

Texas Wine Marketing Research Institute

**College of Human Sciences
Texas Tech University**



A Profile of The Texas Wine and Wine Grape Industry

2004

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Research Report No. 04-01
May, 2005

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Texas Wine Marketing Research Institute

Texas Tech University

The Texas Wine Marketing Research Institute was established at Texas Tech University in 1988. The mission of the Institute is to foster the economic development and growth of the Texas wine and wine grape industry. In achieving this mission through education, research, and service, the Institute works in cooperation with a variety of individuals and organizations including the private sector, other educational organizations, and government officials.

The Institute regularly collects and disseminates information concerning Texas wine and wine grape production, wine sales and wine consumption in Texas, and the industry's economic impacts on the Texas economy. Specific research topics are also examined and include wine tourism, wine sales to restaurants, and retail sales of Texas wines. This information is used by Texas wine grape growers, winery managers, prospective investors, university researchers, industry suppliers, beverage wholesalers, retailers, restaurateurs, and the general public to help make informed decisions concerning this agricultural and beverage industry.

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Acknowledgments

Texas Wineries and Wine Grape Growers

The Texas Wine Marketing Research Institute particularly acknowledges and appreciates the assistance of Texas wine grape growers and wineries in responding to several annual surveys. Their responses have been critical in providing the data that constitute much of this report.

College of Human Sciences, Texas Tech University

The Texas Wine Marketing Research Institute would like to acknowledge the administrators of the College of Human Sciences. Their support and encouragement of the Institute's efforts are appreciated.

Linda Hoover, Ph.D., Dean, College of Human Sciences, Texas Tech University.

Lynn Huffman, Ph.D., Chairperson, Department of Nutrition, Hospitality, and Retailing, College of Human Sciences, Texas Tech University.

Administrators, Texas Tech University

The Texas Wine Marketing Research Institute would like to acknowledge assistance from Chancellor, Dr. David R. Smith; President, Dr. Jon Whitmore; and Vice President for Research, Graduate Studies and Technology Transfer, Dr. Robert M. Sweazy. Their support of research efforts at Texas Tech University is greatly appreciated.

Others

Numerous other people have assisted with the production of this report. Their assistance in providing information and technical assistance is appreciated.

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Executive Summary

An Overview of the Texas Wine and Wine Grape Industry

A major advance for the development of the Texas wine industry began with the recognition of viticulture areas in the state in the early 1970's. Researchers and investors found that Texas has ideal soil and climate conditions for wine grape growing. Texas presently is the fifth largest wine producing state in the nation. By the end of 2004, there were approximately 3,000 bearing acres available for harvest. The number of wineries virtually doubled within the last five years. There are approximately 70 wineries currently open to the public that produce over 1.5 million gallons of wine. Several new wineries are in various stages of development and are expected to open by the end of 2005. While many of the wineries are small producers who concentrate on tourism for the majority of their sales, several of the large wineries have developed state, national, and international markets for Texas wines.

Economic Impact of the Texas Wine and Wine Grape Industry

The growth of the Texas wine and wine grape industry has had significant impacts on the Texas economy. In 2004, the Texas wine industry contributed about \$200 million to the state's economy. Specifically, excise and sales tax revenue collected in 2004 on Texas produced wine was approximately \$4.1 million and resulted in an estimated total economic impact of \$10.5 million. The overall impact is due to substantial expenditures in hospitality and tourism related to the wine industry. For instance, tourists visiting wineries spent an estimated \$27.7 million. These tourists purchased not only wine, but also souvenir items at the wineries and spent money on food, lodging, and other items during their visits to vineyards. The Texas wine and wine grape industry also directly and indirectly supported approximately 1,898 Texas jobs for Texans. As the industry has developed during the past decade, the impacts on tax revenues, employment, paychecks, and the state economy have also grown.

Texas Wine Grape Production

Because of cuts to the Institutes funding, wine grape prices and variety information was not collected for 2004. As a general tendency, the number of acres for each variety has remained relatively constant over the past several years.

According to the Texas Agricultural Statistics Service, the total grape production for 2004 was 8700 tons, an increase of 45 percent with respect to the previous year. The total estimated value of the 2004 yield was 7.8 million with an average price per ton of \$919. The total value of production increased 49.6 percent from 2003.

Texas Wine Production

The 2004 harvest represents a typical level of production that the industry has been experiencing within the last several years. The 1.5 million gallons produced represents an increase of 254,763 gallons over 2003 (a 20 percent increase).

About 63.2 percent of the wine produced in Texas is bottled as varietal wine, and the remainder is non-varietal. In 2004, 44.0 percent was red wine, 43.4 percent was white and 12.6 percent blush.

The growth in the number of wineries has been mainly with smaller wineries producing less than 5,000 gallons per year. The four largest wineries however, still produce the majority of the production in Texas and in 2004 these wineries produced 83 percent of all the wine made in the state.

Texas Wine Sales and Consumption

Wine consumption is on the rise across the United States. Total consumption of wine in the United States increased by 36.9 percent within the last ten years. In 2004, U.S. consumption of wine increased by 5.2 percent compared to the previous year. Texas wine consumption increased by 6.18 percent compared to a 4.5 percent increase during the previous year. Texans continue to purchase wine produced in other countries, which accounted for 23.9 percent of total table wine consumption. Wines from California constituted 69.8 percent of wine consumption in Texas, and wines from Washington, Oregon, Texas, and other states constitute 6.3 percent of wine consumption in Texas.

Texas remained fourth on the list of largest wine consuming states in the U.S. for the year 2003. However, in the per capita wine consumption ranking, Texas stands only 33rd.

In 2003, the market share of Texas wineries increased to 4.4 percent. In addition, if compared to the 0.75 and 1.5 - liter volume shares, Texas has approximately 6.3 percent of this market. Texas remains the largest market for Texas wines with approximately 95 percent of wines produced in Texas being sold within the state.

Section I.

**Economic Impact of the Texas Wine
and Wine Grape Industry**

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Table 1

Economic Impacts, 2004					
	Wine Grape Industry	Wine Industry	State Sales Tax	State Excise Tax	Total
Direct	\$ 8,308,500	\$ 59,196,464	\$3,847,770	\$ 310,032	\$ 71,662,766
Indirect	11,216,475	111,289,350	5,796,984	561,158	128,863,967
Total	\$ 19,524,975	\$ 170,485,814	\$9,644,754	\$ 871,190	\$200,526,733

Source: Texas Wine Marketing Research Institute

Table 2

Economic Impacts, 1998-2004							
	1998	1999	2000	2001	2002	2003	2004
Wine Grape Industry	\$ 16,023,710	\$ 13,485,146	\$ 15,075,438	\$ 20,769,300	\$ 10,262,450	\$ 18,146,700	\$ 19,524,975
Wine Industry	76,833,438	74,880,447	81,575,911	101,433,377	87,226,077	141,906,614	170,485,814
State Sales Tax	7,200,834	7,032,067	7,721,422	9,689,524	5,405,049	8,999,737	9,644,754
State Excise Tax	753,810	669,086	686,469	809,333	444,398	725,149	871,190
Total	\$ 100,811,792	\$ 96,066,746	\$ 105,059,240	\$ 132,701,534	\$ 103,337,974	\$ 169,778,200	\$ 200,526,733

Source: Texas Wine Marketing Research Institute

Figure 1



Source: Texas Wine Marketing Research Institute

Table 3

Employment Impact, 2004			
	Wine Grape Industry	Wine Industry	Total
Direct	140	904	1044
Indirect	115	739	854
Total	255	1643	1898

Source: Texas Wine Marketing Research Institute

Table 4

Employment Impact, 1998-2004							
	1998	1999	2000	2001	2002	2003	2004
Wine Grape Industry	169	154	178	266	126	243	255
Wine Industry	1131	1263	1294	1526	838	1367	1643
Total	1300	1417	1472	1792	964	1610	1898

Source: Texas Wine Marketing Research Institute

Table 5

Tourism Impact, 2004			
	Wine Accessory Items	Travel Impact	Total
Direct	\$ 5,544,000	\$ 11,256,000	\$ 16,800,000
Indirect	3,603,600	7,316,400	\$ 10,920,000
Total	\$ 9,147,600	\$ 18,572,400	\$ 27,720,000

Source: Texas Wine Marketing Research Institute

Table 6

Tourism Impact, 1999-2004						
	1999	2000	2001	2002	2003	2004
Direct	\$11,500,000	\$12,750,000	\$14,025,000	\$15,600,000	\$16,200,000	\$16,800,000
Indirect	6,900,000	8,287,500	9,116,250	10,140,000	10,530,000	10,920,000
Total	\$18,400,000	\$21,037,500	\$23,141,250	\$25,740,000	\$26,730,000	\$27,720,000

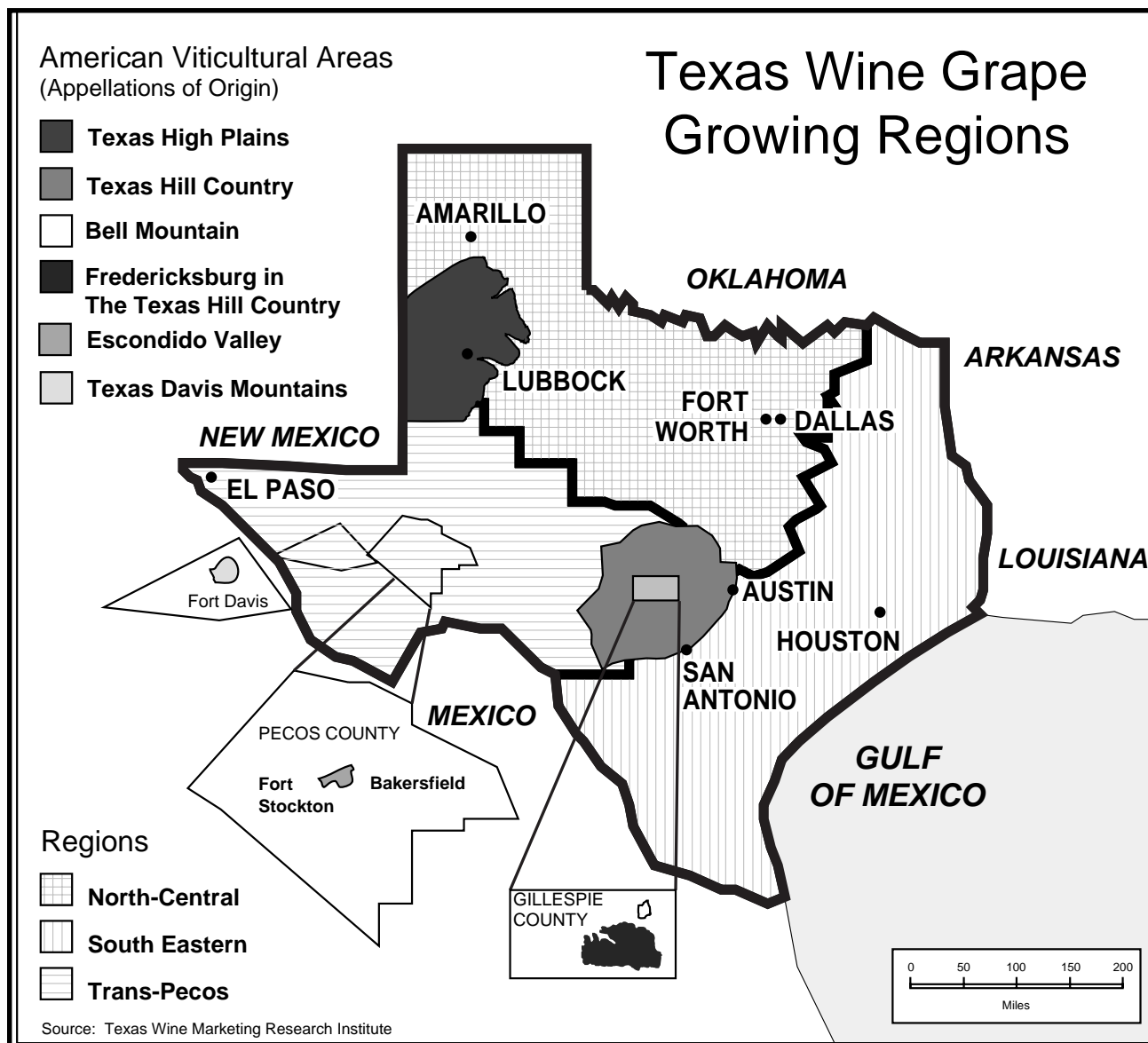
Source: Texas Wine Marketing Research Institute

Section II.

US Wine Grape Production

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Map 1



Description of the American Viticultural Areas in Texas

Texas High Plains - An approximate 12,000 square mile area comprised of all or part of 24 counties in the lower central and western Texas Panhandle region. Established March 2, 1993.

Texas Hill Country - An approximate 15,000 square mile area includes all or part of 22 counties in the Hill Country. This is the largest AVA in the U.S. and includes the “Bell Mountain” and “Fredericksburg in the Texas Hill Country” AVAs. Established November 29, 1991.

