



Track: Strategy / Leadership  
9:30am - 10:30am

Conference Track  
Presented by:



**Marc Cuneo**  
Bulk Wine Broker / Turrentine  
Brokerage



**Christian Klier**  
North Coast Grape Broker /  
Turrentine Brokerage

# State of the North Coast Wine Industry & Bulk Markets

Christian Klier, North Coast Grape Broker  
Marc Cuneo, Bulk Wine Broker





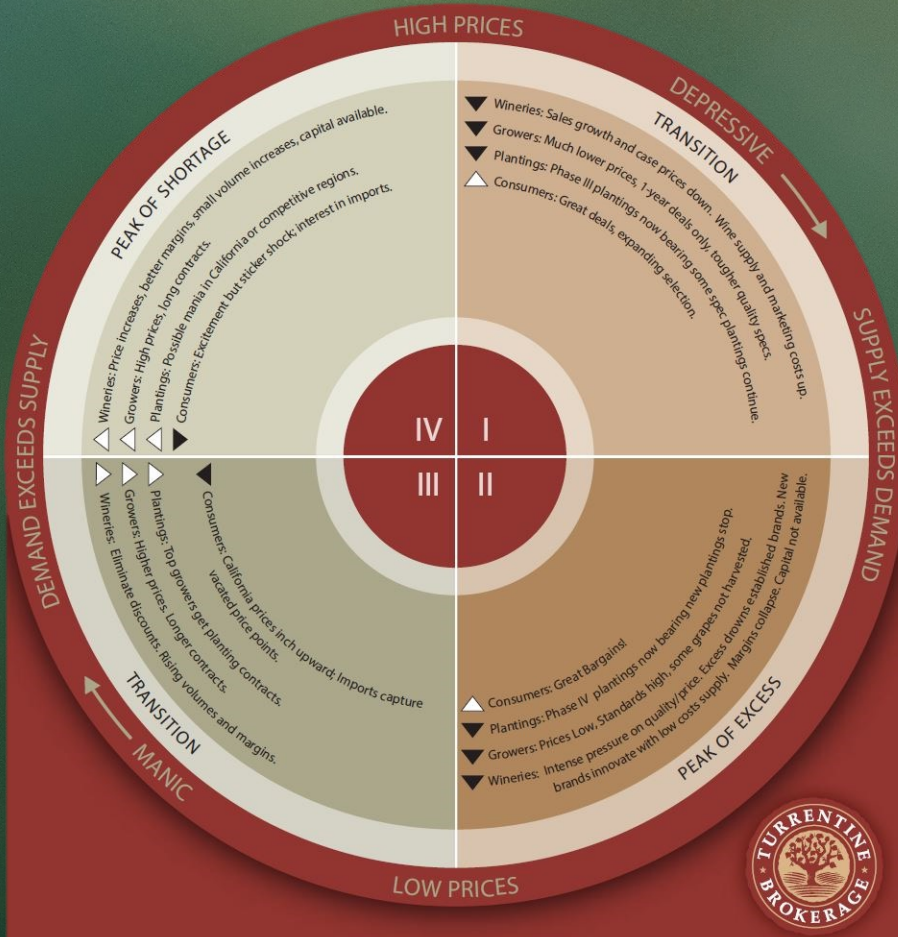
# Drivers of The Wheel

Consumers

Plantings

Growers

Wineries



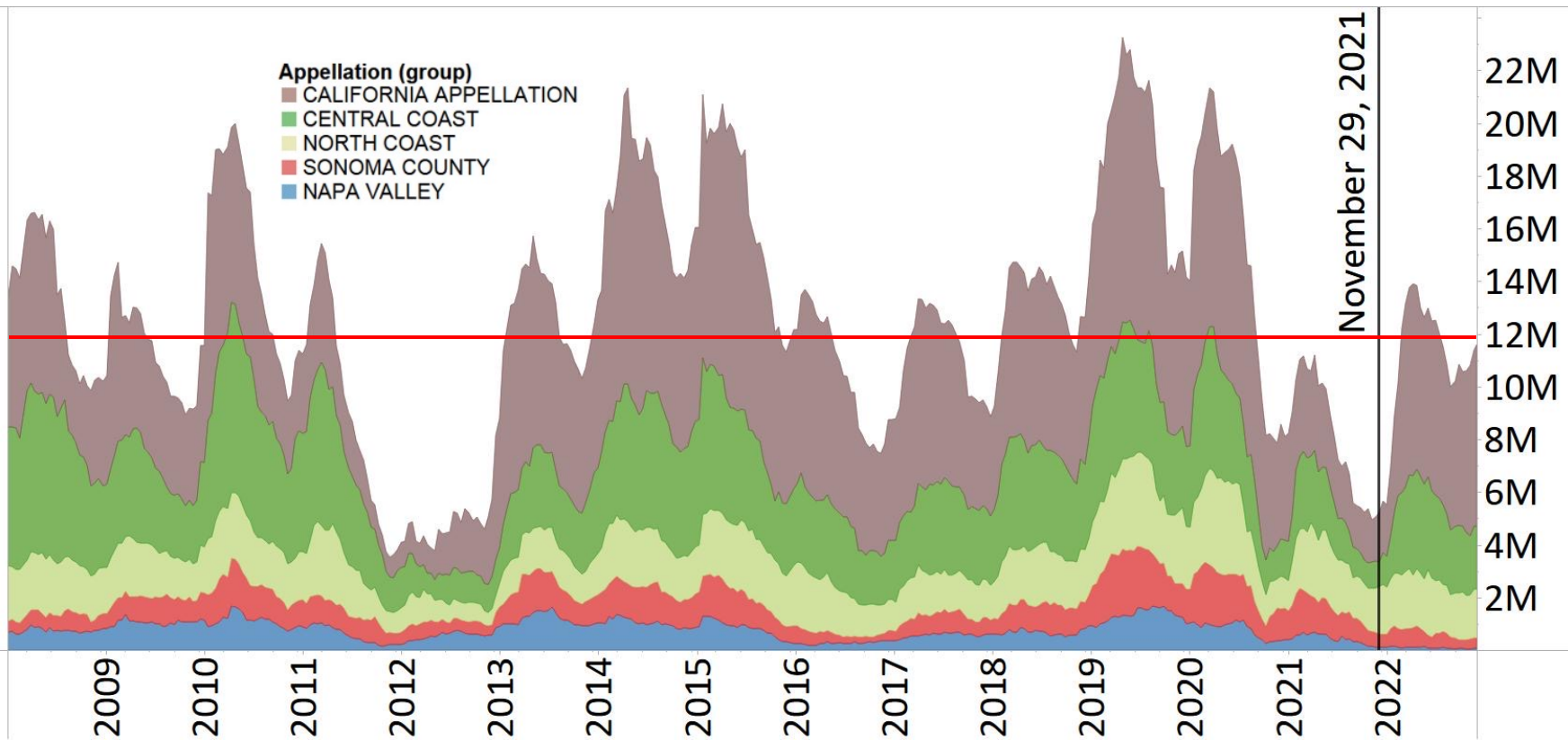
TURRENTINE Wine Business Wheel of Fortune

