



The University of Georgia

Center for Agribusiness and Economic Development
College of Agricultural and Environmental Sciences

Economic Contribution of Georgia Wineries and Vineyards

Prepared by:
Kent Wolfe, Sharon P. Kane, and Karen Stubbs
Center Report: CR-13-06
September 2013



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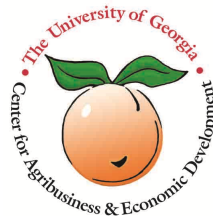
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Executive Summary

The Center for Agribusiness and Economic Development (CAED) was commissioned to examine the data from two surveys to obtain detailed information on winery and vineyard operators and their visitors to update their profiles and estimate the sector's economic contribution to Georgia's economy from a three-component perspective. These components include grape production, winery and vineyard operations, and visitor expenditures. Some highlights from the findings include:

- In terms of grape production, the direct contribution is \$3.4 million worth of output with a total state output contribution of \$6.4 million and 44.5 jobs. The direct figure is very similar to the CAED Farm Gate Value Report for grapes used for winemaking of \$3.0 million in 2011. Based on these figures, grape production generates \$190,267 in state and local taxes.
- The contribution estimate of winery and vineyard operations includes a direct contribution of \$15.1 million in sales or output, with a total of \$23.4 million of output and 95.7 jobs that can be attributed to winery and vineyard operations in the economy. Based on these figures, wineries (less grape production and visitor spending) account for \$1,143,202 worth of state and local tax revenue.
- Visitor spending contributes to the role of wineries and vineyards in the Georgia economy. To provide a range of estimates for the visitor contribution to the area economy, researchers have broken down the visitors according to their reported purpose of their trip to the winery and/or vineyard. The total contribution of output from spending of those whose primary purpose is to visit the winery or vineyard is \$12.7 million, accounting for 125.4 jobs statewide. This visitor spending accounts for \$685,540 worth of state and local taxes. In reference to the visitors that came to the area with another purpose, but visited the winery or vineyard, the total contribution of output or sales is \$39.0 million, attributing a total of 389.9 jobs within the state economy. These visitors account for approximately \$2.1 million worth of state and local taxes.
- Combining all of the categories, Georgia wineries and vineyards and related sectors, along with visitor spending contributes up to \$81.6 million in output, 655.6 jobs throughout the state economy, and \$4.1 million in state and local tax revenue.

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Economic Contribution of Georgia Wineries and Vineyards

1.1 Background/Overview

The Center for Agribusiness and Economic Development (CAED) was commissioned to examine the data from two surveys conducted in the fall of 2012 and spring of 2013 to obtain detailed information on winery and vineyard operators and visitors with the purpose of updating their profiles and provide data to estimate the sector's economic contribution to Georgia's economy.

1.2 Methodology

1.2.1 Owner and Visitor Surveys

The two surveys from the previous study were adapted and updated to collect detailed information on the industry. The first survey, entitled *Georgia Winery and Vineyard Owner Survey*, is focused on collecting cost figures for operating a winery while providing additional descriptive information regarding winery and vineyard operations. The second survey, *Georgia Winery and Vineyard Visitor Survey*, is designed to obtain detailed expenditure data and demographic characteristics from Georgia winery and vineyard visitors to help understand their spending patterns. Data collected from both was used to estimate the economic contribution of Georgia winery and vineyard grape production, operations, and visitor expenditures.

The *Georgia Winery and Vineyard Owner Survey* contains questions regarding visitor totals, marketing, grape acquisition, expenditures, revenues, future plans as well as listing any obstacles encountered by winery and vineyard operators. Most of the questions in the survey are used to provide descriptive statistics of operations that might be useful for potential winery operators or winery analysts. Georgia wineries and vineyards were identified using the Alcohol and Tobacco Tax and Trade Bureau list, along with additional names and contacts provided by the Winegrowers Association of Georgia.

Both surveys contained a cover page designed to solicit cooperation in completing the survey and describing its importance in defining the economic contribution of the industry on a state-wide level. The survey instrument itself was electronic and disseminated through the Winegrowers Association of Georgia directly to their membership and others. The visitor survey was implemented to capture the impact of the visitors and their expenditures associated with the various activities they participated in as a result of coming to the area and visiting the winery and/or vineyard. Winery and vineyard visitors can affect the local economy as they spend money on food, crafts, gas, lodging and other products and services in the area. The *Georgia Winery and Vineyard Visitor Survey* was created to capture per-person per-day spending in the area surrounding the survey. This allows the derivation of an average expenditure per-person dollar amount. This figure can be used to estimate the total number of visitors and how much they spend. Participating wineries were given visitor surveys to be administered to visitors during the fall of 2012.

1.2.2 Economic Contribution Analysis

The methodology applied is an examination of economic contribution. Economic contribution is estimated with models that separate the economy into various industrial sectors such as agriculture, construction, manufacturing, trade, and services; quantifying the relationships between these sectors. For this analysis, we use IMPLAN economic assessment data and software. This model assists in calculating how the sectors under analysis affect output, income, and employment in other industries. These changes are expressed in terms of direct, indirect, and induced effects for each sector of the economy, and help to explain the overall role or importance of the winery and vineyard sector to the total economy.

Direct effects represent the initial influence on the economy, while the indirect effects reflect sales in input industries to those sectors. Induced effects reflect the household spending due to earnings and the resultant spending in both the direct and indirect sectors. Thus, the total economic contribution is the sum of direct, indirect, and induced effects. The analysis is interpreted in terms of employment (jobs), labor income (employee compensation including benefits and proprietor income), and output (market value of goods and services produced).¹

Contribution analysis differs from the more common economic impact analysis of an event or change in the economy, which measures marginal impact. Instead, contribution analysis demonstrates the economic attribution of a project, business, or existing industry (i.e., Wineries and vineyards). The important difference is that in contribution analysis, direct effects represent all sales by the indicated sector (i.e. production) and indirect effects are all sales in the supply chain plus household spending. Together these figures help to illuminate the magnitude of winery and vineyard enterprises in Georgia, the industries that supply inputs to them, and the spending

¹A job in IMPLAN = the annual average of monthly jobs in that industry (this is the same definition used by Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics (BLS), and Bureau of Economic Analysis (BEA) nationally). Thus, 1 job lasting 12 months = 2 jobs lasting 6 months each = 3 jobs lasting 4 months each. A job can be either full-time or part-time. Source: www.implan.com, glossary of terms.

from households that draw income from those sectors. Because of the detailed information available from surveys, analysis from the standpoint of three components was conducted - grape production, wineries (minus production and visitors), and visitors (including those who came with the primary purpose of visiting the winery and those who did not). This study does not represent net economic benefits, cost-benefit analysis, nor does it measure any of the social benefits that might accrue to the state of Georgia for having wineries and vineyards and visitors present.

