

## **Addendum B: 2008 Colorado Winery Status Review**

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### **Introduction**

The implementation of the new CSU Enology Program began in February 2008, with the appointment of Stephen Menke as Associate Professor of Enology, located in the Dept. of HLA and at the WCRC. Since outreach to the Colorado wine industry is a significant portion of this appointment, and since no comprehensive, site-based survey of the status of the wine industry had been done, a comprehensive site-based interview survey of the industry was begun by Dr. Menke, and has been about 2/3 completed.

### **Methodology**

On-site pre-arranged comprehensive interviews were done for part of the wineries. On-site unannounced tastings were also done at tasting rooms of other wineries. The methodology of each differs.

#### **-Unannounced Tastings**

The CSU enologist showed up at winery tasting rooms, during regular business hours, did not identify himself, and tasted all of the available wines for sale, and made tasting notes on the wines and made snapshot observations on the operation of the tasting room at the time.

#### **-Pre-arranged Comprehensive Site Visits**

Times were arranged with the winery owners and winemakers to do a 3-5 hour interview with the CSU enologist. As many winery personnel as it was possible to have available were part of the interview process, but the primary interviewees were the owners and winemakers. A standardized format was used for all interviews, although each interview was somewhat dictated by the eccentricities of the owners, winemakers, and winery infrastructure. The entire interview was oral and confidential notes were taken by the CSU enologist. The interview consisted of four parts: 1) Account of pre-winery personal history, motivations and actions of owners and history of the winery to the present time; 2) discussion of what the current state of the winery was in the eyes of the owners and personnel and what was desired for the future of the winery; 3) the CSU enologist laid out what are the range of actions and outcomes of the CSU Enology Program currently anticipated and asked for input on desires and needs of the wineries for implementation by the CSU Enology Program; 4) bottled and tanked and barreled wines were all tasted with the owners, with confidential tasting notes taken down by the CSU enologist.

During all four phases of the interviews, oral critiques were given by the CSU enologist on the current practices and products and business operations of the winery. Owners and winemakers were free to ask any questions and make any comments.

## **Results**

-28 Site Review visits (21 west and 7 east) → comprehensive review of: history; future plans; personnel; volume; economic indicators; enology outreach, programming, and research needs; perceptions of wine quality (notes)

-21 unofficial visits (15 west and 6 east) → anonymous visits to tasting rooms

### **-Personal wine-tasting impressions**

-277 retail wines tasted (most were 2004 to 2007 vintages), as compared to national retail market without price/value ratio → 3 outstanding, 18 excellent, 42 tending toward excellence, 76 good, 27 average commercial and sound, 67 below average w/o flaws, 31 flawed or faulted but drinkable wines, 13 fatally faulted wines

-146 tanks and barrels tasted (most were 2006 and 2007 vintages) → 33 w/ excellent potential, 69 good to average, 19 below average w/o faults, 20 w/remediable faults; 5 w/recommendation to discard

-most common wine faults, in order of intensity of the problem and in order of incidence were oxidation (37), volatile acidity (22), reduced sulfurs (17) or excess SO<sub>2</sub> (9) and odors generated by *brettanomyces* and/or *lactobacillus* species (10).

-consistently positive wine attributes were: good fruit intensity and color, decent tannin structure, decent mouth-feel, and good initial presentation of aromas and flavors

-attributes that most need improvement were: either overripe or unripe aromas and flavors, lack of middle palate fruit, imbalance of fruit and acidity intensities, inconsistent length of finish

### **-Personal impressions of general state of wineries**

-commercial viability

-only 5 of 28 site-reviewed wineries appear to be in the black w/o outside funds and none finances full lifestyle for owners; suspicion is that this is also true for rest of Colorado wine industry

-wineries often poorly located for customers and not yet adequately exploiting full range of market capabilities, especially front-range demographics, casual and younger wine drinkers, and sub-premium categories

-inventory fluctuations, either excess or shortage, are a common problem

-attitude

-Most wineries are optimistic about their own growth and future profitability, but most admit they do not see quick growth in volume, due to isolation from markets and/or inability to finance growth

-generational transfer or ownership transfer is an issue, though mostly not of an immediate nature, but rather a desire to leave the workload to someone else and still guarantee a legacy operation

-improvement of quality of products, help with marketing, and need for enology education were almost universally cited as major concerns