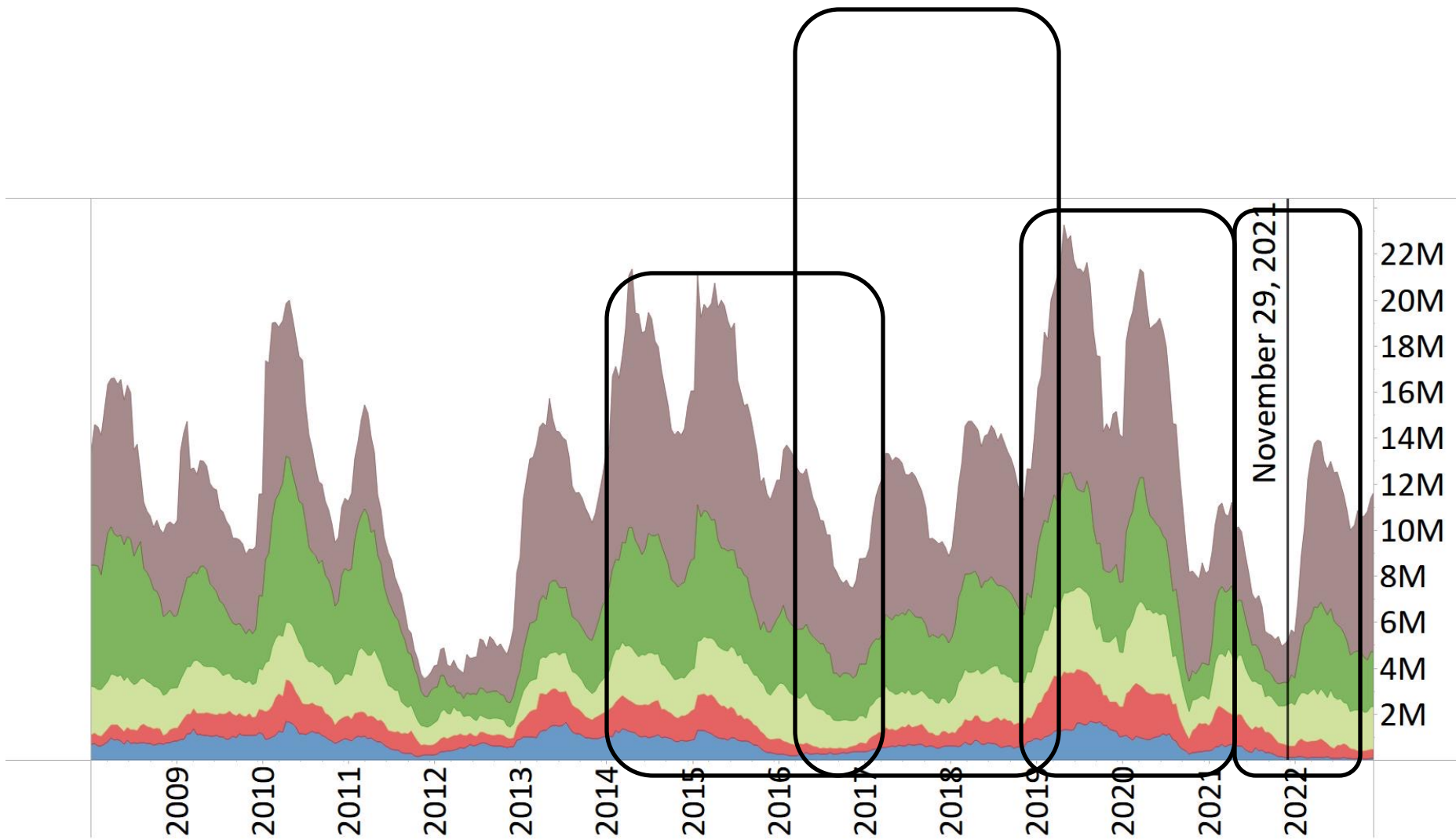
Copyright 2020 Turrentine Brokerage





# Bulk by Region

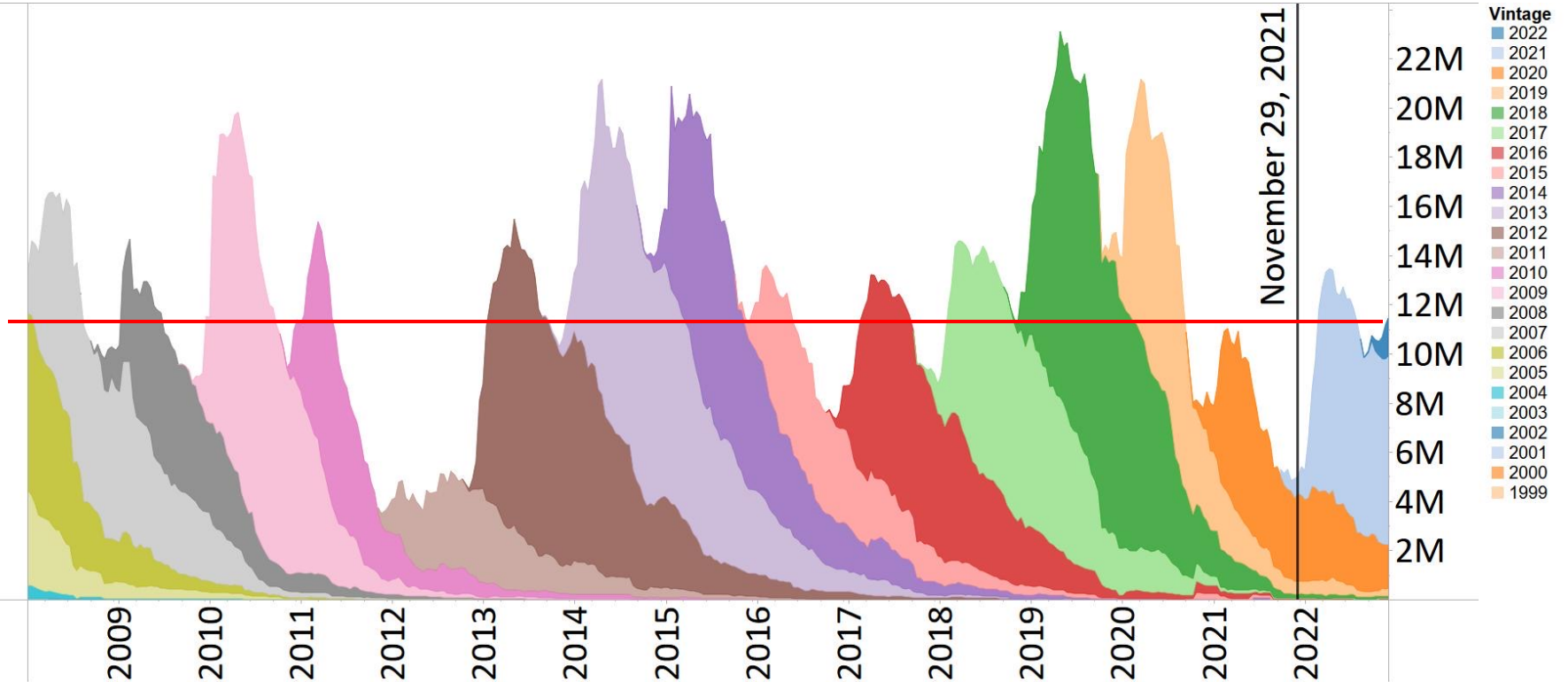




November 29, 2021



# Bulk by Vintage





# Chardonnay

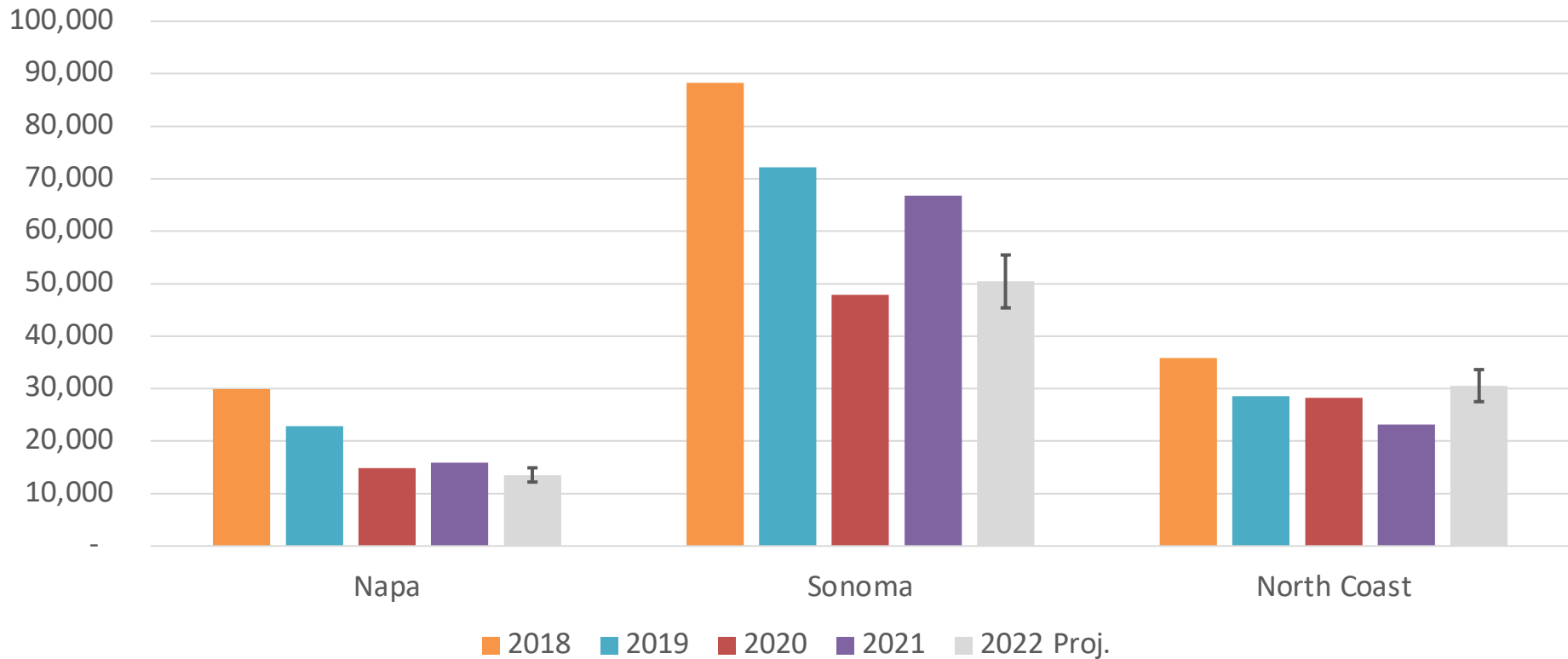






# Chardonnay

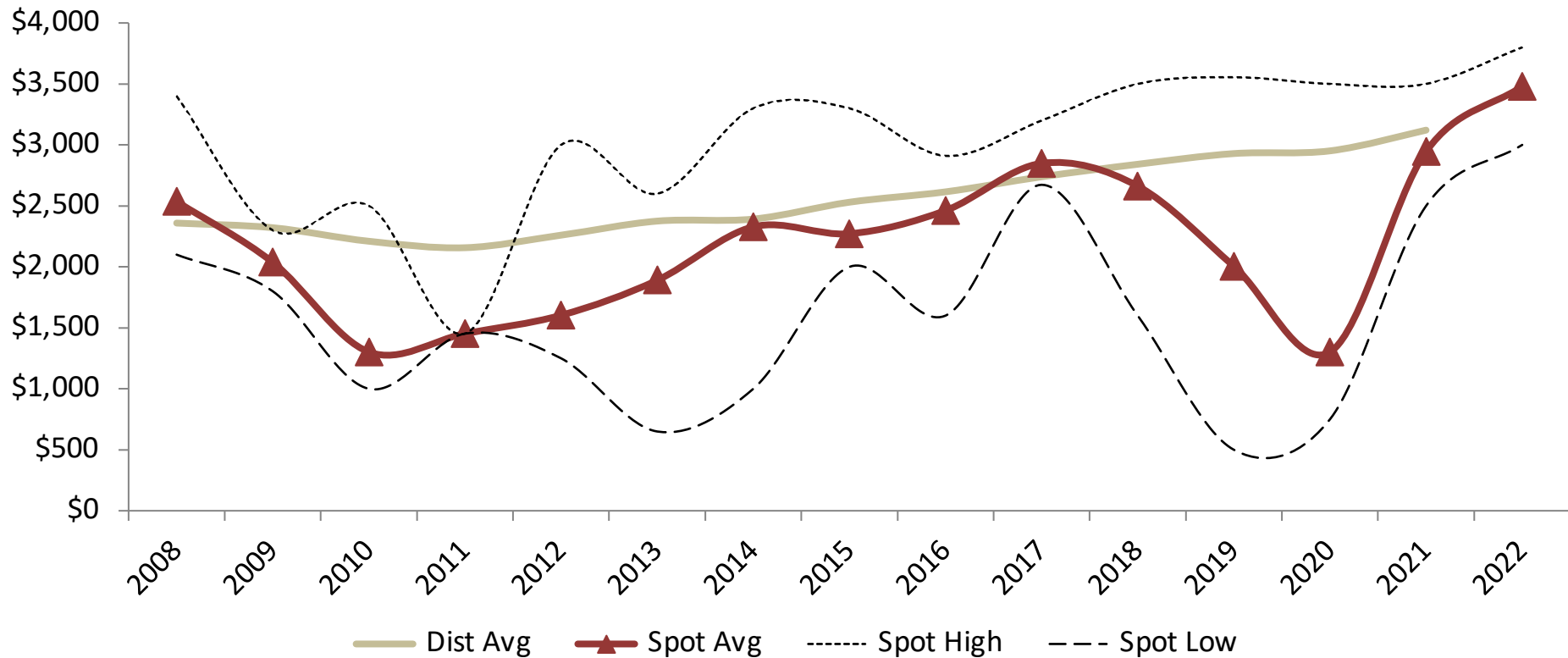
## Recent Tons Crushed & 2022 Projection





