

**2000
New York
WINERY SURVEY**

2000 NEW YORK WINERY SURVEY

Compiled and Issued by

NEW YORK AGRICULTURAL STATISTICS SERVICE
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DEPARTMENT OF AGRICULTURE AND MARKETS
DIVISION OF STATISTICS

Cooperating With

NEW YORK WINE AND GRAPE FOUNDATION
UNITED STATES DEPARTMENT OF AGRICULTURE
NATIONAL AGRICULTURAL STATISTICS SERVICE

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SURVEY DESCRIPTION

Objectives

The 2000 Survey of New York Wineries provides data to help determine the economic impact of the wine industry in New York State by updating the data collected in the 1998 Survey of New York Wineries. In trying to establish these measures, the survey collected information on the amount of wine produced in New York, the total capacity for wine making, some measures of price, value and distribution of product sold, indications of tourism associated with the wine industry, some measures of taxes paid on wines, and some information on investment and expenses of the wineries.

This special study of the wine industry was done in coordination with the New York Wine and Grape Foundation.

Survey Design and Procedures

One questionnaire was used to collect all the information desired from all wineries. With cooperation of the New York Wine and Grape Foundation and other industry representatives, a questionnaire was developed to obtain data pertinent to the industry. In the 1998 survey, the New York Wine and Grape Foundation choose 1985 as the base year from which to measure change. That year happened to be the first year the Wine and Grape Foundation was in existence. To reduce the effort of data collection needed and to make it easier for wineries to report, 1995 and 1997 were selected to show comparisons for current levels of operation. The 2000 survey collected data only for one year to update the 1985, 1995, 1997 series.

Questionnaires were mailed in 2000 to all known wineries. A total of 133 questionnaires were mailed during the entire data collection period. Since the survey form was lengthy and asked for some very detailed data, wineries were not given a closed time frame in which to respond. After several weeks, a second mailing was made to operations who had not returned a report. A few wineries not receiving the initial survey were added to the list. Again, wineries were given an indefinite amount of time to respond. After a reasonable length of time, wineries which still did not return a survey were contacted by telephone or mailed a personal letter encouraging participation. Over the complete period of data collection, usable data from 121 wineries were summarized. The entire data collection period took over a year to complete and final reports were received in the fall of 2001.

Data Tabulation and Estimation

There were 121 questionnaires tabulated for the 2000 Survey of New York Wineries. After questionnaires were returned to the office, they received a manual review for clarity, coding, and a quick check for errors and section completion. Data were keyed and questionnaires were then placed through a thorough computer edit for detailed edit checks and comparisons to industry averages and other standards. After receiving several computer reviews, edited data were summarized and tabulated.

Due to the complexity of the questionnaire, all returned forms were not completely filled out for every item. Some wineries refused to complete some sections of the report due to the personal nature of certain questions. In addition, to maintain confidentiality of operations, some sections of the questionnaire could not be published. To compensate for missing data from operations that refused to report, were inaccessible or went out of business since 2000, data from published and other reliable sources were used to fill in for selected key items on the survey. In this report, tables represented as "State" totals include estimates for missing data. For survey items that could not be estimated, tables represent these data as "survey" totals for reporting wineries.

An attempt was made to provide summaries by Wine Trail and Bureau of Alcohol, Tobacco, and Firearms (BATF) viticulture region. These breakouts were not always possible because publishing data could potentially disclose information about an individual operation. If possible, written permission was obtained from large operations to permit publishing proprietary data.

EARLIEST WINERY DATES BACK TO 1830'S

There were only six wineries established during the period 1830 through 1899. Seven more were established during the period 1900 through 1969. Thus, only 13 of today's 121 wineries responding to this survey operated prior to 1970. From 1970 through 2000, 108 wineries were established in New York. In just the last 11 years there have been 45 wineries established. Of these 45, nine were new since 1998. The surge in the number of wineries is the direct result of the passage of the New York Farm Winery Act of 1976.

Number of Wineries Reporting by Wine Trail and Year Established

Wine Trail	1830 to 1899	1900 to 1969	1970 to 1979	1980 to 1984	1985 to 1989	1990 to 1997	1998 to 2000	Total
Long Island Wine Council	1	-	1	4	5	11	1	23
Shawangunk Wine Trail	1	-	1	2	1	2	-	7
Dutchess Wine Trail	-	-	2	-	1	-	1	4
Cayuga Wine Trail	-	-	-	5	3	4	-	12
Seneca Lake Wine Trail	-	-	3	3	9	8	2	25
Keuka Lake Wine Trail	-	1	1	1	3	2	1	9
None	4	6	6	7	5	9	4	41
Survey Total	6	7	14	22	27	36	9	121

EIGHTY-TWO PERCENT OF WINERIES HAVE FARM LICENSE

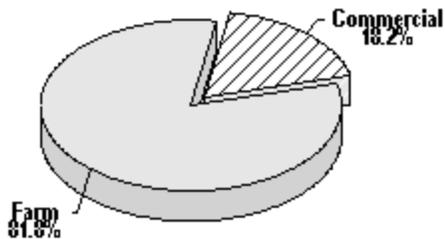
New York wineries are classified as either being a commercial winery or farm winery depending on the type of state license issued. Of the 121 wineries responding to this survey, 22 had a commercial license and 99 had a farm license.