Bell Mountain - An approximate five square mile area on the southern and southwestern slopes of Bell Mountain, which is about 12-15 miles NE of Fredericksburg in Gillespie County. Established October 10, 1986.

Fredericksburg in the Texas Hill Country - An approximate 110 square mile area around the city of Fredericksburg and to the east in Gillespie County.

Established December 22, 1988.

Escondido Valley - An approximate 50 square mile area between Bakersfield and Fort Stockton along Interstate 10 in Pecos County. Established May 15, 1992.

Texas Davis Mountains - The entire area contains approximately 270,000 acres located in the Trans-Pecos region of West Texas. Established May 11, 1998.

**Note:* Although the Mesilla Valley viticultural area does cross into the far western tip of Texas, it only covers a very small area in Texas with the majority of the area located in New Mexico. Therefore, it is not included in this map.

Table 7

California Acres Planted, 1996-2004										
Color	Variety	1996	1997	1998	1999	2000	2001	2002	2003	2004
White	Chardonnay	11,258	11,523	7,402	5,966	4,794	2,308	1,051	1,021	963
	Chenin Blanc	96	324	231	20	23	0	77	65	0
	Colombard	250	5	13	100	122	0	84	43	1,006
	Gewürztraminer	30	331	94	13	18	27	20	27	21
	Muscat Canelli	53	26	61	62	73	25	11	27	18
	Pinot Blanc	14	34	22	9	9	41	10	9	25
	Pinot Gris	267	375	284	615	521	1,460	1,086	1,485	451
	Riesling	31	23	63	101	28	40	96	89	215
	Sauvignon Blanc	680	1,603	1,887	643	493	1,200	1,080	695	382
	Semillon	105	250	70	45	17	48	93	10	2
	Viognier	212	475	200	147	144	137	99	81	70
	Other	481	1,395	914	1,777	583	238	434	193	732
	Red	Barbera	144	83	258	61	62	64	16	6
Cabernet Franc		179	379	501	232	272	240	110	113	32
Cabernet Sauvignon		6,224	9,606	8,812	7,879	7,744	4,315	2,224	853	250
Gamay		0	40	11	4	0	0	17	0	0
Malbec		56	85	299	111	153	104	39	65	29
Merlot		8,375	4,916	4,002	2,737	2,543	2,112	1,317	683	460
Nebbiolo		8	13	13	25	3	4	4	4	1
Petite Verdot		68	76	131	134	209	143	115	159	123
Pinot Noir		1,551	3,019	2,634	3,189	3,988	2,661	922	386	102
Ruby Cabernet		237	717	897	425	140	40	24	0	3
Sangiovese		363	342	281	134	70	95	11	10	68
Syrah/Shiraz		1,156	3,403	2,877	2,518	2,566	1,645	758	358	186
Zinfandel		3,610	3,555	1,691	903	1,156	1,008	1,020	657	368
Other		1,670	2,066	3,900	3,937	1,805	1,668	981	1,059	1,342
Total		37,118	44,664	37,548	31,787	27,536	19,623	11,699	8,098	6,852
Source: Texas Wine Marketing Research Institute and California Agricultural Statistics Services.										

Table 8

		Price per Ton, 2004								
		California Grape Pricing Districts								
Color	Variety	1	2	3	4	5	6	7	8	9
White	Chardonnay	\$ 1,064	\$ 817	\$1,576	\$2,129	\$ 784	\$908	\$944	\$ 1,278	\$ 454
	Chenin Blanc	754	-	531	875	348	-	272	662	341
	Colombard	721	-	529	-	247	-	200	-	200
	Gewürztraminer	957	785	1,292	931	-	1,137	886	818	818
	Muscat Canelli	1,435	941	2,170	1,402	1,099	1,300	1,255	1,009	-
	Pinot Blanc	961	1,200	1,713	1,278	-	1,350	675	1,712	-
	Pinot Gris*	1,233	1,300	1,569	1,997	718	1,234	1,175	1,558	607
	Riesling	1,367	1,074	2,018	2,128	972	800	896	898	1,200
	Sauvignon	878	826	1,424	1,629	458	513	906	918	281
	Semillon	1,147	833	1,869	2,512	600	916	932	532	585
Viognier*	1,232	1,243	2,096	2,027	560	905	1,179	1,395	450	
Other	1,092	1,150	1,554	1,850	400	891	1,232	1,404	501	
Total White Weighted Average		1,026	843	1,554	1,994	644	889	942	1,176	443
Red	Barbera	1,379	1,096	2,929	1,769	1,949	457	1,277	1,326	900
	Cabernet Franc	1,266	1,824	2,499	3,935	1,221	1,387	708	1,069	-
	Cabernet Sauvignon	1,393	1,508	2,398	3,948	701	736	1,084	925	326
	Gamay	810	700	895	917	603	-	648	760	1,000
	Malbec*	1,233	1,691	2,420	4,047	1,120	1,600	963	1,497	900
	Merlot	1,174	951	1,664	2,636	779	1,029	1,070	1,019	534
	Pinot Noir	1,527	1,800	1,975	2,175	658	2,065	1,291	2,273	1,441
	Ruby Cabernet	-	-	2,100	-	-	-	-	-	-
	Sangiovese	1,348	1,793	2,195	2,178	-	1,209	990	974	1,067
	Syrah/Shiraz	1,328	1,184	2,042	2,711	671	691	1,024	1,122	517
Zinfandel	1,087	889	2,302	1,878	572	1,155	712	683	297	
Other	1,432	1,287	2,235	2,159	1,375	1,214	1,300	1,234	502	
Total Red Weighted Average		1,231	1,309	2,093	3,256	718	984	1,099	1,043	359
Total All Wine Weighted Average		\$1,151	\$1,161	\$1,869	\$2,936	\$676	\$948	\$1,015	\$1,074	\$391
* Produced in relatively small quantities.										
1 Mendocino	4 Napa	7 Monterey/San Benito				10 Sierra Foothills				
2 Lake	5 Solano	8 South-Central Coast				11 Eastern Delta				
3 Sonoma/Marin	6 North-Central Coast	9 Central-Northern California				12 Northern San Joaquin				
Note: The California Grape Crush Report and the California Grape Acreage report are provided annually by the California Agricultural Statistics Service (CASS) and may be obtained on the Internet at < www.nass.usda.gov/ca/homepage.htm >.										
Similar reports are available from the wine grape statistics specialists of the Washington Agricultural Statistics Service < www.nass.usda.gov/wa/homepage.htm >, the Oregon Agricultural Statistics Service at < www.oda.state.or.us/oass/oass.html >,										
and the Texas Agricultural Statistics Service at < www.nass.usda.gov/tx/tgrape.htm >.										
Source: Texas Wine Marketing Research Institute; California, Washington, Oregon, and Texas Agricultural Statistics Services.										

Section III.

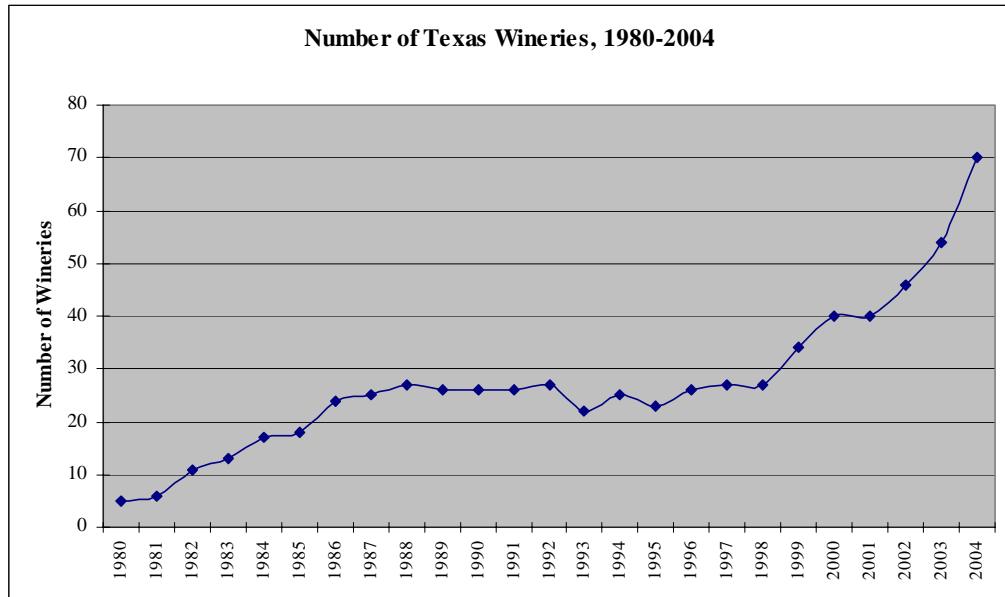
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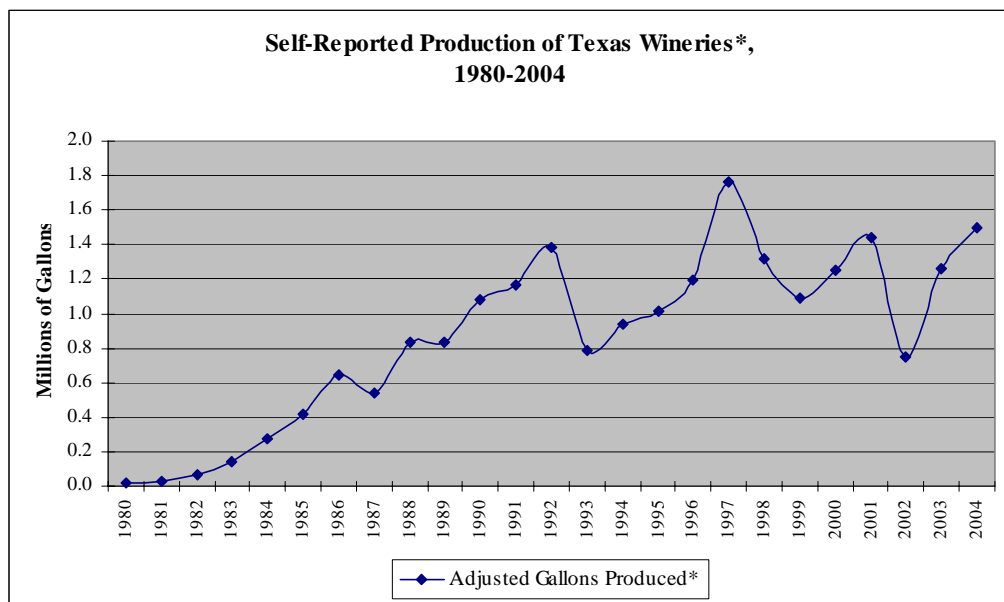
Self Reported Production of Texas Wineries, 1980 - 2004		
Year	Adjusted Gallons Produced*	Number of Wineries
1980	17,000	5
1981	24,000	6
1982	69,000	11
1983	142,000	13
1984	278,000	17
1985	416,000	18
1986	645,000	24
1987	541,000	25
1988	831,000	27
1989	837,000	26
1990	1,079,000	26
1991	1,169,000	26
1992	1,386,000	27
1993	786,000	22
1994	938,000	25
1995	1,010,000	23
1996	1,196,000	26
1997	1,760,770	27
1998	1,314,544	27
1999	1,087,656	34
2000	1,247,221	40
2001	1,445,036	40
2002	745,235	46
2003	1,265,000	54
2004	1,519,764	70
*Adjusted for juice and bulk wine sales between Texas wineries.		
Source: Texas Wine Marketing Research Institute		

Figure 2



Source: Texas Wine Marketing Research Institute

Figure 3



Source: Texas Wine Marketing Research Institute

Table 10

Number of Wineries by Production Category, 2000-2004					
Production Category in Thousands of Gallons	2000	2001	2002	2003	2004
<5 (Less than or equal to 5,000 gallons annual production)	23	20	26	32	48
5-10 (5,000 - 10,000 gallons annual production)	5	7	6	7	7
10-50 (10,000 - 50,000 gallons annual production)	8	9	10	11	11
>50 (More than 50,000 gallons annual production)	4	4	4	4	4
Total	40	40	46	54	70
Source: Texas Wine Marketing Research Institute					

Table 11

Adjusted Gallons Produced*, Fermenting, and Storage Capacities by Production Category 2000-2004						
Production Category in Thousands of Gallons		2000	2001	2002	2003	2004
<5	Produced	32,021	27,365	26,847	46,054	56,198
	Fermenting	76,316	40,180	40,853	26,158	85,777
	Storage	97,367	53,255	64,067	41,040	119,803
5-10	Produced	35,349	56,575	44,995	72,452	37,451
	Fermenting	38,796	59,488	55,438	75,710	35,997
	Storage	46,216	79,258	56,058	80,541	70,497
10-50	Produced	133,498	162,288	174,732	272,242	160,669
	Fermenting	263,580	248,695	287,529	134,526	305,165
	Storage	358,240	376,255	410,820	219,056	377,468
>50	Produced	944,502	1,165,629	498,661	874,252	1,265,445
	Fermenting	1,486,000	2,064,502	2,068,745	2,392,036	1,385,863
	Storage	2,157,545	2,148,887	2,160,045	2,571,404	2,376,671
Total Produced		1,145,370	1,411,857	745,235	1,265,000	1,519,763
Total Fermenting		1,864,692	2,412,865	2,452,565	2,628,430	1,812,802
Total Storage		2,659,368	2,657,655	2,690,990	2,912,041	2,944,439
*Adjusted for juice and bulk wine sales between Texas wineries.						
Source: Texas Wine Marketing Research Institute						

