

California Grape Market Metrics Sample

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District 4 Cabernet Sauvignon Pricing Detail and History

2020 Base Price Distribution by Transaction Size: Weighted Percentiles

Segment	Min	10th	20th	30th	40th	50th	60th	70th	80th	90th	Max
Less than 20 tons	233	4,015	6,180	7,873	8,643	9,116	9,975	11,818	13,871	20,461	65,919
20 to 50 tons	200	2,300	3,970	5,803	7,284	7,872	8,500	8,997	9,600	12,000	28,500
100 to 500 tons	500	1,850	2,400	4,000	5,500	6,050	7,000	7,842	8,000	9,291	17,500
500 tons or more	2,000	2,000	2,000	2,000	3,000	4,740	4,740	4,740	5,000	9,239	9,239
All sales	200	2,000	2,400	4,200	4,950	6,200	7,498	7,873	9,075	9,936	65,919

Base Price History by Percentile: All Sales

Segment	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
25th Percentile	3,000	3,135	3,952	4,250	4,700	5,000	5,400	6,000	6,300	5,884	3,000
50th Percentile	4,450	4,300	4,945	5,099	5,500	5,839	6,289	6,875	7,500	7,854	6,200
75th Percentile	5,500	5,500	6,000	6,294	6,854	6,853	7,541	8,400	9,000	9,400	8,561
Ratio 75th to 25th	1.8	1.8	1.5	1.5	1.5	1.4	1.4	1.4	1.4	1.6	2.9

Weighted Average Base Price History by Transaction Size

Segment	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Less than 20 tons	6,307	6,179	6,300	7,071	6,823	8,464	9,072	9,602	10,027	10,747	11,578
20 to 50 tons	5,450	5,843	5,483	6,129	6,392	6,690	7,118	7,946	8,983	8,899	7,872
100 to 500 tons	4,077	4,145	4,888	5,219	5,718	5,974	6,205	6,789	7,158	7,173	5,841
500 tons or more	3,183	3,571	4,586	4,679	5,450	5,524	6,512	7,028	7,311	6,728	4,288
All sales	4,457	4,659	5,058	5,493	5,922	6,323	6,836	7,517	7,955	7,949	6,510

Transaction Count History

Segment	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Less than 20 tons	358	353	332	396	410	489	520	537	557	611	298
20 to 50 tons	153	156	199	182	242	184	235	270	304	282	142
100 to 500 tons	63	54	83	78	70	59	70	65	96	86	49
500 tons or more	8	7	11	8	13	9	12	12	16	14	8
All sales	582	570	625	664	735	741	837	884	973	993	497