Farm wineries came into existence as a result of the New York State Farm Winery Act of 1976. Wineries had been required to sell 95 percent of their wines through distributors. The Farm Winery Act permitted wineries of a limited size to sell their wines directly to consumers. This encouraged the establishment of small wineries throughout the major grape growing regions of the state.

Wineries, by Type of License, 2000

License	Number of Wineries
Commercial	22
Farm	99
Survey Total	121

Number of Wineries and Wine Production, by Type of License, 2000



Number of Wineries



Wine Production

TWO-THIRDS OF WINERIES ON INTERNET

Over two-thirds of the 121 New York wineries reporting on this survey had a Home Page on the world wide web. In 1997 only one-third of wineries had a Home Page. The percentage of wineries with a Home Page varied from 44 percent in the Lake Erie Region to 90 percent in the Cayuga Lake Region. On Long Island 78 percent reported having a Home Page. In the Finger Lakes Region 65 percent reported having a Home Page. The Hudson River Region recorded 61 percent having a Home Page. Fifty-six percent of the wineries not included in a BATF viticulture area had a Home Page.

Wineries with an Internet Home Page, by BATF Region, 2000

BATF Region	Wineries Reporting	
	Home Page	All Wineries
	<u>Number</u>	
Long Island	21	27
Hudson River	11	18
Cayuga Lake	9	10
Finger Lakes	31	48
Lake Erie	4	9
All Other	5	9
Survey Total	81	121

WINERIES ACCOUNT FOR 11 PERCENT OF NEW YORK GRAPE ACREAGE

For the 2000 New York Winery Survey, 50 wineries reported operating vineyards totaling 3,312 acres, down from 3,400 acres in 1997. The largest acreage was reported from the Finger Lakes Region vineyards. The estimate of bearing acreage for New York in 2000 totaled 31,500 acres. The 121 wineries also purchased 39,259 tons of grapes from 518 producers in New York. In 1997, 37,500 tons were purchased from 482 producers. In 2000, the tons of grapes utilized in all New York wineries totaled 41,000 tons.

Vineyard Operations and Purchases, by BATF Region, 2000

Category	BATF Region						
	Long Island	Hudson River	Cayuga Lake	Finger Lakes	Lake Erie	All Other	Survey Total
	Number						
Wineries Reporting	27	18	10	48	9	9	121
Wineries with Vineyards	10	8	6	24	2	*	50
	Acres						
Acres of Grapes at Vineyards	730	127	230	2,078	147	*	3,312
	Number						
Growers Purchased From	13	15	40	362	85	3	518
	Tons						
Tonnage Purchased	284	190	574	31,031	7,169	11	39,259

* Included in Finger Lakes Region

38,300 TONS OF NEW YORK GRAPES USED IN 1997

In the 1998 New York Winery Survey, wineries were asked how many tons of grapes were used during 1997 and their projections for usage in 1998 and 2002. Wineries used 38,300 tons of New York grapes in 1997. (Grapes grown in out-of-state vineyards are not included in this total.) By year 2002 expectations are that usage will increase one-third to 50,300 tons. During 1997, Native American varieties accounted for 74 percent of the total New York grapes used. Usage of these varieties is expected to increase the most by year 2002, from 28,200 tons in 1997 to 35,800 tons. This is a 39 percent jump in usage. French American varieties are second in usage at 6,900 tons in 1997. Wineries anticipate a 15 percent increased to 9,700 tons in year 2002. Third are Vinifera varieties at 3,200 tons in 1997. Usage of these varieties is projected to increase 1,600 tons, 33 percent, in year 2002.

Tons of New York Grapes Used, by Year and Variety ^{1/}

Variety	1997	Projected 1998	Projected 2002	2002 as percent of 1998
Native American	28,200	25,700	35,800	139
French American	6,900	8,400	9,700	115
Vinifera	3,200	3,600	4,800	133
Survey Total	38,300	37,700	50,300	133

^{1/} Source: 1998 New York Winery Survey.

TOTAL RECEIPTS DOWN FROM 1999 TO 2000

Wineries and processing plants in New York crushed 192,630 tons of grapes in 1999 and 144,230 tons in 2000. About one-third of that total was used in wine production. Native American varieties accounted for 92 percent of the tonnage in 1999 and 90 percent of the total in 2000. Even though total tonnage was down from 1999 to 2000, the amount of vinifera grapes delivered showed a good increase. Receipts in 1999 were very high due largely to a very high production that year. Production increased 64 percent from 1998 then dropped 25 percent in 2000 to near average levels.

