



CIATTI

GLOBAL WINE & GRAPE BROKERS

FOR IMMEDIATE RELEASE

2019 California Winegrape Crushed 3,890,253 Tons

(February 10, 2020, Novato, CA) – We’ll never know how big this crush could have been!! The California Department of Food and Agriculture Preliminary Grape Crush Report for 2019 was released today. The 2019 Harvest size rivals the 2014 harvest and is the second smallest harvest since 2011. While not good news for farmers it is welcome respite for an industry under pressure from oversupply and weak case goods demand. While most all thought the harvest could be the largest ever “unpicked fruit” are the words of the day! Of note: red wine grapes were down 12.8% while white grapes were only down 4.3%, indicating that varieties such as Cabernet Sauvignon, Pinot Noir and Zinfandel may have been the varieties left on the vine!

Ciatti’s experienced brokers will be available for further details, comments & analysis on the 2019 California Grape Crush Report. Please call 415-458-5150.

 CIATTI GLOBAL WINE & GRAPE BROKERS	2018 Tons	2019 Tons	18-19% Δ	2018 Prices	2019 Prices	18-19% Δ
Red Wine	2,447,930	2,135,112	-12.8%	\$1,052	\$995	-5.3%
White Wine	1,833,755	1,755,141	-4.3%	\$650	\$593	-8.8%
Chardonnay	711,668	638,029	-10.4%	\$1,001	\$928	-7.4%
Pinot Gris	275,608	246,889	-10.4%	\$559	\$526	-5.9%
Riesling	36,334	34,001	-6.5%	\$689	\$679	-1.5%
Sauvignon Blanc	118,050	119,203	0.9%	\$1,151	\$1,092	-5.1%
Cabernet Sauvignon	680,308	574,286	-15.5%	\$1,724	\$1,724	0.0%
Merlot	258,942	219,138	-15.4%	\$815	\$787	-3.4%
Petite Sirah	108,682	97,609	-10.2%	\$973	\$951	-1.7%
Pinot Noir	313,824	263,311	-16.1%	\$1,879	\$1,642	-12.7%
Syrah	94,329	81,363	-13.8%	\$862	\$851	-1.1%
Zinfandel	387,965	345,214	-11.0%	\$623	\$591	-4.9%
Totals Statewide	4,281,684	3,890,253	-9.1%	\$881	\$812	-7.8%

Cabernet Sauvignon was most surprising: many thought this was going to be the first year that Cabernet Sauvignon was going to produce more tons in California than Chardonnay. However, that was not the case; the Cabernet Sauvignon tons crushed was down over 106K tons (-15.5%) from 2018 for a total of 574,285 tons. The main reason: tons left on the vine and not crushed this year. Cabernet Sauvignon tons had continued to grow in California over the last few years, led by new plantings in many of the Coastal and North Valley areas of California. Cabernet Sauvignon was just 455,594 tons in 2015 and had grown to 679,476 tons in 2018.

– *Glenn Proctor*

Chardonnay remained at the top for most tonnage of a winegrape variety crushed in 2019 with a state total of 638,029 tons, but it was down by -10.4% in volume and down -7.4% in price per ton compared with last year.

Regional differences showed that yields were significantly down in the premium Coastal districts, but were still unchanged to slightly up in the Central Valley and Southern Interior Valley. North Coast and Central Coast were both off by -15 to 20% compared to last year.

Lodi and Clarksburg yields were virtually unchanged. Modesto was off by -14%, Fresno and Bakersfield's Chardonnay crop were up by approximately +3 to +5%.

Changes in pricing for Chardonnay were modest and were converse to the above yields. There were slight pricing increases in North Coast and Central Coast by 0 to +5% and declines in Central Valley by -3 to -7%.

– *John White*

Pinot Noir is one of the most popular grape varieties we grow in California. The 2019 USDA California Grape Crush Preliminary Report showed Pinot Noir accounted for approx. \$440million dollars in value. However the headline that stuck out most was the drop in price from 2018 to 2019, down 12.7%. This marks two years in a row where the overall Pinot Noir price has dropped. A lot of high level wine industry professionals will keep asking the question, will Pinot Noir pricing continue to drop in 2020. – *Todd Azevedo*

The total **Zinfandel** grape crush in California was 345,214 tons down -11% from 2018. The Interior region accounted for 91% of the state's total but saw a challenging market for both red and white resulting in some grapes going unpicked as well as vineyards being removed. Lodi crushed 113,887 tons down -16% their lowest amount in the last 6 years with the average price continuing to decline at \$613. District 13 crushed the largest amount of Zinfandel totaling 148,414 tons. District 3 (Sonoma) was down -18.2% crushing 12,765 tons and wasn't excluded from a difficult market. However, average prices declined slightly to \$3,094 a ton.