# Napa Valley Chardonnay

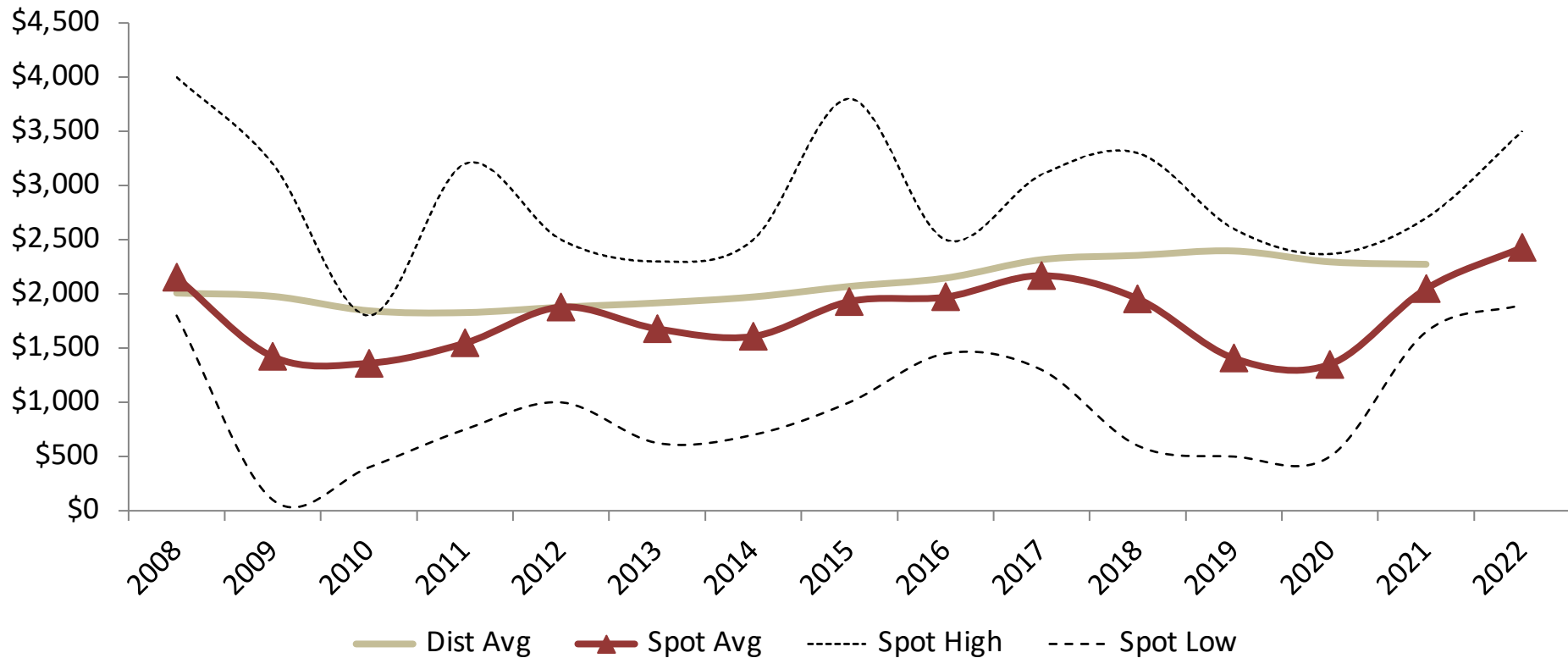
## Spot Market vs. District Average Grape Price