Grapes Processed in New York Wineries and Processing Plants 1/

Variety	Total Receipts <u>2/</u>		Primary Utilization			
	1999	2000	Wine		Juice and Other	
			1999	2000	1999	2000

Thousand Tons

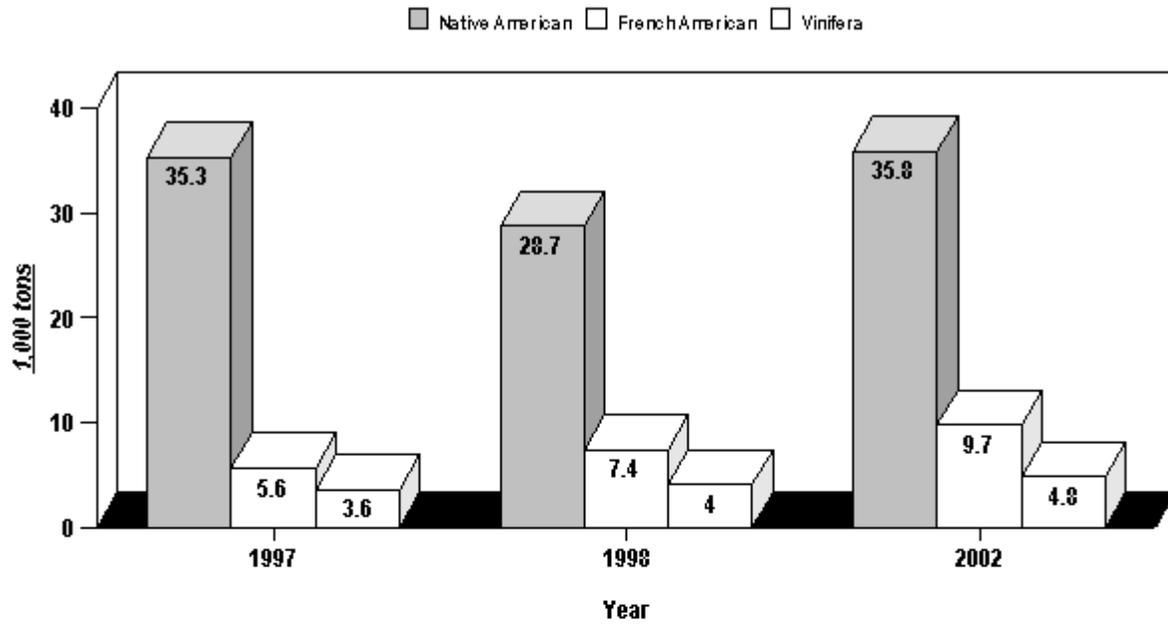
Native American	177.4	130.0	46.3	34.0	131.2	95.6
French Hybrids	8.3	7.3	5.6	7.4	.3	.4
Vinifera	3.9	4.7	3.9	4.6	-	<u>3/</u>
All Other	3.0	2.6	3.0	2.6	-	<u>3/</u>
 State Total	 192.6	 144.2	 61.1	 48.1	 131.5	 96.1

1/ Source: New York Agricultural Statistics Service.

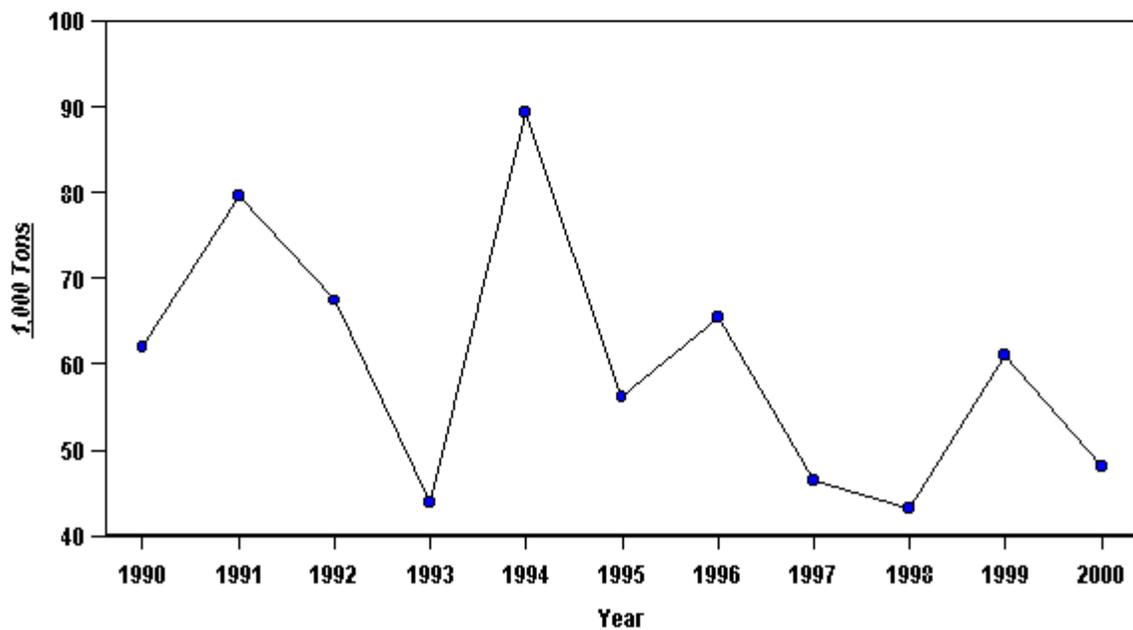
2/ Includes tonnage from other states and Canada.

3/ Included in total.

1997 Use and Projected Use of Grapes for Wine by Variety



Grapes Processed in New York for Wine



Source: New York Agricultural Statistics Service.

