THE ILLINOIS GRAPE AND WINE INDUSTRY

Its Current Size, 2006 Production, and Growth

Principle Investigator

Bill Shoemaker

Survey Director

Gene Campbell

Cover Design

Crystal Bartanen

Department of Natural Resources and Environmental Sciences
University of Illinois at Urbana-Champaign

Contributors and Sponsors

Illinois Grape Growers and Vintners Association
Executive Director: Bill McCartney
Member Contact: Robert Hall

Illinois Department of Agriculture

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In May, 2007, a survey of Illinois' vineyards and wineries was initiated by the University of Illinois at Urbana-Champaign with the support of the Illinois Grape Growers and Vintners Association (IGGVA). Additional funding was provided by the Illinois Department of Agriculture.

Objective: The survey's objective was to assess the current size and scope of Illinois' grape and wine industry including the documentation of important grape and wine production statistics.

Methodology and Response Rate: A mail questionnaire was used to collect information from vineyard and winery owners and operators. A survey population of 511 was compiled from all known interested and active grape growers and vintners who possessed an Illinois address. The survey questionnaire was developed in partnership with IGGVA and implemented using the following schedule (Table 1).

Table 1. Survey implementation schedule.

Date	Activity
May 22	Postcard pre-notice
May 29	First mailing of the questionnaire
June 5	Postcard reminder
June 26	Second mailing of questionnaire
July 1-30	Telephone follow-up to non-respondents
July 31	Third mailing of questionnaire

Survey returns identified 191 active vineyard and/or winery operations. In addition, 54 respondents, who were either hobbyists (33) or others not currently in the business (21), expressed plans to establish a commercial vineyard or winery within the next five years; 79 respondents, who included hobbyist (40) or others (39), had no plans to sell grapes or wine; and 23 addresses were identified as duplicates or no longer valid. This resulted in a revised survey population of 488 and an overall survey response rate of 66.4 percent.

Twenty vineyards and five wineries who responded in 2005 (Campbell and Shoemaker 2005) did not respond in 2007. For these non-respondents, selected information gathered in 2005 (e.g., date of establishment, total grape acres, tankage, etc.) was used to supplement data from the current 2007 survey. Of the 144 remaining non-respondents, secondary sources were used to identify 35 additional vineyards and 15 additional wineries. These secondary sources, in conjunction with conservative survey averages, were used to compute expanded estimates for selected vineyard and winery production statistics like total grape acres and winery production. The terms "reporting" or "reported" are used to identify results based on survey returns only.

Overview of Grape and Wine Industry: The 211 active vineyard and/or winery operations identified by the 2005 and 2007 surveys consist of 200 vineyards and 62 wineries. The additional 35 vineyards and 15 wineries identified through secondary sources increase the overall totals to 235 vineyards and 77 wineries (Table 2). Sixty percent of these vineyards and wineries are located in south central or southern Illinois. Furthermore, southern Illinois is home to the top three counties with the greatest number of vineyards (Jackson, Union, and Johnson) as well as home to the top two counties (Union and Jackson) with the greatest number of wineries (Table 3). Other top counties are Jo Daviess in northern Illinois and Madison in south central Illinois.

Table 2. Number of Illinois vineyards and wineries by region.

Region*	Vineyards		Wineries	
	(no.)	(%)	(no.)	(%)
North	57	24	20	26
Central	37	16	11	14
South Central	50	21	17	22
South	91	39	29	38
Total	235	100	77	100

* IGGVA defined regions (see Appendix for included counties).

Seventy-eight counties within Illinois (76 percent) have at least one vineyard and 46 counties (45 percent) have at least one winery. As documented in 2005, the majority of these vineyards and wineries are relatively new. For example, 84 percent of reporting vineyards and wineries were established in the last ten years (Figures 1 and 2). Vineyard and winery establishment percentages for the last five years are 34 and 48 percent, respectively. In addition, 50 survey respondents (who are not currently in the business) expressed plans to establish a vineyard within the next five years while 26 plan to establish a winery. Also, during this same five-year period, 44 existing vineyards reported that they expect to add a winery to their operations.

The continued growth of Illinois' grape and wine industry is further illustrated by comparing the Illinois Grape and Wine Resources Council's 2002 estimate of 31 wineries to today's number of 77 wineries; an increase of 148 percent over a five-year period. The number of total vineyards has also grown rapidly; increasing by 158 percent between 1999 (91 vineyards) and 2007 (235 vineyards).

The average period between year of establishment and first sale was 3.33 years for reporting vineyards and 0.94 years for reporting wineries (Table 4). The majority of vineyards (65 percent) sold their first grapes within three years of establishment while the majority of wineries (81 percent) sold their first wine within one year of establishment.

As of January 1, 2007, it is estimated that Illinois grapes were planted on 1,083 acres (Table 5). Twenty-five percent were in the northern region, 16 percent in the central, 27 percent in south central, and 32 percent in the southern region. The statewide average was 4.5 grape acres per reporting vineyard.

Sixty-one percent of planted acres (659 acres) were estimated to be harvested in 2006. Thirty-seven percent of these harvested grape acres were in the southern region, 31 percent in south central, 13 percent were in the central region, and 19 percent in the northern region. The statewide per reporting vineyard average was 2.7 harvested acres.

Table 3. Counties with greatest number of vineyards and wineries.

