

# Preliminary 2022 Winegrape Crush Report at 3.35 Million Tons, Lightest Crop Since 2011

by Turrentine Brokerage  
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For Immediate Release

**Novato, CA** – The California Department of Food and Agriculture Preliminary *Grape Crush Report*, containing tons crushed and prices of wine grapes sold during the 2022 harvest, has been released. The *Crush Report* provides growers and wineries insight into the inventory position of the California wine business as a whole and influences market dynamics for the current bulk wine market, as well as the upcoming 2023 winegrape market.

The 2022 California Grape Crush report confirmed today what the industry had already expected; the 2022 wine grape crop was far from a barn burner. Yields per acre were light for the third year in a row, in many cases lighter than projected, and highly variable due to frost, excessive heat, and the continued effects of drought. Due to lower 2022 yields, the overall supply wineries received was less than projected. However, recent trends illustrating a challenging consumer sales growth environment may balance the 2022 wine supply, leaving some wineries closer to balance on their 2022 vintage.

## Key Insights by Region

|                          | Tons Crushed 2022 | Tons Crushed 2021 | Net Gain/Loss | Equivalent Gallons | % Chg | 2022 % Δ to 5Y Avg |
|--------------------------|-------------------|-------------------|---------------|--------------------|-------|--------------------|
| <b>North Coast</b>       | 445,669           | 431,905           | 13,764        | 2,271,000          | 3%    | -8%                |
| <b>Central Coast</b>     | 421,692           | 553,583           | -131,891      | -21,762,000        | -24%  | -18%               |
| <b>Northern Interior</b> | 880,946           | 990,869           | -109,923      | -18,137,000        | -11%  | -7%                |
| <b>Southern Interior</b> | 1,547,505         | 1,580,487         | -32,982       | -5,442,000         | -2%   | -15%               |

|                           | Tons Crushed 2022 | Tons Crushed 2021 | Net Gain/Loss | Equivalent Gallons | % Chg | 2022 %Δ to 5Y Avg |
|---------------------------|-------------------|-------------------|---------------|--------------------|-------|-------------------|
| <b>Cabernet Sauvignon</b> | 556,788           | 594,913           | (38,125)      | (6,291,000)        | -6%   | -6%               |
| <b>Chardonnay</b>         | 520,983           | 619,360           | (98,377)      | (16,232,000)       | -16%  | -17%              |
| <b>Pinot Noir</b>         | 232,568           | 275,233           | (42,666)      | (7,040,000)        | -16%  | -13%              |
| <b>Sauvignon Blanc</b>    | 125,847           | 131,972           | (6,125)       | (1,011,000)        | -5%   | 4%                |

|                     |         |         |          |             |     |      |
|---------------------|---------|---------|----------|-------------|-----|------|
| <b>Pinot Grigio</b> | 196,428 | 213,893 | (17,465) | (2,882,000) | -8% | -19% |
| <b>Zinfandel</b>    | 307,169 | 292,985 | 14,184   | 2,340,000   | 5%  | -9%  |
| <b>Merlot</b>       | 182,425 | 186,455 | (4,030)  | (665,000)   | -2% | -16% |
| <b>Petite Sirah</b> | 87,139  | 89,274  | (2,135)  | (352,000)   | -2% | -9%  |

## General/Statewide

The total California 2022 winegrape crush of 3.35 million tons, the lightest in over a decade, played a significant role in the overall market for grapes and bulk wine in 2022 and continues to be a contributing factor to the moderate to strong levels of demand the market is currently experiencing. –Audra Cooper, Central Coast Grape Broker

Two of the largest contributors to the 2022 crop being down 282,000 tons from 2021 and 13% from the five-year average were historic spring frosts and excessive heat in August and September, neither of which bode well for wine grape yields. –Audra Cooper, Central Coast Grape Broker

Overall Chardonnay tons crushed were down approximately 100,000 tons in 2022; led by significant decreases in regions such as Monterey County, Lodi, and the Clarksburg region, keeping supply of bulk wine in check and the grape market in balance. –Steve Fredricks, President