2000 WINE PRODUCTION TOTALS 40.8 MILLION GALLONS

New York wine production climbed to 40.8 million gallons in 2000, an increase of 29 percent from 1997 and 65 percent above 1985. Capacity increased also, but at a slower pace. In 2000, wineries had production capacity of 34.7 million gallons, up two percent from 1997 and 23 percent above 1985. As a result of production increasing more than capacity, wineries were utilizing 100 percent of their capacity in 2000 compared to 94 percent in 1997 and only 88 percent in 1985.

Commercial wineries produced 39.2 million gallons of wine in 2000, 29 percent more than in 1997 and 61 percent more than in 1985. Commercial wineries accounted for 96 percent of the total wine produced in New York during 2000, the same as in 1997. Production capacity was 32.4 million gallons in 2000, up 2 percent from 1997. During 2000, commercial wineries were utilizing 100 percent of their capacity, an increase from 96 percent in 1997.

Farm wineries produced 1.6 million gallons of wine in 2000, up 23 percent from 1997 and more than three times the amount produced in 1985. Capacity, at 2.3 million gallons increased 10 percent from 1997 and more than doubled since 1985. Farm wineries utilized 70 percent of their production capacity in 2000, 62 percent in 1997 and 50 percent in 1985.

Capacity for wineries belonging to the Long Island Wine Trail was 844,000 gallons, up from 723,000 in 1997. Production for this wine trail rose to 618,000 gallons in 2000 from 492,000 in 1997. Capacity and production for this wine trail led all wine trails in 2000. Next largest was the Seneca Lake Wine Trail with a capacity in 2000 of 778,000 gallons and production of 546,000 gallons up from the 1997 capacity of 633,000 gallons and production of 401,000 gallons.

NEW YORK WINE CAPACITY OVER 34 MILLION GALLONS

Wine production capacity was 34.7 million gallons in 2000. Of this capacity only four percent was in oak barrels, once the primary material used in wine making. This increased from three percent in 1997. Stainless steel and other materials accounted for the remaining 96 percent in 2000 and 97 percent in 1997.

Farm wineries had a production capacity of 2.3 million gallons in 2000. Oak accounted for 18 percent of this capacity, unchanged from 1997. Capacity in oak barrels was nearly five times larger in 2000 than it was in 1985, while stainless steel and other materials about doubled.

Only three percent of commercial winery capacity is oak barrels the same as in 1997. This dropped from eight percent in 1985. Capacity increased to 32.4 million gallons in 2000. Oak barrel capacity was less than half of what it was in 1985.

Capacity, by Type of Container

Year	Capacity		
	State Total	Steel & Other	Oak
	Million Gallons	Percent	
1985	28.2	92	8
1995	33.4	97	3
1997	33.9	97	3
2000	34.7	96	4

Farm Capacity, by Type of Container

Year	Capacity		
	State Total	Steel & Other	Oak
	Million Gallons	Percent	
1985	1.0	92	8
1995	1.8	84	16
1997	2.1	82	18
2000	2.3	82	18

Commercial Capacity, by Type of Container

Year	Capacity		
	State Total	Steel & Other	Oak
	Million Gallons	Percent	
1985	27.2	92	8
1995	31.6	97	3
1997	31.8	97	3
2000	32.4	97	3

Wine Production and Capacity, New York

Year	Commercial		Farm		State Total	
	Capacity	Production	Capacity	Production	Capacity	Production
Million Gallons						
1985	27.2	24.3	1.0	0.5	28.2	24.8
1995	31.6	29.2	1.8	1.2	33.4	30.4
1997	31.8	30.4	2.1	1.3	33.9	31.7
2000	32.4	39.2	2.3	1.6	34.7	40.8

Wine Production and Capacity, by Wine Trail

Wine Trail	1985		1995		1997		2000	
	Capacity	Production	Capacity	Production	Capacity	Production	Capacity	Production
Thousand Gallons								
Long Island	271	217	606	417	723	492	844	618
Shawangunk	363	38	385	51	387	54	438	74
Dutchess	23	11	65	45	67	48	68	38
Cayuga	88	62	221	189	243	199	346	269
Seneca Lake	232	100	529	353	633	401	778	546
Keuka Lake	185	60	261	103	282	113	228	163
None	26,997	24,329	31,299	29,213	31,571	30,426	31,983	39,075
State Total	28,159	24,817	33,366	30,371	33,906	31,733	34,686	40,783

1997 Wine Production, by Appellation ^{1/}

Wine Trail	Appellation on Label			
	BATF Viticultural Area	New York or New York State	American	None
Percent				
Long Island	89	3	8	0
Shawangunk	14	61	25	0
Dutchess	26	74	0	0
Cayuga	98	2	0	0
Seneca Lake	96	4	0	0
Keuka Lake	98	2	0	0
None	1	8	32	59
Survey Total	3	7	31	59

^{1/} Source: 1998 New York Winery Survey.

OVER ONE-HALF OF NEW YORK WINES ARE TABLE WINES

New York wineries produced 21.5 million gallons of table wine in 2000, 53 percent of the total wine produced. Fortified wine production is estimated at 11.9 million gallons 29 percent of the total. Specialty wines were third with 4.8 million gallons, 12 percent of the total followed by sparkling wines at 2.5 million gallons, 6 percent of the total. Desert wines accounted for only 10,000 gallons. Production of these five types of wines as a percent of total wine production has remained fairly constant since 1985 although actual gallons produced has increased for each type. Production of table wines showed the largest increase from 1997. There was a jump in production of 10.3 million gallons from 1997 and 2000. Production of specialty wines increased 2.3 million gallons during the same time period. Sparkling wine production increased 946,000 gallons and dessert wine production increased 3,000 gallons. Fortified wine production decreased 4.5 million gallons.

