

## The 2010 Maryland Vineyard Survey

KEY MARYLAND VINEYARD STATS FOR 2010	
Total MGG/MWA Surveys Distributed: <b>240</b>	Total Vineyards: <b>150</b>
Total Survey Participation Rate: <b>84%</b>	Total Vineyard Acres: <b>601</b>
Total Wineries: <b>46</b>	Total Vines: <b>525,104</b>
Total Commercial Growers (Excl wineries): <b>29</b>	Total Maryland Tons Harvested: <b>949</b>

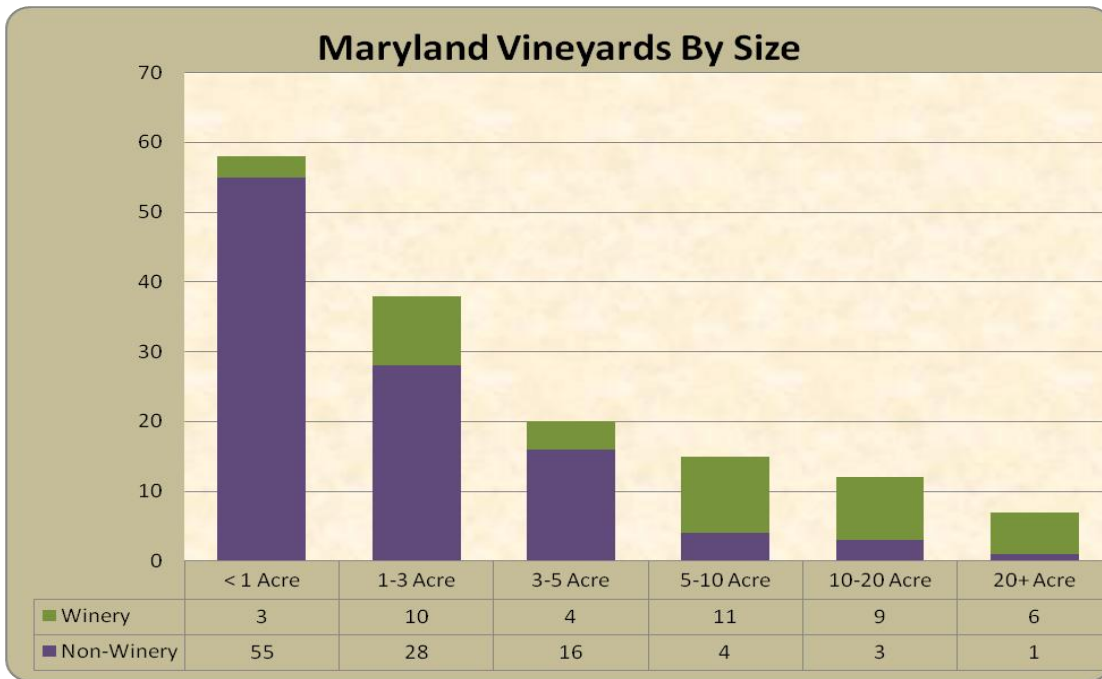
In 2001, we conducted the first Maryland vineyard survey. At that time there were 12 Maryland wineries, 75 vineyards and a total of 212 vineyard acres. In 2006, 2008 and 2010 we've followed-up with additional surveys. Over the last nine years we've seen amazing growth in the industry.

The 2010 Maryland Vineyard survey was distributed to approximately 240 Maryland Grape Grower Association members and wineries in November of 2010. Responses were received from 84% of the group.