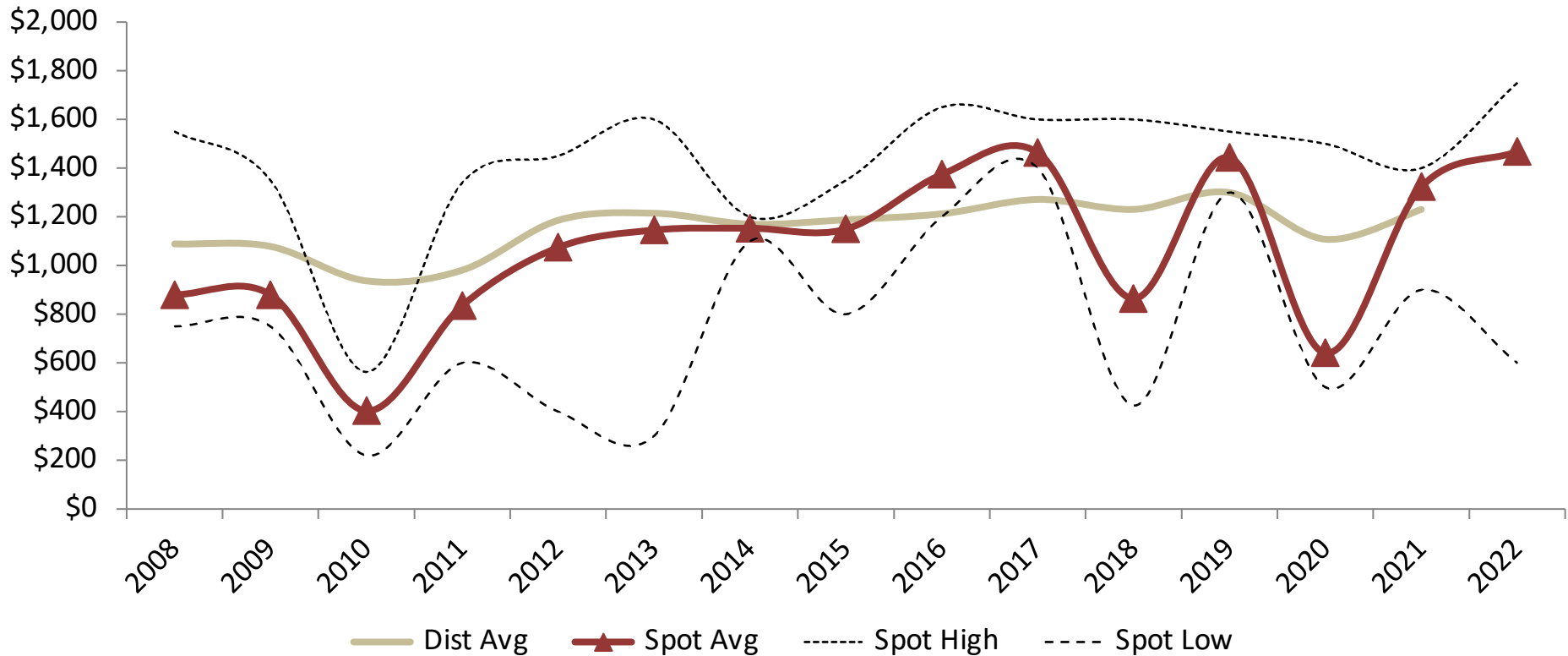
# Sonoma County Chardonnay

## Spot Market vs. District Average Grape Price



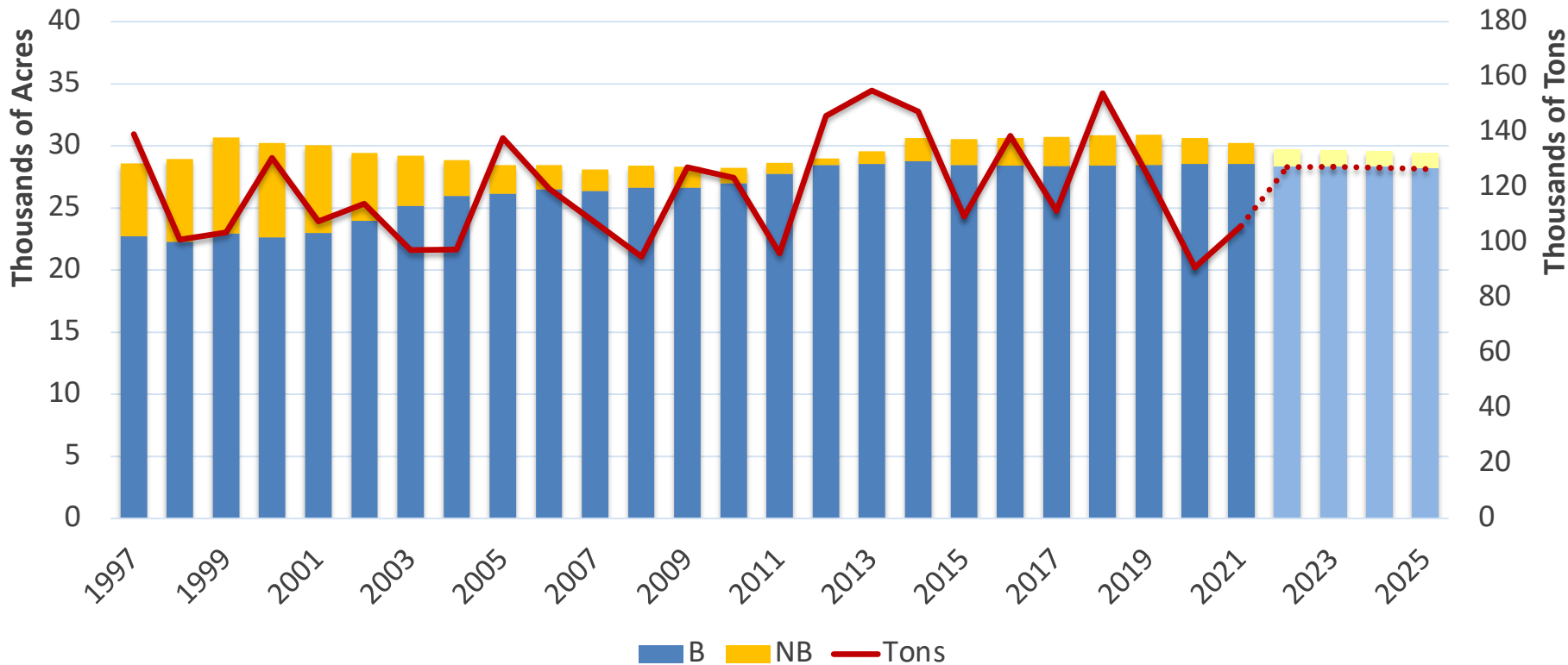


# North Coast Chardonnay District Average Grape Price





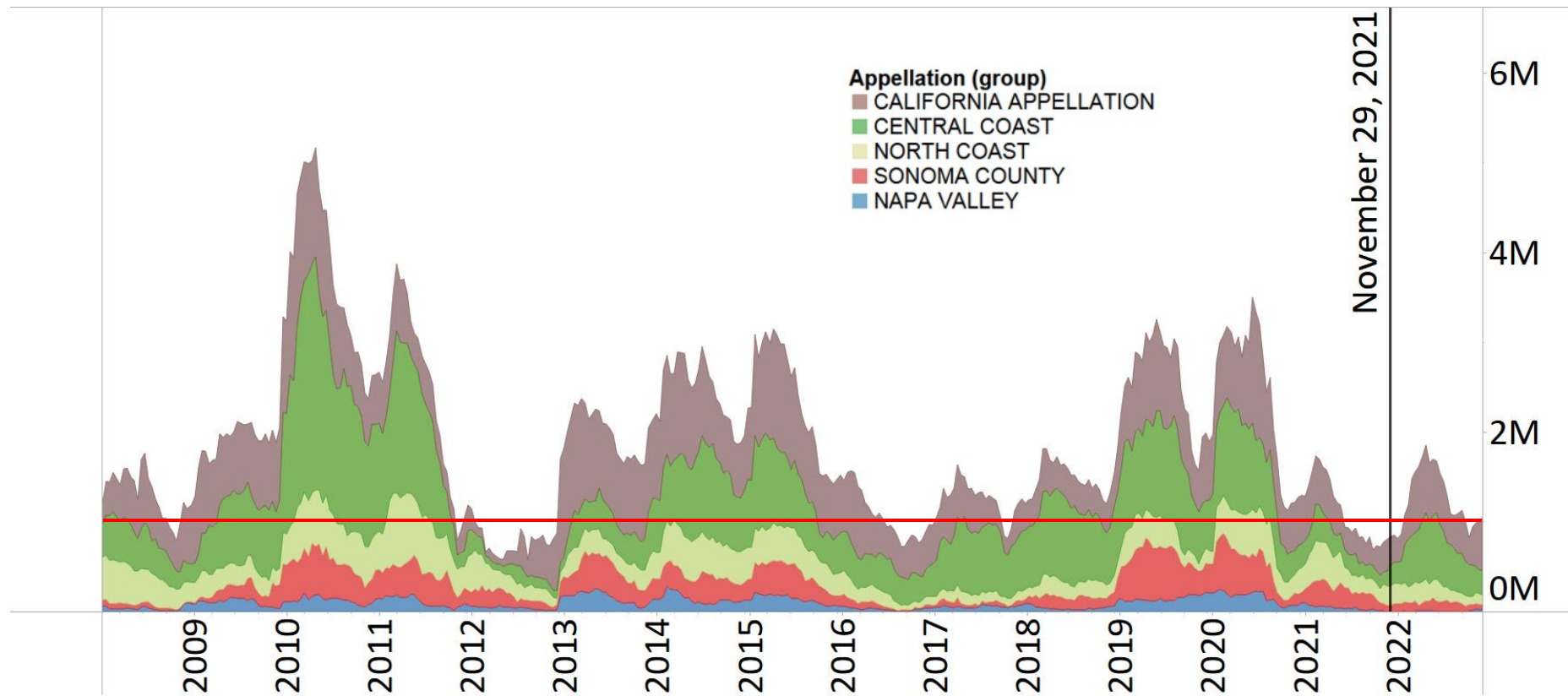
# All North Coast Chardonnay Bearing vs. Non-bearing Acres & Tons Crushed