Wine Production, by Year and Type

Year	Total Wine	Type of Wine				
		Table	Sparkling	Dessert	Fortified	Specialty
Thousand Gallons						
1985	24,817	7,560	1,373	2	13,647	2,235
1995	30,371	12,276	2,088	8	13,066	2,933
1997	31,733	11,246	1,587	7	16,384	2,509
2000	40,783	21,535	2,533	10	11,915	4,790

TABLE WINE TOTALS OVER 21 MILLION GALLONS

Table wine production in 2000 totaled 21.5 million gallons, almost double production in 1997. Red wines accounted for 41 percent of the table wine production in 2000, white wines 27 percent, and rose and blush 32 percent. Rose and blush wines took a dramatic jump between 1997 and 2000 at the expense of red and white wines.

Table Wine Production, by Year and Type

Year	Table Wine Thousand Gallons	Type of Table Wine Percent		
		Red	White	Rose and Blush
1985	7,560	53	39	8
1995	12,276	52	40	8
1997	11,246	50	41	9
2000	21,535	41	27	32

2.7 MILLION PEOPLE VISIT WINERIES

A total of 2.69 million people visited New York wineries during 2000, an increase of 22 percent from 1997 and nearly seven times the number of visitors as during 1985. Wineries in every region of the state recorded steady increases since 1985.

Wineries in the Seneca Lake Wine Trail attracted the most visitors; 849,000 during 2000. This was an increase of 29 percent from 1997 and over 15 times as many visitors as during 1985.

The Keuka Lake Wine Trail registered the largest percentage increase from 1985 to 2000. The number of visitors increased 55 fold in that time period. This wine trail realized a 39 percent increase in visitors from 1997 to 2000.

On Long Island, the number of visitors in 2000, at 535,000, was 15 percent above the number in 1997 and nearly 11 times the number during 1985.

Wineries not registered in a wine trail had 628,000 visitors, 22 percent more than in 1997 and seven times the visitation of 1985.

Winery Visitation by Wine Trail and Year

Wine Trail	Number of Visitors			
	1985	1995	1997	2000

Thousands

Long Island	50	192	466	535
Shawangunk	98	142	158	161
Dutchess	19	28	37	44
Cayuga	64	245	284	358
Seneca Lake	56	515	658	849
Keuka Lake	2	41	79	110
None	95	276	514	628
 State Total	 384	 1,439	 2,196	 2,685

WINERY VISITS MOSTLY OF A GENERAL NATURE

Winery visitors generally came to the wineries for general purposes, according to survey results. General purpose visits accounted for 80 percent of all visitors in 1997 and 83 percent in 2000. However, comments suggest that visitors were attracted to the regions because of existing wine trails even though the trail may not have been hosting an event on any given day. The fact that there were wine trails with maps, signs, etc. drew people to the area. Statewide, the percentage of visits in 2000 of a general nature ranged from 58 percent for the Shawangunk Wine Trail to 98 percent of a general nature for wineries not belonging to a wine trail. General visits accounted for 93 percent of all visits for the Dutchess Wine Trail.

Winery Visitation, by Reason of Visit

Wine Trail	Reason for Visit					
	General Visit		Winery Event		Trail Event	
	1997	2000	1997	2000	1997	2000

Percent

Long Island	79	73	21	24	*	3
Shawangunk	56	58	28	29	16	13
Dutchess	94	93	6	7	*	*
Cayuga	78	86	6	6	16	8
Seneca Lake	83	83	5	4	12	13
Keuka Lake	68	65	7	16	25	19
None	91	98	6	2	3	*
 State Total	 80	 83	 10	 10	 10	 7

* Less than one percent.

**Sales at Tasting Room
Average Sales per Customer**

Wine Trail	Year		
	1995	1997	2000
	<u>Dollars</u>		
Long Island Wine Council	15.45	18.50	12.50
Shawangunk Wine Trail	<u>1/</u>	<u>1/</u>	10.50
Dutchess Wine Trail	10.55	13.05	36.40
Cayuga Wine Trail	10.55	14.40	20.30
Seneca Lake Wine Trail	7.40	8.50	12.30
Keuka Lake Wine Trail	13.35	14.40	17.00
None	12.90	13.60	11.70
Survey Total	11.95	13.80	13.75

1/ Included with Dutchess Wine Trail.

**Sales at Tasting Room
Percentage of Sales by Type**

Wine Trail	1997		2000	
	Wine Sales	Other Items	Wine Sales	Other Items
	<u>Percent</u>			
Long Island Wine Council	95	5	82	18
Shawangunk Wine Trail	<u>1/</u>	<u>1/</u>	88	12
Dutchess Wine Trail	76	24	67	33
Cayuga Wine Trail	80	20	88	12
Seneca Lake Wine Trail	87	13	84	16
Keuka Lake Wine Trail	85	15	77	23
None	87	13	74	26
Survey Total	86	14	81	19

1/ Included with Dutchess Wine Trail.

