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The drought that continues to plague California wreaked havoc on production yields in 2021, resulting in one of the North Coast's smallest harvests in over a decade. The 2021 USDA Preliminary Grape Crush Report confirms wine grape tonnage from the North Coast region, which includes Sonoma, Napa, Lake County and Mendocino counties, was down 27% to 46,909 tons. The total tonnage of wine grapes crushed in all of California was up approximately 6% to 3.6M tons. Although the 2021 crop was small in Mendocino County, the quality was excellent, after an exceptionally early harvest, without any weather or smoke incidents.

Chardonnay remains the dominant varietal grown in Mendocino, accounting for 34% of the fruit harvested in 2021, but experienced a whopping 25% decrease in tonnage to 16,034 tons. Cabernet Sauvignon, the second largest varietal crop in Mendocino, increased tonnage by 6%, reflecting the new Cabernet Sauvignon acreage coming into production and represented over 19% of the total Mendocino grape harvest for a total of 9205 tons. Pinot Noir, the third largest crop, decreased in tonnage by 6%, and represents almost 16% of the total crop. Zinfandel (7%), Merlot (5%), and Sauvignon Blanc (5%) are also commonly planted varietals in Mendocino County.

The value of the Mendocino crop for 2021 is reported to be \$83.9M, up approximately 1.4% from 2020, which is in line with the increase of Cabernet Sauvignon in tons crushed. Although the 2021 crop was one of the smallest dating back to 2008, wine grapes remain one of Mendocino County's most valuable agricultural commodities.

The silver lining is that grape prices were up significantly from 2020, with the average price per ton up over 19% in Mendocino County. Red varietals showed the highest price increase, Syrah was up 21% to \$1914/ton, Merlot was up 19% to \$1416/ton and Cabernet Sauvignon was up 12% to \$1979/ton. Chardonnay prices increased (14%) to \$1312/ton, as did Sauvignon Blanc (3%) to \$1426/ton. Pinot Noir, which is grown throughout Mendocino County, continues to be the most valuable grape varietal with an average price of \$3079/ton, a price increase of 5%.

The small 2021 crop, following the small crop in 2020 due to wildfires, has helped to put the grape and bulk wine market back in balance following the huge harvest of 2018 and the impacts of Covid-19 on the marketplace the last two years.

The market for North Coast winegrapes is hot, with buyers contracting fruit uncharacteristically early in the year. The 2022 crop will likely be light due to the continued drought, which means growers have opportunities to lock in multi-year contracts.

Mendocino is well situated to provide value and quality in this competitive market, as demand for the region's main varietals, Chardonnay and Cabernet Sauvignon, remains strong. Further, Mendocino Pinot Noir is highly sought after for premium and high-end brands. Zinfandel, Syrah, and Merlot are varieties especially attractive for the red blends that continue to grow in popularity.

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