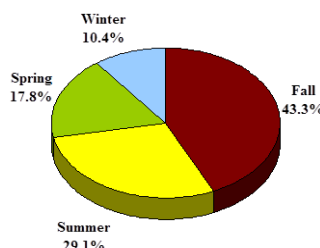
1.3 Owner Survey Results

This section of the report provides descriptive information regarding the wineries that participated in the research project, their associated activities, and operations which are derived from the Georgia Winery and Vineyard Owner Survey. Of the wineries and vineyards that were identified, a total of 21 participated in the study. However, not all 21 answered each question within the survey.²

1.3.1 Seasonality

Most (88 %) of the participating wineries and vineyards reported seasonality in customer traffic and sales. Figure 1 presents the visitor traffic by the four seasons. The figure indicates that breakdown of visitors by season for all the wineries. Fall and summer are the busiest seasons, followed by spring and winter.

Figure 1.1: Seasonal Traffic Patterns



1.3.2 Annual Visitors

The winery survey asked the wineries to provide an estimate of the total number of visitors they host annually. On average, respondents reported that 7,885 people visited their winery and/or vineyard in the last twelve months. The median number of visitors was estimated to be 1,500 annually.

The mean value will be used to represent the number of visitors non-responding wineries and vineyards entertain annually. Extrapolating the mean annual visitors calculated from the participating wineries to the non-participating wineries it is estimated that there was a total of 424,951 visitor days in the last twelve months.³ The

²Because not all surveys were filled out completely, it was possible to only complete the analysis from a statewide perspective. Researchers were unable to perform analysis on more detailed geographic characteristics and other distinctions present in the survey. Not only were there too few responses to analyze for some of the questions, but the finer detail could risk disclosure of particular business entities.

³The options for operation description included 1) winery and vineyard, 2) winery only, and 3) vineyard only. The visitor figures were calculated separately for each. Based on the survey responses, the number of visitor days for wineries and vineyards were 418,817 and for vineyards 6,133. Since

figure was calculated by using the mean visitors days reported by wineries and vineyards and multiply by the estimated total number. Georgia wineries and vineyards range significantly in size from less than 100 visitors to 45,000 visitors.

In breaking down the total figures for visitors, respondents were offered a selection of choices that sum to 100 % The following table shows a breakdown of the responses.

Table 1.1: Owner Reported Visitor Type by Reason for Visit

Visitor Type	Percentage
Winery & Vineyard Visitors	75.8
Special Event Visitors	23.8
Gift Shop Visitors	2.9
Restaurant Visitors	8.0
Lodging or Other	0.0

1.3.3 Visitor Origins

The owners were also asked the approximate percentage of the reported visitors that were from out-of-state, which they reported as just over one-quarter (28.2%) of these visitors. Table 1.2 displays the percentage distribution that winery and vineyard operators reported their customers traveled. The table indicates that a majority (88.2%) of visitors are traveling up to 99 miles to the winery, with the highest reported category between 50 and 99 miles. Nearly three out of ten (29.4%) visitors are traveling less than 50 miles. The owners indicated that a small but significant number of visitors (11.8%) travel between 100 and 499 miles to patron the wineries and vineyards.

Table 1.2: Winery and Vineyard Visitors Travel Distance - Owner Reported

Distance	Percentage
Less than 20 miles	11.8
20-49 miles	17.7
50-99 miles	58.8
100-499 miles	11.8
500 miles or more	none reported

The survey asked winery operators to rank⁴ five selected states and an other category in which they could name any state, in order of most to least visitors. The question is used to examine where most of the out-of-state visitors are coming from

there was only one response from a business reporting winery only, that response was combined with the winery and vineyard category to prevent any disclosure of identifying information about that establishment.

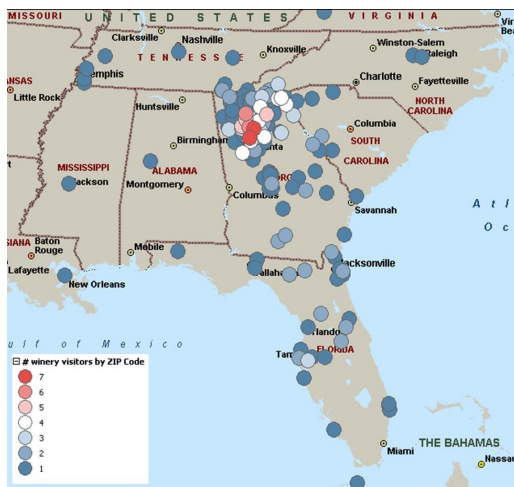
⁴1=most visitors; 6=least

according to the winery operator. Florida was indicated by the winery and vineyard owners as the state with the most residents visiting. All of the participating respondents indicated either 1 or 2 for their ranking of Florida, with a mean ranking of just over 1. The ranking of the states providing the most visitors, excluding Georgia, are listed in Table 1.3. The order of importance (starting with most important) as indicated by owners are as follows: Florida, South Carolina, North Carolina, Tennessee, Alabama, and Other. A similar question was posed to winery and vineyard owners to rank⁵ different regions of Georgia with regard to visitor origins. Results were that most visitors reside in Metro Atlanta, North Georgia, Savannah, Augusta, South Georgia, and other. Figure 1.2 is a map of home locations of winery and vineyard visitors obtained from the visitor survey zip codes as a comparison.