Percentage of Winery Visitors, by Place of Origin and Wine Trail, 2000

Wine Trail	NY	VT, MA & CT	NJ	PA	MD & VA	Ohio	Other	Unknown
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Percent

Long Island Wine Council	48	6	3	*	*	*	2	39
Shawangunk Wine Trail	45	8	17	4	*	*	5	20
Dutchess Wine Trail	30	*	*	*	*	*	*	67
Cayuga Wine Trail	3	*	*	*	*	*	*	94
Seneca Lake Wine Trail	50	2	2	8	3	3	2	30
Keuka Lake Wine Trail	36	4	*	4	6	3	5	41
None	23	19	10	20	4	8	*	15
Survey Total	35	8	5	9	2	3	2	36

* Less than 2 percent.

WINERY EMPLOYEES

Over one-half (57 percent) of the full time winery employees in 2000 were involved in wine production. Employees involved with the vineyard operation accounted for 13 percent; tasting room, 10 percent; and marketing and sales, 9 percent. Full time employees occupied 81 percent of the jobs involving wine production and 78 percent in marketing and sales.

Most part time workers (46 percent) were involved in the tasting room. Vineyard workers were next at 35 percent, followed by wine production at 12 percent, and marketing and sales at 2 percent.

Of all the employees, part time employees accounted for 85 percent of the jobs in the tasting room and 76 percent in the vineyard operation.

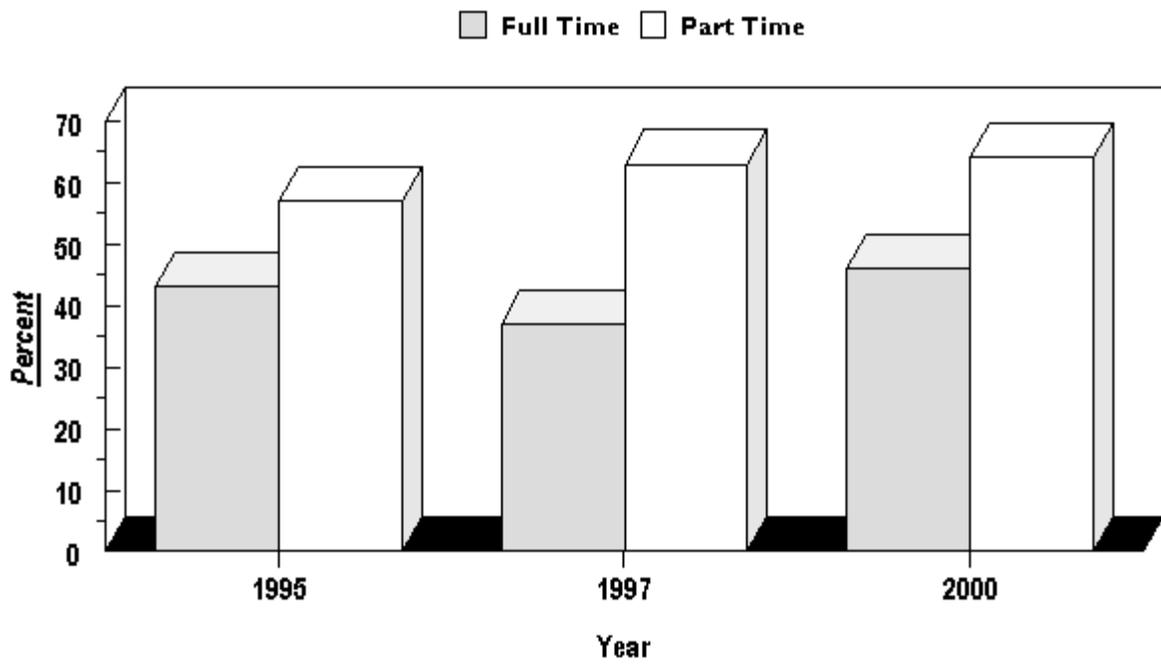
Winery Employment by Primary Task

Task	1997		2000	
	Full Time	Part Time	Full Time	Part Time
	<u>Percent</u>			
Vineyard Operation	19	44	13	35
Wine Production	51	9	57	12
Tasting Room	10	32	10	46
Marketing and Sales	7	3	9	2
Other	13	12	11	5
Survey Total	100	100	100	100

Full- and Part-Time Employees Occupying Each Activity

Task	1997		2000	
	Full Time	Part Time	Full Time	Part Time
	<u>Percent</u>			
Vineyard Operation	20	80	24	76
Wine Production	77	23	81	19
Tasting Room	16	84	15	85
Marketing and Sales	58	42	78	22
Other	38	62	37	63
Survey Total	37	63	46	64

Percentage of Winery Employees Working Full Time and Part Time by Year



NEW YORK SALES STRONG FOR WINE TRAIL WINERIES

Wineries belonging to a wine trail sold from 85 percent to 100 percent of the wine they produced to buyers in New York State. Sales within New York for these wineries has shown an increase since 1997 for all wine trails except Dutchess and Seneca Lake. Dutchess increased it's sales to other states while Seneca Lake sales held steady.

Wineries not belonging to a wine trail sold most of their wine to buyers in other states. New York sales in 2000 accounted for only 5 percent of the wine produced by these wineries, down from 11 percent in 1997.