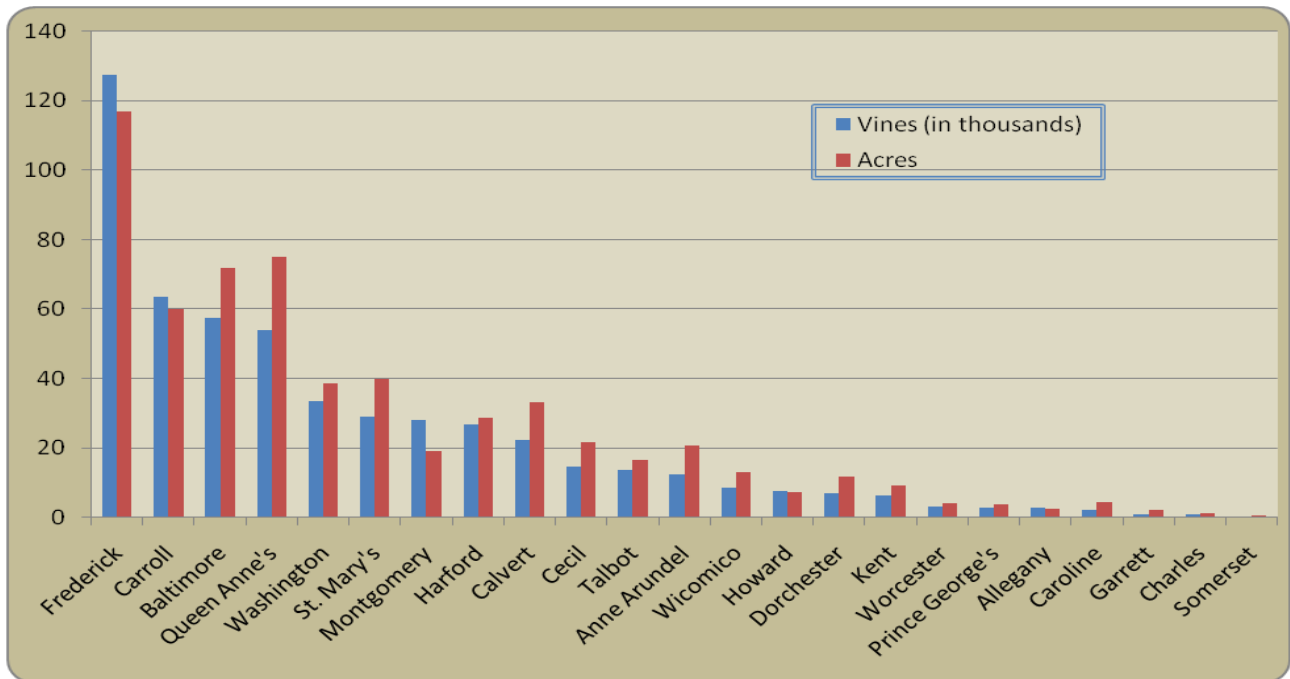
Results indicate that compared to the most recent survey in 2008, fewer new growers are entering the industry, but despite the economic downturn existing growers are continuing with their plans to become commercial growers and wineries. By the end of 2015 there will be an additional 26 wineries, six of which will be started by existing commercial growers (growers who sold grapes to a winery in 2010).

Membership Future Plans	Total Responses	Plan to be a Commercial Grower by 2015	Plan to be a Winery by 2015
Currently Don't Grow Grapes	41	9	1
Non-Commercial Grower	78	10	19
Commercial Grower	29	n/a	6
Bonded Winery	46	n/a	n/a
Out of State Grower, Etc.	5	n/a	n/a
<b>Grand Total</b>	<b>199</b>	<b>19</b>	<b>26</b>

The survey identified 150 vineyards across the state, representing 601 acres and 525,000 vines. That is a 19% increase in vines and a 12% increase in acreage over the two year period since the 2008 survey. Growers also project a 14% acreage increase from 2010 to 2011, with the majority of the new plantings occurring at non-winery vineyards. There are 28 vineyards that have more than 5000 vines, 21 are wineries and 7 are non-winery commercial growers.