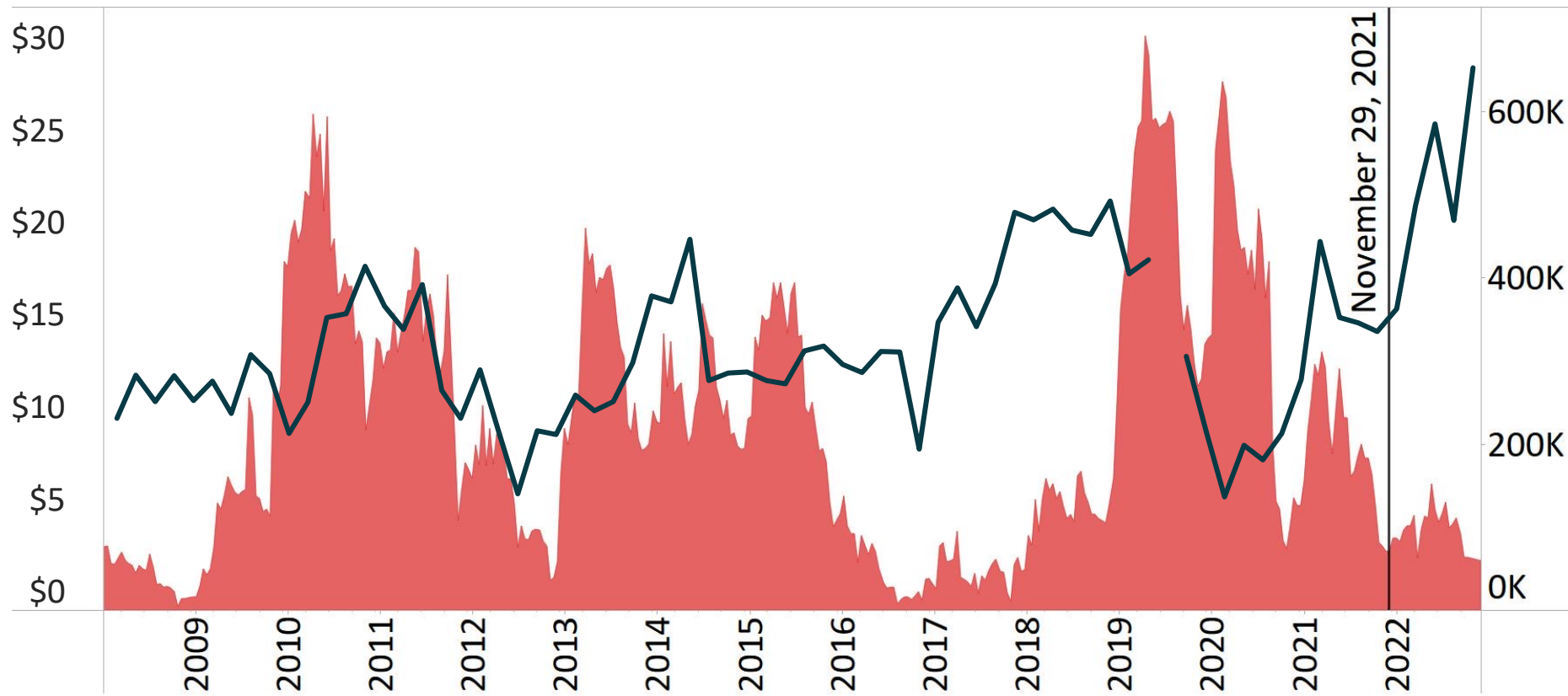
# Chardonnay

## Bulk Gallons Actively for Sale





# Sonoma County Chardonnay Bulk Gallons & Spot Market Price





# Cabernet Sauvignon

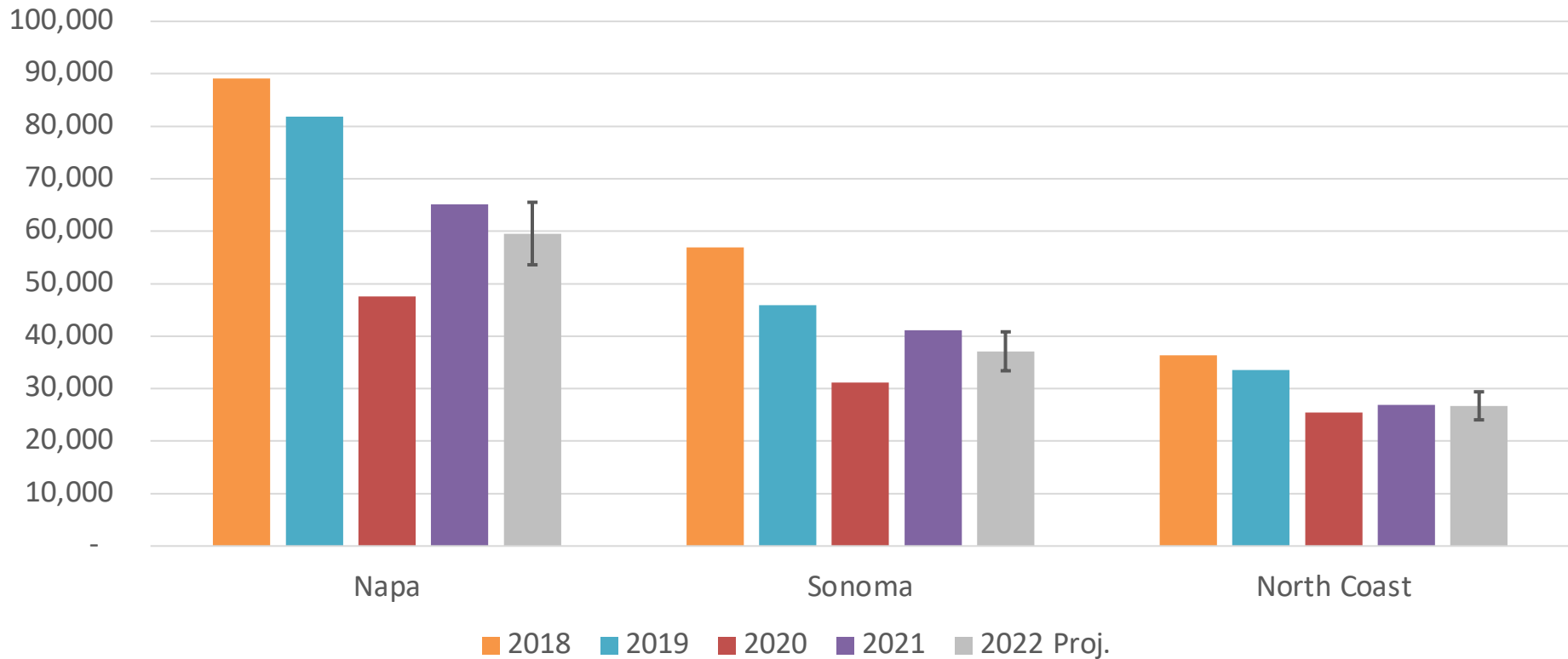






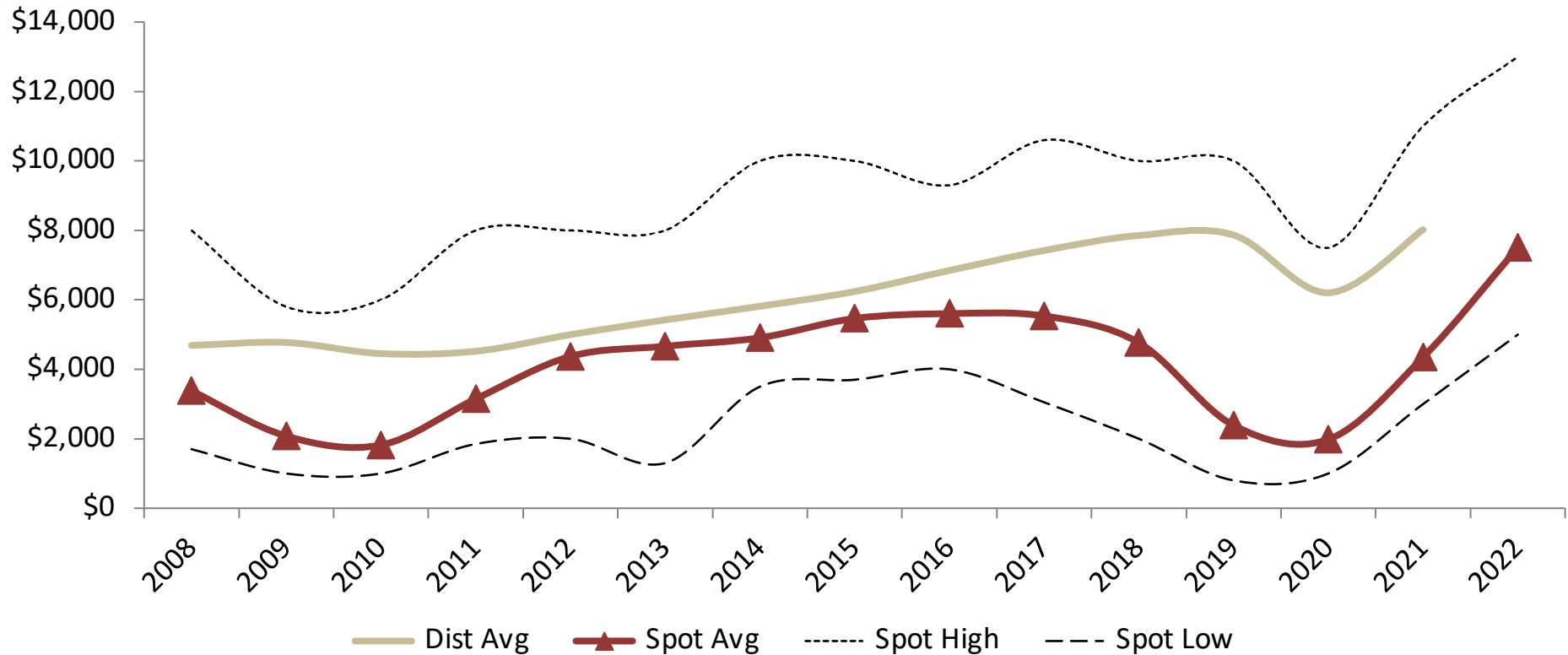
# Cabernet Sauvignon

## Recent Tons Crushed & 2022 Projection



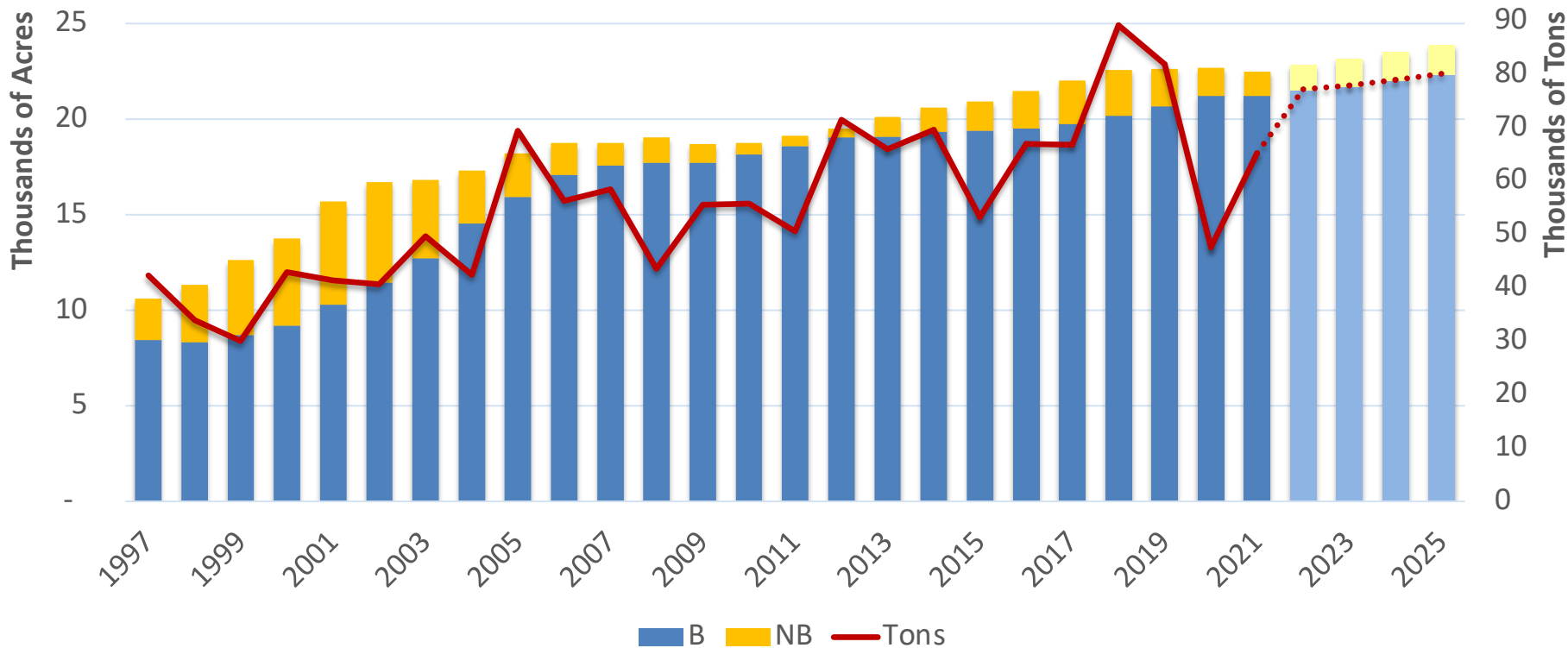