Presently, the wine industry is experiencing high prices for California coastal bulk wine and grapes due to a lack of supply rather than increasing case sales. We have not seen this type of market situation in a very long time, if ever. Prior to the pandemic, the California wine industry was in oversupply for grapes and bulk wine. This downturn was rather severe due to the unusually large amounts of available bulk wine and grape volumes throughout California. The pandemic changed the demand for bulk wine and grapes. Consumers purchased more wine than expected plus ongoing vineyard removals and light harvests moved the oversupply into balance. Many believe the industry is one large crop away from oversupply. –Brian Clements, Vice President

## North Coast

The total tons crushed in the North Coast regions were below expectations and below the five-year average again this year, the third light year in a row, keeping the markets for bulk wine and 2023 grapes active. –Steve Fredricks, President

The 2022 Napa Valley Cabernet Sauvignon crop was 69,309 tons, up 6% from last year, but still less than projected due to the weather and excessive heat. The limited availability, in part, led to another district average price record at \$8,947.18. Winery competition for early 2023 available tons remains strong. –Christian Klier, North Coast Grape Broker

The 2022 growing season began with low cluster counts. This indicator for lighter yields caused the Sonoma County Chardonnay market to be active early in the year with upward pressure on pricing which is reflected in the district average price of Sonoma County Chardonnay, up 7% from last year to \$2,439.39 per ton. –Christian Klier, North Coast Grape Broker

The 2022 Sonoma County Chardonnay tons crushed were down 12% from last year's small crop—certainly less than what wineries wanted due to the strong demand for 2022 bulk Chardonnay and the early activity for 2023 grapes. —Christian Klier, North Coast Grape Broker

Sonoma County Pinot Noir tons crushed were down 16% in 2022 compared to 2021. There was strong demand for available fruit, especially late in the season when the crop was verified to be light. This was mostly due to weather events which kept upward pressure on grape price resulting in a record district average price of \$3,749.05 per ton, up 8% from 2021. This is reflected in a strong grape market to begin 2023. —Christian Klier, North Coast Grape Broker

Sauvignon Blanc tons crushed throughout the North Coast rebounded from a light 2021 crop. The limited supply is keeping the market for 2023 grapes active and putting upward pressure on price. This is the greatest demand the market has experienced for Sauvignon Blanc and is reflected by the record setting average prices across all North Coast districts. —Christian Klier, North Coast Grape Broker

### **Central Coast**

Total tons crushed of 2022 Central Coast grapes were 24% down compared to 2021, equating to roughly 9.2 million fewer cases. —Audra Cooper, Central Coast Grape Broker

Spot market grape prices were flat to roughly 15% up for all major varieties, further depicting an improvement in the market as compared to the previous four years. However, the total value of Central Coast wine grapes was \$661,000,000, down \$153,000,000 from 2021, due to lower volumes. —Audra Cooper, Central Coast Grape Broker

The Paso Robles Cabernet Sauvignon and Monterey County Pinot Noir yields per acre were, overall, the lowest the regions have experienced since 2015 with tons crushed down 17% and down 23% from 2021, respectively. While the Central Coast varieties were negatively impacted by excessive heat, Paso Robles Cabernet Sauvignon and Monterey Pinot Noir were more impacted than most. —Audra Cooper, Central Coast Grape Broker

District 8 Cabernet Sauvignon, largely Paso Robles, is alive and well. This is not only reflected in the strong demand from local and out of area grape buyers, but also in the district average price of \$1,823.80 which is a \$212.67 per ton increase over 2021. This is the largest jump in district average price since 2012. However; it is important to note the district average is a weighted average. District 8 Cabernet Sauvignon crop was down 17%, which has further influenced the market. —Audra Cooper, Central Coast Grape Broker

District 8 Cabernet Sauvignon was down 17%, slightly better than estimates of 20% or more down from estimates, but still significantly light, which has kept the market active for bulk wine and 2023 grapes. —Audra Cooper, Central Coast Grape Broker

District 7 Chardonnay, was down a whopping 30% from the previous year—the lightest in 20 years! —Audra Cooper, Central Coast Grape Broker