Table 1.3: Importance of Surrounding States and Regions Within Georgia

Out of State Visitors	Avg. Rank	In-State Visitors	Avg. Rank
Florida	1.2	Metro Atlanta	1.5
South Carolina	2.6	North Georgia	2.6
North Carolina	3.3	Savannah	3.8
Tennessee	4.0	Augusta	4.3
Alabama	4.1	South Georgia	4.5
Other	5.8	Macon	4.8
		Other Georgia Location	6.5

Figure 1.2: Visitor Origin Map



⁵The ranking for this question was 1 for most visitors, 7 for least.

1.3.4 Marketing

Marketing plays a significant role in attracting customers and increasing sales through distribution channels. From the survey, Table 1.4 shows the most common marketing strategies in descending order used by the wineries that responded to the survey. Marketing through the Internet and Facebook are clearly the most popular marketing activity followed by the use of rack cards, magazines and the local Chamber of Commerce or Convention and Visitors Bureau (CVB). None of the owners reported that they market their vineyard separately from the winery.

Other responses listed include the following: personal circles or word of mouth, a local shopper ad, Point North; Atlanta Mag; Mountain Lane, some paid ads (got lots of free coverage in magazines such as Southern Living, NE Georgia Living, Atlanta Magazine, Southern Distinction, Macon Magazine), local newspaper ad for special events (in the N Georgia mountain communities), and fliers.

Table 1.4: Marketing Efforts by Owners

Marketing Type	Percent
Internet	71.4
Facebook	61.9
Rack Cards	57.1
Magazines	52.4
Chamber/CVB	52.4
Cross marketing (Other Wineries)	42.9
Cross marketing (Tourism Industry)	42.9
Brochures	38.1
Travel Guides	33.3
Other	28.6
Radio	19.0
Twitter	19.0
Television	14.3

Owners were also asked to describe the portion of their business that they can attribute to their website and Facebook pages. None indicated that they did not have a website or Facebook page, while the highest response for website was in the 50 to 74 percent category and highest for Facebook was in the 25 to 49 percent category. See Table 1.5 for website and Facebook details.

1.3.5 Area Attractions

Table 1.6 shows winery and vineyard owner responses regarding attractions that draw visitors to the area other than the winery or vineyard. Scenery, events, and outdoor recreation/camping were important factors with regard to attracting visitors to a winery and vineyard. Specific mentions under the other category include apple houses and festivals, fall festivals, trade shows, nurseries, and other wineries.

Table 1.5: Business Attributed to Website & Facebook

Portion of Business	Website	Facebook
None	6.7	14.3
Less than 10%	13.3	7.1
10%-24%	20.0	21.3
25%-49%	20.0	42.9
50%-74%	26.7	14.3
75%-99%	13.3	0.0

Table 1.6: Area Attractions Drawing Visitors

Attraction	Percentage
Scenery	76.2
Events	71.4
Outdoor recreation/ Camping	66.7
Culture	28.6
Other	19.0
None	9.5

1.3.6 Networking and Associations

When asked if they belonged to any local/regional organizations or associations for winery or vineyard owners, responses included Wine Growers Association of Georgia, Mountain Wine Country Association, West Georgia Vineyard and Winery Association, Georgia Wine Council, Northwest Vineyard Association, WineAmerica, GeorgiaGrown, and city/county Chambers of Commerce or CVBs. One mentioned that they work with other wineries to make their wine since their winery is not yet built.

In responding to how they work individually with local businesses to promote their own business, the responses included:

- We market with local restaurants and lodging facilities
- Cross marketing, word of mouth, rack card exchange, verbal description to interested customers looking for other activities
- Work with lodging partners with coupons and specials
- Licensing prohibits promoting within County
- Co-op advertising, brochure sharing, web links
- We distribute discount coupons to some local businesses
- Referrals

- Sponsoring special events with wine donations and raising funds for the local charities.
- Joint rack cards, joint events, joint websites
- Personal contact with B&B's and restaurants
- The Chamber/CVB publishes a joint Dahlenega Wine Trail Brochure which is paid for equally by each winery. The Chamber/CVB also organizes a Dahlenega Wine Trail Weekend
- Work with local B&B's, cabins, resorts, restaurants, merchants, clubs, transportation services, International Associations, and LivingSocial group tours
- Present an annual Georgia Wine Country Festival (now in its 12th year) every weekend in June at Three Sisters Vineyards - inviting Georgia wineries to come and pour wines and sell products
- Wine dinners with area restaurants and inns
- Special wine tastings. (most regional wine shops and many upscale restaurants carry our wines)
- Work with WAG to participate in Wine Highway Weekend

With respect to the importance of business networking to the success of their business, 70% of the winery and vineyard owners felt that it was either very or extremely important to their success. In addition, 70% of owners indicated in the survey that they would be interested in participating in a new networking program if available. The following festivals include those in which they participated in the last twelve months:

- Wine Fest at Habersham Winery
- GA Fine Wine Festival at Blackstock Vineyards and Winery
- Crane Creek Tomato Fest
- Crane Creek Harvest Fest
- Country wine festival Three Sisters
- Steak cook-off Lincolnton
- Taste of Sautee
- Taste of Clarkesville
- Winefest at Ashford Manor
- Aqua Vino at the GA Aquarium
- Vidalia onion festival

- Taste of White County
- Sautee Nacoochee Winter Wine Weekend
- Spring Wine Highway Weekend
- Rabun County farm winery day
- Georgia Wine Country Festival
- Dahlonega Wine Trail Weekend
- A Vintage Affair,
- Decatur Wine Festival
- High Museum Wine Auction
- Oconee Arts Festival (food and wine) Athens-Watkinsville
- Crushfest at Yonah Mountain Vineyards

1.3.7 Georgia Winery and Vineyard Facts

The wineries and vineyards were asked the date the facility was created. Those wineries responding to the survey are on average 8.5 years old. Given the range of years they have been open, a better indication might be the median number of years, which is approximately 6 years.

The average Georgia winery/vineyard from our survey reported a total of 172.1 total acres. Of the total 43.9 acres are reported as used for grape production, with an average of 52.2% in vinifera and/or hybrid grades and 11.1% in grapes other than vinifera or hybrid. Owners reported that over the next year, the wineries and vineyards plan to expand the acreage devoted to grapes by an average of less than one acre and by an additional 2.7 acres in the next five years. Table 1.7 shows the reported varieties of grapes currently produced, in alphabetical order:

Though there was one mention of acquiring grapes from other vineyards for quality and blending purposes, Table 1.8 (in alphabetical order) shows a summary of the future plans for varieties in grape production:

Approximately 64% of wineries reported purchasing grapes from other wineries or vineyards to meet the demand for wine production. Respondents who acquired grapes or grape juice from outside of Georgia purchased from California, New York, and North Carolina.