County	Vineyards (no.)	County	Wineries (no.)
Jackson	20	Union	7
Union	18	Jackson	6
Johnson	12	Madison	4
Jo Daviess	11	Adams	3
Madison	9	De Kalb	3
Williamson	8	Randolph	3
McHenry	6	Clinton	2
Franklin	5	Cook	2
Henry	5	Crawford	2
Macoupin	5	Henry	2
Adams	4	Jo Daviess	2
Greene	4	Johnson	2
Kane	4	LaSalle	2
LaSalle	4	Lake	2
Ogle	4	Richland	2
Saline	4	Shelby	2
Woodford	4	Williamson	2
Subtotal	127*		48**

* Top 17 counties contain 54 % of Illinois' vineyards; 78 counties within Illinois (76 %) have at least one vineyard.

** Top 17 counties contain 62 % of Illinois' wineries; 46 counties within Illinois (45 %) have at least one winery.

Figure 1. Year of establishment for 206 reporting vineyards.

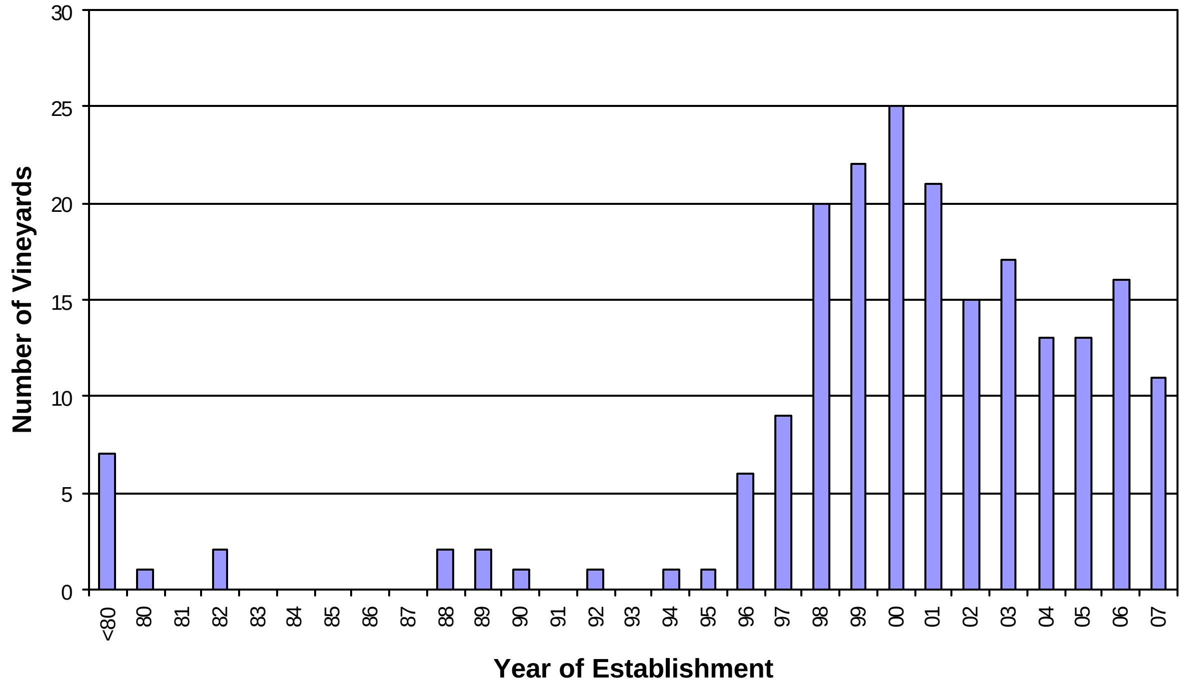

Figure 2. Year of establishment for 63 reporting wineries.