# Napa Valley Cabernet Sauvignon Spot Market vs. District Average Grape Price



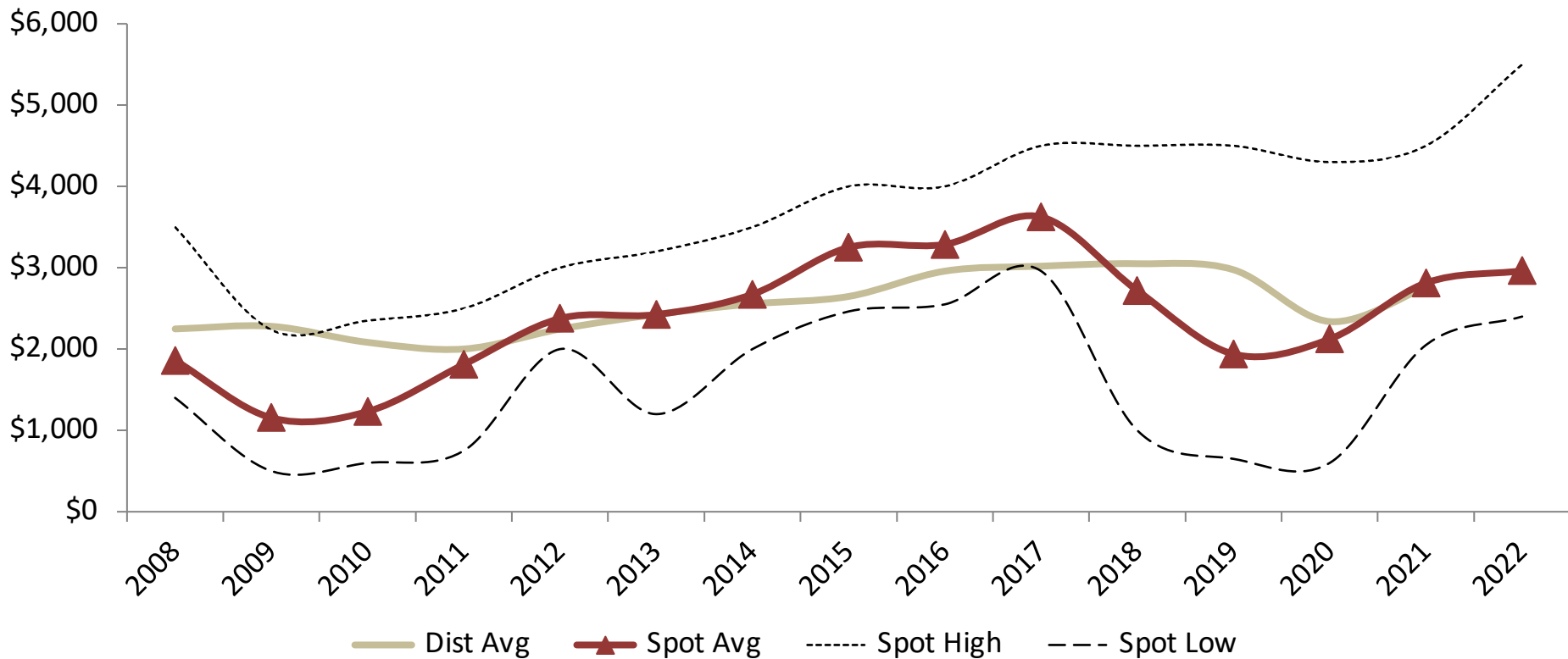


# Napa Valley Cabernet Sauvignon Bearing vs. Non-bearing Acres & Tons Crushed



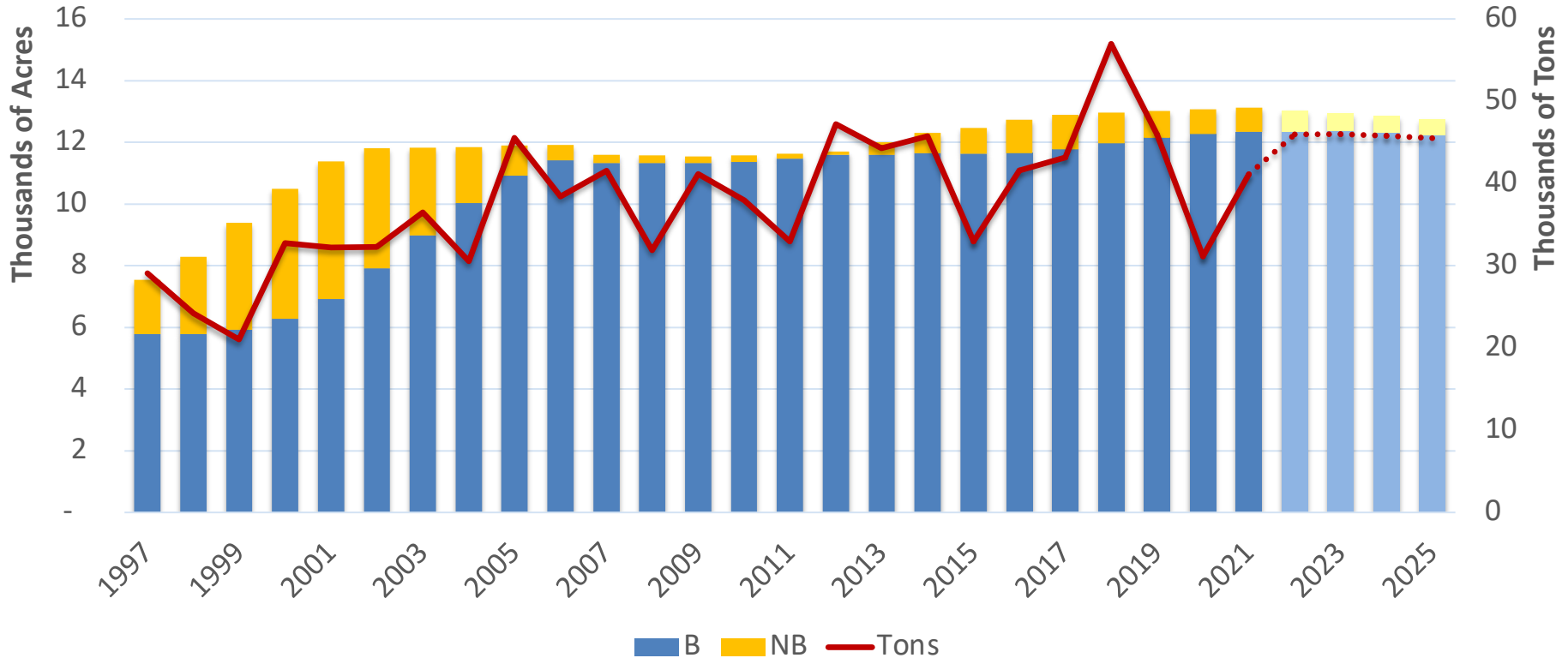


# Sonoma County Cabernet Sauvignon Spot Market vs. District Average Grape Price



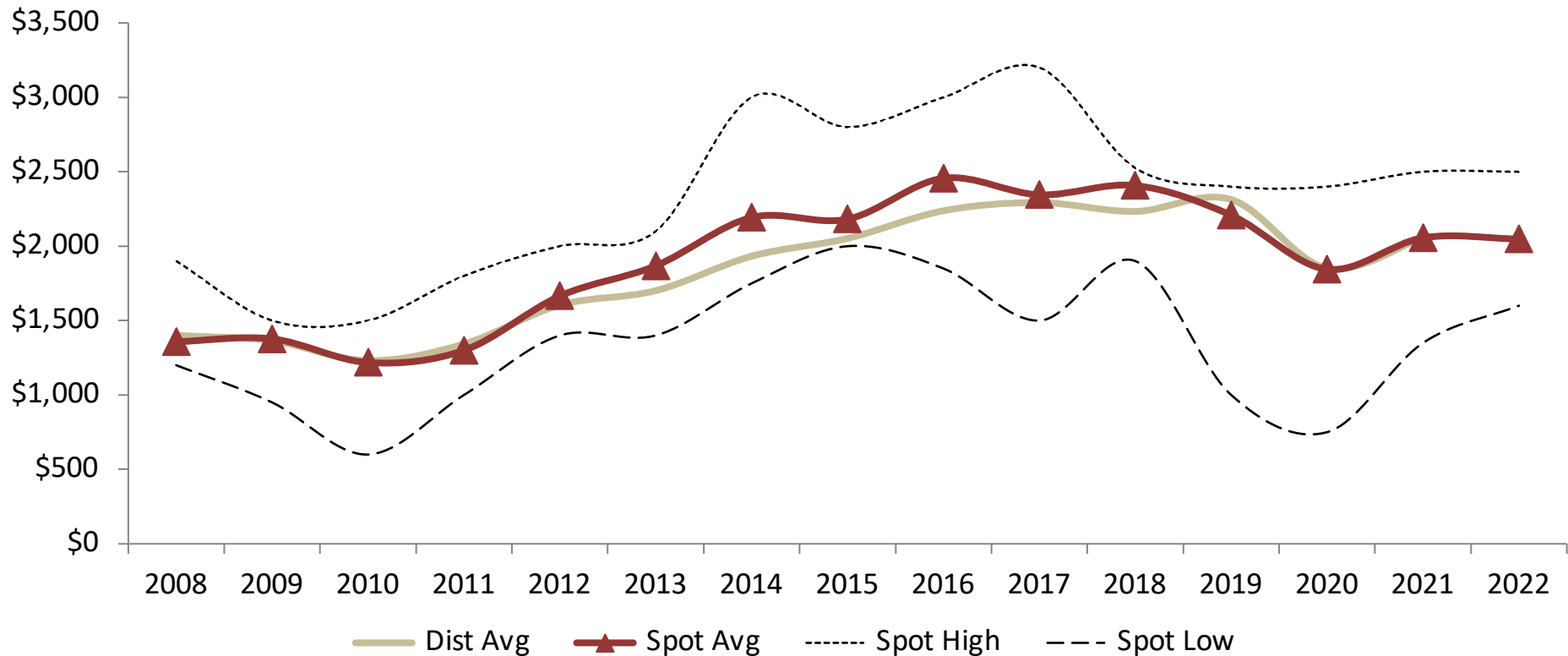