Most (87.5%) of the respondents to this survey reported that they did not sell grapes or grape juice to other wineries and/or vineyards. Wineries were asked about the contractual agreement they had for purchasing grapes, given the choices of long term contract (3+ years), short term contract (less than 3 years), and spot market. There was limited response to the question, but an average of 25.4% of tonnage was described as purchased using the spot market (median 5%).

Table 1.7: Grape Varieties Currently Produced

Grape Variety	Mentions	Grape Variety	Mentions
Aglianico	1	Norton	4
Albarino	1	Petit Manseng	2
Blau Franish	1	Petit Verdot	2
Cabernet Franc	11	Pinot Blanc	1
Cabernet Sauvignon	9	Pinot Grigio	3
Cabs	1	Pinot Noir	1
Carlos Muscadine	1	Riesling	1
Catawba	2	Sangiovese	1
Chambourcin	3	Sauvignon Blanc	1
Chardonnay	5	Scarlett Cabernet	1
Cynthiana-Norton	2	Seyval Blanc	5
Delicious Muscadine	1	Summit Muscadine	1
Early Fry Muscadine	1	Supreme Muscadine	1
Fry Muscadine	1	Sweet Jenny Muscadine	1
Greuer Veltliner	1	Tannat	3
Ison Muscadine	1	Touriga Nacional	2
Late Fry Muscadine	1	Traminette	3
Malbec	5	Vidal	1
Merlot	9	Vidal Blanc	4
Mourvedre	1	Vignoles	1
Muscadine	1	Villard Noir Traminette	1
Noble Muscadine	1	Viognier	3
Noiret	1		

Table 1.8: Grape Varieties for Future Production

Grape Variety	Mentions
Cabernet Franc	2
Cabernet Sauvignon	1
Catawba	1
Chambourcin	1
Chardonnay	2
Cynthiana-Norton	1
Hybrids	1
Malbec	1
Merlot	1
Mix - Vinifera and hybrids	1
Muscadines	1
Noiret	1
Norton	1
Perhaps another S.Italian grape	1
Petit Manseng	3
Petit Syrah	1
Pinotage	1
Presently not determined	1
Riesling	1
Sangiovese	1
Sauvignon Blanc	2
Seyval Blanc	1
Tempranillo	1
Trimanette	1
Type not yet known	1
Vidal Blanc	1
Viognier	2
White grape variety	1
Zweigelt	1

A large portion (84.6%) reported that they do not stock or sell wines from other Georgia wineries, though not all answered the question. Of those that did respond, 61.5% reported that they either were interested or perhaps interested in stocking other Georgia produced wines. When queried about possible obstacles in selling other Georgia wines, responses included: legal issues and expensive licensing requirements, transportation of wine from one winery to the other, room in winery, cost, licensing, and pricing and logistics. Another comment indicated that it would dilute their branding or complicate the operation; it is better to collaborate on marketing instead.

Table 1.9 provides the percentage of wine sales at specified price ranges, summing to 100% for each respondent. Over 85% of the wine sold at Georgia wineries and vineyards is priced between \$10 and \$25 per bottle, with most between \$10 and \$20, according to the owner responses.

Table 1.9: Average Retail Wine Sales Reported by Owners

Price Range	Response Avg.
Less than \$10 per bottle	5.8%
\$10-\$15	31.7%
\$16-\$20	35.9%
\$21-\$25	17.8%
\$26-\$30	6.3%
\$31-\$35	1.7%
\$36-\$40	0.4%
More than \$40 per bottle	0.4%

When asked about production capabilities, on average, participating wineries and vineyards reported the capability to produce a maximum of 3,170 (median 1,500) cases of wine annually with their present equipment and facilities. Table 1.10 presents anticipated expansion plans for selected aspects of wine production and facilities. The percentages represent the response average given by participating wineries and vineyards when asked about plans to expand over the next three years. They indicated that they plan to expand acreage devoted to grapes by an average of just over 63%. They also plan to expand wine processing equipment and wine storage equipment by 29% and bottling equipment by 19% over the same time period. The smallest expansion plans are for gift shop and restaurant facilities which were indicated as zero.

Owner respondents were asked to indicate how they intend to market and sell their grapes, both now and in the future. One in five (19.0%) of the total number of respondents indicated that they currently market through their own winery, while 38.1% said that they will market through their own winery in the future. The category of personal networking was indicated by approximately one-third (33.3%) of the total and was the same for current and future.

Table 1.10: Expansion Plans for Next Three Years

Category	Response Avg.
Acreage devoted to grapes	63.1
Wine processing equipment	28.8
Wine storage equipment	28.8
Bottling equipment	18.8
Retail facility	7.5
Event facility	6.3
Lodging or other amenities	6.3
Gift shop facility	0.0
Restaurant facility	0.0

1.3.8 Support for Viticulture Area Designation

An American Viticulture Area is a designated grape-growing region in the United States distinguishable by geographic features, with boundaries defined by the United States Department of Treasury Alcohol Tax and Trade Bureau (TTB). The winery and vineyard owners were asked if they would support having American Viticulture Areas in Georgia and more than one-half (57.2%) indicated yes or maybe, with another 19.1% needing more info before expressing support. None specifically indicated that they did not support such a designation, though a large portion left the question unanswered.

