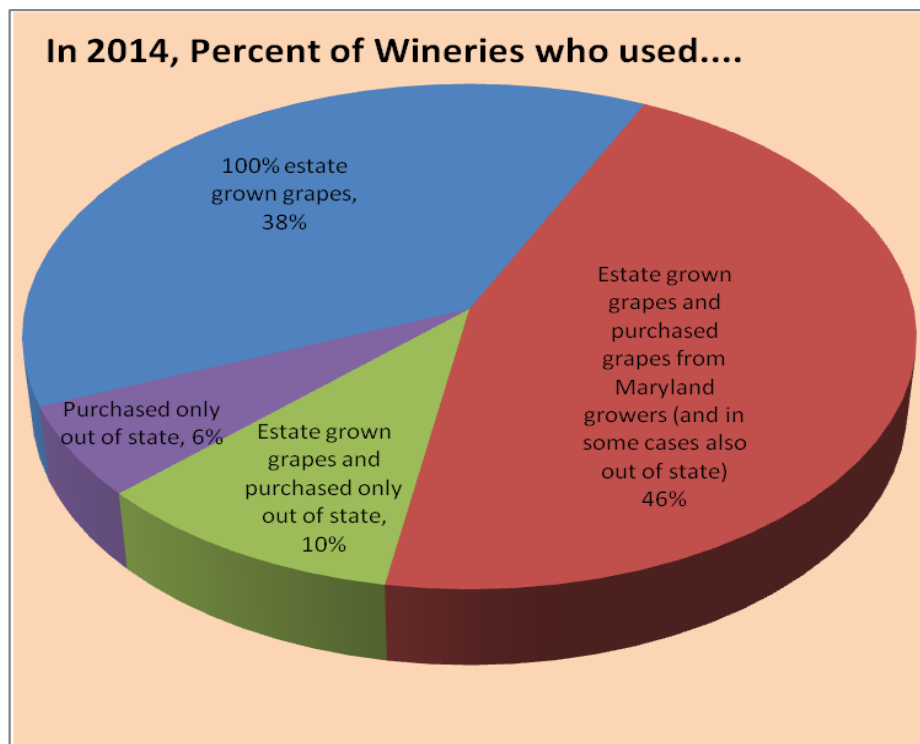
The survey identified 165 vineyards across the state, representing 858 acres. Of that, 777 acres is in commercial production. Wineries own 71% of the total Maryland vineyard acreage.

<b>Maryland Vineyard Acreage</b>				
<b>Year</b>	<b>Non-Commercial</b>	<b>Commercial Grower</b>	<b>Winery</b>	<b>Total</b>
2006	70	121	242	432
2008	121	130	284	535
2010	70	126	405	601
2014	81	170	607	858

There is a vineyard in every Maryland county and a winery in 20 of the 23 counties. Twenty five percent (25%) of Maryland’s vineyard acres are in Frederick county, followed by Queen Anne’s, Carroll, and Baltimore counties.

<b>MARYLAND VINEYARDS</b>	<b>2014 ACRES</b>			
	<b>Non-Commercial</b>	<b>Commercial Grower</b>	<b>Winery</b>	<b>Total</b>
<b>Total</b>	<b>81</b>	<b>170</b>	<b>607</b>	<b>858</b>
Allegany		2.5		2.5
Anne Arundel	0.5	0.5	27.0	28.0
Baltimore	5.8	10.0	52.5	68.3
Calvert	5.5	4.1	28.5	38.1
Caroline	10.5	5.0		15.5
Carroll	7.0	20.0	53.0	80.0
Cecil	1.0		40.5	41.5
Charles	1.6	3.0		4.6
Dorchester	2.5		13.0	15.5
Frederick	13.5	1.5	201.0	216.0
Garrett			1.5	1.5
Harford	0.5	3.0	23.0	26.5
Howard	5.0		4.0	9.0
Kent	1.5	5.5	10.0	17.0
Montgomery	4.6	11.5	24.0	40.1
Prince George's	10.6	7.0	2.0	19.6
Queen Anne's	2.5	48.0	38.0	88.5
Somerset	3.0			3.0
St. Mary's	1.0	24.5	27.0	52.5
Talbot	0.2	4.0	9.0	13.2
Washington	4.5	19.5	35.0	59.0
Wicomico			13.0	13.0
Worcester			4.5	4.5

Of the 71 wineries, 12 do not have a vineyard, and 3 of the 12 do not make grape wine, only cider and/or mead. Of the 68 wineries that produce grape wine, 38% make wine from only their own estate grown grapes. The remaining 62% either don't grow grapes or choose to supplement their harvest by purchasing grapes, primarily from other Maryland growers. Approximately 2,700 tons of grapes were used in the production of 2014 Maryland wine, of which 61.5% was grown in Maryland (up from 53% in 2010). MWA and MGGA have rolled out a web program to connect Maryland buyers and sellers to make the in-state exchange of grapes easier, but some buyers and sellers still face difficulty sourcing or selling grapes, primarily because of specific varietal availability or demand.



There was an 84% increase in Maryland production tonnage from 2010 to 2014. Commercial growers provided 18% of the 2014 harvest (300 tons) to supplement the winery harvest (1,346 tons).

	2006	2008	2010	2014
Maryland Tons Sold to Maryland Wineries	224	172	195	370
From Commercial Growers				300
From Other Wineries				70

Although the current survey did not collect information about grape varieties, we know from previous results that there are more than 90 varieties of grapes planted in Maryland. The most numerous varieties include Cabernet Sauvignon, Chardonnay, Merlot, Cabernet Franc, Chambourcin, and Vidal Blanc, with red Vinifera grapes make up approximately half of all the planted acres. Based on 2011 plantings, trending varieties include Gruner Veltliner, Albarino, Melody, Sauvignon Blanc, Syrah, Petit Verdot, Malbec, and Cabernet Franc.