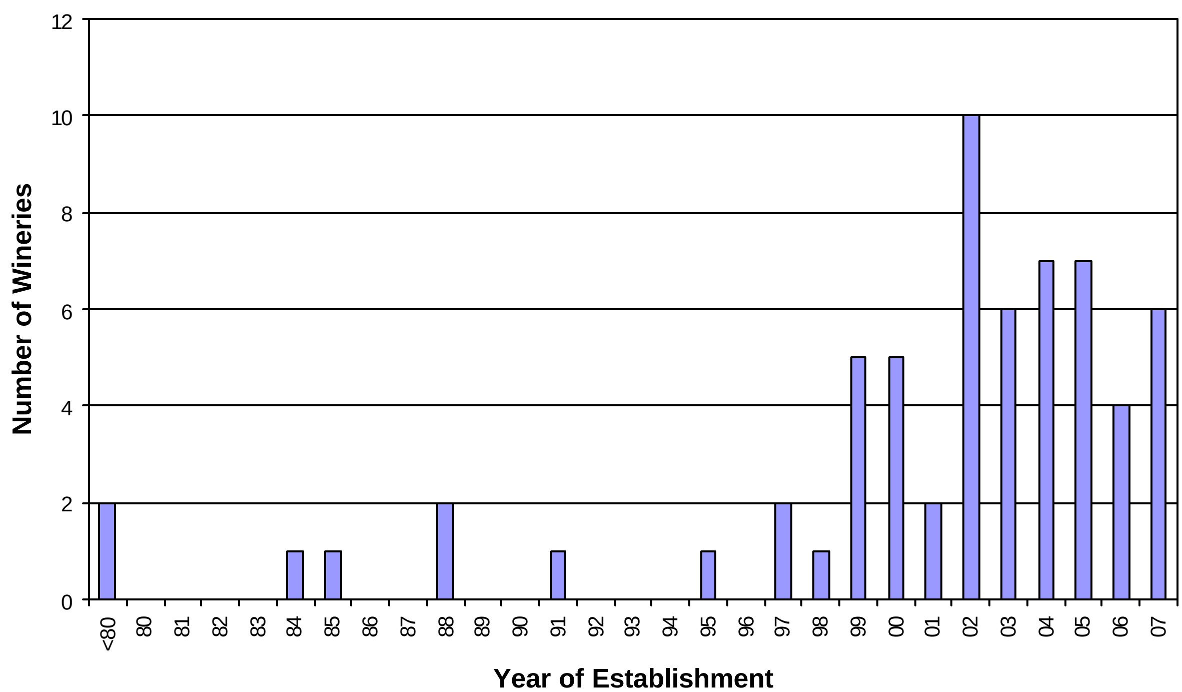

Table 4. Time to first sale from year of establishment.

Period in Years	Vineyards * (%)	Wineries (%)
Establishment Year	0.7	42.5
1	2.1	38.9
2	22.0	5.6
3	40.4	7.4
4	20.6	5.6
5	10.7	
6		
7	1.4	
8		
9	1.4	
10 or greater	0.7	
Total	100.0	100.0
Average Period	3.33 years	0.94 years

* Based on reporting vineyards that have sold grapes.

Table 5. Number of Illinois total and harvested grape acres by region.

Region *	Total Acres as of 1/1/07		2006 Harvested Acres	
	(ac.)	(%)	(ac.)	(%)
North	270	25	123	19
Central	169	16	86	13
South Central	296	27	204	31
South	348	32	246	37
Total	1,083	100	659	100
Average **	4.47		2.72	

* IGGVA defined regions.
** Overall average per reporting vineyard.

Existing Illinois wineries are estimated to have a capacity of about 844,372 gallons, consisting of 726,106 gallons in tankage and 118,266 gallons in oak barrels (Table 6). Thirty-eight percent of tankage capacity is in the northern region, nine percent in the central, 25 percent in south central, and 28 percent in the southern region. Only three percent of oak barrel capacity was in the central region with 71 percent in the north and 26 percent in the combined south central and southern regions. The overall averages for tankage and oak barrel capacities were 9,344 and 3,968 gallons per reporting and producing winery.

In 2006, it is estimated that 564,270 gallons of wine were produced, comprising 67 percent of total capacity. Fifty percent of this production was in the northern region, 26 percent in the south, 17 percent in south central, and seven percent in the central region. Average production per reporting and producing winery was 8,929 gallons. Capacity utilization was greatest in the northern region at 79 percent followed by the southern (66 percent), central (57 percent), and south central regions (49 percent).

Table 6. Winery capacity and 2006 wine production (in gallons) by region.

Region *	Tankage		Oak Barrels		2006 Production **	
	(gal.)	(%)	(gal.)	(%)	(gal.)	(%)
North	275,937	38	83,869	71	283,482	50
Central	64,849	9	3,862	3	39,326	7
South Central	181,100	25	8,815	8	93,162	17
South	204,220	28	21,720	18	148,300	26
Total	726,106	100	118,266	100	564,270	100
Average ***	9,344		3,968		8,929	

* IGGVA defined regions.
** 2006 production comprises 67 % of capacity.
*** Average per reporting and producing winery.

Reported Vineyard Acreage by Grape Variety: Based on reporting vineyards, 13 grape varieties accounted for 85 percent of the 2006 harvested acres and 80 percent of total acres. Ranked in descending order by harvested acres, these varieties are: Chardonel, Chambourcin, Vignoles, Traminette, Norton, Frontenac, Foch. Seyval, Vidal Blanc, Concord, St. Croix, Cayuga White, and Niagara (Table 7). Greater than 87 different grape varieties were reported planted by Illinois vineyards.

As measured against the total 2006 harvest level, harvested acres are expected to increase by 22 percent to 804 acres in 2007, by 39 percent to 913 acres in 2008, and by 50 percent to 988 acres in 2009. The incremental annual harvested acre increases to 2007, 2008 and 2009 are 22, 14, and eight percent, respectively. The top 13 grape varieties listed above are expected to comprise 82 percent of harvested acres in 2007, 80 percent in 2008, and 78 percent in 2009.

Table 7. Average vine age; total acres as of 1/1/07; 2006 harvested acres; expected acres to be harvested in 2007, 2008, and 2009; and future plantings by grape variety.