Table 1.11: Support for Viticulture Area Designation

AVA Interest	Percent
Yes	38.1
Unanswered	23.8
Maybe	19.1
Need More Info	19.1

1.3.9 Obstacles Facing Georgia Wine Industry

Responses to the final question in the Georgia Winery and Vineyard Owners Survey indicate several obstacles faced by Georgia winery operators. The question present in the survey is an open-ended response which allowed for operators to express their opinions. Overall, the responses fell into the following groupings:

- Time, legalities, costs, and investment in developing operation
- Time for Federal Label approval
- Inability to have off-site events where wineries can sell wine

- State laws and regulations
- Government intervention
- Getting the word out on the quality of GA wine
- Weather/animal damage to crops
- Need state government managed wine commission or marketing board; should mirror what has been done in neighboring states and around the country
- Need of state support and help with marketing our growing agribusiness

1.3.10 Actions to Help Develop Georgia Wine Industry

A question in the Georgia Winery and Vineyard Survey asks owners their opinion about actions that could be taken to help increase the production and sales of Georgia wine. As in previous research conducted by CAED⁶, the responses to the question largely parallel responses given to the obstacle question. The responses are listed below:

- Active state program that supports and promotes the Georgia wine industry
- Advertisement and community awareness
- Advertising
- Advice on the growing and production of quality wines from the University of Georgia and the Cooperative Extension Service
- Allowing direct sales of local winery products
- Change rules regulating [previous question] to make it easier for wineries to sell and market their wines in Atlanta area
- Creation of a viticulture position for teaching and research at UGA
- Education of current farmers on the financial side of grape growing and wine making
- Form a Georgia Wine Commission or Marketing Board that is totally managed by State Government. Establish an annual budget to support the effort by using a small portion of alcohol excise taxes to purchase billboards, directional signs, print brochures, and hire a full time individual at the State level who has public relations experience to promote the Georgia Wine Industry

⁶Kyle Watts, Kent Wolfe, Archie Flanders and John McKissick, *Wine Industry Survey*, University of Georgia, College of Agricultural and Environmental Sciences, Center for Agribusiness and Economic Development, 2009. Available online at <http://www.caes.uga.edu/center/caed/pubs/2009/documents/CR-09-05.pdf>.

- Georgia one- or two-day festival license. Currently festivals must be hosted on a winery property. A festival license will give us the opportunity to go to our customers in convenient locations (in metro Atlanta or others) (2)
- Help from the University of Georgia and other area colleges and universities (classes in Viticulture, research)
- If the wineries in Georgia could come together in a State Winegrowers Association run by the membership would be a big step. This would assist us in bringing a unified message relative to the needs and desires of the industry to the State Government
- Legislation that would allow wineries to sell wine at off-site events, i.e. festivals
- Local legislation to allow more wineries in counties that do not currently allow it
- Non-exclusive representation by distribution agents
- Reform of the alcohol rules and regulations in the state to facilitate and encourage expansion of the wine business
- Shipping out of state
- Signs permit by state
- State marketing support (2)
- State should help with marketing the industry as it does other agricultural businesses! (our own association has done some marketing of Georgia fine wines.)
- State should support funding (matching to the private money the Winegrowers have raised for viticulture and enology chair at the U. Office (We appreciate the support of the Dean of the College of Agriculture and have hosted 6 interns over 5 years in our vineyards and could be done to encourage training of young Georgia winemakers
- State wine highway open to all wineries
- State winery council
- The formation of a state wide all-inclusive Georgia Wine Organization Legislation that would give the state wide Wine Organization support, i.e. logistics, planning and advertising

1.4 Visitor Survey Results

The purpose of this section is to provide descriptive statistics on information from the Georgia Winery and Vineyard Visitor Survey. Participating wineries asked visitors if they would be willing to fill out a short survey. A total of 334 Georgia Winery and Vineyard Visitors filled out surveys for the data used in the study, though all visitors did not answer all questions. These results should be interpreted with caution due to the small sample size and non-random survey sample.

1.4.1 Demographic Profile of Visitors

Age

The average age of the respondents was 46.6 years old with respondents ranging from 21 to 83 years of age. Those who responded to the survey tended to be more female (62%) than male (38%) which is in line with the findings from previous CAED study.⁷

Educational Attainment

Just over 67% of the respondents reported being employed full-time with 21.7% being retired. Approximately 11% were either employed part-time (4.0%) or were students (7.0%). When asked about highest level of educational attainment, 40.9% reported having completed a 4-year college degree, 32.2% have a graduate or professional degree, 20.3% had a 2-year college degree or technical degree. The final 6.6% had a high school degree or equivalent.

Racial/Ethnic Composition

When asked to describe their race, most responded that they were of white ethnicity (92.9%), with the next highest category of Black or African-American at 3.2%. The Asian and Other race categories each respectively made up 1.8% of the respondents, and .4% describes as Native Hawaiian or other Pacific Islander. In reference to Hispanic ethnicity, most were not Spanish, Hispanic, or Latino in origin (96.3%).

Household Income Range

Table 1.12 displays percentages for ranges of annual household incomes before taxes for survey participants. The highest response range is that of \$150,000 or more, followed by \$75,000 to \$99,999. Nearly two out of three (63.4%) of all the respondents indicated that they have incomes of \$75,000 or more while less than ten percent have incomes under \$35,000 per year. In comparison, the U.S. Census Bureau's American Community Survey finds that approximately 31.3% of all Georgians have incomes of \$75,000 or more, and 36% have incomes under \$35,000 per year.

⁷Earlier referenced CAED study also found the results similar to information found in the Adams Wine Handbook from 2007 which reported that wine drinkers are 42.4% male and 57.6% female.

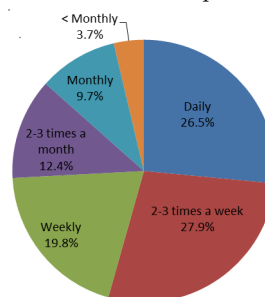
Table 1.12: Visitor Household Income

Income Range	Percent
\$0-\$24,999	4.9
\$25,000-\$34,999	3.7
\$35,000-\$49,999	11.9
\$50,000-\$74,999	16.0
\$75,000-\$99,999	17.2
\$100,000-\$124,999	16.4
\$125,000-\$149,999	12.3
\$150,000 or more	17.5

1.4.2 Wine Consumption Frequency

Figure 1.3 shows the drinking frequency of winery and vineyard visitors. Nearly three out of four visitors do not consume wine on a daily basis (73.5%). Those who consume wine 2-3 times per week (27.9%) represent the largest percentage, followed closely by daily at 26.5%. Next largest is weekly (19.8%), 2-3 times per month (12.4%), monthly (9.7%), and a small group consuming less than monthly (3.7%).