Percent of Wine Sales by Location and Wine Trail

Wine Trail	1997			2000		
	New York	Other States	Other Countries	New York	Other States	Other Countries

Percent

Long Island	89	8	3	90	9	1
Shawangunk	83	13	4	85	11	4
Dutchess	97	3	*	89	11	-
Cayuga	100	*	-	100	*	-
Seneca Lake	95	5	*	95	5	*
Keuka Lake	87	12	1	98	2	*
None	11	86	3	5	94	1
 Survey Total	 14	 83	 3	 7	 92	 1

* Less than one percent.

Percent of Cases Sold in Region where Produced, 2000

Survey Total	Wine Trail						
	Long Island	Shawangunk	Dutchess	Cayuga	Seneca Lake	Keuka Lake	None

Percent

8	73	84	84	77	8	87	6
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Percent of Cases Sold, by Distribution Channel, by Wine Trail, 2000

Wine Trail	Direct to Consumer	Direct to Restaurants and Stores	Through New York Distributor	Through Out-of-State Distributor	Through Exporter	Other
	Percent					
Long Island	41	29	24	4	*	2
Shawangunk	54	2	21	18	5	-
Dutchess	59	33	-	8	-	-
Cayuga	71	3	26	*	-	-
Seneca Lake	59	15	20	1	*	5
Keuka Lake	63	2	27	*	*	8
None	*	*	*	2	*	98
Survey Total	2	*	1	2	*	95

* Less than one percent.

Percent of Dollar Sales, by Distribution Channel, by Wine Trail, 2000

Wine Trail	Direct to Consumer	Direct to Restaurants and Stores	Through New York Distributor	Through Out-of-State Distributor	Through Exporter	Other
	Percent					
Long Island	51	28	16	3	*	2
Shawangunk	71	2	16	9	2	-
Dutchess	63	31	-	6	-	-
Cayuga	79	2	19	*	-	-
Seneca Lake	67	13	14	1	*	5
Keuka Lake	70	2	19	*	*	9
None	*	*	*	3	*	94
Survey Total	7	1	2	3	*	87

* Less than one percent.

2001 SURVEY OF NEW YORK WINERIES

(For 2000 Data)

The New York Wine & Grape Foundation is conducting this survey to collect updated information about the New York wine industry. This information is needed to measure the current economic situation of the wine industry. Your cooperation with completing the form and returning it promptly is greatly appreciated. Please return your survey in the enclosed postage paid envelope to the NYS Department of Agriculture and Markets, Division of Statistics. Your individual response will remain confidential and only aggregated data will be published by the Division of Statistics.

James Trezise

President, New York Wine & Grape Foundation

Please make corrections to name, address and Zip Code, if necessary.

Section 1 - GENERAL INFORMATION

- | | |
|--|---|
| 1. In what year was your winery established? | Year
<div style="border: 1px solid black; padding: 2px; width: 100px; margin: 0 auto;"> 101
 _ _ _ </div> |
| 2. Is your New York State license Commercial winery? - Farm winery? - 3 | Code
<div style="border: 1px solid black; padding: 2px; width: 100px; margin: 0 auto;"> 102 </div> |
| 3. In which BATF (<i>Bureau of Alcohol, Tobacco, and Firearms</i>) viticultural area is your winery located? (Check one, enter code) | Code
<div style="border: 1px solid black; padding: 2px; width: 100px; margin: 0 auto;"> 103 </div> |
| North Fork, Long Island - 1 Cayuga Lake Region - 4 None - 7
The Hamptons, Long Island - Finger Lakes Region - 5
Hudson River Region - 3 Lake Erie Region - 6 | |
| 4. In what county is your winery located? . . County _____ | Office Use
<div style="border: 1px solid black; padding: 2px; width: 100px; margin: 0 auto;"> 104 </div> |
| 5. Which "Wine Trail" (if any) does your winery belong to? (Check one box, enter | Code
<div style="border: 1px solid black; padding: 2px; width: 100px; margin: 0 auto;"> 105 </div> |
| Long Island Cayuga
Seneca
Dutchess Keuka | |
| 6. Do you have your own "Home Page" on the world wide web?
(Check one box) | Code
<div style="border: 1px solid black; padding: 2px; width: 100px; margin: 0 auto;"> 106 </div> |
| YES - 1
NO - 3 | |

Section 2 - VINEYARD INFORMATION

1. Does your operation have a vineyard?

YES - Continue

NO - Enter code "3", go to question 3

Code

201

1a. In 2000, how many acres of grapes did this operation:

a. Own, rent or lease?

	Bearing acres	Non bearing acres
a. Own, rent or lease?	202	206

2. Please list the top 5 varieties grown in your vineyards and enter the acres of each:

	Variety		Acres
1	_____	.....	+ 8__
2	_____	.....	+ 8__
3	_____	.....	+ 8__
4	_____	.....	+ 8__
5	_____	.....	+ 8__
6	All other _____	.....	+ 8__
		TOTAL	= 899

3. Did you purchase grapes in 2000?

YES - Continue

NO - Enter code "3", go to Section 3

Code

212

4. From how many New York growers did you purchase grapes in 2000? **No.**

213

4a. How many tons of New York grapes did you purchase in 2000? **Tons**

214

1. What was your total **production capacity** for 2000?

Year	Capacity (Gallons)		
	Total	Stainless steel	Oak barrels
2000	301	311	321

2. Record the **gallons** of wine produced by type for 2000.

(This information is available from the Form 702 filed monthly with the BATF)

Year	Total gallons	Total wine by type (Gallons)				
		Table wine	Sparkling wine	Dessert wine <u>1/</u>	Fortified wine <u>2/</u>	Specialty wine <u>3/</u>
2000	304	314	324	334	344	354

1/ Dessert wines refer to harvest and ice wines below 14 percent alcohol.