Variety *	Average Age	1/1/07 Total Acres	2006 Harvested Acres	Expected Acres to be Harvested in 2007	2008	2009	Expected Acres to be Planted 2007-2012
	(no.)	(ac.)	(ac.)	(ac.)	(ac.)	(ac.)	(ac.)
Chardonel	6.31	106.36	80.52	85.54	83.99	87.36	4.50
Chambourcin	5.40	111.85	68.43	77.72	94.09	105.03	33.78
Vignoles	5.90	71.67	56.68	63.40	66.65	67.75	22.68
Traminette	4.64	62.47	42.56	48.54	56.79	63.30	13.50
Norton	5.29	59.07	35.40	50.23	57.85	60.55	24.43
Frontenac	3.80	64.89	32.38	44.77	50.58	58.16	9.91
Foch	4.77	82.88	31.79	45.35	57.45	60.87	7.50
Seyval	6.11	41.85	31.18	34.05	34.48	33.23	3.10
Vidal Blanc	6.81	39.11	24.57	31.91	31.91	31.91	4.50
Concord	12.92	20.92	18.72	17.95	17.95	18.38	1.93
St. Croix	4.63	19.82	13.06	15.48	17.45	19.09	2.50
Cayuga White	4.89	17.63	12.87	16.12	17.02	17.53	5.00
Niagara	6.92	16.09	12.25	15.13	15.22	15.90	8.10
NY 73	3.38	14.85	9.30	11.90	12.75	14.20	8.50
NY 70	2.43	13.31	9.00	12.53	14.28	16.68	10.25
Leon Millot	3.94	15.02	7.40	11.07	13.98	15.18	3.75
Chancellor	6.13	10.26	5.75	5.85	7.20	7.45	0.18
Catawba	6.77	7.71	5.70	6.55	6.94	7.34	0.63
Cabernet Franc	4.67	5.20	5.20	5.20	5.20	5.20	2.00
Edelwiess	3.73	7.83	5.00	5.63	8.13	8.05	0.50
NY 76	1.00	7.45	5.00	8.00	9.20	10.25	16.50
LaCrosse	4.16	10.12	3.73	6.44	7.89	9.19	3.58
GR-7	3.89	7.96	3.50	4.10	5.65	5.85	0.20
St. Pepin	4.07	10.00	2.88	7.38	7.98	8.31	0.46
De Chaunac	8.50	3.10	2.50	3.10	3.10	3.10	0.00
Steuben	6.29	2.74	2.25	2.12	2.62	2.87	0.25
Chardonnay	4.50	2.01	2.01	2.01	2.01	2.01	0.50
Rougeon	4.00	3.05	1.90	2.00	2.00	2.00	0.00
Landot Noir	3.00	1.79	1.50	1.50	1.50	1.50	0.00
Golden Muscat	3.00	4.98	1.25	1.50	4.98	4.98	0.25
Villard Blanc	11.33	3.25	1.25	4.75	4.75	4.75	1.50
Baco Noir	8.00	1.00	1.00	1.00	1.00	1.00	0.00
All Others	2.84	47.76	7.09	14.98	31.37	46.94	37.38
Subtotal **	5.12	894.00	543.62	663.80	753.96	815.91	227.86
Supplemental ***		188.75	114.97	139.98	158.93	172.07	48.52
Total		1,082.75	658.59	803.78	912.89	987.98	276.38

* Ranked in descending order by 2006 harvested acres.
** Based on reporting vineyards.
*** Added estimates based on secondary information for 35 non-reporting vineyards.

By 2012, total grape acres are expected to increase by 276 to 1,359 acres; an increase of about 26 percent. The 13 varieties listed earlier are expected to comprise 62 percent of these newly planted acres.

Statewide, the top nine grape varieties (Chardonel, Chambourcin, Vignoles, Traminette, Norton, Frontenac, Foch, Seyval, and Vidal Blanc) comprise 74 percent of all harvested acres reported by responding vineyards. The top nine varieties by region are listed in Table 8.

Reported Market Statistics by Grape Variety: In 2006, an estimated 1,666 tons of grapes were marketed by Illinois' vineyards (Table 9). Ranked in descending order by tons marketed in 2006, the reported top 16 varieties are Chardonel, Chambourcin, Traminette, Vidal blanc, Vignoles, Seyval, Norton, Frontenac, Foch, Concord, Cayuga White, NY 70 (Corot Noir), St. Croix, Niagara, Chancellor, and Catawba. These 16 varieties accounted for 91 percent of total reported tons marketed. Eight percent of total marketed production was sold out-of-state.

The southern region accounted for 41 percent of marketed production in 2006, south central 34 percent, the central region 11 percent, and the north 14 percent (Table 10). Eighty-three percent of tons sold out-of-state were from the south central and southern regions.

Ninety-three percent of harvested grapes were for use in wine making, five percent were sold fresh, and one percent was used in unfermented juice (Table 11). For grapes that were shipped to wineries, 81 percent were self-delivered by the vineyard, 16 percent were picked up by the winery, and three percent were shipped by hired transport. A cold storage facility was available to 62 (33 percent) of reporting vineyards.

Pest Management Problems: The top three vineyard pest management problems were birds, Japanese beetles, and deer (Table 12). As a group, disease comprised about 32 percent of the most serious pest problems cited by vineyard owners, wildlife conflicts accounted for 29 percent, weeds 19 percent, and insects 18 percent. Other diseases cited were viruses, anthracnose, and ripe and bunch rot. Bees and rose chafers were other insects cited. Other weeds listed by vineyard owners were bull nettles, quack grass, poison hemlock, morning glory, and Johnson grass. Opossums were included as "other" wildlife pests along with problems from neighboring cows.

Based on the three top rankings (1 to 3), disease and insect management was the most challenging vineyard management issue cited by vineyard owners (Table 13). Second most challenging was canopy management followed by wildlife management, pruning, and weed management. Variety selection, vine training, trellising system selection, fertilization, soil pH adjustment, and crop estimation before harvest were about equal with respect to the degree of challenge each presented to the vineyard owner. Other top ranked management issues were herbicide drift from neighboring fields and equipment and labor costs or availability. Additional issues cited were time management, irrigation, application of chemicals, new site preparation, weather problems, and replacement of dead vines.