Table 12

Percent Adjusted Gallons Produced* by Production Category, 2000-2004					
Production Category in Thousands of Gallons	2000	2001	2002	2003	2004
<5	3%	2%	4%	4%	4%
5-10	3%	4%	6%	6%	2%
10-50	12%	11%	23%	21%	11%
>50	82%	83%	67%	69%	83%
Total	100%	100%	100%	100%	100%
*Adjusted for juice and bulk wine sales between Texas wineries.					
Source: Texas Wine Marketing Research Institute					

Table 13

Texas Winery Crush Gallons Extracted by Wine Grape Origin and Source, 2004						
	Gallons			Percent		
	Origin			Origin		
	Within	Outside		Within	Outside	
Source	Texas	Texas	Total	Texas	Texas	Total
Own	365,411	-	365,411	62.1%	0.0%	62.1%
Purchased	17,653	205,360	223,013	3.0%	34.9%	37.9%
Total	383,064	205,360	588,424	65.1%	34.9%	100.0%
Source: Texas Wine Marketing Research Institute						

Table 14

Texas Winery Juice and Bulk Wine Gallons Sold by Destination and Form, 2004						
	Gallons			Percent		
	Destination			Destination		
	Within	Outside		Within	Outside	
Form	Texas	Texas	Total	Texas	Texas	Total
Juice	4,974	-	4,974	19.5%	0.0%	19.5%
Bulk Wine	20,535	-	20,535	80.5%	0.0%	80.5%
Total	25,509	-	25,509	100.0%	0.0%	100.0%
Source: Texas Wine Marketing Research Institute						

Table 15

Texas Winery Juice and Bulk Wine Gallons Purchased by Origin and Form, 2004						
	Gallons			Percent		
	Origin			Origin		
	Within	Outside		Within	Outside	
Form	Texas	Texas	Total	Texas	Texas	Total
Juice	28,817	78,166	106,983	19.7%	53.6%	73.3%
Bulk Wine	4,323	34,674	38,997	3.0%	23.7%	26.7%
Total	33,140	112,840	145,980	22.7%	77.3%	100.0%
Source: Texas Wine Marketing Research Institute						

Table 16

Percent Bottled Gallons Produced by Type and Industry Structure, 2004					
Production Category in Thousands of Gallons	Varietal	Non-Varietal	Sparkling	Fortified	Total
<5	3.1%	0.3%	0.0%	0.0%	3.4%
5-10	2.1%	0.3%	0.0%	0.0%	2.4%
10-50	9.3%	1.0%	0.0%	0.0%	10.3%
>50	48.7%	34.4%	0.0%	0.8%	83.9%
Total	63.2%	36.0%	0.0%	0.8%	100.0%
Source: Texas Wine Marketing Research Institute					

Table 17

Percent Bottled Gallons Produced by Color and Industry Structure, 2004				
Production Category in Thousands of Gallons	Red	White	Blush	Total
<5	2.3%	0.8%	0.2%	3.3%
5-10	1.6%	0.7%	0.1%	2.4%
10-50	5.4%	4.3%	0.6%	10.3%
>50	34.7%	37.6%	11.7%	84.0%
Total	44.0%	43.4%	12.6%	100.0%
Source: Texas Wine Marketing Research Institute				

Table 18

Percent Bottled Gallons Produced by Color and Type, 2004				
	Red	White	Blush	Total
Varietal	25.5%	33.2%	4.4%	63.1%
Non-Varietal	17.7%	10.1%	8.2%	36.0%
Sparkling	0.0%	0.0%	0.0%	0.0%
Fortified	0.8%	0.1%	0.0%	0.9%
Total	44.0%	43.4%	12.6%	100.0%
Source: Texas Wine Marketing Research Institute				

Section IV.

Wine Sales and Consumption

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Table 19

Per Capita Sales of Table Wine Ranked by State (9-liter cases per 1,000 adults), 2003			
District of Columbia	2,726	Minnesota	972
New Hampshire	2,393	Georgia	895
Nevada	2,124	North Carolina	871
Delaware	1,939	Michigan	855
Massachusetts	1,864	Missouri	846
Connecticut	1,772	New Mexico	830
Vermont	1,760	Louisiana	815
Rhode Island	1,732	South Carolina	796
New Jersey	1,695	Wyoming	788
Oregon	1,686	Texas	775
California	1,674	Indiana	764
Washington	1,632	Pennsylvania	731
Hawaii	1,567	Ohio	724
Florida	1,558	Alabama	661
Alaska	1,431	Tennessee	616
Colorado	1,410	Nebraska	611
New York	1,324	North Dakota	555
Maine	1,318	Utah	529
Idaho	1,273	Kentucky	520
Arizona	1,233	South Dakota	513
Virginia	1,233	Kansas	507
Montana	1,168	Oklahoma	493
Maryland	1,120	Iowa	487
Illinois	996	Arkansas	478
Wisconsin	993	Mississippi	366
		West Virginia	348

Source: Adams Wine Handbook, 2004

Table 20

Market Share of Texas Varietal and Non-Varietal Wine in Texas, 1999-2004						
Calendar Year	Total 9-L Cases Consumed in Texas	Total Gallons Consumed in Texas	Bottled Gallons Taxably Withdrawn From Texas Wineries	Percent Bottled Wine Sales in Texas Markets	Percent Market Share of All Volume Sizes	Estimate* Percent Market Share of 0.75 & 1.5 Liter Sizes Only
1999	9,146,100	21,430,997	994,503	96%	4.5%	6.9%
2000	10,222,000	24,305,872	948,720	95%	3.7%	5.8%
2001	10,193,000	24,236,915	838,121	95%	3.5%	5.3%
2002	10,807,100	25,697,122	745,235	95%	2.9%	4.5%
2003	11,550,000	27,463,590	1,265,000	95%	4.4%	6.3%
2004**	11,931,150	28,369,888	1,519,764	95%	5.1%	7.3%
* Based on national supermarket scanner data for 0.75 and 1.5 liter size volume shares.						
** Estimated						
Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004						

Figure 4

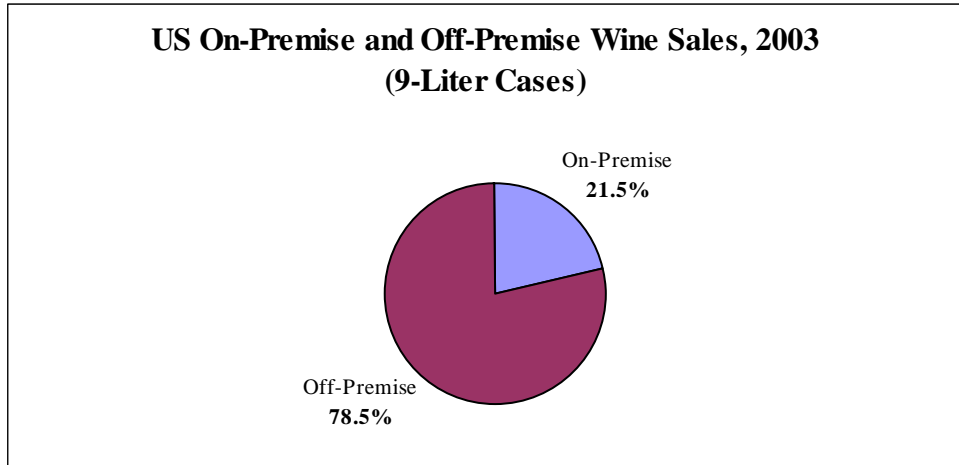


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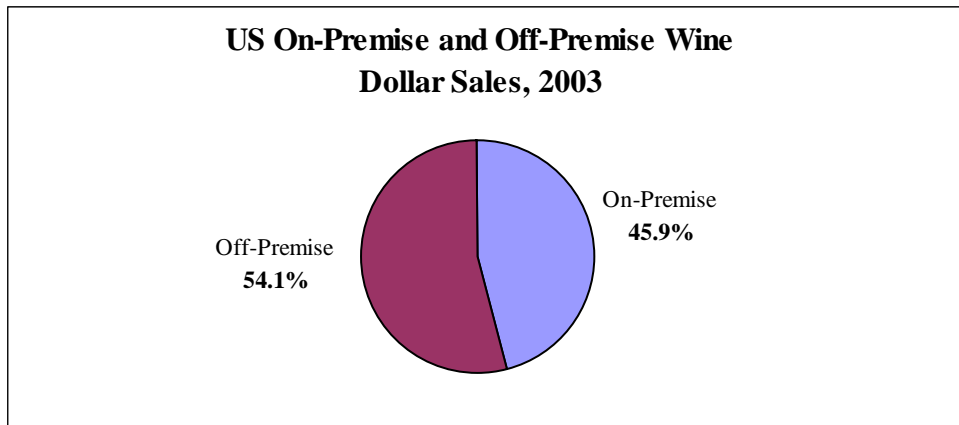
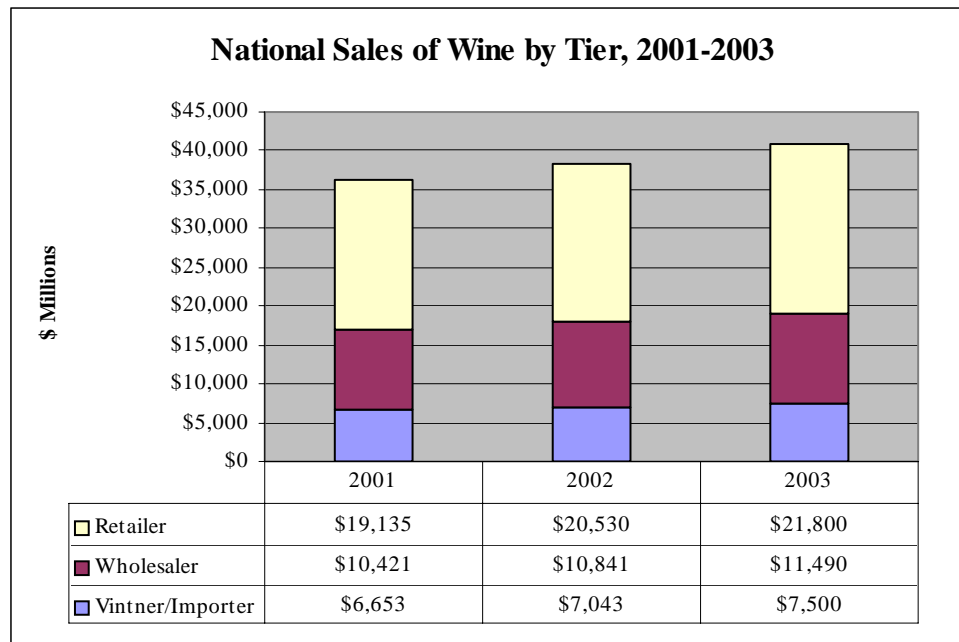