2/ Fortified wines refer to ports and sherries above 14 percent alcohol.

3/ Specialty wines include fruit wines, honey wines, brandies, wine coolers (wine base not malt base) and others.

3. For **Table Wine** production, break down the total gallons produced for 2000 by the appropriate category.

Year	Table wine produced (Gallons)			
	Total	Red	White	Rose/Blush
2000	307	317	327	337

4. Of the **Table Wine** produced in 2000, report the percentage produced by species of grape.
(Even if the wines are not labeled by variety.)

Variety	Gallons
Native American	360
French-American	361
Vitis Vinifera	362

1. Report the actual or estimated number of visitors to your winery in 2000, and the actual or estimated reasons (catalysts) for their visits.

Year	Total number of visitors	Reason for visits		
		General	Special winery event	Wine trail event
2000	401	411	421	431

2. Report the actual or estimated total dollar sales at your winery in 2000, the average sale per customer (based on your answer to question 1, above), and the actual or estimated percentage of sales of wine versus other items.

Year	Total sales	Average per customer	Sales by type	
			Wine	Other items
2000	404	414	424	434

3. Record the actual or estimated number of visitors to your winery in 2000 by state and country of origin. (The total should equal the "Total Number of Visitors" in question 1, above.)

State/Country of origin	Number	State/Country of origin	Number
New York	437	Virginia	444
Vermont	438	Ohio	445
Massachusetts	439	California	446
Connecticut	440	All Other - United States	447
New Jersey	441	All Other - Foreign	448
Pennsylvania	442	Unknown	449
Maryland	443		

1. Record the total number of **cases** sold by location for 2000.

Year	Total cases sold	Cases sold by location		
		New York	Other States	Other Countries
2000	501	511	521	531

2. Record your **Total Case Sales** in cases and dollars in 2000 at the following locations:

Location	Cases sold	Total dollar sales
Direct to consumer at your winery	540	541
Direct to restaurants and liquor stores	542	543
Through a New York distributor	544	545
Through distributors in other states	546	547
Through importers/distributors in other countries	548	549
Other (<i>Specify</i>) _____	550	551

3. What percentage of your **Total Case Sales** occurred in your general region in 2000?
 (*Long Island, Hudson Valley, Finger Lakes, Lake Erie*)

Percent

552

Section 6 - TAXES PAID

1. How much has your winery paid (or indirectly contributed) to the **Federal** government and **New York State** government in the form of taxes listed below? (Provide your best estimates of State and Federal excise taxes paid by wholesalers, and New York State sales tax (indirect) paid by retailers and restaurants for sales of your wine.)

Federal tax	Dollars 2000	State Tax	Dollars 2000
Direct excise tax	601	Direct excise tax (winery)	617
Excise taxes by wholesalers(estimated) . .	602	Excise taxes by wholesalers estimated) . .	618
		Direct sales tax from winery	619
		Indirect sales tax from retailers and restaurants (estimated)	620
TOTAL	603	TOTAL	621

Section 7 - INVESTMENT AND EXPENSES

1. What was the number of employees and total payroll in your operation in 2000?

Year	Total payroll (Dollars)	Number of paid employees		
		Full-time	Part-time	Total
2000	630	640	650	660

2. Of your total paid employees in 2000, what activities did they perform? (Count each employee only once under their **primary** activity)

Activity	Number of employees		
	Total	Full-time	Part-time
Vineyard operation	643	653	663
Wine production	644	654	664
Tasting room	645	655	665
Marketing and sales	646	656	666
Other	647	657	667

3. What was the **Total Capital Investment** made by you and others in your operation during the past three years?

	Dollars			
	1998	1999	2000	3-year Total
Vineyard Investment	670	673	676	679
Winery Investment	671	674	677	680
TOTAL	672	675	678	681

3a. Have you added any new structures to your winery during the past 3 years?
 (Please check any/all appropriate boxes.)

Tasting Room

720

Warehouse

721

Winemaking Facility

722

Other Please specify: _____

723

4. Are you able to hire reliable workers when needed for your:

Vineyard?

- YES - 1

- NO - 3

Code
740

Winery?

- YES - 1

- NO - 3

741

If **YES**, where and how do you find workers? _____

If **NO**, how do you solve your labor problems? _____

5. What are the most important things New York State can do for you to enhance prosperity and growth of the grape and wine industry?

1. _____

2. _____

3. _____

6. What are your 2 most major concerns for the New York grape and wine industry during the next 5 to 10 years?

1. _____

2. _____

7. Do you have any other comments, concerns or suggestions about the New York grape and wine industry?

This completes the survey. Thank you for your help.

Respondent's Name: _____
Position/Title: _____