Figure 1.3: Wine Consumption Frequency



1.4.3 Wine Consumption Occasions

Visitors were asked on which occasions they usually drink wine and were asked to include multiple responses. The top response categories were when socializing (78.1%), special occasions or holidays (74.2%) and meals at home (71.2%) were the top three. Just over one-third (34.1%) reported drinking wine at bars.

1.4.4 Visitor Wine Preference

Given a choice between dry or sweet wine, visitors were asked to select which they usually drink. Nearly sixty-seven (66.4%) percent usually drink dry wine, with the remaining 33.4% indicating a preference for sweet wine. The next series of questions asked about the type that they usually drink. The top selections included red wine (63.5%) and white wine (40.1%). Muscadine, sparkling, blush, dessert wine, and other fruit flavored wine received fewer responses. Further, they were asked to list their favorite variety of wine.⁸

⁸Since participants were asked to list their one favorite, we selected only the first response as the favorite, though there were a few that listed more than one. Researchers also corrected spelling errors and elaborated on abbreviated or names in jargon format.

Table 1.13: Visitor Wine Preference

Favorite	Percentage	Favorite	Percentage
Blackberry-Red	0.4%	Pinot Grigio	5.4%
Blends	0.4%	Pinot Grigio Rose	0.4%
Blueberry	0.4%	Pinot Noir	6.4%
Blush	2.1%	Prosecco	0.4%
Cabernet Blend	0.7%	Red	18.9%
Cabernet Franc	0.7%	Red Blends	0.4%
Cabernet Sauvignon	11.4%	Red Wine	0.4%
Cabernets	0.4%	Riesling	2.9%
Chambourcin	0.4%	San Sebastian	0.4%
Champagne	0.4%	Sangiovese	0.7%
Chardonnay	3.6%	Sauvignon Blanc	3.9%
Columbia Crest	0.4%	Shirah	0.4%
Cynthiana	0.4%	Shiraz	0.4%
Dessert	0.7%	Spanish Red	0.4%
Dry Red	0.4%	Sparkling	0.7%
Fla Joe	0.4%	Sweet	1.4%
Fruit Flavor	0.4%	Tempranillo	0.4%
Full Bodied	0.4%	Traminette	0.4%
Georgia Grown Blends	0.4%	Traveler	0.4%
Malbec	2.1%	Unoaked Chardonnay	0.4%
Merlot	5.7%	Viognier	1.1%
Moscato	0.4%	Vitiano	0.7%
Mountain Cyn	0.4%	White Dry	0.4%
Muscadine	8.2%	White Merlot	0.4%
Norton	1.4%	White Wine	6.8%
Petit	1.4%	White Zinfandel	1.4%
Petit Manseng	0.7%	White blend Merlot	0.4%

1.4.5 Visitor Wine Purchases

Table 1.14 reveals where surveyed visitors purchase wine. When participants were asked to answer where they most purchase wine from, a majority (54.6%) bought from a grocery store or supermarket. Nearly one in five (19.1%) purchased from a winery or package store (17.1%). The small portion that mentioned "other" purchase locations (3.4%) that included club stores, wholesale and by mail. During the past month,

Table 1.14: Visitor Wine Purchase Store Type

Wine Purchase Store Type	Percent
Grocery Store/Supermarket	54.6
Winery	19.1
Package Store	17.1
Restaurant/Bar	5.5
Other (please specify)	3.4
Internet	0.3

respondents reported purchasing an average of 7.8 bottles, .86 boxes of wine and 6.4 glasses of wine. Table 1.15 indicates the price ranges for bottled wine purchases reported during the last month. The highest response range was that of \$10-\$15, which was reported at an average of 40.5%. The next highest response was that of the \$16 to \$20 price range at 22.3%, followed by less than \$10 at 17.2%. Another important question was included to find out how much visitors spend on wine each month. The average visitor surveyed reported spending approximately \$108.29 on wine during a typical month. Respondents who reported purchasing wine in the

Table 1.15: Price Ranges for Bottled Wine

Price Range	Percent
Less than \$10	17.2
\$10 to \$15	40.5
\$16 to \$20	22.3
\$21 to \$25	10.2
\$26 to \$30	4.8
\$31 to \$35	1.6
\$36 to \$40	0.6
Greater than \$40	1.6

previous month were asked from what regions did these wines originate. California (32.6%) and Georgia (29.9%) purchases are the highest response average categories. At nearly half that amount are the international wine purchases (15.5%). See Table 1.16 for details.

Table 1.16: Geographic Origin of Wine Purchased

Geographic Origin of Wine Purchased	Percent Avg.
California	32.6
Georgia	29.9
International	15.5
Southeast	5.5
Washington/Oregon	5.0
Midwest	2.0
Southwest	0.5
Northeast	0.4
New York	0.3

1.4.6 Reason for Visiting Winery and Vineyard

One important question from the visitor surveys asks people what brings them to visit the winery. Approximately 43% of all respondents were visiting the winery or vineyard as the primary reason. The other 57% were visiting the winery and/or vineyard for another reason, perhaps as part of an overall attraction to the area such as scenery or a festival. The results indicate that 67% of out-of-state visitors are coming to the winery as a secondary reason. More than one-half (54.0%) of the Georgia resident visitors are visiting as the primary reason.

Table 1.17 highlights responses to the question about how familiar participants are with Georgias winery and vineyard industry. The highest response was that in which 33.9% reported “Not very” as their choice, followed by “Somewhat” at 30.8%, “A little” (20.9%), and “Very” at 14.4%. Georgia residents are more familiar with the industry than out-of-state residents. Only 2.5% of out-of-state visitors are very familiar with Georgias wine industry, with more than one-half (53.2%) indicating that they were “Not very” familiar. Of those that answered the question about whether

Table 1.17: Familiarity with Georgia Wine Industry

	All respondents	Georgia Residents	Non-GA Residents
Not very	33.9	24.2	53.2
A little	20.9	20.6	22.8
Somewhat	30.8	35.6	21.5
Very	14.4	19.6	2.5

they attended any other wineries and vineyards while in the area, 41% indicated that they did not on this trip. The remaining 58.2% visited at least one other wineries while on their current trip. Respondents that reported visiting a winery had an average attendance of 4.1 times per year. Of those answering the question about winery visits, some also answered a similar question regarding wine festival attendance and indicated that they had attended an average of 1.9 festivals in Georgia. This was

approximately 28.8% of visitors that reported attending a wine festival.