Figure 6



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 7

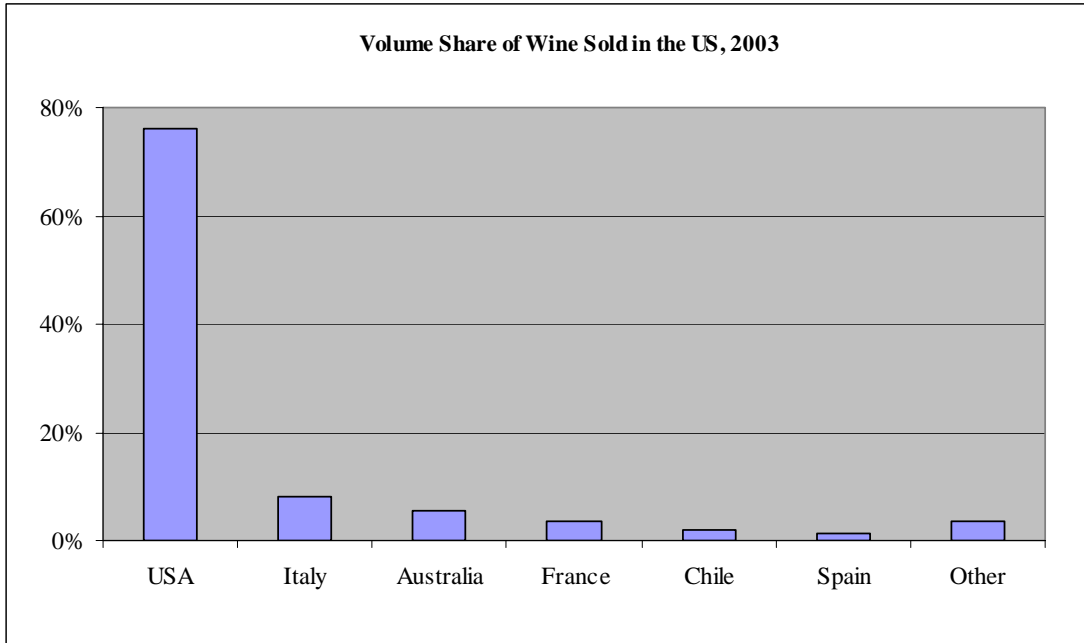
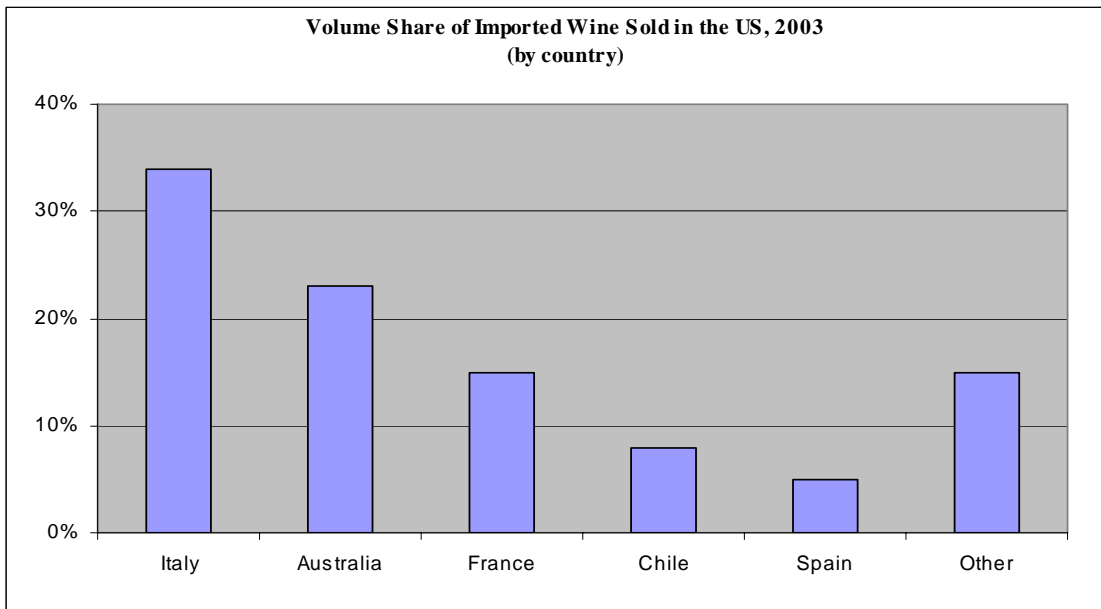


Figure 8



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 9

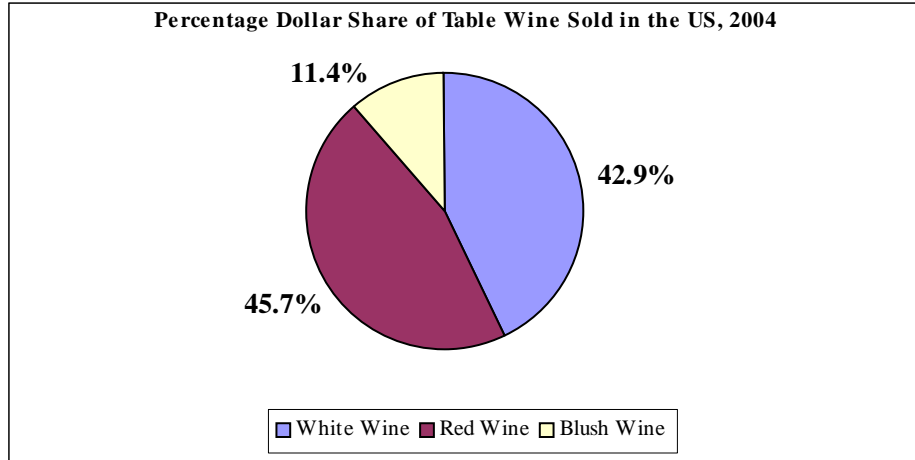


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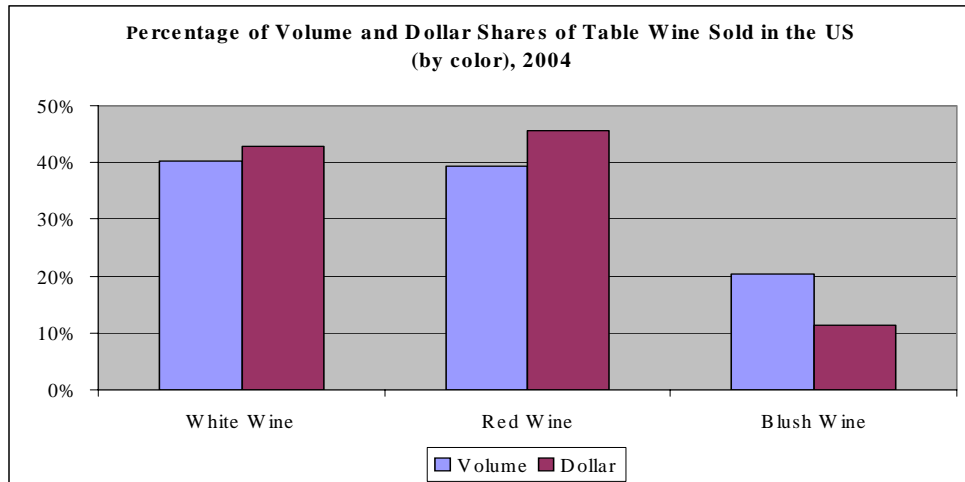
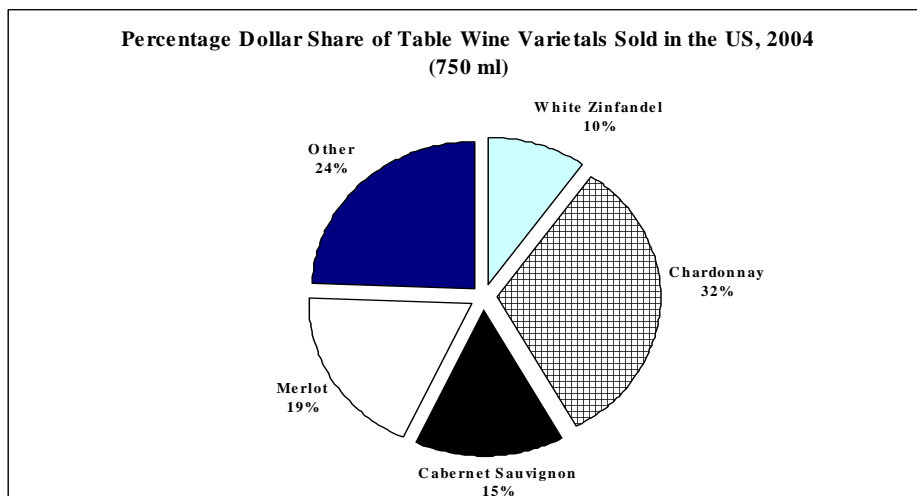


Figure 11



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 12

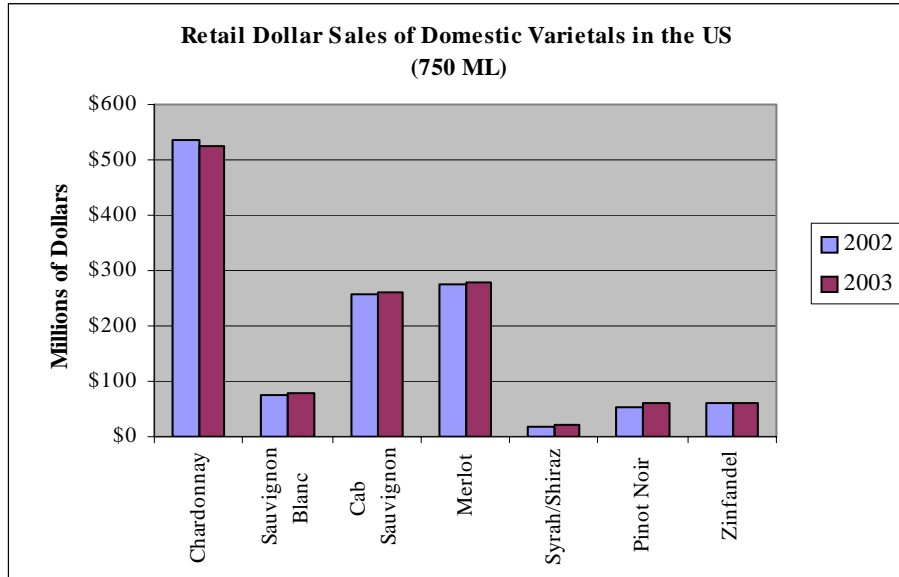
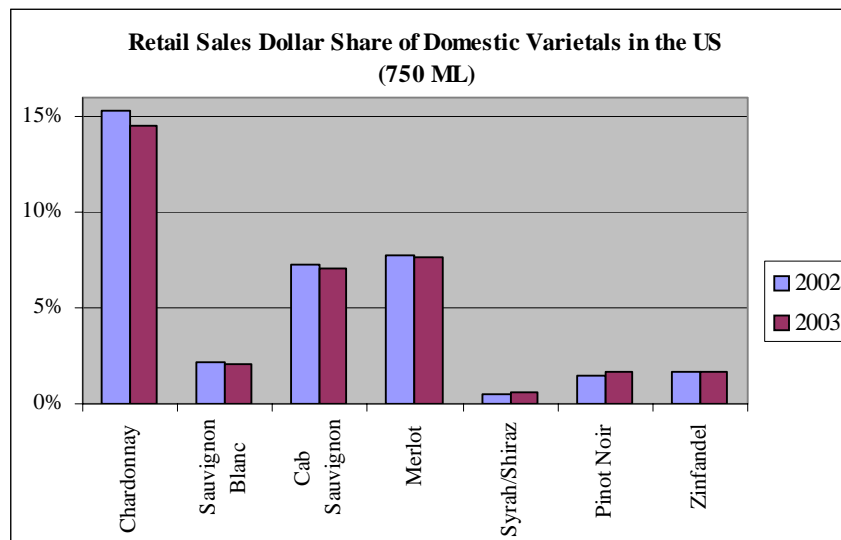


Figure 13



Source: Texas Wine Marketing Research Institute and Wine Business Monthly, Sep 2003

Figure 14

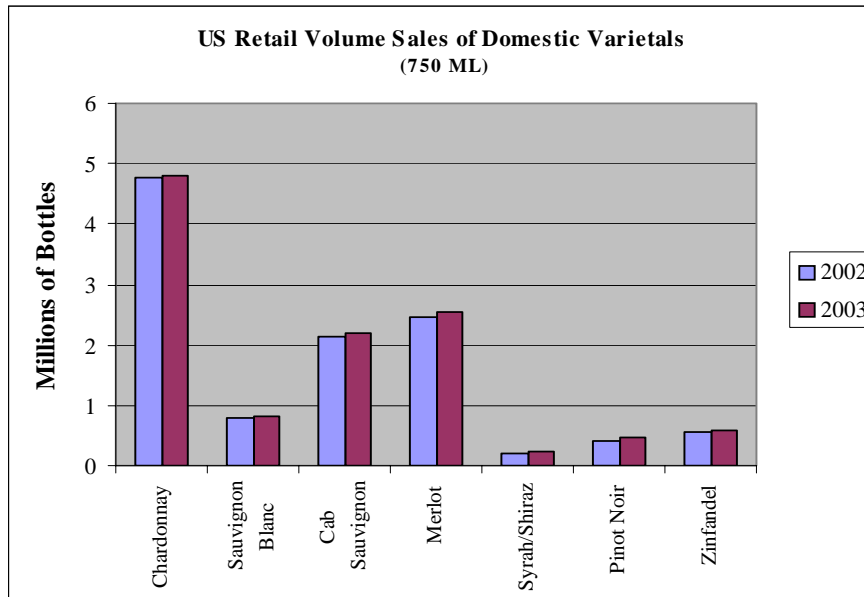
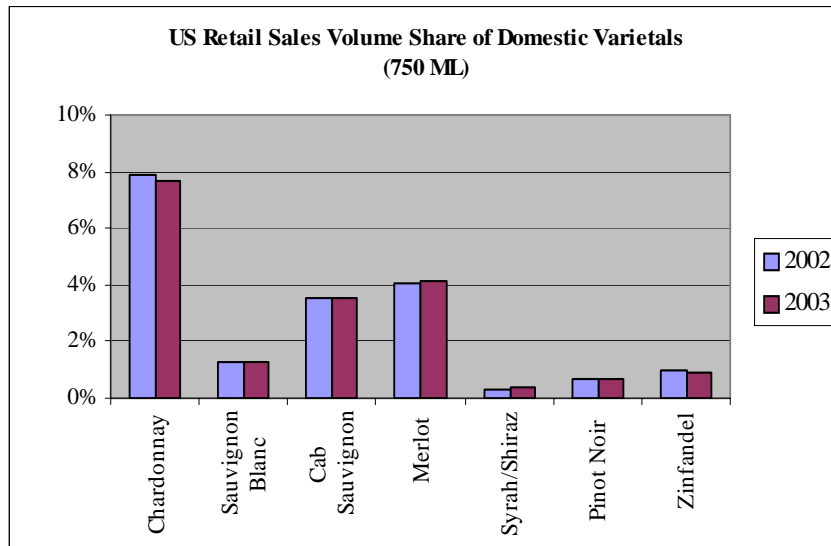