Table 8. Top nine grape varieties by region; ranked in descending order by 2006 harvested grape acres.

Region *	Variety	1/1/07 Total Acres (ac.)	2006 Harvested Acres (ac.)
North	Foch	57.42	19.39
	St. Croix	15.09	10.43
	Frontenac	25.41	10.00
	Vignoles	8.00	7.00
	Niagara	6.94	6.10
	Concord	5.69	4.10
	Leon Millot	8.89	3.90
	St. Pepin	7.27	2.75
	LaCrosse	7.81	2.60
Central	Frontenac	22.85	10.60
	Concord	9.70	9.70
	Chardonel	11.69	9.30
	Vignoles	14.17	8.68
	Seyval	7.34	5.33
	Foch	14.11	5.00
	Chambourcin	5.65	3.25
	Traminette	7.18	2.77
	Cayuga White	5.51	2.50
South Central	Chardonel	62.25	43.25
	Traminette	34.60	24.10
	Vignoles	24.66	19.60
	Norton	20.25	13.80
	Chambourcin	22.98	13.58
	Frontenac	12.30	7.85
	Seyval	12.26	7.20
	Villard Blanc	15.94	6.50
	Foch	8.35	6.40
South	Chambourcin	83.16	51.60
	Chardonel	31.59	27.67
	Vignoles	24.84	21.40
	Norton	31.97	19.35
	Seyval	20.40	17.15
	Traminette	16.69	13.94
	Vidal Blanc	13.91	12.07
	Cayuga White	6.37	5.87
	Cabernet Franc	5.20	5.20

* IGGVA defined regions.

Table 9. Tons marketed and sold out-of-state in 2006, sale price per ton, and sugar content by grape variety.

Variety *	Tons Marketed in 2006 (tons)	Tons Sold Out-of-State in 2006 (tons)	2006 Sale Price per Ton Low ($/ton)	High ($/ton)	Average ($/ton)	Sugars °Brix (%)
Chardonel	210.32	17.10	700	1200	891	22.83
Chambourcin	199.35	1.00	800	1200	1061	22.31
Vignoles	93.33	0.00	900	1500	1109	23.15
Traminette	161.93	59.25	800	1200	1022	21.52
Norton	90.24	0.00	700	1200	1028	23.31
Frontenac	72.97	1.00	800	1500	1051	23.15
Foch	58.12	2.00	600	1500	969	21.78
Seyval	92.55	1.00	700	1000	867	21.08
Vidal Blanc	95.51	2.00	700	1000	880	22.13
Concord	51.58	11.00	360	1500	674	17.04
St. Croix	25.85	0.00	800	1000	939	21.11
Cayuga White	41.55	5.50	400	1000	794	20.08
Niagara	24.57	2.00	500	1000	670	17.88
NY 73	10.90	0.00	1000	1000	1000	21.03
NY 70	30.22	0.00	1000	1100	1050	19.70
Leon Millot	10.75	0.00	900	1200	1060	22.56
Chancellor	22.75	0.00	750	1200	1000	21.50
Catawba	21.01	1.00	600	1000	780	19.05
Cabernet Franc	15.50	2.00	1000	1500	1283	21.65
Edelwiess	15.80	4.80	850	1000	925	18.00
NY 76	0.00	0.00	---	---	---	---
LaCrosse	8.50	0.00	1000	1000	1000	21.00
GR-7	16.90	10.00	1000	1000	1000	---
St. Pepin	8.50	0.00	1000	1000	1000	20.67
De Chaunac	5.50	0.50	600	750	675	18.50
Steuben	1.75	0.00	600	600	600	18.00
Chardonnay	5.10	0.00	1000	1200	1144	20.28
Rougeon	2.50	0.00	400	400	400	18.50
Landot Noir	1.30	0.00	1000	1000	1000	20.00
Golden Muscat	3.00	0.00	700	900	800	19.50
Villard Blanc	12.50	0.00	750	750	750	23.00
Baco Noir	0.00	0.00	---	---	---	---
All Others	7.49	0.00				
Subtotal **	1,417.84	120.15				
Supplemental ***	248.15	21.00				
Total	1,665.99	141.15				

* Ranked in descending order by 2006 harvested acres.
** Based on reporting vineyards.
*** Added estimates based on secondary information for 35 non-reporting vineyards.

Table 10. 2006 tons marketed and sold out-of-state by region.

Region *	2006 Tons Marketed (tons)	(%)	2006 Tons Sold Out-of-State (tons)	(%)
North	235	14	8	6
Central	184	11	16	11
South Central	572	34	93	66
South	675	41	24	17
Total	1,666	100	141	100

* IGGVA defined regions.

Table 11. 2006 crop usage, method of grape transport to winery, and availability of cold storage.

Crop Usage	Percent of Grapes	
Fresh Sales	5	
Wine Making	93	
Unfermented Juice	1	
Other *	1	
Total	100	
Method of Transport	Percent of Grapes	
Self-delivered	81	
Hired Transport	3	
Winery Pickup	16	
Total	100	
Cold Storage Facility Available	Number Yes	Percent
Vineyards	62	33

* "Other" includes processing grapes into jelly and waste due to birds or herbicide drift from neighboring fields.

Table 12. Pest management problems cited as most serious by Illinois vineyard owners, ranked by cited frequency (percent).