District 7 Crush Summary

Varietal	Tons Crushed					Brix Crushed				
	2020	2019	5YR AVG	VS 2019	VS AVG	2020	2019	5Y AVG	VS 2019	VS AVG
Pinot Noir	34,616	55,232	55,417	-37%	-38%	25.3	25.5	25.4	-0.2	-0.1
Cabernet Sauvignon	26,800	29,254	29,609	-8%	-9%	24.4	25.7	25.2	-1.3	-0.8
Merlot	11,529	18,476	23,942	-38%	-52%	24.1	24.9	25.2	-0.8	-1.1
Syrah	2,938	7,371	7,154	-60%	-59%	24.2	25.1	25.4	-0.9	-1.2
Grenache	2,093	3,119	2,624	-33%	-20%	23.2	23.9	23.7	-0.7	-0.5
Malbec	1,675	3,139	2,760	-47%	-39%	23.5	24.9	24.6	-1.4	-1.1
Petite Sirah	1,586	2,108	2,208	-25%	-28%	25.3	25.4	25.6	-0.1	-0.3
Petit Verdot	612	910	1,096	-33%	-44%	24.5	24.8	24.7	-0.3	-0.2
Zinfandel	359	741	586	-52%	-39%	25.5	23.8	24.1	1.7	1.4
Gamay (Napa)	245	243	290	0%	-16%	22.6	22.6	21.8	0.0	0.8
Cabernet Franc	237	602	597	-61%	-60%	25.9	25.8	25.8	0.1	0.1
Sangiovese	182	203	274	-10%	-33%	23.4	23.6	25.0	-0.2	-1.6
Tempranillo	135	143	110	-6%	23%	24.8	23.6	24.8	1.2	0.0
Cinsaut	96	78	67	23%	42%	21.0	19.8	20.4	1.2	0.6
Primitivo	82	232	139	-65%	-41%	26.5	27.4	26.6	-0.9	-0.1
Other Red	81	110	186	-26%	-56%	23.6	24.2	24.5	-0.5	-0.9
Mourvedre	58	99	102	-42%	-43%	24.0	22.7	23.0	1.3	1.0
Teroldego	39	49	32	-20%	22%	24.0	24.2	20.1	-0.2	3.9
Dolcetto	35	10	20	260%	76%	20.5	25.5	22.9	-5.0	-2.4
Tannat	21	163	215	-87%	-90%	25.3	35.3	29.1	-10.0	-3.8
Barbera	20	34	115	-39%	-82%	23.8	26.2	27.0	-2.4	-3.2
Negrette	15	13	12	11%	21%	23.6	24.0	25.1	-0.4	-1.5
Total Red	83,466	122,338	127,560	-32%	-35%	25.4	24.7	25.2	0.7	0.1
Chardonnay	78,712	86,911	96,138	-9%	-18%	24.3	24.3	24.4	0.0	-0.1
Pinot Gris	7,371	7,887	7,182	-7%	3%	22.3	22.8	22.8	-0.5	-0.5
Sauvignon Blanc	6,737	7,503	7,429	-10%	-9%	22.6	23.8	23.6	-1.2	-1.0
Gewurztraminer	6,259	6,175	7,342	1%	-15%	22.1	23.0	22.9	-0.9	-0.8
White Riesling	2,796	5,609	7,307	-50%	-62%	21.4	22.0	23.0	-0.6	-1.6
Pinot Blanc	871	754	711	15%	22%	22.8	22.0	23.1	0.8	-0.3
Viognier	531	373	487	42%	9%	24.7	24.7	24.2	0.0	0.5
Malvasia Bianca	407	546	827	-26%	-51%	23.6	23.9	24.1	-0.3	-0.5
Muscat Blanc	370	538	893	-31%	-59%	23.4	24.7	24.6	-1.3	-1.2
Grenache Blanc	202	102	115	98%	76%	22.0	22.5	22.2	-0.5	-0.2
Gruener Veltliner	201	365	345	-45%	-42%	21.0	23.2	23.3	-2.2	-2.3
Albarino	147	395	352	-63%	-58%	22.2	22.6	23.3	-0.4	-1.1
Chenin Blanc	82	679	745	-88%	-89%	22.8	24.0	23.4	-1.2	-0.6
Marsanne	54	42	74	28%	-27%	23.9	24.2	24.6	-0.3	-0.7
Other White	46	88	53	-47%	-13%	19.4	21.9	25.1	-2.5	-5.7
Roussanne	31	41	49	-25%	-37%	23.5	24.3	23.9	-0.8	-0.4
Semillon	29	31	39	-8%	-26%	24.2	25.2	24.8	-1.0	-0.6
Picpoul Blanc	28	35	27	-20%	2%	20.5	21.5	20.6	-1.0	-0.1
Vermentino	27	33	9	-19%	193%	21.4	20.3	21.8	1.1	-0.4
Sauvignon Musque	26	41	49	-36%	-48%	22.8	22.8	22.4	0.0	0.4
White Total	104,926	118,147	130,171	-11%	-19%	24.0	23.8	24.1	0.2	-0.1
Grand Total	188,392	240,485	257,730	-22%	-27%	24.2	24.7	24.7	-0.5	-0.5