Figure 15



Source: Texas Wine Marketing Research Institute and Wine Business Monthly, Sep 2003

Figure 16

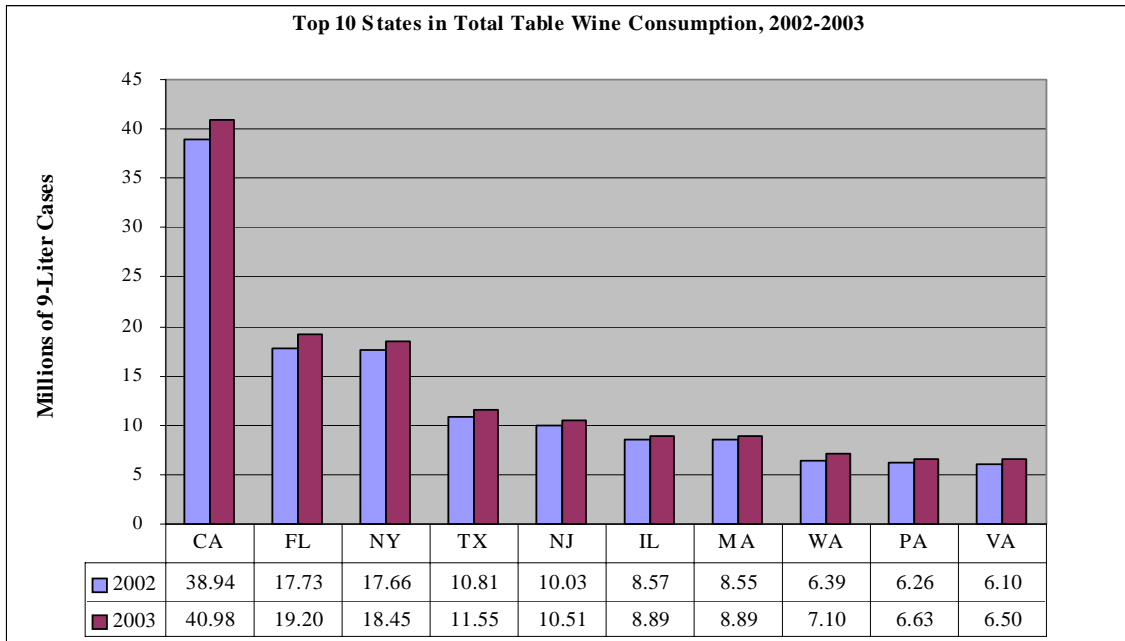
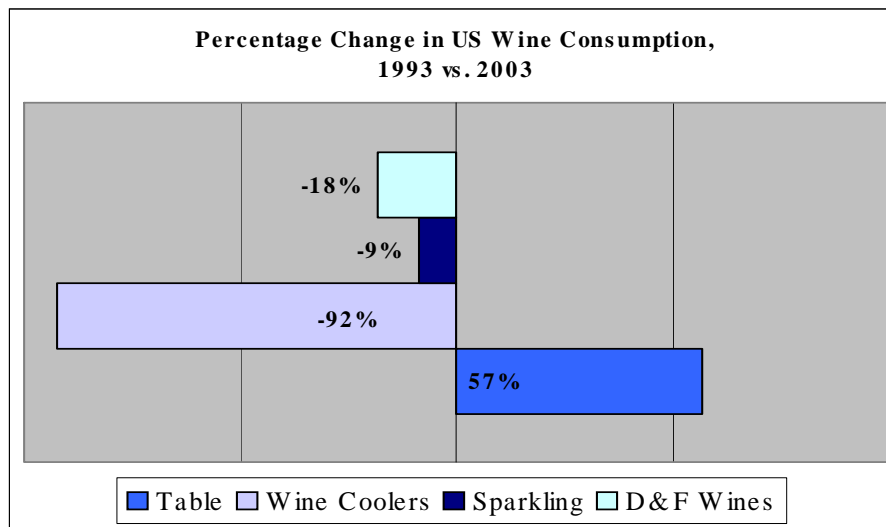


Figure 17



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 18

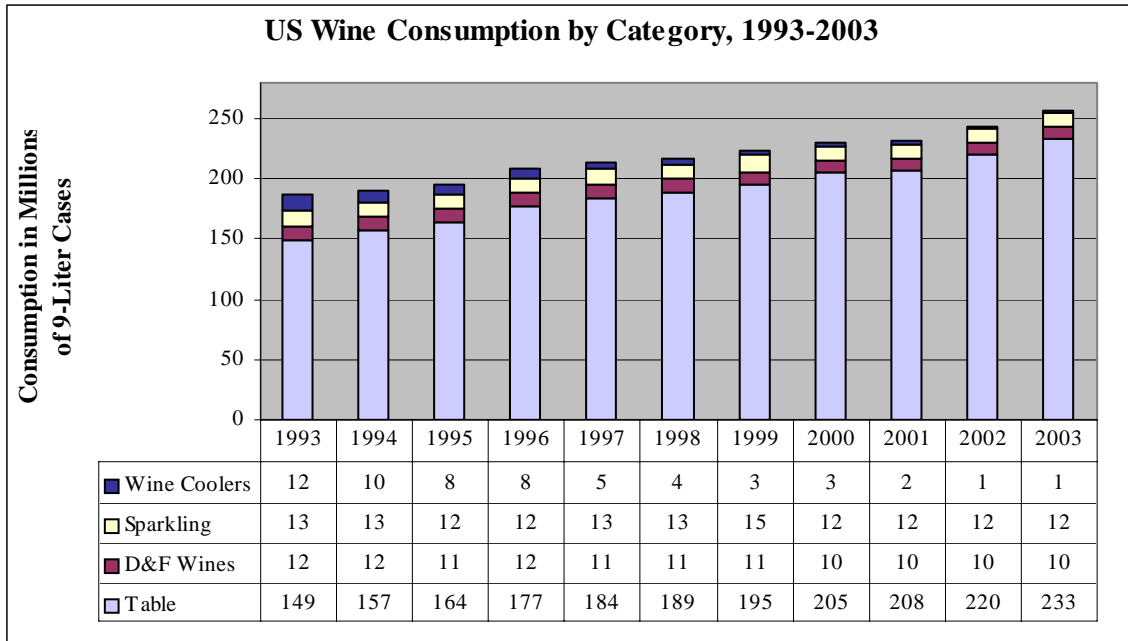
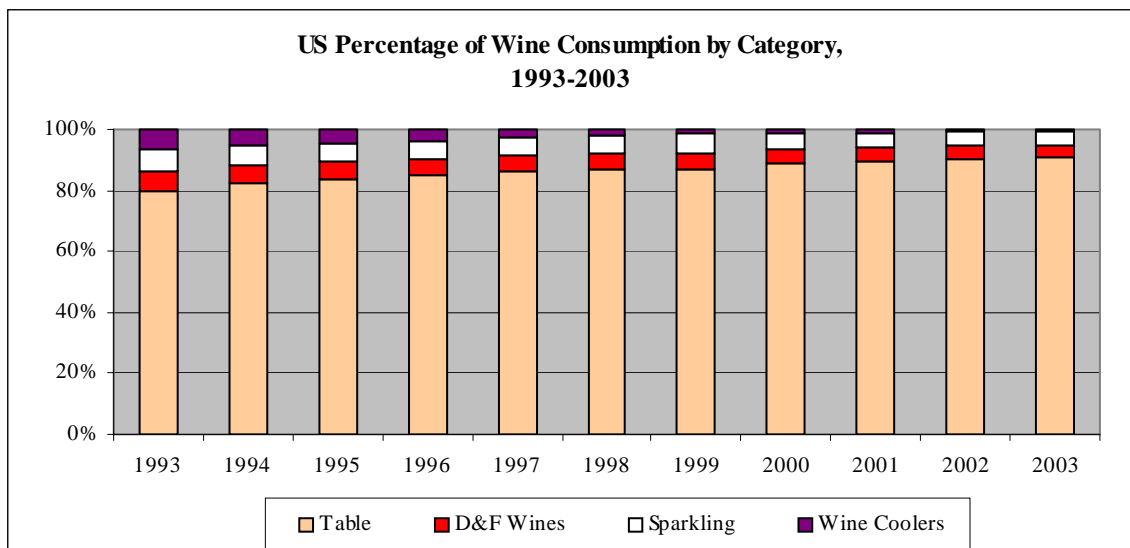


Figure 19



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 20

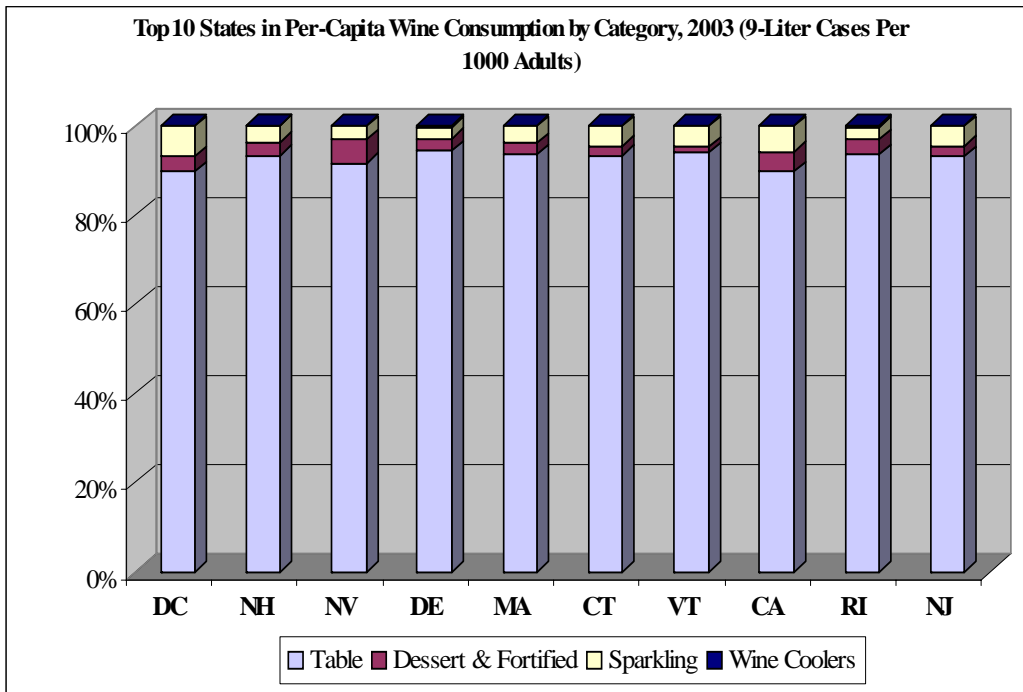
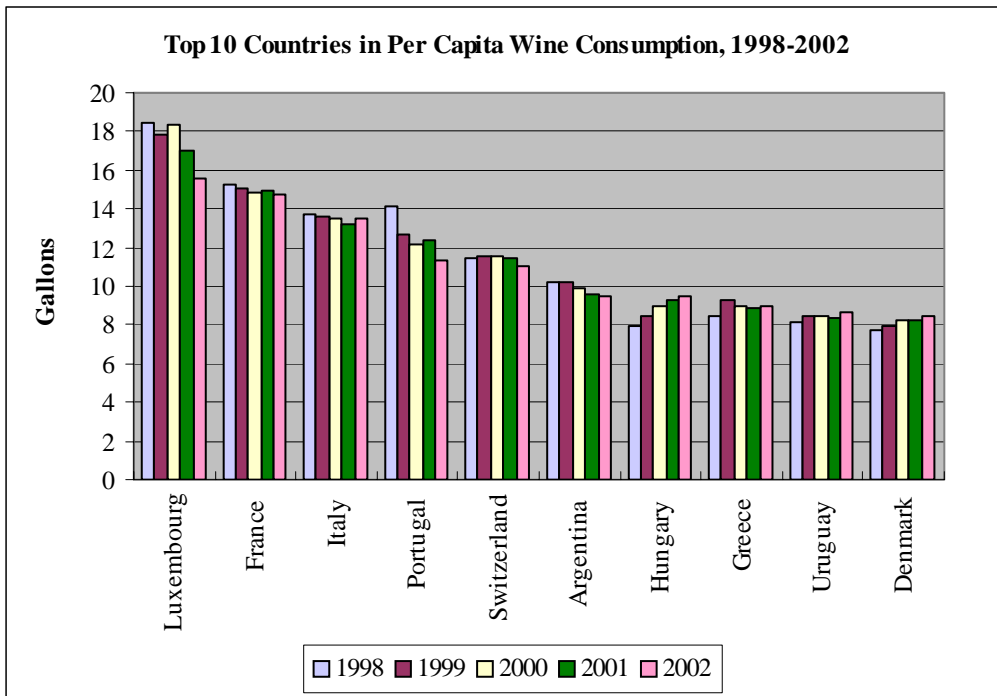