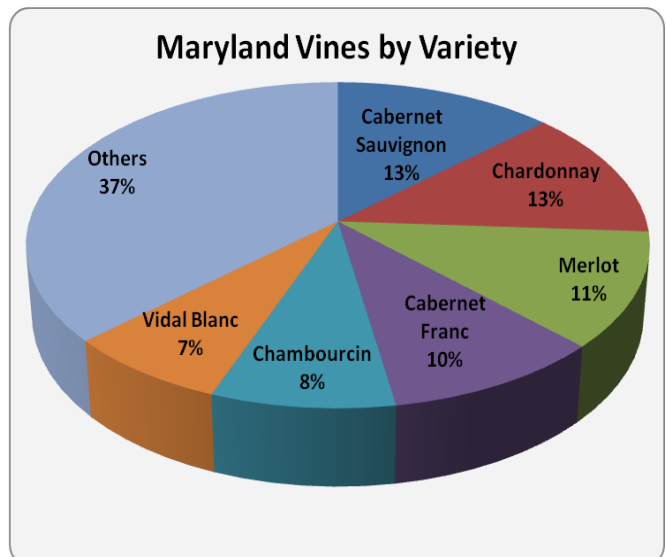
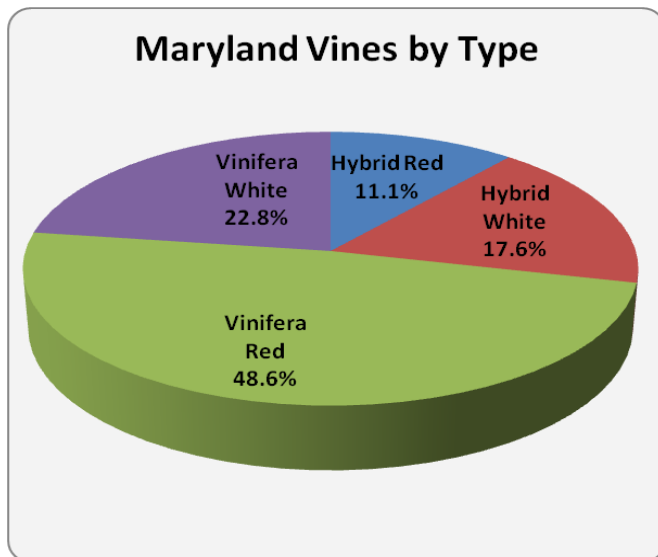
There are approximately 90 varieties of grapes planted in Maryland and there is a vineyard in every Maryland County. The majority of grape vines are grown in Frederick County (24%), followed by Carroll (12%), Baltimore (11%) and Queen Anne’s Counties (10%). If measured by acreage, vs. vines, Frederick (19%) remains the leader, followed by Queen Anne’s (12.5%), Baltimore (11.9%), and Carroll (10%).



Statewide, we’ve seen an increase from 668 vines per vineyard acre in 2001 to the present 874 vines per acre in 2010, and the trend is definitely shifting toward closer spacing, as the 2011 plantings will be closer to 1,133 vines per acre. The current average for the Wineries is 938 vines per acre.

MARYLAND VINEYARDS	ACRES				VINES			
	Non-Commercial	Commercial Grower	Winery	Total	Non-Commercial	Commercial Grower	Winery	Total
<b>Total</b>	<b>70.1</b>	<b>126.1</b>	<b>405.2</b>	<b>601.4</b>	<b>52,378</b>	<b>92,679</b>	<b>380,047</b>	<b>525,104</b>
Allegany		2.5		2.5		2,700		2,700
Anne Arundel	2.7		18.0	20.7	3,080		9,300	12,380
Baltimore	4.5	10.0	57.2	71.7	2,292	6,000	49,239	57,531
Calvert	4.1	1.5	27.5	33.1	3,560	1,168	17,550	22,278
Caroline	1.0	3.5		4.5	500	1,776		2,276
Carroll	4.5	21.7	34.0	60.1	3,455	16,658	43,275	63,388
Cecil	5.1		16.5	21.6	6,580		8,175	14,755
Charles	0.8	0.5		1.3	654	150		804
Dorchester	0.1	0.8	11.0	11.9	50	350	6,655	7,055
Frederick	9.2	2.0	105.7	116.9	6,270	1,850	119,415	127,535
Garrett			2.0	2.0			1,000	1,000
Harford	5.5	2.7	20.5	28.7	3,550	2,850	20,445	26,845
Howard	2.4		5.0	7.4	1,225		6,500	7,725
Kent	6.1	3.0		9.1	4,400	1,843		6,243
Montgomery	2.6	4.0	12.6	19.2	1,262	3,200	23,523	27,985
Prince George's	1.8	2.0		3.8	1,560	1,247		2,807
Queen Anne's	4.0	45.7	25.3	74.9	2,823	33,750	17,250	53,823
Somerset	0.3			0.3	124			124
St. Mary's	6.3	14.0	19.5	75.8	4,950	9,372	14,820	29,142
Talbot	3.3	9.3	4.0	16.6	1,709	8,500	3,400	13,609
Washington	5.6	3.0	30.0	38.6	4,110	1,265	28,000	33,375
Wicomico	0.4		12.5	12.9	200		8,400	8,600
Worcester			4.0	4.0			3,100	3,100