Problem	Percent *	Problem	Percent *
Birds	13.53	Crown Gall	3.47
Japanese Beetles	12.72	AM Lady Beetles	3.35
Deer	11.56	Racoons	2.89
Black Rot	7.75	Phomposis	2.54
Annual Grasses	7.40	Grape Berry Moths	2.20
Broadleaves	7.05	Canada Thistle	1.97
Phylloxera	6.71	Woody Plants	1.39
Powdery Mildew	6.36	Bindweed	1.39
Downey Mildew	5.09	Turkeys	1.04

* "Other" pest problems comprise the remaining 1.59 percent of responses.

Winery capacity and production: As stated earlier, current winery capacity is estimated at 844,372 gallons with 2006 production at 564,270 gallons. Forty-six percent of this production was sold through tasting room sales, nine percent greater than that reported in 2005. Of total cases sold, 67 percent were sold through a distributor and 33 percent of cases were self-delivered to a retailer.

White wine comprised 47 percent of 2006 wine production, red wine accounted for 34 percent, non-grape wine 16 percent, and juice over two percent (Figure 3). Eighty percent of all wine produced came from Illinois fruit (43 percent was estate grown) and 56 percent of reporting wineries used Illinois grown fruit exclusively.

Forty-three percent of 2007 reporting wineries were unable to purchase all the grapes they needed from Illinois producers. Listed in descending order by the number of times cited, the grape varieties reported in short supply were Chambourcin, Concord, Vignoles, Vidal Blanc, Cabernet Sauvignon, Niagara, Norton, Riesling, Traminette, Cabernet Franc, Catawba, Chardonel, Merlot, Shiraz, and Zinfandel (Table 14). Wineries reported that they would have purchased an additional 211 tons had the grapes been available.

In addition, of the varieties listed in short supply, the amount of grapes purchased from out-of-state growers was reported at 137.5 tons. In terms of times cited, California led the states that supplied whole grapes to Illinois wineries (Table 15), New York led with supplying grape juice, and California and Michigan led as the source for bulk wine.

Table 13. Vineyard management issues ranked from most challenging (1) to least challenging (10) by Illinois vineyard owners.

Rank	Canopy Mgmt. (%)	Crop Estimation (%)	Disease Mgmt. (%)	Insect Mgmt. (%)	Fertilization (%)	Soil pH Adjustment (%)
1	23.95	5.03	21.12	19.35	4.32	3.90
2	18.56	6.92	16.15	15.48	8.02	7.79
3	10.78	6.92	16.15	15.48	7.41	6.49
4	7.78	8.18	10.56	11.61	9.88	10.39
5	16.17	8.81	16.15	15.48	12.96	11.69
6	7.19	6.92	8.07	9.03	14.20	14.94
7	5.99	15.72	3.73	3.87	16.67	16.23
8	2.40	16.35	3.73	3.87	16.05	17.53
9	1.20	18.24	2.48	2.58	5.56	6.49
10	5.99	6.92	1.86	3.23	4.94	4.55
	100.00	100.00	100.00	100.00	100.00	100.00

Rank	Pruning (%)	Variety Selection (%)	Vine Training (%)	Trellising System (%)	Weed Mgmt. (%)	Wildlife Mgmt. (%)
1	9.04	9.74	5.06	5.07	8.33	16.76
2	17.47	3.90	3.80	2.90	13.10	13.87
3	13.86	7.14	11.39	10.87	12.50	12.14
4	11.45	1.95	10.76	8.70	13.10	10.40
5	12.05	8.44	13.92	13.04	14.29	9.83
6	9.04	4.55	13.29	13.77	13.69	10.98
7	9.64	5.84	14.56	15.94	8.33	9.83
8	8.43	16.88	16.46	17.39	8.93	8.09
9	6.63	30.52	6.96	8.70	4.76	5.78
10	2.41	11.04	3.80	3.62	2.98	2.31
	100.00	100.00	100.00	100.00	100.00	100.00

Figure 3. 2006 winery production by product category.