Figure 21



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Table 21

Wine Consumption in Texas (9-Liter Cases)				
Year	Table Wine	% Change	All Wine*	% Change
1994	7,496,172	4%	9,744,225	0%
1995	7,438,538	-1%	9,358,767	-4%
1996	7,821,500	5%	9,665,900	3%
1997	7,876,700	1%	9,497,000	-2%
1998	8,502,070	8%	10,041,700	6%
1999	9,146,100	8%	10,677,500	6%
2000	10,222,000	12%	11,630,800	9%
2001	10,193,000	0%	11,528,000	-1%
2002	10,807,100	6%	12,047,300	5%
2003	11,550,000	7%	12,791,300	6%

** All Wine includes table wine, wine coolers, champagne & sparkling wine, dessert & fortified wine, vermouth/ aperitif*

Source: Adams Wine Handbook (1994-2004)

Table 22

Per Capita Consumption of Table Wine in Texas (9-Liter Cases per 1,000 Adults)		
Year	Consumption	Rank by State
1994	609.4	29
1995	589.8	34
1996	610.5	35
1997	607.3	35
1998	634.4	35
1999	654.1	35
2000	731.1	34
2001	698.2	35
2002	734.8	34
2003	774.9	33

Source: Texas Wine Marketing Research Institute and Adams Wine Handbook (1994-2004)

Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 22

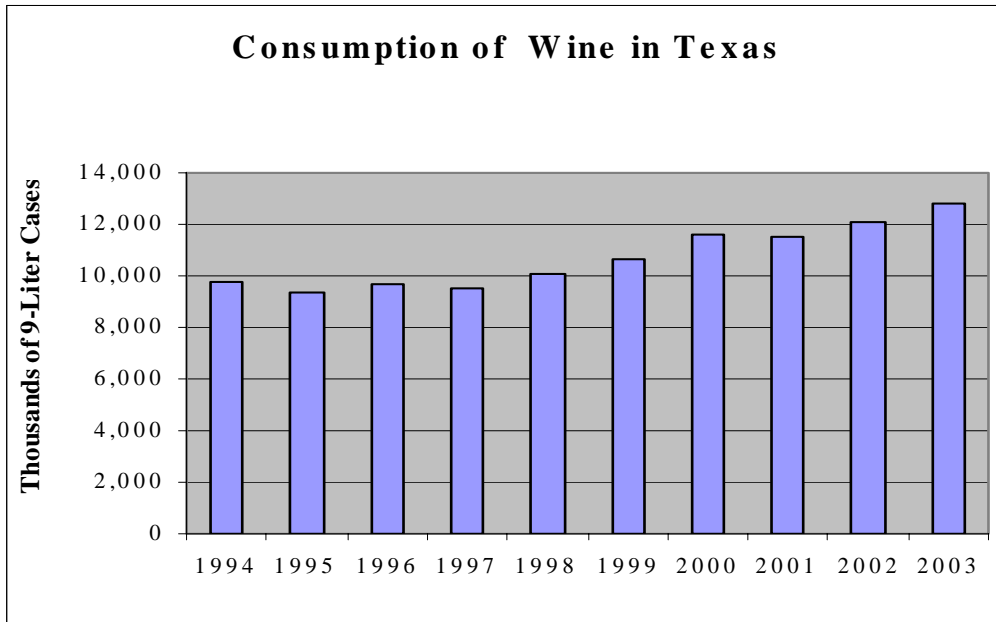
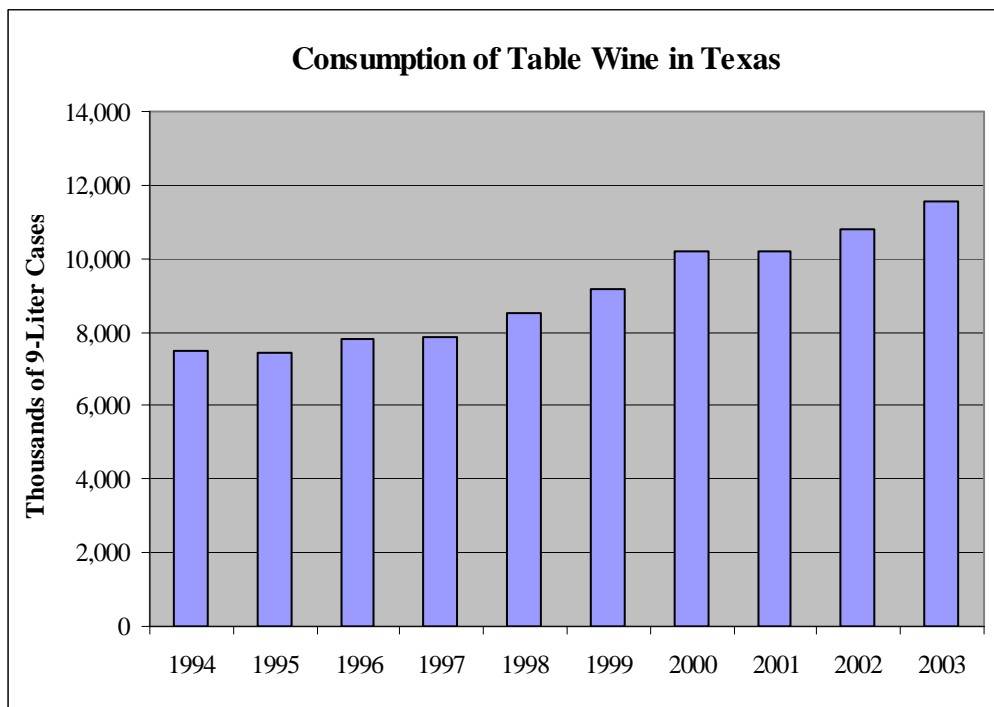


Figure 23



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 1994-2004

Figure 24

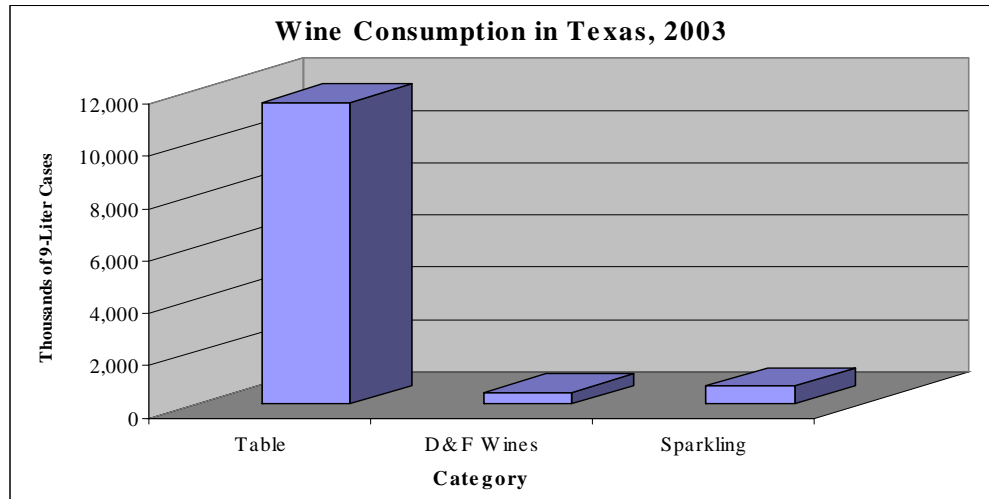


Figure 25

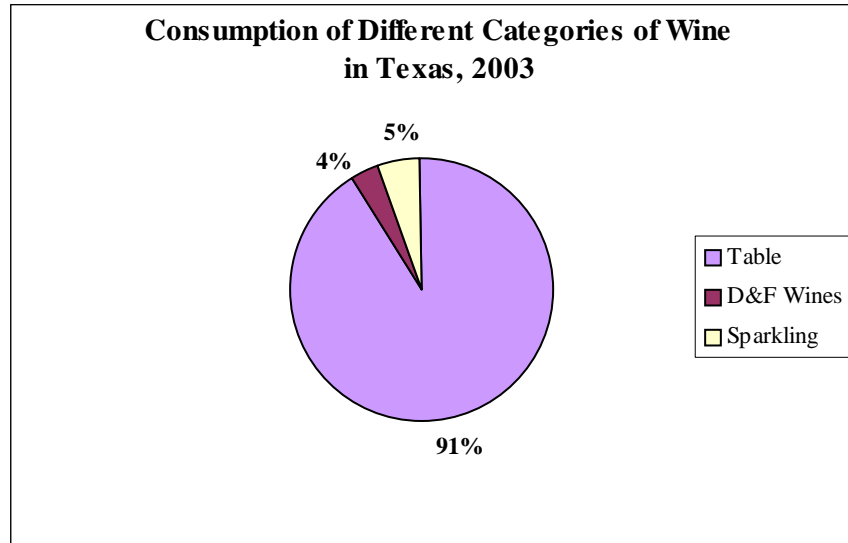
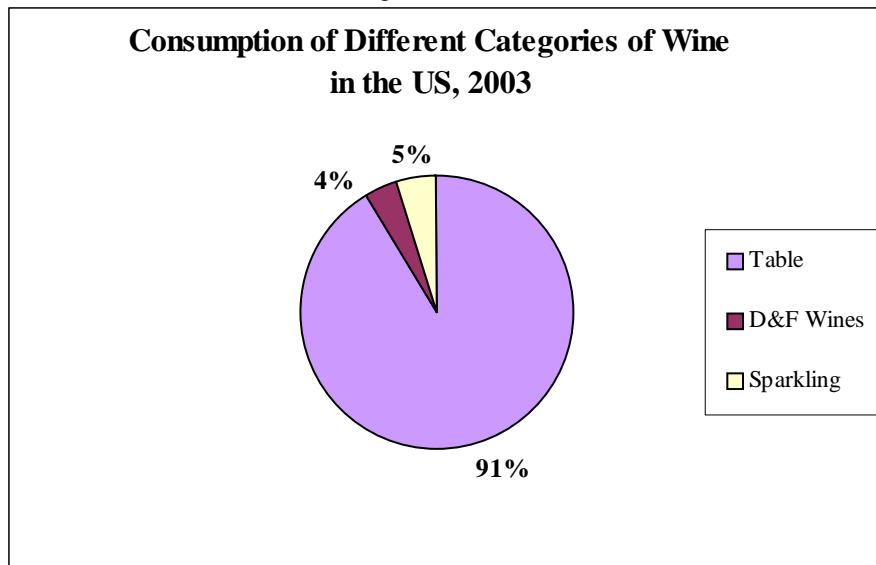


