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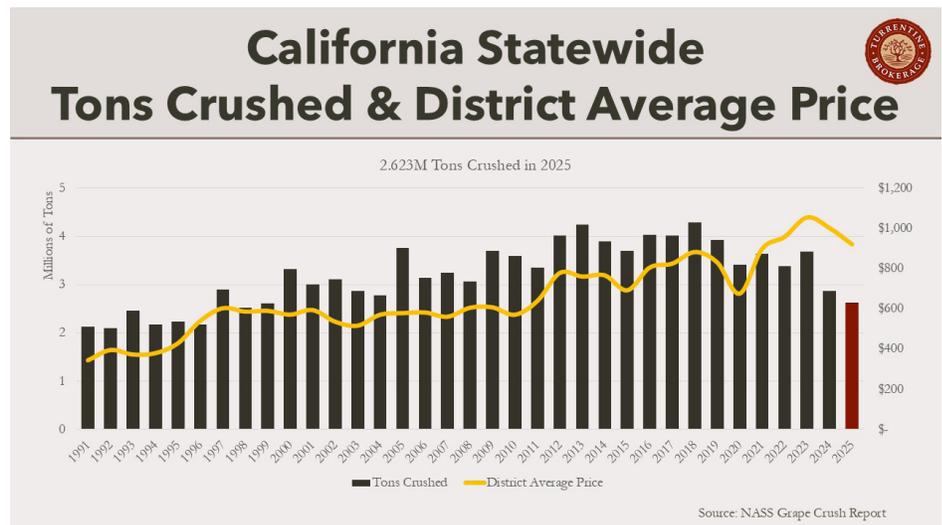
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THE 2025 CROP WAS DOWN AN EQUIVALENT OF 72 MILLION CASES FROM THE FIVE-YEAR AVERAGE

NOVATO, CA – March 13th, 2026 – Following the release of the Preliminary 2025 California Grape Crush Report, Turrentine Brokerage, the largest California grape and bulk wine brokerage company, has issued a market assessment characterizing the 2025 vintage as one of the most challenging for the wine industry since Prohibition.

According to the new state data, the total tons crushed came in at 2.62 million tons, a figure that is above initial projections and well above what was felt by the industry. This statewide volume is 8% below 2024 and 23% below the 5-year average. Total red wine production declined by 9% and white wine production declined by 6%. “The decrease in tons is still very positive news for the industry overall,” said Steve Fredricks, President at Turrentine Brokerage.

“The 2025 vintage highlights the industry’s directional shift of declining production and an overall restructure of the industry. 2025 represented continued challenges for growers and wineries that were strikingly apparent at harvest,” said Audra Cooper, Vice President at Turrentine Brokerage. “Between a cooler growing season, reduced vineyard inputs, and multiple rain events which led to excessive late-season disease pressure and combined with soft demand, 2025’s challenges were relentless.”



Key Takeaways from 2025:

- **A Correction in Volume:** The 2025 crop is the lightest on record since 1999. This reduction is attributed not only to weather and acreage removals, but also a lack of grape demand, which left significant tonnage uncontracted and unharvested.
- **Reduced Crop Value:** The total 2025 crop value throughout California was down 16% from last year to \$2.414 billion, and down 22% from the five-year average. Cabernet Sauvignon, Chardonnay, Pinot Noir, and Zinfandel declined more than \$330 billion in total crop value from last year.
- **Low Market Activity:** Buying activity for grapes and bulk wine remained low statewide through the end of the season. Late-season activity was largely limited to opportunistic plays in the North Coast and Paso Robles for Cabernet Sauvignon, with minimal movement to replace grapes rejected due to disease pressure.

Industry Analysis & Outlook

The 2025 Grape Crush Report highlights a pivotal moment in the restructure of the California wine industry. Wineries planned to go light on this vintage, and it is estimated that 57,000 acres were removed with significantly more unharvested in 2025. This strategic decision,

combined with the seasonal challenges, has accelerated the market's transition. The five-year average crop size from 2019 to 2023 was 3.6 million tons. The efforts to reduce crop size in 2025 has resulted in a decrease of 1 million tons from the five-year average, or the equivalent of 72 million cases.

While the industry is largely trending toward a decline in total production, Sauvignon Blanc increased 22,000 tons and Pinot Gris increased 8,000 tons from 2024. This is concerning with more acres coming into production on both varieties, and Sauvignon Blanc is being heavily discussed between nurseries and growers for additional plantings.

Following are the largest takeaways by region:

	Tons Crushed 2025	Tons Crushed 2024	Net Gain/Loss	Equivalent Gallons	Equivalent Cases	% Change	2025 % Δ to 5- Year Avg.
North Coast	458,041	498,550	-40,508	-6,886,000	-2,896,283	-8%	-1%
Central Coast	337,513	348,245	-10,732	-1,824,000	-767,183	-3%	-25%
Northern Interior	687,567	756,098	-68,532	-11,650,000	-4,900,043	-9%	-23%
Southern Interior	1,081,733	1,184,616	-102,883	-17,490,000	-7,356,374	-9%	-28%

North Coast, Christian Klier

- “Tons crushed of Napa Valley Cabernet Sauvignon in 2025 were similar to 2024 due primarily to an increase in yield per acre, with the district average price decreasing modestly.”
- “District average prices throughout the North Coast are not representative of the spot market prices for new contracts for the second consecutive year. An example of district average price varying dramatically from spot market pricing is Sonoma County Chardonnay with the district average price of \$2,370 while spot market prices were closer to \$800 per ton.”
- “District average prices for Mendocino County Pinot Noir surpassed Sonoma County due to the lack of large volume end-of-season deals coupled with relatively high prices per ton in Anderson Valley.”

Central Coast, Eddie Urman

- “The 2025 yields per acre were substantially healthier than 2024, despite harvesting 10,700 fewer tons. Total Central Coast tons were not reflective of the unharvested volumes left behind by the soft market.”
- “Central Coast Cabernet Sauvignon production has dropped by 52,000 tons from 2023, reflecting a market contraction. However, District 8’s crop is up 13% year-over-year, thanks to better yields per acre and demand for Paso Robles grapes compared to neighboring regions.”
- “District 7 and 8 Sauvignon Blanc total tons crushed increased by 32% over 2024, which puts it in line with the monster crop of 2023; however, it is important to note that there were significant volumes of Sauvignon Blanc that went unharvested in 2025 creating a false sense of how much supply has grown in the Central Coast.”
- “District 8 Cabernet Sauvignon sales value has declined 44% since 2023. More accurately highlighting the pressure growers have felt over the past few years compared to the 11% decrease in the district average pricing from 2024 to 2025.”

San Joaquin Valley, Mike Needham

- “Statewide tons crushed for French Colombard declined by more than 46,000 tons while Muscat of Alexandria was down more than 18,000 tons, reflecting the combination of soft demand and acreage removals, particularly in the South Valley.”
- “The Lodi Chardonnay crop was the smallest on record since 1998, coming in at 86,000 tons. 2025 marks the second year below 100,000 tons.”
- “California Zinfandel continues to see a dramatic decline in production, with only 51,400 tons crushed in Lodi (District 11). This region historically had always been above 100,000 tons prior to 2023.”

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.