District 3 Price Summary: Weighted Average Price Per Ton

Varietal	Count	2020 Purchases		Base Contract Price			Grower Price Non-Related		
		Total Tons	Average Tons	2020	2019	Change	2020	2019	Change
Pinot Noir	346	14,237	41.1	3,253	3,944	-18%	3,047	3,913	-22%
Cabernet Sauvignon	233	19,668	84.4	2,518	3,055	-18%	2,338	2,975	-21%
Zinfandel	154	4,737	30.8	2,769	3,142	-12%	2,571	3,128	-18%
Syrah	92	1,018	11.1	2,565	2,817	-9%	2,380	2,807	-15%
Merlot	74	3,390	45.8	1,620	2,000	-19%	1,506	1,985	-24%
Petite Sirah	55	538	9.8	2,754	3,160	-13%	2,716	3,151	-14%
Malbec	49	461	9.4	2,703	3,040	-11%	2,509	3,033	-17%
Cabernet Franc	48	542	11.3	3,548	3,810	-7%	3,232	3,759	-14%
Grenache	48	409	8.5	2,609	3,205	-19%	2,166	3,164	-32%
Petit Verdot	33	220	6.7	3,218	3,403	-5%	2,957	3,455	-14%
Sangiovese	23	197	8.6	2,373	2,575	-8%	2,335	2,531	-8%
Primitivo	17	121	7.1	2,600	2,542	2%	2,561	2,370	8%
Mourvedre	17	63	3.7	2,985	3,455	-14%	2,591	3,487	-26%
Carignane	16	153	9.6	2,451	2,574	-5%	2,443	2,566	-5%
Meunier	9	103	11.4	2,324	2,527	-8%	2,324	2,527	-8%
Barbera	8	20	2.5	3,423	3,261	5%	2,261	2,976	-24%
Alicante Bouschet	7	54	7.7	3,061	3,076	0%	3,097	3,070	1%
Gamay (Napa)	6	52	8.7	2,113	2,314	-9%	2,084	2,314	-10%
Cinsaut	5	8	1.7	2,613	3,075	-15%	2,640	3,200	-17%
Total Red	1287	46,160	35.9	2,731	3,253	-16%	2,545	3,209	-21%
Chardonnay	441	31,189	70.7	2,310	2,415	-4%	2,296	2,397	-4%
Sauvignon Blanc	136	8,619	63.4	1,551	1,814	-15%	1,520	1,803	-16%
Viognier	47	216	4.6	2,704	2,696	0%	2,594	2,718	-5%
Pinot Gris	21	636	30.3	1,841	1,907	-3%	1,844	1,851	0%
Semillon	21	164	7.8	2,546	2,498	2%	2,552	2,532	1%
Grenache Blanc	20	65	3.2	2,614	3,060	-15%	2,397	2,920	-18%
White Riesling	11	76	6.9	2,327	2,293	1%	2,331	2,296	2%
Albarino	11	37	3.4	2,473	2,531	-2%	2,493	2,533	-2%
Roussanne	11	27	2.5	2,589	2,893	-10%	2,332	2,783	-16%
Vermentino	10	56	5.6	2,388	2,376	1%	2,300	2,211	4%
Gewurztraminer	9	44	4.9	2,099	1,968	7%	1,890	1,984	-5%
Sauvignon Musque	6	94	15.6	2,261	1,820	24%	2,261	1,820	24%
Pinot Blanc	6	80	13.4	2,352	2,276	3%	2,360	2,278	4%
French Colombard	5	49	9.7	1,423	1,328	7%	1,423	1,328	7%
Gray Riesling	5	18	3.6	2,469	2,506	-1%	2,469	2,506	-1%
Muscat Blanc	5	13	2.5	2,545	3,110	-18%	2,439	3,281	-26%
Total White	807	41,376	51.3	2,147	2,303	-7%	2,133	2,289	-7%
Total Wine	2094	87,536	41.8	2,455	2,845	-14%	2,345	2,806	-16%