Figure 26



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 27

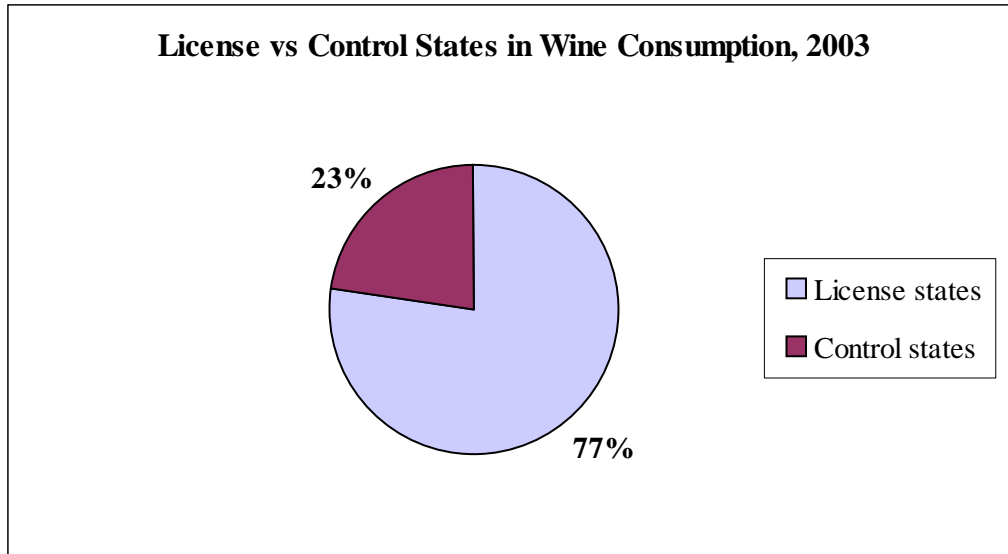
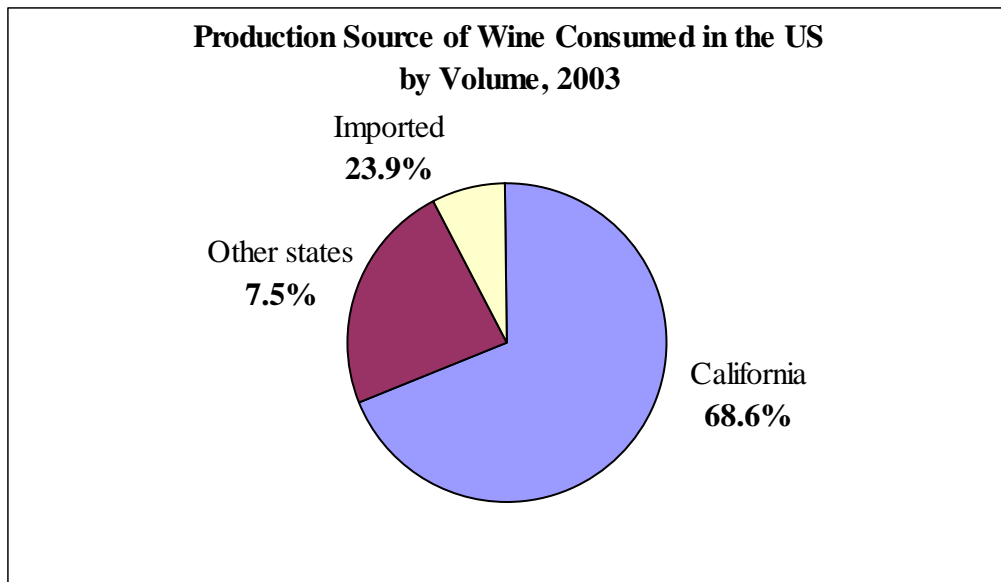


Figure 28



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Figure 29

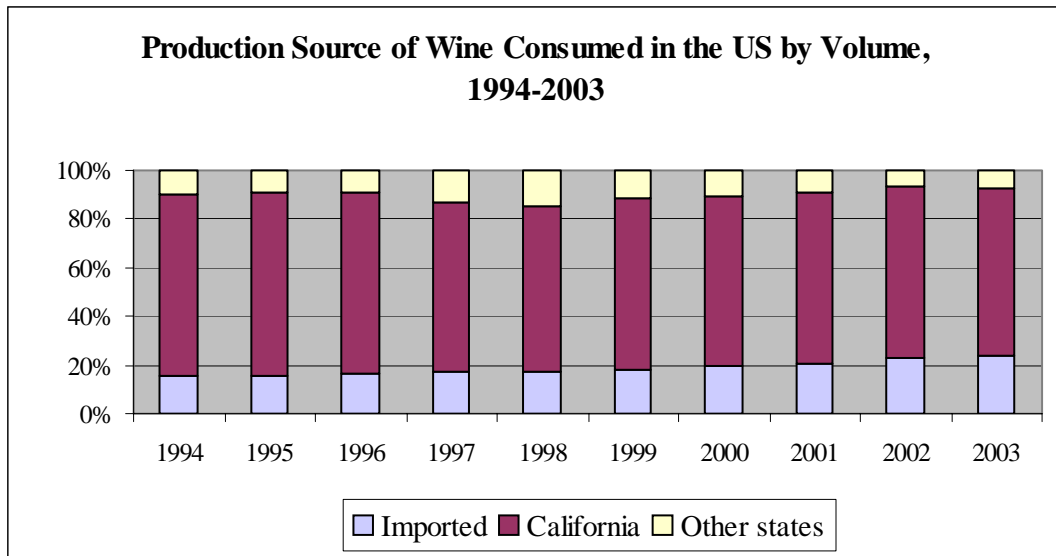
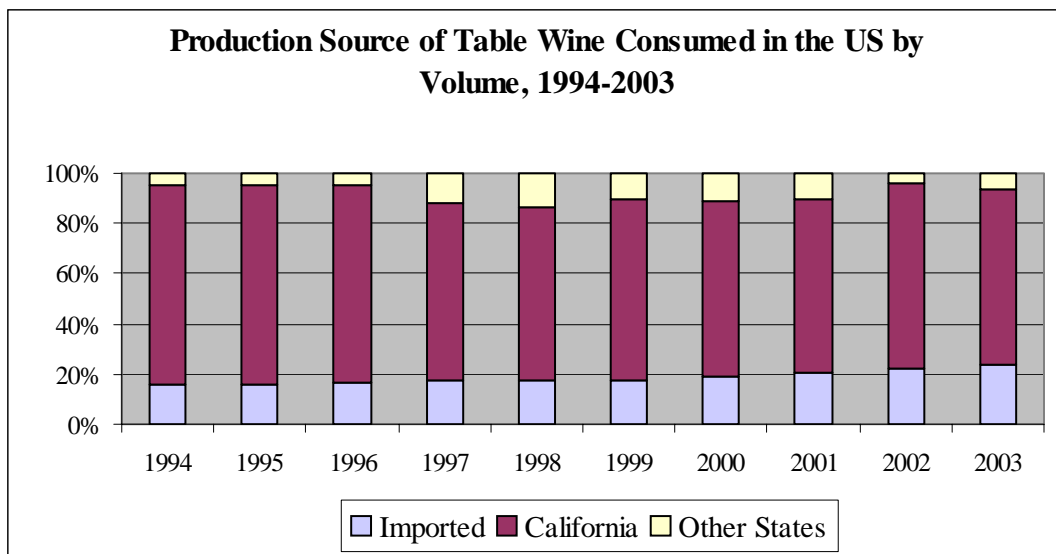
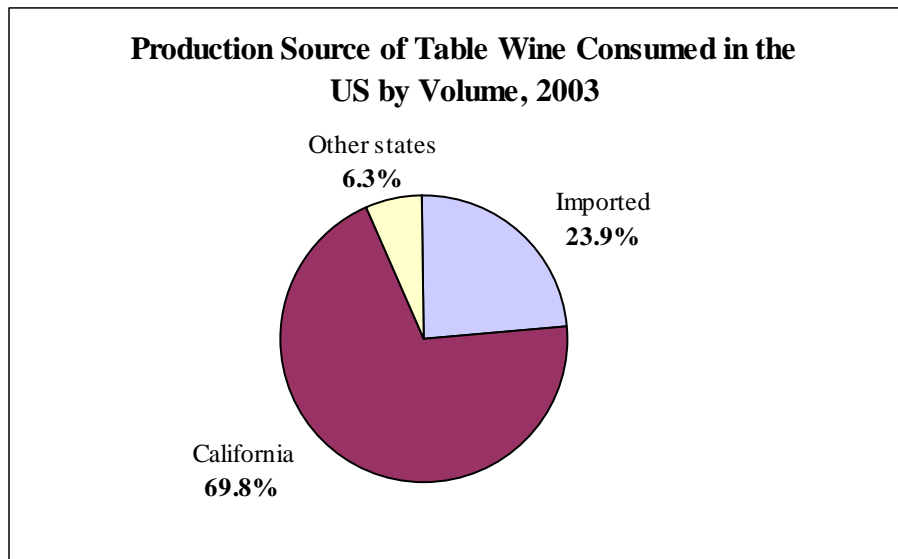


Figure 30



Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 1994-2004

Figure 31



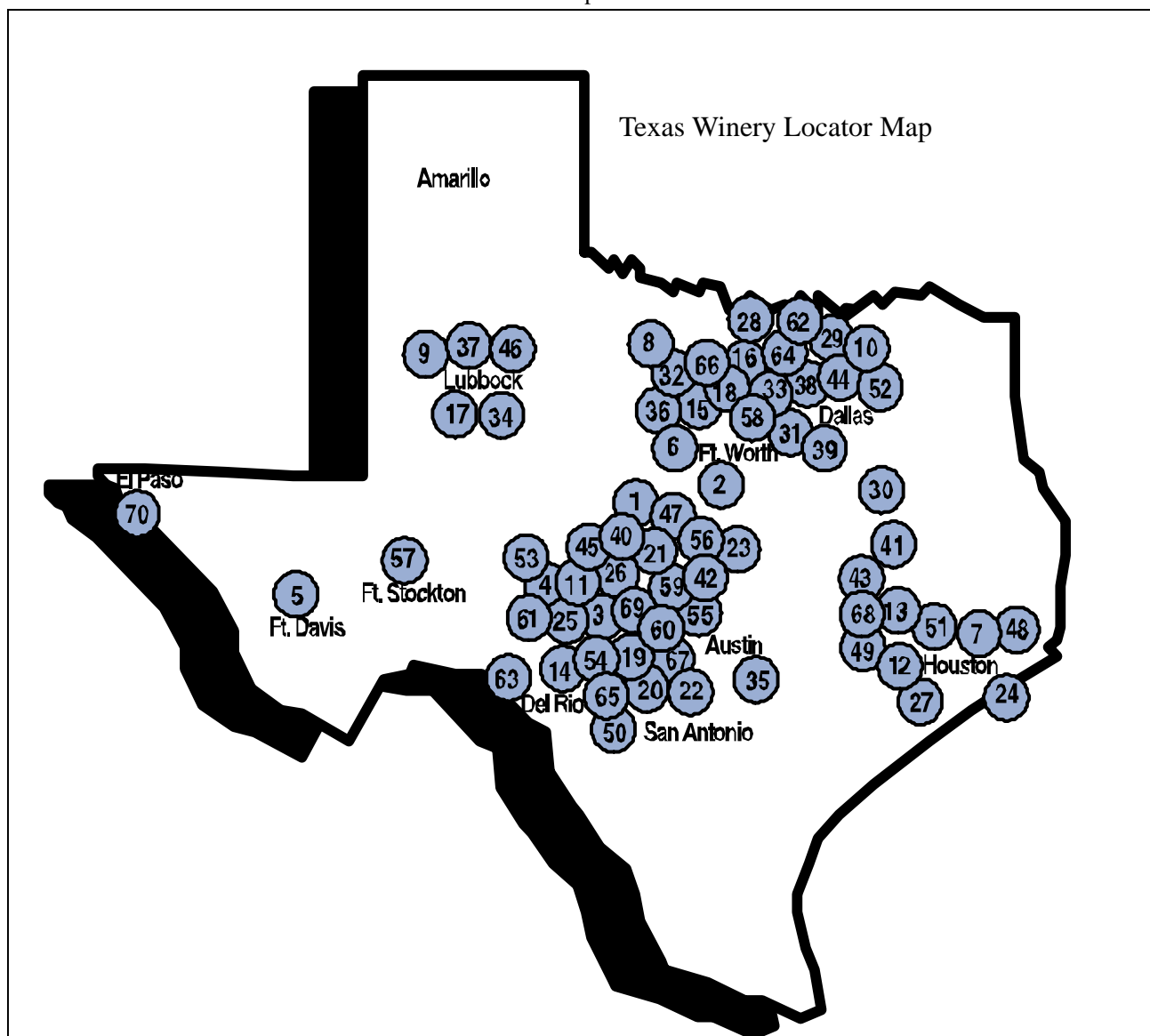
Source: Texas Wine Marketing Research Institute and Adams Wine Handbook, 2004

Section V.