Red Vinifera grapes make up nearly half of all the planted acres. The top six varieties remain unchanged since 2006: Cabernet Sauvignon, Chardonnay, Merlot, Cabernet Franc, Chambourcin, and Vidal Blanc. Those six varieties represent more than 60% of all Maryland grapes in the ground and also more than 60% of the 2010 harvest tonnage.



The 2011 plantings will be 87% Vinifera and 66% red varieties. Cabernet Franc, Chardonnay, Albarino, Syrah, Merlot and Petit Verdot will make up the majority of the new vines going in the ground this year. Eight varieties will see more than a 25% increase based on estimated 2011 plantings; Gruner Veltliner, Albarino, Melody, Sauvignon Blanc, Syrah, Petit Verdot, Malbec, and Cabernet Franc.

MARYLAND STATEWIDE VARIETAL SUMMARY (500+ Vines)				
Variety	2010 Varieties Reported	Est. 2011 New Vines	Est. 2011 Total Vines	% Increase
<b>TOTAL REPORTED</b>	<b>498,655</b>	<b>88,274</b>	<b>586,929</b>	<b>17.7%</b>
Cabernet Sauvignon	65,313	4,375	69,688	6.7%
Chardonnay	64,328	11,606	75,934	18.0%
Merlot	57,001	7,953	64,954	14.0%
Cabernet Franc	49,788	13,602	63,390	<b>27.3%</b>
Chambourcin	44,051	3,376	47,427	7.7%
Vidal Blanc	37,079	2,744	39,823	7.4%
Pinot Gris	18,801	2,500	21,301	13.3%
Syrah/Shiraz	18,208	8,500	26,708	<b>46.7%</b>
Petit Verdot	16,654	5,800	22,454	<b>34.8%</b>
Traminette	16,546	2,052	18,598	12.4%
Barbera	13,739	1,701	15,440	12.4%
Seyval Blanc	14,542	876	15,418	6.0%
Viognier	10,923	1,000	11,923	9.2%
Cayuga	10,408		10,408	0.0%
Pinot Noir	7,775		7,775	0.0%
Gewurztraminer	7,505		7,505	0.0%
Sangiovese	6,417	50	6,467	0.8%
Albarino Fore	3,802	10,812	14,614	<b>284.4%</b>
Norton	3,501		3,501	0.0%
Malbec	3,217	1,000	4,217	<b>31.1%</b>
Sauvignon Blanc	3,197	3,052	6,249	<b>95.5%</b>
Niagra	3,006		3,006	0.0%
Vignoles	2,745		2,745	0.0%
Concord	2,288		2,288	0.0%
Chancellor	1,514		1,514	0.0%
Zinfandel	1,421		1,421	0.0%
Petit Manseng	1,367		1,367	0.0%
Melody	1,200	2,000	3,200	<b>166.7%</b>
Villard Blanc	1,103		1,103	0.0%
Montepulciano	1,000		1,000	0.0%
Riesling	981		981	0.0%
Gruener Veltliner	900	4,700	5,600	<b>522.2%</b>
Nebbiolo	843	25	868	3.0%
Bianca	802		802	0.0%
Reliance	663		663	0.0%
Chardonnay	653		653	0.0%
Pinot Blanc	636		636	0.0%
<b>Maryland Varieties with fewer than 500 vines include (in descending order):</b>				
Noiret	St. Vincent	Marsanne	Chelois	Columbard
Steuben	Landot	Golden Muscat	Verdelho	Counoise
Foch	Semillon	Roussanne	Leon Millot	Durif
DeChaunac	Dolcetto	Grenache	Catawba	Negro Amaro
Linae	Cynthiana	Touriga Nacional	Fiano	Souzao
Frontenac	Carmenere	Swenson Red	Viozinho	Vernaccia
Mars	Pinotage	Aglianico	Gamay Noir	Primitivo
Vanessa	Lemberger	Tannat	Hibernal	Malvasia Blanca
Rubired	Petit Sirah	Tinto Cao	Verdejo	Canadice
	Mourvedre	Baco	Aleatico	Graciano