– *Johnny Leonardo*

North Coast: After the huge harvest from the previous year in the North Coast, most expected and welcomed a modest 2019 harvest. Volumes in the North Coast fell by more than 15% and pricing remained soft as the vines alternated crop load and wineries adjusted their inventories down and sought price relief.

What started off as very favorable growing conditions and a balanced crop load later became “challenging” for some to say the least. The 2019 vintage gave us a bumpy ride at the end of harvest with late season frosts and fires which may have affected some of the later ripening red varieties.

Districts 1 to 5 better known as the North Coast were all down in delivered tonnages for the major winegrape varieties as demonstrated by the following highlights:

Napa Cabernet Sauvignon	-12.2%	↓
Sonoma Chardonnay	-19.5%	↓
Sonoma Pinot Noir	-20.5%	↓
Mendocino Chardonnay	-16.6%	↓
Lake County Chardonnay	-5.7%	↓

– *John White*

The overarching theme for the 2019 **Central Coast** harvest will be “what was left on the vine”. The Central Coast area (Districts 6, 7, 8) picked 474,347 tons down from 2018’s 568,887 tons. The Central Coast is so top heavy with Cabernet Sauvignon, Chardonnay and Pinot Noir grapes, they account for approximately 68% of the total crop in the Central Coast. Bulk inventories are still high from the 2018 harvest and knowing the 2019 tonnages now, a large portion of the market is still nervous about taking on more inventory. – **Todd Azevedo**

Interior 2019 Crush: Collectively the Interior region’s 2019 grape crush was down 6% from 2018 totaling 2,896,971 tons. Despite totals being significant, percentage decreases were not as large overall, as they were in the coastal regions. Overall demand was very quiet resulting in both unpicked vineyards as well as vineyard removals contributing to the decrease in tons crushed.

Southern Interior (Districts 12, 13, 14): District 14 (Bakersfield area) was down -9.6% to a total of 274,165 tons. Pinot Grigio saw the largest decrease down -55%. District 13 (Madera/Fresno) saw a modest decrease of -2%, crushing 1,269,430 tons. Results however, were somewhat mixed. Cabernet Sauvignon was down -17.6% and Zinfandel was down -6.4%, but Chardonnay increased 5.8% and French Colombard crushed 273,909 tons up 5%. District 12 (Modesto area) decreased -12.6% to total 310,155 tons with Zinfandel down -31.5% and Cabernet down -18.6%.

Northern Interior (Districts 9, 10, 11, 17): In 2019 District 11 (Lodi) was down -9.4% overall to 770,992 tons following the record producing crop of 2018. The region saw significant decreases in Zinfandel -16% and Cabernet -17.9%. Like much of the state this was partly due to a stagnant market which left some vineyards unharvested. Sauvignon Blanc was one of the few varieties to increase up 15.3%. Clarksburg (District 17) was down slightly -4.5% to 179,213 tons. The region’s largest variety Chardonnay was up a modest 1.2% to 60,890 tons crushed. District 9 (Northern CA) was one of the only regions to show an increase up 9.4% but District 10 (Sierra Foothills) struggled crushing 17,227 tons down -28.6%. – **Johnny Leonardo**

About CIATTI GLOBAL WINE & GRAPE BROKERS

The Ciatti Company is the world’s largest and most comprehensive bulk wine and grape brokerage. Aside from its home base in Novato, California, seven additional offices around the world provide clients the kind of information and intelligence that today’s competitive global wine industry demands.

The company, founded in 1971, has deep roots in the wine industry, both in California and the countries in which the company operates. The current partnership includes industry professionals with over 135 years of collective experience including: John Ciatti, Greg Livengood, Glenn Proctor, John White, Chris Welch, Steve Dorfman and brokers: Johnny Leonardo, Todd Azevedo, and Dennis Schrapp.

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