# Sonoma County Cabernet Sauvignon Bearing vs. Non-bearing Acres & Tons Crushed



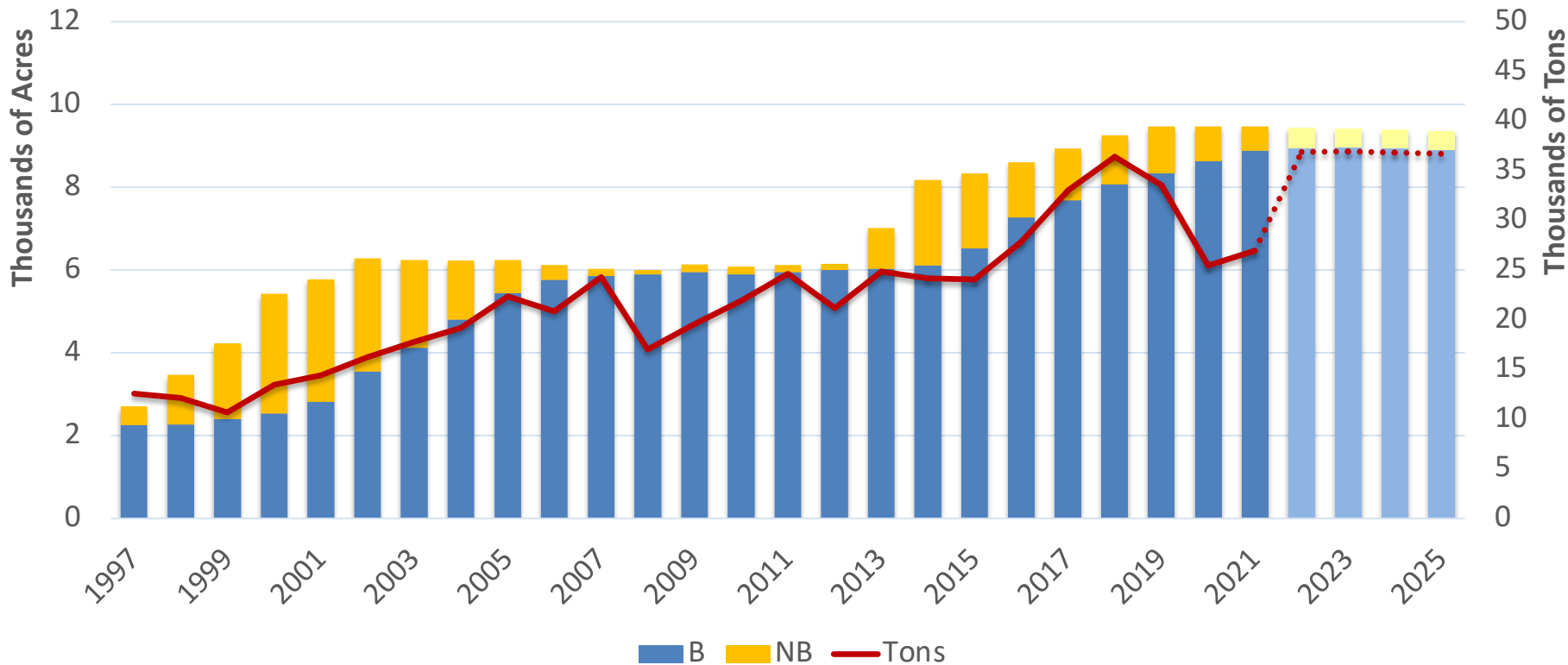


# North Coast Cabernet Sauvignon Spot Market vs. District Average Grape Price



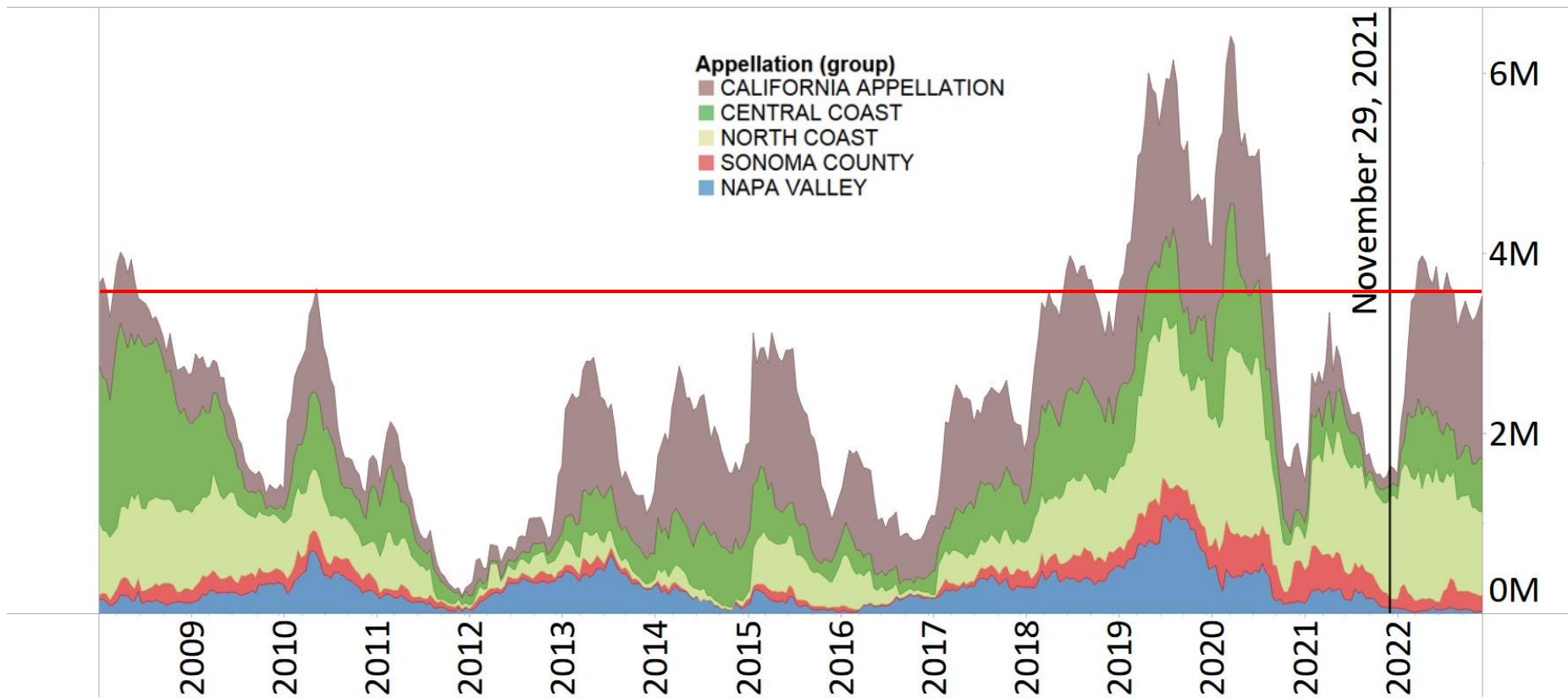


# North Coast Cabernet Sauvignon Bearing vs. Non-bearing Acres & Tons Crushed





# Cabernet Sauvignon Bulk Gallons Actively for Sale





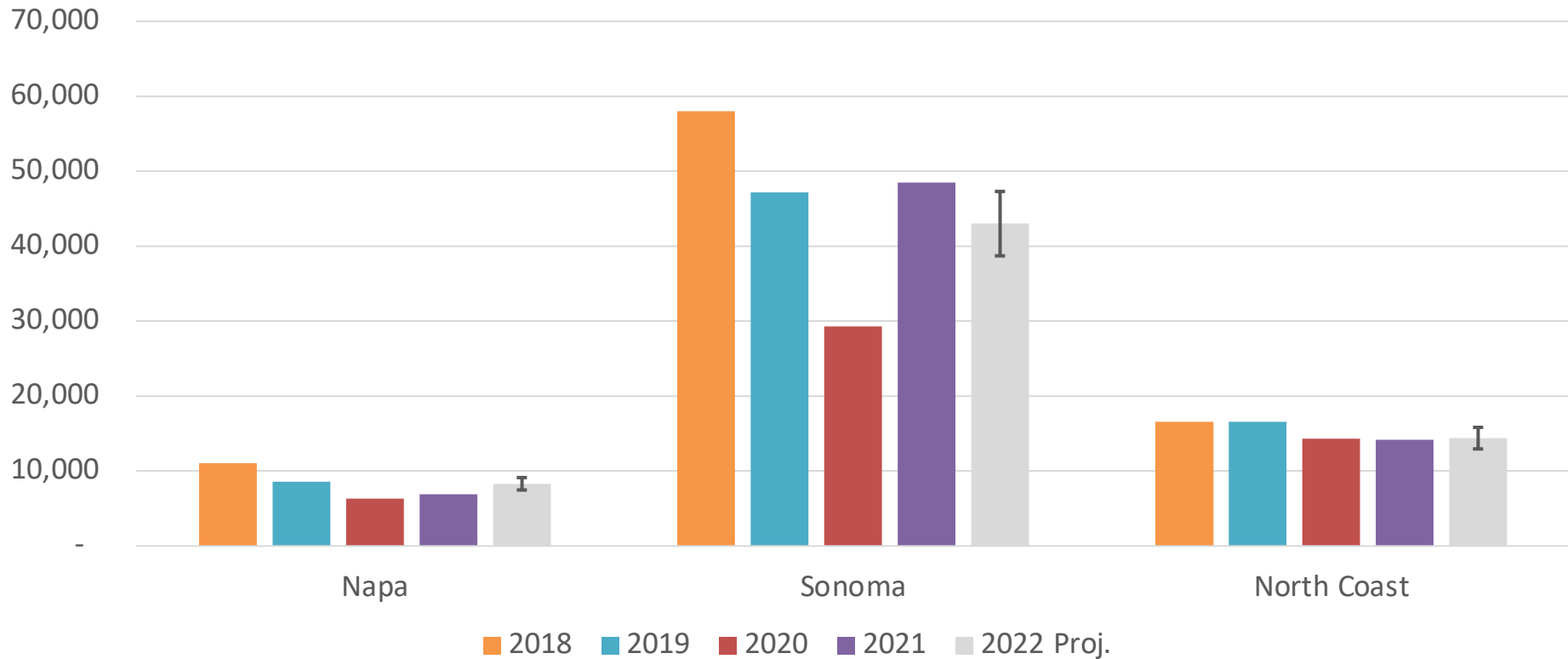


