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2019 was one of the North Coast's more challenging harvests for a variety of reasons, and the 2019 USDA Preliminary Grape Crush Report confirms wine grape tonnage from the North Coast region, which includes Sonoma, Napa, Lake County and Mendocino was down 17% to 490,912 tons. The total tonnage of wine grapes crushed in all of California was down approximately 9% to 3,890,253 tons. While a good deal of grapes went unharvested, the quality of the fruit picked is generally agreed to be excellent, due to the long and even ripening conditions. Fire weather conditions also gave the region a much-needed break.

A multitude of factors affected the 2019 crop, perhaps the most significant was the oversupply from a huge harvest in 2018, and a marketplace in which wine sales remain flat. Growers without grape contracts had little choice but leave fruit hanging, which decreased the tons crushed for 2019.

The value of the Mendocino crop for 2019 is reported to be \$112.85 million, down approximately 18% from 2018, which is in line with the decrease in tons crushed. Yet, the crop has surpassed the \$100 million mark for four of the past six years and remains one of Mendocino County's most valuable agricultural commodities.

Chardonnay remains the dominant varietal grown in Mendocino, accounting for 33% of the fruit harvested in 2019, but experienced a 17% decrease in tonnage to 22,326 tons. Cabernet Sauvignon, the second largest varietal crop in Mendocino, decreased tonnage by 12%, and represented over 19% of the total Mendocino grape harvest for a total of 12,941 tons. Pinot Noir, the third largest crop, decreased in tonnage by 9%, and represents almost 15% of the total crop. Zinfandel (7%), Merlot (6%), and Sauvignon Blanc (6%) are also commonly planted varietals in Mendocino County.

The silver lining is that grape prices remain steady and healthy for Mendocino County overall. Chardonnay, which continues to top the charts in popularity worldwide, led the way here in Mendocino County. Chardonnay prices increased (3%) to \$1327/ton, as did Sauvignon Blanc (2%) to \$1388/ton.

Pinot Noir, which is grown throughout Mendocino County, continues to be the most valuable grape varietal with an average price of \$3110/ton, a price increase of 1%. Prices on Cabernet Sauvignon (\$1989/ton) and Merlot (\$1342/ton)

were down, reflecting the bounty of the 2018 grape harvest as demand has not caught up with in the bulk market. However, Syrah prices increased 4% to \$1640/ton and Zinfandel 1% to \$1720/ton.

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 stable varieties and especially attractive for the red blends that continue to grow in popularity. As the rose all day—and all year—trend continues to gain steam, other red varieties grown here, like Carignane and Sangiovese, may prove attractive to brands looking to fill out their DTC offerings. Mendocino's old vine varieties, especially those farmed organically or biodynamically, are also particularly prized by winemakers in the natural wine movement.

Mendocino County remains well-positioned to adapt and maneuver as the marketplace continues to evolve.

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