There has been more than a 200% increase in Maryland vineyard acreage since 2001 and the industry is starting to see an increase in the ability of Maryland growers to meet the Maryland winery demand. Winery acreage accounts for the growth due to: 1) new wineries, 2) commercial growers that became wineries, and 3) larger plantings at existing wineries.

<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	106	126	405	637

In 2008, 1.25 tons of grapes had to be purchased out of state for every ton that was produced in Maryland, but in 2010 the figure was .89 tons purchased for each ton grown. Growers harvested more Maryland grapes than were purchased out of state, meeting 53% of the winery production needs. There was a 49% increase in total Maryland tonnage from 2008 to 2010. Commercial growers provided 21% of the 2010 harvest (195 tons) and 79% was Winery estate grown (754 tons).

Estimates for the Commercial Grower's 2011 harvest suggests a 57% increase over 2010. Much of this is the result of the additional 2008 and 2009 plantings partially funded by the Maryland Capital Assistance Grant.

	<b>2006</b>	<b>2008</b>	<b>2010</b>	<b>2011 Estimate</b>
Maryland Tons Sold to Maryland Wineries	224	172	195	306

<b>Varieties Sold by Maryland Commercial Vineyards to Maryland Wineries</b>			
	<b>Commercial Growers</b>	<b>Tons Sold to Maryland Wineries</b>	<b>Average Price Paid by Maryland Winery</b>
<b>TOTAL</b>	<b>29</b>	<b>195</b>	<b>1337</b>
Vidal Blanc	13	36.7	1,086
Chambourcin	13	30.4	1,070
Merlot	3	27.6	1,500
Chardonnay	7	18.3	1,508
Cabernet Sauvignon	6	17.3	1,867
Traminette	5	14.7	1,121
Seyval Blanc	4	13.4	1,051
Barbera	2	10.0	1,592
Cabernet Franc	9	7.1	1,828
Villard Blanc	1	4.0	-
Sangiovese	1	3.6	-
Pinot Gris	3	2.9	1,600
Cayuga	2	2.7	1,400
Chancellor	1	2.6	-
Pinot Noir	2	1.2	1,800
Misc. Varieties < 1 ton	-	2.0	-

There is no doubt that the rapid growth in the Maryland wine and grape industry has been bolstered by the generous grants from the Maryland Wine and Grape Promotion Fund, administered by the Maryland Department of Agriculture. This, coupled with the educational and technical support provided through the University of Maryland Extension and the on-going activities and support of the Maryland Wineries and Maryland Grape Growers Associations will continue the statewide growth trend.

<b>MARYLAND GRAPE INDUSTRY GROWTH</b>					
	<b>2001</b>	<b>2006</b>	<b>2008</b>	<b>2010</b>	<b>2011 Forecast</b>
Total Vineyards	75	121	132	150	153
Commercial (Non-Winery) Vineyards	Not Available	23	22	29	33
Wineries	12	26	33	46	53
Vines	141,686	296,054	440,175	525,104	617,646
Vineyard Acres	212	431	535	601	683
Total Maryland Harvest Tons	Not Available	656	637	949	1200+