District 13 Price History

Varietal	Weighted Average Base Contract Price Per Ton										
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cabernet Sauvignon	351	479	539	515	419	378	395	379	398	364	390
Petite Sirah	359	471	593	471	410	453	487	401	399	277	390
Merlot	337	430	469	420	358	341	346	357	358	330	373
Syrah	328	410	433	440	367	346	336	339	350	340	361
Grenache	251	314	366	348	318	280	303	325	338	336	340
Pinot Noir	376	461	504	484	448	443	424	408	368	252	339
Tempranillo	325	410	412	385	334	321	320	350	337	303	331
Barbera	251	340	382	358	311	311	309	316	318	307	318
Carignane	261	351	385	393	344	333	293	295	299	246	308
Zinfandel	252	338	392	368	305	284	289	296	302	291	301
Ruby Cabernet	259	344	367	368	307	287	295	283	276	237	282
Rubired	253	303	306	304	282	264	264	263	265	261	263
Other Red	218	338	353	302	280	246	287	301	301	237	338
All Red Varieties	272	350	385	366	320	296	302	306	309	289	309
Sauvignon Blanc	301	357	418	380	305	307	510	515	532	518	451
Pinot Gris	361	436	450	474	454	449	446	445	438	417	446
Muscat Blanc	445	493	479	441	369	394	430	429	440	365	405
Chardonnay	330	406	465	422	364	364	377	392	401	382	394
Chenin Blanc	250	324	362	351	324	324	316	321	325	294	322
Muscat of Alex.	359	386	396	344	288	281	283	290	292	281	291
French Colombard	242	303	329	302	259	250	261	268	291	277	286
Other White	214	298	327	311	261	259	258	253	272	260	262
All White Varieties	268	336	370	343	297	293	304	309	326	308	320
All Varieties	271	346	381	359	313	295	303	307	315	296	313

District 11 Production History: Red Varietals

Varietal	Tons Crushed										
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cabernet Sauvignon	106,833	96,766	131,323	145,264	138,676	134,347	165,635	163,727	198,838	164,119	156,048
Zinfandel	148,527	111,218	170,459	178,898	125,126	119,276	146,881	124,212	135,645	114,703	105,435
Merlot	70,458	71,366	87,035	96,702	77,428	73,576	82,877	78,444	82,713	71,269	57,812
Petite Sirah	19,754	24,406	25,987	27,402	26,752	32,375	44,096	40,848	47,552	42,102	39,663
Pinot Noir	13,184	21,530	26,431	25,696	21,631	24,562	34,348	37,484	45,745	44,521	39,542
Malbec	2,860	2,836	6,404	8,773	10,716	12,744	16,664	15,206	19,530	18,766	15,414
Syrah	20,279	21,684	25,939	25,555	23,505	18,687	20,590	19,198	16,949	13,171	13,159
Petit Verdot	3,282	4,317	5,458	5,342	6,647	6,957	12,133	13,159	13,997	13,765	12,732
Teroldego	272	263	400	500	341	1,762	6,221	6,931	10,975	14,734	9,497
Tannat	967	1,119	1,591	1,506	2,107	2,890	3,387	3,533	3,742	4,235	3,081
Touriga Nacional	1,468	1,188	1,711	1,727	1,403	1,089	1,848	1,880	2,077	1,996	2,239
Rubired	346	844	621	621	566	1,540	643	2,173	2,423	2,007	1,466
Alicante Bouschet	1,695	2,126	3,167	2,129	2,251	2,094	2,336	1,596	2,764	2,233	1,392
Tempranillo	405	614	1,019	926	950	1,620	1,695	1,769	1,517	1,286	1,369
Barbera	1,014	1,097	1,726	2,125	1,453	1,145	1,540	1,639	1,511	1,085	1,004
Cabernet Franc	1,738	2,332	3,449	3,495	2,904	2,888	2,079	2,541	2,376	2,345	887
Carignane	1,345	1,496	1,922	2,247	1,230	1,057	1,056	1,086	1,421	1,174	825
Grenache	391	769	615	753	744	505	814	807	958	947	822
Graciano	33	27	28	84	170	182	206	208	366	536	537
Sangiovese	1,596	1,980	2,501	1,890	1,946	1,715	1,768	1,375	929	712	431
Lagrein	-	-	-	-	-	163	252	257	223	316	320
Dornfelder	-	-	-	83	434	197	277	271	248	359	303
Mourvedre	63	68	58	63	53	141	61	41	67	97	211
Muscat Hamburg	80	56	67	9	88	-	171	163	175	146	201
Primitivo	24	77	241	56	37	227	101	73	452	301	197
Ruby Cabernet	570	668	779	622	650	676	640	779	429	254	153
Cinsaut	188	243	53	108	104	126	163	145	92	156	144
Souzao	256	185	277	302	278	232	254	196	242	172	144
Other Red	826	974	989	839	1,430	1,406	1,893	1,832	1,792	1,266	455
Total Red	398,451	370,247	500,250	533,716	449,622	444,177	550,628	521,571	595,746	518,771	465,482