Location of Texas Wineries

Location of Texas Wineries Map	40
Texas Winery Directory List	41
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Map 2



- 1. Alamosa Wine Cellars
- 2. Barking Rocks Winery
- 3. Becker Vineyards
- 4. Bell Mountain Vineyards
- 5. Blue Mountain Wines
- 6. Bluff Dale Vineyards
- 7. Bruno & George Wines
- 8. Brushy Creek Vineyards
- 9. Cap*Rock Winery
- 10. Carmela Winery
- 11. Chisholm Trail Winery
- 12. Circle S Vineyards
- 13. Colony Cellars
- 14. Comfort Cellars
- 15. Cross Timbers Winery
- 16. Crossroads Vineyards & Winery
- 17. Delaney Vineyards #1
- 18. Delaney Vineyards #2
- 19. Driftwood Vineyards
- 20. Dry Comal Creek Vineyards
- 21. Fall Creek Vineyards
- 22. Fawn Crest Vineyards
- 23. Flat Creek Estate

- 24. Frascione Winery
- 25. Fredericksburg Winery
- 26. Grape Creek Vineyard
- 27. Haak Vineyards & Winery
- 28. Hidden Springs Winery
- 29. Homestead Vineyards & Winery
- 30. Kiepersol Estates Vineyards
- 31. La Bodega Winery
- 32. La Buena Vida Vineyards #1
- 33. La Buena Vida Vineyards #2
- 34. La Diosa Cellars
- 35. Lehm Berg Winery
- 36. Lightcatcher Winery
- 37. Llano Estacado Winery
- 38. Lone Oak Vineyards
- 39. Los Pinos Ranch Vineyards
- 40. Lost Creek Vineyard
- 41. Maydelle Country Wines
- 42. McReynolds Winery
- 43. Messina Hof Winery Cellars
- 44. Nashwood Winery
- 45. Oberhof Winery
- 46. Pheasant Ridge Winery

- 47. Pillar Bluff Vineyards
- 48. Piney Woods Country Wines
- 49. Pleasant Hill Winery
- 50. Poteet Country Winery
- 51. Red River Winery
- 52. San Martiño Winery & Vineyards
- 53. Sandstone Cellars Winery
- 54. Singing Water Vineyards
- 55. Sister Creek Vineyards
- 56. Spicewood Vineyards
- 57. Ste. Genevieve Wines
- 58. Su Vino Winery
- 59. Texas Hills Vineyard
- 60. The Bella Vista Ranch
- 61. Torre di Pietra
- 62. Triple "R" Ranch
- 63. Val Verde Winery
- 64. Wales Manor
- 65. Water 2 Wine
- 66. Wichita Falls Winery
- 67. Wimberley Valley Winery
- 68. Windy Hill Winery
- 69. Woodrose Winery
- 70. Zin Valle Vineyards

Alamosa Wine Cellars

Jim and Karen Johnson, Owners
677 CR 430, PO Box 212
(3 mi W of Bend on Hwy 580)
Bend, TX 76824
Ph. (325) 628-3313
E-mail: alamosa@centex.net
www.alamosawinecellars.com

Barking Rocks Winery

Tiberia, Owner and Winemaker
1919 Allen Court
Granbury, TX 76048
Ph. (817) 579-0007
E-mail: gigem04@charter.net
www.barkingrockswine.com

Becker Vineyards

Dr. Richard and Bunny Becker, Owners
PO Box 393 (464 Jenschke Ln, S off Hwy 290)
Stonewall, TX 78671
Ph. (830) 644-2681
Fax (830) 644-2689
E-mail: beckervyds@fgb.net
www.beckervineyards.com

Bell Mountain Vineyards

Bob and Evelyn Oberhelman, Owners
Box 756 (1463 Bell Mountain Rd)
Fredericksburg, TX 78624
Ph. (830) 685-3297
Fax (830) 685-3657
E-mail: bellmtn@ctesc.net
www.bellmountainwine.com

Blue Mountain Vineyard & Winery

Nell Weisbach, Owner; Patrick Johnson, Winemaker
HCR 74, Box 7 (Hwy 166)
Fort Davis, TX 79734
Ph. (915) 426-3763
E-mail: patj@overland.net

Bluff Dale Vineyards

David and Theresa Hayes, Owners
5222 CR 148
Bluff Dale, TX 76433
Ph. (254) 728-3540
E-mail: thewinery@bluffdalevineyards.com
www.bluffdalevineyards.com

Bruno & George Wines

Shaw Bruno and Gary George, Owners
406 Messina Road
Sour Lake, TX 77659
Ph. (409) 898-2829
www.brunoandgeorge.com/index.htm

Brushy Creek Vineyards

Les Constable, Winemaker
572 CR 2798
(Between Bowie and Decatur on US 287/81)
Alvord, TX 76225
Ph. (940) 427-4747
Fax (940) 427-4746
E-mail: brushyck@wf.net
www.brushycreekvineyards.com

Cap*Rock Winery at Lubbock

Don Roark, Owner
408 East Woodrow Rd
Lubbock, TX 79423
Ph. (806) 863-2704
Fax (806) 863-2712
E-mail: stevecaprock@yahoo.com
www.caprockwinery.com

***Cap*Rock Winery at Grapevine
(Tasting Room)***

409 S Main St
Grapevine, TX 76051
Ph. (817) 329-9463

Carmela Winery

Joseph Anselmo, Manager
210 W. Broadway; P.O.Box 295
Prosper, TX 75078
Ph. (972) 346-2894
Fax (972) 347-2190
E-mail: carmela1@sbcglobal.net

Chisholm Trail Winery

Paula Williamson, Owner
2367 Usener Rd
(2.3 mi off Hwy 290 on Usener Rd)
PO Box 1274
Fredericksburg, TX 78624
Ph. (830) 990-CORK (2675)
or 1-877-990-2675
Fax (830) 990-9965
E-mail: chisholmtrail@ktc.com
www.chisholmtrailwinery.com

Circle S Vineyards

Dave Stacy, Owner
9920 Hwy 90A #B-268
Sugar Land, TX 77487
Ph. (281) 265-9463
Fax (281) 325-0631
E-mail: info@circlesvineyards.com
www.circlesvineyards.com

Colony Cellars

Oak Tree Ranch Corporation

35955 Richard Frey Rd.
Waller, TX 77484
Ph./Fax (979) 826-3073
www.colonycellars.com

Comfort Cellars Winery

Cathy Winmill, Owner
723 Front St, PO Box 324
Comfort, TX 78013
Ph. /Fax (830) 995-3274
E-mail: bobwinemaker@yahoo.com

Cross Timbers Winery

Don Bigbie, Owner
805 N Main St
Grapevine, TX 76051
Ph. (817) 488-6789
Fax (817) 488-7981
E-mail: crosstimberswinery@directlink.net
www.crosstimberswinery.com

CrossRoads Winery

John Otis, Owner
15222 King Road 1001
Little Elm, TX 75034
Ph. (972) 294-4144
Fax (972) 899-1295

**Delaney Vineyards at Lamesa
(Production Facility)**

Jerry Delaney, Owner
1 mi N of Lamesa on Hwy 137
Lamesa, TX 79331
Ph. (806) 872-3177
Fax (806) 872-2421
E-mail: info@delaneyvineyards.com
www.delaneyvineyards.com

Delaney Vineyards at Grapevine

2000 Champagne Blvd
Grapevine, TX 76051
Ph. (817) 481-5668
Fax (817) 251-8119

Driftwood Vineyards

Gary and Kathy Elliott, Owners
4001 Elder Hill Road
Driftwood, TX 78619
Ph. (512) 858-4508
Fax (512) 858-2020
E-mail: info@driftwoodvineyards.com
www.driftwoodvineyards.com

Dry Comal Creek Vineyards

Franklin and Bonnie Houser, Owners
1741 Herbelin Road
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Fax (830) 885-4124
E-mail: sales@drycomalcreek.com
www.drycomalcreek.com

Fall Creek Vineyards

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Tow, TX 78672
1402 San Antonio St. Ste. 200
Austin, TX 78701
Ph. (512) 476-4477 (325) 379-5361
Fax (512) 476-6116 (915) 379-4741
E-mail: chad@fcv.com
www.fcv.com

Winery

Fawn Crest Vineyards

Wayne and Patty McNeil, Owners
22743 Cascade Springs
Katy, TX 77494
Ph. (281) 392-3645
Fax (281) 392-5010
E-mail: almitra@msn.com
www.fawncrest.com

Flat Creek Estate

Rick and Madelyn Naber, Owners
24912 East Singleton Bend E#1
(6 mi W of Lago Vista on FM 1431)
Marble Falls, TX 78654
Ph. (512) 267-6310
Fax (512) 267-6321
E-mail: flatcreekwines@aol.com
www.flatcreekestate.com

Frascone Winery

Jim Frascone, Owner
311 Bayside Drive
Oak Island, TX 77514
Ph. (409) 252-4506
Fax (409) 252-4151
E-mail: jfrascone@frasconewinery.com
www.frasconewinery.com

Fredericksburg Winery

The Switzer Family, Owners
247 W Main St
Fredericksburg, TX 78624
Ph. (830) 990-8747
Fax (830) 990-8747
E-mail: wine@fgbwinery.com
www.fbgwinery.com

Grape Creek Vineyards, Inc.

Jason Englert, Winemaker
PO Box 102 (Hwy 290, E of Fredericksburg)
Stonewall, TX 78671
Ph. (830) 644-2710
Fax (830) 644-2746
E-mail: relax@grapecreek.com
www.grapecreek.com

Haak Vineyards & Winery

Raymond and Gladys Haak, Owners
6318 Ave. T (1.8 mi. S of Hwy 6)
Santa Fe, TX 77510
Ph. (409) 925-1401
Fax (409) 925-0276
E-mail: gladys@haakwine.com
www.haakwine.com

Hidden Springs Winery

Jim and Lela Banks, Owners
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Pilot Point, TX 76258
Ph. (940) 686-2782
Fax (940) 686-4206
E-mail: winemaker@hiddenspringswinery.com
www.hiddenspringswinery.com

***Homestead Winery at Ivanhoe
(Production Facility)***

Gabe and Barbara Parker, Owners
PO Box 35 (County Rd 2041)
Ivanhoe, TX 75447
Ph. (903) 583-4281
Fax (903) 583-2024

***Homestead Winery at Denison
(Tasting Room)***

220 W Main St
Denison, TX 75020
Ph. (903) 464-0030

***Homestead Winery at Grapevine
(Tasting Room)***

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Grapevine, TX 76051
Ph. (817) 251-9463

Kiepersol Estates Vineyards

Pierre de Wet, Owner
3933 FM 344E
Tyler, TX 75703
Ph. (903) 894-8995
Fax (903) 894-7933
E-mail: winery@kiepersol.com
www.kiepersol.com

La Bodega Winery

John Broncato and Gina Puente-Broncato
Terminal A, Gate A15 (Dallas/Ft. Worth Intl. Airport)
DFW Airport, TX 75261
Ph. (972) 574-1440
Fax (972) 574-4353
E-mail: jbrancato01@charter.net

La Buena Vida Vineyards at Springtown

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www.labuenavida.com

La Buena Vida Vineyards at Grapevine

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Fax (817) 421-3635
E-mail: lbv@labuenavida.com
www.labuenavida.com

La Diosa Cellars

Sylvia McPherson and Catherine Traxler, Owners
901 17th Street
Lubbock, TX 79401
Ph. (806) 744-3600
Fax (806) 744-3704
www.ladiosacellars.com

Lehm Berg Winery

Carl and Mary Beth Droemer, Owners
1266 CR 208
Giddings, TX 78942
Ph. (979) 542-2726
Fax (979) 542-0082
E-mail: lehmberrywinery@verizon.net
www.lehmberrywinery.com

LightCatcher Winery

Terry and Caris Turpen, Owners
6925 Confederate Park Road
Ft. Worth, TX 76108
Ph. (817) 237-2626
Fax (817) 237-0736
E-mail: lightcatch@aol.com
www.lightcatcher.com

Llano Estacado Winery

Llano Estacado, Inc., Owner
PO Box 3487 (3.2 mi E of US 87 S on FM 1585)
Lubbock, TX 79452
Ph. (806) 745-2258
Fax (806) 748-1674
E-mail: info@llanowine.com
www.llanowine.com

Lone Oak Vineyards Corp

Robert and Jamey Wolf, Owners
4781 E Lone Oak Road
Valley View, TX 76272
Ph. (940) 637-2612
Fax (940) 637-2963
E-mail: loneoak@texoma.net

Los Pinos Ranch Vineyards

Jeff and Ana Luisa Sneed, Owners
658 CR 1334
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Fax (903) 855-1771
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www.lospinosranchvineyards.com

Lost Creek Vineyard

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1129 RR 2233
Sunrise Beach, TX 78643
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Fax (325) 388-0910
E-mail: icvine@tstart.net
www.lostcreekvineyard.com

Maydelle Country Wines

Steven Harper, Owner
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Rusk, TX 75785
Ph /Fax (903) 795-3915
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www.maydelle.biz

McReynolds Wines

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Cypress Mills, TX 78663
Ph. (830) 825-3544
Fax (830) 825-1105
E-mail: info@mcreynoldswines.com
www.mcreynoldswines.com

Messina Hof Winery & Resort

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Nashwood Winery

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Stephen Eubanks, Winemaker
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Oberhof Wine Cellars

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Pheasant Ridge Winery

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Pillar Bluff Vineyards

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www.pillarbluff.com

Piney Woods Country Wines

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Pleasant Hill Winery

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Poteet Country Winery

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www.poteetwine.com

Red River Winery

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Spring, TX 77373
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San Martiño Winery & Vineyards

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Fax (972) 772-1902
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Sandstone Cellars Winery

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Mason, TX 76856
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Singing Water Vineyards

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Sister Creek Vineyards

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Spicewood Vineyards

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Ste. Genevieve Wines

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Su Vino Winery

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Texas Hills Vineyard

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www.texashillsvineyard.com

The Bella Vista Ranch

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Torre di Pietra

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Triple "R" Ranch

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Val Verde Winery

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Wales Manor

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Water 2 Wine

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Wichita Falls Vineyards & Winery

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Wimberley Valley Wines at Driftwood

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Windy Hill Winery

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Conversion Factors From Metric to US Measurements

1 liter	=	0.2642 U.S. gallons
1 hectoliter	=	26.418 U.S. gallons
1 hectokilo (1 quintal)	=	0.1102 tons (1 ton = 2,000 pounds)
1 kilometer	=	0.6214 mile
1 hectare	=	2.47 acres
1 case	=	9 liters (2.3778 gallons)
1 ton of wine grapes	=	170 gallons hand harvested or 200 gallons mechanically harvested

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