End of season demand was moderate to strong for District 7 (primarily Monterey County) Pinot Noir, which was both a blessing and a curse. A blessing as it further aided in the recovery of Pinot Noir from structural excess as exemplified by the decrease in production by 1.15 million cases from 2021. A curse because no one was satisfied, neither buyer nor seller, with the low producing year for Monterey County Pinot Noir. —Audra Cooper, Central Coast Grape Broker

The 2022 District 8 average price for Chardonnay increased to \$1,627.16, meanwhile production was down 29% from 2021. –Audra Cooper, Central Coast Grape Broker

The District 8 Pinot Noir district average price decreased by 6%, despite the crop decreasing by 22% from 2021 and 14% from the five-year average, showing continued need for market recovery for this variety in the Central Coast. –Audra Cooper, Central Coast Grape Broker

## **Lodi & Interior**

Mother Nature had her way in shaping the size of the 2022 crop. It started with historically severe frost events with damage reported up and down the Valley, but northern Lodi and Delta area vineyards were the most extensively damaged. Three of the larger varieties planted in the regions most affected by the frost were Chardonnay, Pinot Noir, and Sauvignon Blanc. Total tons crushed of these varieties in District 11 and 17 combined were down 26%, 15%, and 15%, respectively. –Mike Needham, Central Valley Grape Broker

Yields were all over the board this year, but whites came in lighter than reds in the San Joaquin Valley, in general. Yields for white varieties were also affected by the heat spell. Chardonnay, for example, was down 18% in District 11 which helped keep pricing strong at \$627 per ton on average, a 5% increase. –Mike Needham, Central Valley Grape Broker

The early-season activity for Cabernet Sauvignon slightly increased the overall price paid per ton as evidenced by the increased district average prices per ton paid in District 11, 12, and 13 to \$695, \$579, and \$449, respectively. –Mike Needham, Central Valley Grape Broker

The availability of French Colombard and Chenin Blanc were in short supply on the spot market in the Southern San Joaquin Valley in 2022. As a result, Thompson Seedless continued to have demand as winegrapes in 2022. 90,074 tons of Thompson Seedless were crushed for wine grapes in 2022. –Mike Needham, Central Valley Grape Broker

Pinot Noir had a limited amount of supply available due to frost. District 17 Pinot Noir saw yields that were down 36% in 2022. There were no available Pinot Noir grapes in the valley post frost event in 2022. –Mike Needham, Central Valley Grape Broker

There was early season demand for Petite Sirah,, Merlot, and Zinfandel due to their blendability into red blend programs in 2022. But once that demand was met by wineries, it was more challenging to find a buyer in the third quarter of the year. That being said, Zinfandel in District 11 price increased 5% last year to \$710 per ton. –Mike Needham, Central Valley Grape Broker

## **About Turrentine Brokerage**

Turrentine Brokerage, founded in 1973, serves as trusted and strategic advisors to growers, wineries, and financiers and specializes in the strategic sourcing of wine grapes and bulk wine from the major growing areas across the globe. Working with thousands of wineries worldwide, and with over 2,000 growers, this experienced team has negotiated transactions between buyers and sellers valued at more than \$3 billion over the past decade.

**Turrentine Brokerage is available to provide comment and analysis on this report** and its probable impact on growers, wineries and consumers. Turrentine Brokerage will have its experienced team of grape and wine brokers and analysts available all-day Friday, February 10<sup>th</sup> and throughout the following week for comments and questions.

## Contact

|                 |                            |                |   |
|-----------------|----------------------------|----------------|---|
| Steve Fredricks | President                  | (415) 847-0603 | Bulk wine throughout CA and global import/export  |
| Brian Clements  | Vice President             | (707) 495-8151 | Grapes throughout California  |
| Audra Cooper    | Grape Broker / Partner     | (805) 400-9930 | Grapes from Monterey, San Benito, Santa Clara, San Luis Obispo and Santa Barbara Counties |
| Mike Needham    | Grape Broker / Partner     | (707) 849-4337 | Grapes from the San Joaquin and Sacramento Valleys  |
| Christian Klier | Grape Broker               | (707) 867-8212 | Grapes from the Napa, Sonoma, Mendocino and Lake Counties                                 |
| Marc Cuneo      | Bulk Wine Broker / Partner | (707) 217-1369 | Bulk wine, domestic and international   |