Merlot Production and Pricing Summary

District	Count	2020 Purchases			Base Contract Price per Ton			Grower Price Non-Related		
		Tons	Avg Tons	Avg Brix	2020	2019	Change	2020	2019	Change
1	22	1,105	50	24.6	1,211	1,341	-10%	1,194	1,338	-11%
2	10	515	51	24.6	707	1,308	-46%	958	1,387	-31%
3	74	3,390	46	25.0	1,620	2,000	-19%	1,506	1,985	-24%
4	157	3,669	23	25.3	3,284	4,048	-19%	3,133	3,940	-20%
5	9	341	38	25.1	1,768	1,703	4%	1,779	1,718	4%
6	32	890	28	25.7	1,054	1,054	0%	979	942	4%
7	20	3,115	156	24.7	813	981	-17%	718	956	-25%
8	89	4,034	45	25.6	1,575	1,429	10%	1,575	1,259	25%
9	5	758	152	23.1	534	616	-13%	555	616	-10%
10	19	534	28	24.7	1,753	1,766	-1%	1,746	1,762	-1%
11	60	49,504	825	24.4	524	495	6%	525	508	3%
12	19	14,747	776	24.5	475	447	6%	491	476	3%
13	15	23,787	1,586	24.0	373	330	13%	379	353	7%
14	2	7,133	3,566	25.2	350	175	100%	na	1,400	na
15	1	5	5	24.0	1,200	462	160%	1,200	462	160%
16	25	94	4	24.9	1,705	1,814	-6%	1,678	1,751	-4%
17	18	4,075	226	23.8	608	604	1%	544	522	4%
Total	577	117,695	204.0	24.5	661	775	-15%	664	800	-17%

District	Tons Crushed					Brix Crushed				
	2020	2019	5YR AVG	VS 2019	VS AVG	2020	2019	5Y AVG	VS 2019	VS AVG
1	2,444	3,935	5,582	-38%	-56%	25.0	25.5	25.1	-0.5	-0.1
2	626	1,127	1,456	-44%	-57%	24.5	25.0	24.9	-0.5	-0.4
3	5,655	12,325	13,060	-54%	-57%	25.0	25.7	25.2	-0.7	-0.2
4	7,199	12,365	14,183	-42%	-49%	25.4	25.7	25.5	-0.3	-0.1
5	552	629	753	-12%	-27%	25.0	24.9	25.4	0.1	-0.4
6	1,343	2,143	2,195	-37%	-39%	25.6	25.2	24.9	0.4	0.7
7	11,529	18,476	23,942	-38%	-52%	24.1	24.9	25.2	-0.8	-1.1
8	7,918	10,284	14,878	-23%	-47%	25.3	25.8	25.3	-0.5	0.0
9	2,379	3,438	2,289	-31%	4%	23.4	23.6	25.0	-0.2	-1.6
10	723	842	832	-14%	-13%	24.5	25.1	25.3	-0.6	-0.8
11	57,812	71,269	77,776	-19%	-26%	24.3	25.3	25.4	-1.0	-1.1
12	17,938	20,868	28,277	-14%	-37%	24.5	25.0	25.1	-0.5	-0.6
13	37,775	40,265	44,387	-6%	-15%	24.2	24.5	24.8	-0.3	-0.6
14	7,384	14,598	13,843	-49%	-47%	25.1	24.8	25.1	0.3	0.0
15	20	49	38	-59%	-47%	25.1	25.6	25.4	-0.5	-0.3
16	240	619	430	-61%	-44%	24.6	24.6	24.8	0.0	-0.2
17	6,000	7,245	7,353	-17%	-18%	23.8	24.2	24.4	-0.4	-0.6
Total	167,538	220,475	251,274	-24%	-33%	24.4	25.1	25.1	-0.6	-0.7