1.4.7 Distance Visitors Traveled

Table 1.18 indicates that the typical Georgia winery visitor travels 100 miles or less. In fact, 65.6% of visitors come from less than 100 miles. Just over one in five (22.5%) traveled between 100 and 500 miles, and 11.9% of visitors traveled 500 miles or more. The winery and vineyard visitors reported an average visit of 3.0 days to the area. Of those visiting with the winery and vineyard as their primary purpose, 71% of visitors indicated that they were not staying overnight for their visit. In contrast, of those with another purpose for their visit, 63.1% said that were planning to stay overnight. This most closely matches tourism research by the Georgia Department of Economic Development, which found that visitor trips to Georgia that included a visit to a winery included an overnight stay 64% of the time.⁹

Table 1.18: Visitor Miles Traveled

Miles	Percent
0 to 50	34.0
50 to 100	31.6
100 to 500	22.5
500 to 1,000	7.4
1,000 to 2,000	3.2
Over 2,000	1.4

1.4.8 Visitor Lodging

Table 1.19 shows where survey respondents indicated that they were likely to stay during their overnight visit, broken down by whether the winery and vineyard was primary purpose of trip or not. Those with winery visit as their primary purpose chose mostly to lodge at a Hotel/Motel (28.6%) or in cabins (25.0%). Those with another purpose for their visit largely chose cabins (45.7%), followed by friends and/or family (21.0%).

The typical visitor party size was 3 people. Respondents reported spending an average of 69.6% (median 80%) within a 10-15 mile radius of the winery their party was currently visiting. The following set of tables (Tables 1.20-1.21) were derived from the visitor survey and contains visitor expenditure data that is required to estimate the portion of economic contribution due to visitor expenditures. Information is

⁹Note that this research is not conducted in a method exactly replicating this survey. Similarities should be noted, but some of the definitions differ. According to the Department of Economic Development, they analyze the total number of trips taken that listed a winery as an activity in which they participate. This measure would not include the category listed as "Visiting Friends and Family". The breakdown listed above is based on spending by those visitors and their classification as an overnight or day trip visitor.

Table 1.19: Lodging Choice by Trip Purpose

Lodging Type	Trip Purpose	
	Winery	Other
Bed & Breakfast	14.3	7.4
Cabin	25.0	45.7
Friends/Family	17.9	21.0
Hotel/Motel	28.6	12.4
Other	14.3	7.4
RV Park/Camping	0.0	6.2

separated out by day and overnight visitors (Table 1.20) and by those for whom the primary purpose was the winery/vineyard or not (Table 1.21).

Table 1.20: Spending Per Day by Overnight and Day Visitors

Category	Overnight Visitors	Day Visitors
	Spending/day	Spending/day
	(\$)	(\$)
Restaurant	24.27	9.58
Grocery	11.76	4.24
Souvenirs	10.31	5.62
Fuel	12.42	6.69
Entertainment	6.32	3.47
Bed & Breakfast	98.00	n/a
Cabin	70.26	n/a
Hotel/Motel	74.63	n/a
RV/Camping	40.00	n/a
Other Lodging	110.00	n/a

1.5 Economic Contribution

The economic contribution of grape production to the State of Georgia represents the value of grapes produced at the wineries/vineyards and the value of grapes grown by other in-state growers which are used for wine production at Georgia wineries. Very few wineries purchased grapes from out-of-state which are not included in this study because they do not apply to the state impact. Based on the survey responses applied to all wineries and vineyards, the total average value of grapes produced by all Georgia wineries that are used for their own production needs amounted to \$2,532, 361. Respondents also indicated that they purchase grapes from other Georgia growers for wine production. The estimated total of purchased grapes is \$836,586. Combining the value for both categories, grapes produced at own winery, and grapes produced by

Table 1.21: Annual Visitor Spending by Winery Primary Purpose and Other

Category	Overnight Visitors		Day Visitors	
	Winery (\$)	Other (\$)	Winery (\$)	Other (\$)
Restaurant	1,185,647	3,898,526	468,006	1,538,850
Grocery	574,504	1,889,026	185,647	681,077
Souvenirs	503,668	1,656,111	274,550	902,749
Fuel	606,746	1,995,043	326,822	1,074,625
Entertainment	308,747	1,015,191	169,518	169,518
Bed & Breakfast	684,138	1,166,474	n/a	n/a
Cabin	858,092	5,155,430	n/a	n/a
Hotel/Motel	1,041,620	1,480,509	n/a	n/a
RV/Camping	0	396,438	n/a	n/a
Other Lodging	767,910	1,309,307	n/a	n/a

other Georgia grape growers, indicates the direct impact of grape production which is \$3,368,947. Table 1.22 presents results of the analysis of the contribution of grapes

Table 1.22: Grape Production Contribution

Contribution Type	Employment (#)	Labor Income (\$)	Value Added (\$)	Output (\$)
Direct Effect	19.2	2,539,909	1,880,081	3,368,947
Indirect Effect	8.7	318,842	492,793	871,090
Induced Effect	16.6	697,198	1,279,167	2,143,426
Total Effect	44.5	3,555,949	3,652,041	6,383,463
State/Local Taxes (\$)				190,267

produced in Georgia for Georgia wineries. The direct contribution of \$3.4 million worth of output estimated from the responses in the winery survey is similar to the \$3.0 million represented in the Georgia Farm Gate Fruits and Nuts Report for 2011.¹⁰ The indirect portion is \$871,090 and represents the sales contribution of the supporting industries of grape production (i.e. ag inputs). The next category is the induced effect of \$2.1 million, which accounts for the employee spending of those working in both the direct and indirect businesses. Summing all together generates a total state output contribution of \$6.4 million.

Labor income represents wages and benefits for employees and proprietary income. A total of \$3.6 million in labor income is generated from those who work directly in grape production or are associated in an indirect way as well as the induced effects. Combined, these comprise a total of 44.5 jobs involved in grape production and related industries. A total value added impact of \$3.7 million is generated by grape

¹⁰See www.caed.uga.edu for the online report.

production and related industries. Based on these figures, grape production generates \$190,267 in state and local taxes.