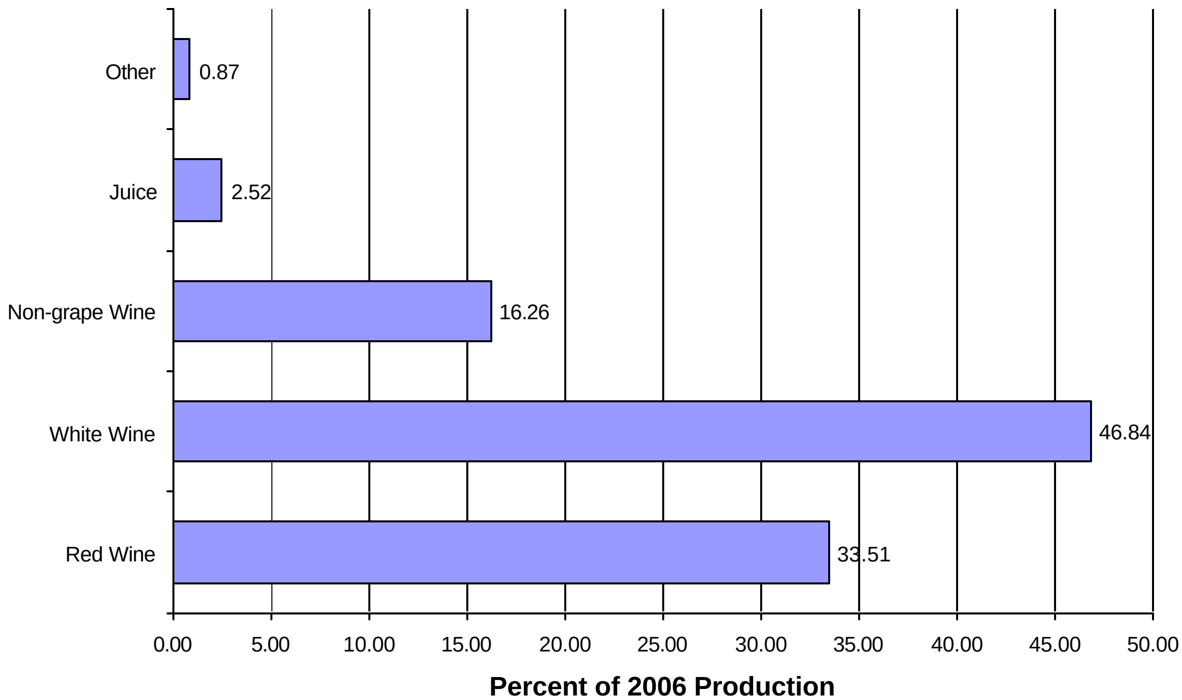

Table 14. Grape varieties cited in short supply by wineries.

Variety	No. Times Cited
Chambourcin	6
Concord	5
Vignoles	5
Vidal Blanc	4
Cabernet Sauvignon	2
Niagara	2
Norton	2
Riesling	2
Traminette	2
Blackberry	1
Cabernet Franc	1
Catawba	1
Chardonel	1
Merlot	1
Shiraz	1
Zinfandel	1

Table 15. Source of out-of-state purchases of whole grapes, grape juice, bulk wine, and other fruit or juice.

	State	No. Times Cited
Whole Grapes:	California	6
	Oregon	3
	Washington	3
	Michigan	2
	Missouri	2
	Indiana	1
	New York	1
Grape Juice:	State	No. Times Cited
	New York	13
	California	5
	Michigan	4
	Oregon	3
	Pennsylvania	2
	Washington	2
	Ohio	1
Bulk Wine:	State	No. Times Cited
	California	6
	Michigan	6
	Oregon	2
	Washington	2
	Indiana	1
	New York	1
	Ohio	1
	Pennsylvania	1
Other Fruit or Juice:	State	No. Times Cited
	Michigan	3
	New York	3
	Wisconsin	3
	California	2
	Indiana	1
	Oregon	1
	Washington	1

Winery Expansion Plans: Thirty wineries (59 percent of those responding) expressed plans to increase the size of their winery. Beginning in 2007 and ending in 2012, these 30 wineries plan to add an additional 234,392 gallons to their wine production capacity (Table 16).

Table 16. Plans to increase wine production capacity by existing wineries.

Expected Year	Additional Capacity Increase in Gallons
2007	6,171
2008	137,721
2009	36,500
2010	29,000
2011	10,000
2012	15,000
Total	234,392

Vineyard and Winery Workforce: Vineyards reported 1,121 paid employees and laborers in 2006; 70 percent were seasonal, 18 percent were part-time (year-round), and 12 percent were full-time (Table 17). A per vineyard average of 2.0 workers (paid laborers and volunteers) were used for pruning, 2.2 workers during the summer season (May – August), and an average of 6.0 workers were used for harvesting (Table 18).

Table 17. 2006 reported total vineyard workforce.*

Status	Number (no.)	Percent (%)	Average ** (no.)
Full-time	134	12	1.76
Part-time***	197	18	2.37
Seasonal	790	70	6.75
Total	1,121	100	6.92

* Paid employees and laborers.
** For vineyards reporting workers by listed status.
*** Year-round.

Table 18. 2006 reported vineyard workforce by season.*

Status	Pruning	Summer	Harvest	Total
	Paid Employees/Volunteers During			
	(no.)	(no.)	(no.)	(no.)
Full-time	116	105	109	330
Part-time	128	129	118	375
Seasonal	149	166	721	1,036
Volunteer	97	91	567	755
Total	490	491	1,515	2,496
Average no.** of workers	2.02	2.18	6.01	
Range of ** workers	1 – 14	1 - 21	1 - 50	
Percentage of vineyards reporting workers	77	73	68***	

* Same worker may be counted in any or all seasons.
** Based on vineyards that used paid employees and volunteers.
*** Twenty-one percent of reporting vineyards had not sold any grapes as of January 1, 2007.

In 2006, Illinois wineries reported a workforce of 363 paid employees and laborers (Table 19). For wineries with their own vineyard, a portion of these workers were also used for pruning, summer maintenance, and harvest. Twenty-five percent of winery workers were seasonal, 41 percent were part-time (year-round), and 34 percent worked full-time.

Table 19. 2006 reported total winery workforce.*

Status	Number	Percent	Average**
	(no.)	(%)	(no.)
Full-time	125	34	3.2
Part-time***	148	41	3.7
Seasonal	90	25	3.5
Total	363	100	7.0

* Paid employees and laborers.
** For wineries reporting workers by listed status.
*** Year-round.

As stated, reporting vineyards and wineries used 1,121 and 363 workers, respectively, in their operations. If workers from the 35 non-responding vineyards and 15 non-responding wineries are included; it is estimated that the respective totals would increase to 1,285 (for vineyards) and 433 (for wineries). In general, these worker totals do not include the owners of the vineyard or winery.

Additional Respondent Comments: Reported comments by survey respondents included concerns related to the long-term, economic viability of vineyard operations. These comments were based either on the rising cost of production inputs, the selling price of grapes, or on the flood of new entrants into commercial grape growing. A few vineyards also had trouble finding buyers for their grapes along with questions regarding proper pricing techniques. As in 2005, these comments reflect the complexities of commercial grape production as well as the industry's recent expansion and growth.

Comparisons Between Surveys: Selected results from the 2005 and 2007 Illinois vineyard and winery surveys are presented in Table 20. Over the last two years, the number of existing vineyards and wineries in Illinois has grown by 22 percent and, between 2004 and 2006, total grape and harvested acres have increased by 20 and 30 percent, respectively. For this same two-year period, tons marketed were up 35 percent and winery capacity was 26 percent greater.

An extraordinarily large increase (153 percent) in oak barrels (gallons) was reported between 2004 and 2006. Most of this reported increase was in the northern region. In other comparisons, a greater percentage of grapes were being self-delivered by vineyards to wineries in 2006 and red wine, non-grape wine, and juice were making up a larger proportion of production (in 2006).

Concluding Remarks: As reported in 2005, while Illinois' grape and wine industry has a rich and important history, the majority of current vineyards and wineries are relatively new. For example, 84 percent of reporting vineyards and wineries were established within the last ten years. And, if current plans are realized, the State's present number of 235 vineyards and 77 wineries would increase by over 21 and 91 percent, respectively, during the next five years.

As of January 1, 2007, total grape acres were estimated at 1,083 acres. Sixty-one percent of this land or 659 acres were harvested in 2006. By 2009, harvested acres are expected to increase by about 50 percent to 988 acres. In addition, it is estimated that existing vineyards expect to plant 276 new grape acres between 2007 and 2012. These new plantings would increase <u>total</u> grape acres by about 26 percent to 1,359 acres without taking into account the addition of any new vineyards.

Illinois' wine production in 2006 is estimated at 564,270 gallons and comprises about 67 percent of capacity (844,372 gallons). Planned expansions by existing wineries will increase capacity to 1,078,764 gallons (an additional 28 percent increase) by the year 2012. And, this does not include expectations to establish 91 percent more wineries within the next five years.

The rebirth of Illinois' grape and wine industry continues to be exciting and a boost to regional development. How well the industry manages its continued growth is a question of increasing importance.

Table 20. Comparison of selected statistics between the 2005 and 2007 Illinois vineyard and winery surveys.

Selected Statistic	Illinois Vineyard and Winery Survey * 2005	2007	Percent Change
Existing vineyards	193	235	+22
Existing wineries	63	77	+22
Total grape acres	906	1,083	+20
Harvested acres	505	659	+30
Expected acres to be planted in next 6 years	217 **	276 **	+27
Tons (of grapes) marketed	1,235	1,666	+35
Percentage of grapes			
Self-delivered	68	81	+13
By hired transport	8	3	-5
Winery pickup	24	16	-8
Tankage (gallons)	625,240	726,106	+16
Oak Barrels (gallons)	46,661	118,266	+153
Capacity (gallons)	671,901	844,372	+26
Production (gallons)	451,079	564,270	+25
Percentage of production			
Red wine	30.8	33.5	+2.7
White wine	55.5	46.8	-8.7
Non-grape wine	11.9	16.3	+4.4
Juice	0.3	2.5	+2.2
Other	1.5	0.9	-0.6
Reported workforce			
Vineyard	834	1,121	+34
Winery	186	363	+95

* Production, marketing, and workforce data are from the year 2004 for the 2005 survey and 2006 for the 2007 survey.

** Future plantings expected during 2005 – 2010 (2005 survey) and 2007 – 2012 (2007 survey).

Appendix: Illinois counties by IGGVA defined regions.

North	Central	South Central	South
Boone	Adams	Bond	Alexander
Bureau	Brown	Calhoun	Clinton
Carroll	Champaign	Cass	Edwards
Cook	De Witt	Christian	Franklin
DeKalb	Ford	Clark	Gallatin
DuPage	Fulton	Clay	Hamilton
Grundy	Hancock	Coles	Hardin
Henry	Henderson	Crawford	Jackson
Jo Daviess	Iroquois	Cumberland	Jefferson
Kane	Kankakee	Douglas	Johnson
Kendall	Knox	Edgar	Massac
Lake	Livingston	Effingham	Monroe
LaSalle	Logan	Fayette	Perry
Lee	Macon	Greene	Pope
McHenry	Marshall	Jasper	Pulaski
Mercer	Mason	Jersey	Randolph
Ogle	McDonough	Lawrence	Saint Clair
Rock Island	McLean	Macoupin	Saline
Stephenson	Menard	Madison	Union
Whiteside	Peoria	Marion	Wabash
Will	Piatt	Montgomery	Washington
Winnebago	Putnam	Morgan	Wayne
	Schuyler	Moultrie	White
	Stark	Pike	Williamson
	Tazewell	Richland	
	Vermilion	Sangamon	
	Warren	Scott	
	Woodford	Shelby	

Reference:

Campbell, G. and B. Shoemaker. 2005. The Illinois Grape and Wine Industry, Its Current Size, 2004 Production, and Growth. Department of Natural Resources and Environmental Sciences, University of Illinois at Urbana-Champaign. 15 pp.