The second component of the three part analysis is the contribution of wineries minus grape production. The first component accounted for the grape production alone; therefore the economic contribution presented in Table 1.23 do not include grape production. The figures also do not account for the visitor expenditure contribution generated by the wineries, which will be explored in the next component. The direct contribution is \$15.1 million in sales or output, with indirect contribution of \$5.6 million worth of output, and \$2.7 million in induced or employee spending contribution. Summing all, \$23.4 million worth of total contribution to output is generated. Labor income accounts for \$4.4 million for a total employment of 95.7 jobs that can be attributed to wineries in the economy. The total value added component accounts for \$7.1 million. Based on these figures, wineries (less grape production and visitor spending) account for \$1,143,202 worth of state and local tax revenue. The

Table 1.23: Winery Contribution

Contribution Type	Employment	Labor Income	Value Added	Output
	(#)	(\$)	(\$)	(\$)
Direct Effect	44.9	1,387,723	2,289,064	15,050,425
Indirect Effect	29.7	2,088,637	3,140,902	5,621,051
Induced Effect	21.1	891,309	1,631,433	2,734,154
Total Effect	95.7	4,367,668	7,061,399	23,405,629
State/Local Taxes (\$)				1,143,202

following tables (1.24 and 1.25) present the estimates of the economic contribution generated by the spending pattern of those visiting wineries and vineyards, with the first highlighting those who said that their primary purpose for visiting the area was the winery/vineyard and the second, those who stated some other primary purpose for visiting the area.¹¹ The total contribution of output from the visitors whose primary purpose is to visit the winery or vineyard is \$12.7 million. A total labor income contribution of \$4.3 million in wages and benefits to employees and proprietary income is contributed to the economy by this spending. A total of 125.4 jobs are involved.. A total value added contribution to the state economy of \$6.8 million is generated from expenditures associated with the primary purpose winery visitors. Finally, the visitors generate \$685,540 worth of state and local taxes. In reference to the visitors that came to the area with another purpose, but visited the winery or vineyard, the total contribution of output or sales is \$39.0 million. There was a total labor income contribution of \$13.3 million in wages and benefits to employees and proprietary income contributed to the economy through this spending. A total of

¹¹Generally, the most conservative estimate of economic contribution would narrow down to only those who came with the event/activity as their primary reason for visiting the area. For the purpose of this study, we are looking at all of the visitors - both those who came as primary purpose and those who came with other purpose. Looking at both provides a low and a high estimate of what the potential contribution might be, depending on how it would be defined.

Table 1.24: Primary Purpose Visitor Spending

Contribution Type	Employment	Labor Income	Value Added	Output
	(#)	(\$)	(\$)	(\$)
Direct Effect	87	2,510,034	3,609,905	7,366,916
Indirect Effect	18.1	939,767	1,654,649	2,730,485
Induced Effect	20.3	853,633	1,562,796	2,618,937
Total Effect	125.4	4,303,434	6,827,350	12,716,338
State/Local Taxes (\$)				685,540

389.9 jobs within the state economy are estimated to be attributed to this spending. A total value added contribution to the state economy of \$6.8 million is generated from expenditures associated with the primary purpose winery visitors. Finally, these visitors account for approximately \$2.1 million worth of state and local taxes. Table

Table 1.25: Other Purpose Visitor Spending

Contribution Type	Employment	Labor Income	Value Added	Output
	(#)	(\$)	(\$)	(\$)
Direct Effect	272.4	7,855,220	11,068,725	22,613,402
Indirect Effect	54.7	2,838,468	5,058,352	8,318,997
Induced Effect	62.8	2,645,591	4,843,424	8,116,617
Total Effect	389.9	13,339,279	20,970,501	39,049,016
State/Local Taxes (\$)				2,051,270

1.26 presents the total economic contribution summary for Georgia wineries and vineyards and the associated operations. The overall contribution was presented in the form of three components; grape production, wineries (without grape production or visitor spending), and visitor expenditure, delineated between those who came with the winery as the primary purpose for their visit to the area and those who did not come to the area with the primary purpose of visiting the winery. The total contribution within the Georgia economy represented in Table 1.26 is the sum of all of these components, including both types of visitors as mentioned above. A total of grape production, wineries, and visitors of \$81.6 million worth of output is contributed to the Georgia economy. A total labor income of \$25.6 million represents the wages and benefits for employees and proprietor income. Overall, 655.6 jobs can be attributed to Georgia wineries and vineyards and their associated operations and visitors. Total value added accounts for \$38.5 million. This total contribution generates approximately \$4.1 million worth of tax revenue to the state and local governments.

Table 1.26: Total Contribution of All Components

Contribution Type	Employment	Labor Income	Value Added	Output
	(#)	(\$)	(\$)	(\$)
Direct Effect	423.5	14,292,886	18,847,775	48,399,690
Indirect Effect	111.3	6,185,713	10,346,696	17,541,623
Induced Effect	120.8	5,087,731	9,316,820	15,613,135
Total Effect	655.6	25,566,330	38,511,291	81,554,448
State/Local Taxes (\$)				4,070,280

1.6 Conclusion

Based on survey information of visitors collected by participating winery and vineyard businesses and through the Winegrowers Association of Georgia of the owners, the Center for Agribusiness and Economic Development (CAED) estimated the economic contribution of Georgia Wineries and Vineyards from a three-component perspective. This perspective included an analysis of grape production, an estimation of output or sales, and reported spending from all types of visitors to the area. From analyzing these operational and descriptive characteristics of Georgias wineries and vineyards and spending patterns of visitors to these facilities, CAED constructed a winery profile, visitor profile, and range of economic contribution of this important agribusiness sector. Overall, the Georgia Winery and Vineyard and related sectors, along with visitor spending contributes up to \$81.6 million in output, 655.6 jobs throughout the states economy, and \$4.1 million in state and local tax revenue.

The Center for Agribusiness & Economic Development



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To provide feasibility and other short term studies for current or potential Georgia agribusiness firms and/or emerging food and fiber industries.

To provide agricultural, natural resource, and demographic data for private and public decision makers.

To find out more, visit our Web site at: <http://www.caed.uga.edu>

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