# Pinot Noir



# Pinot Noir

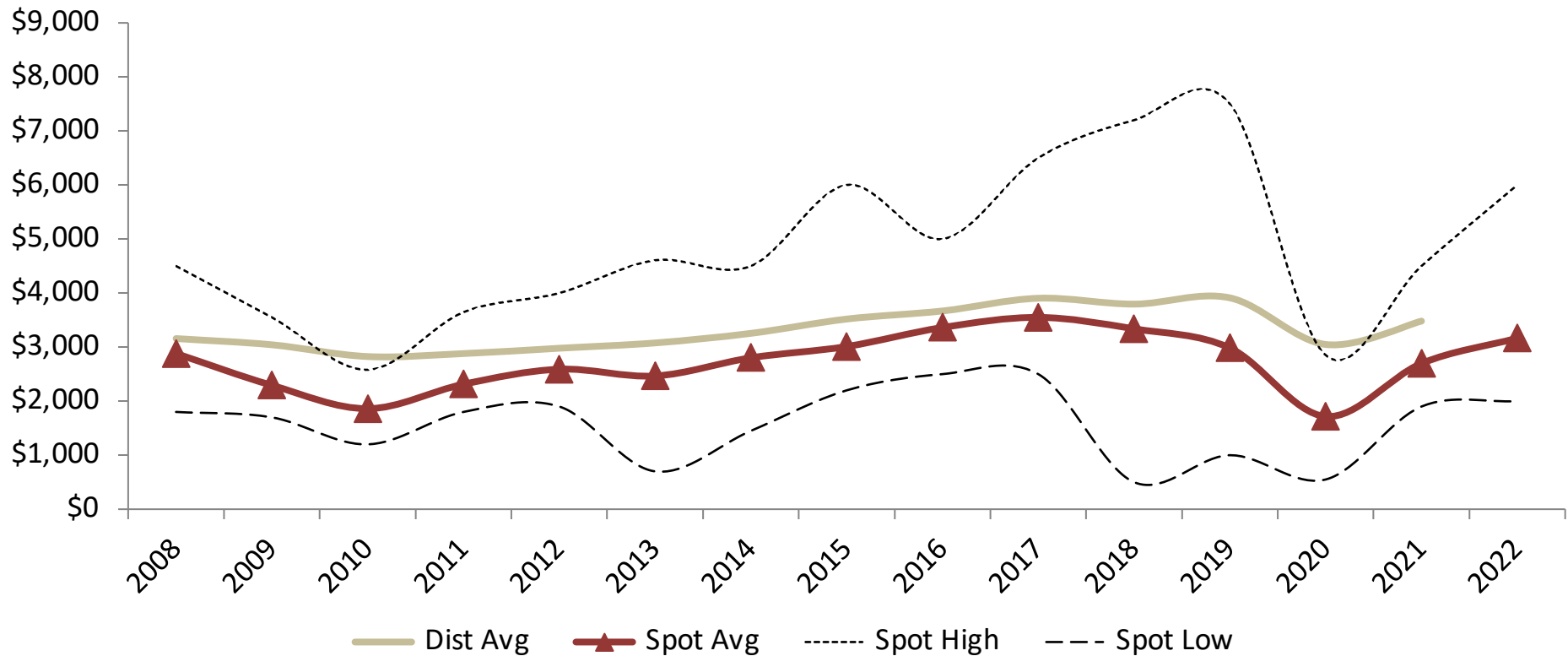
## Recent Tons Crushed & 2022 Projection





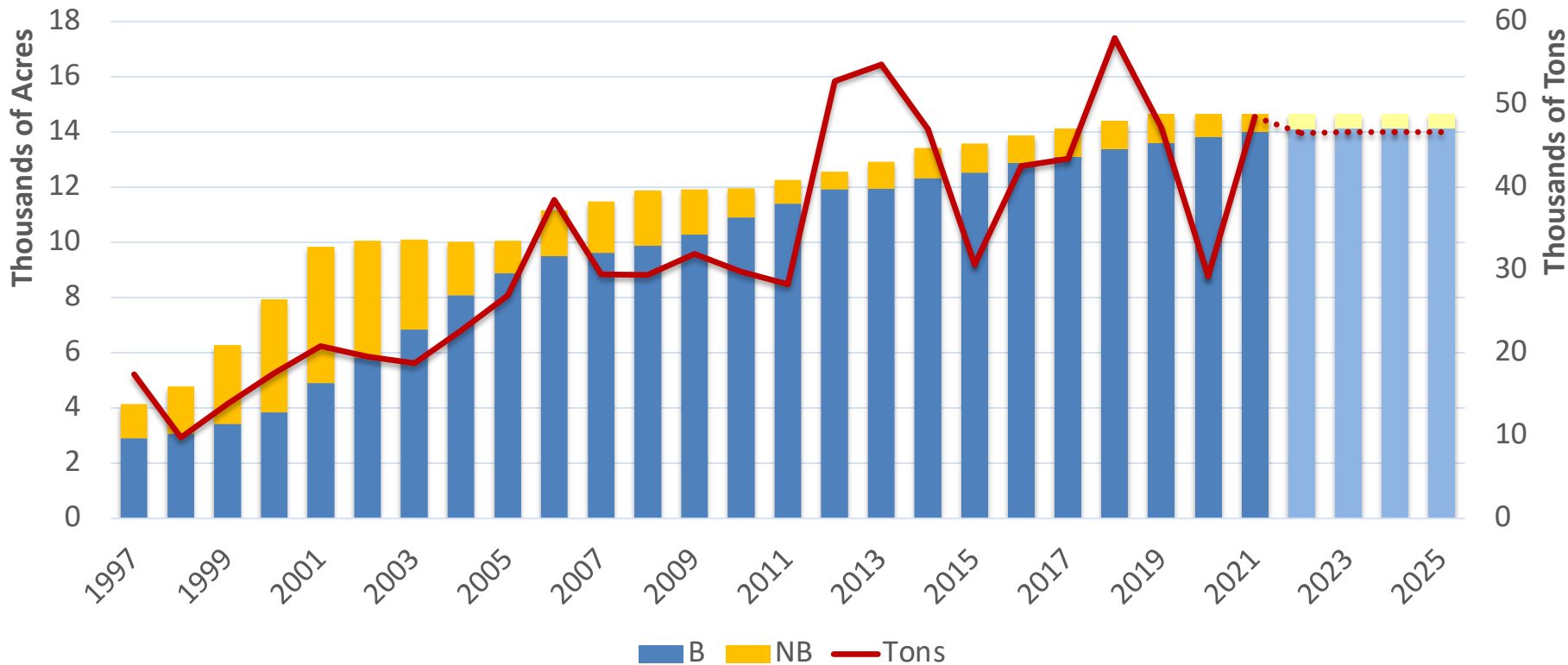
# Sonoma County Pinot Noir

## Spot Market vs. District Average Grape Price





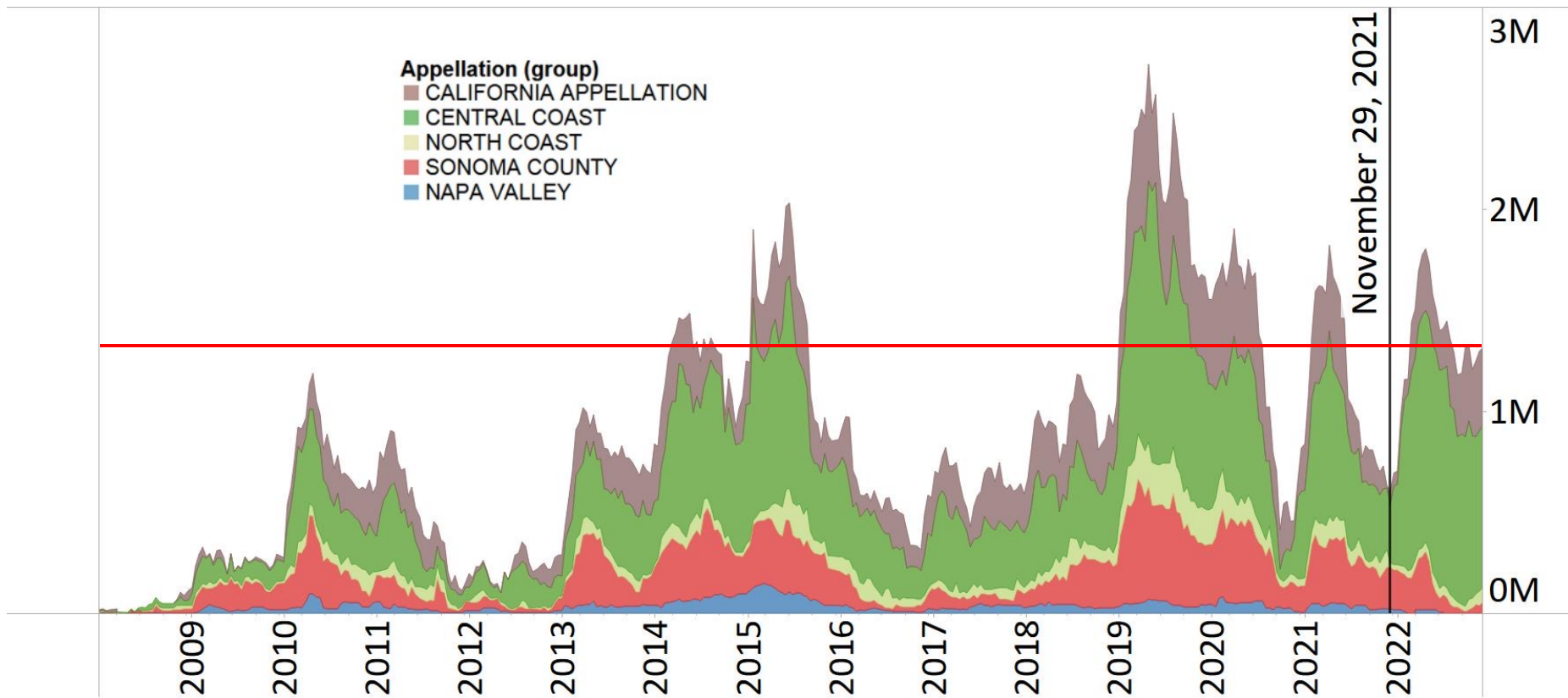
# Sonoma County Pinot Noir Bearing vs. Non-bearing Acres & Tons Crushed





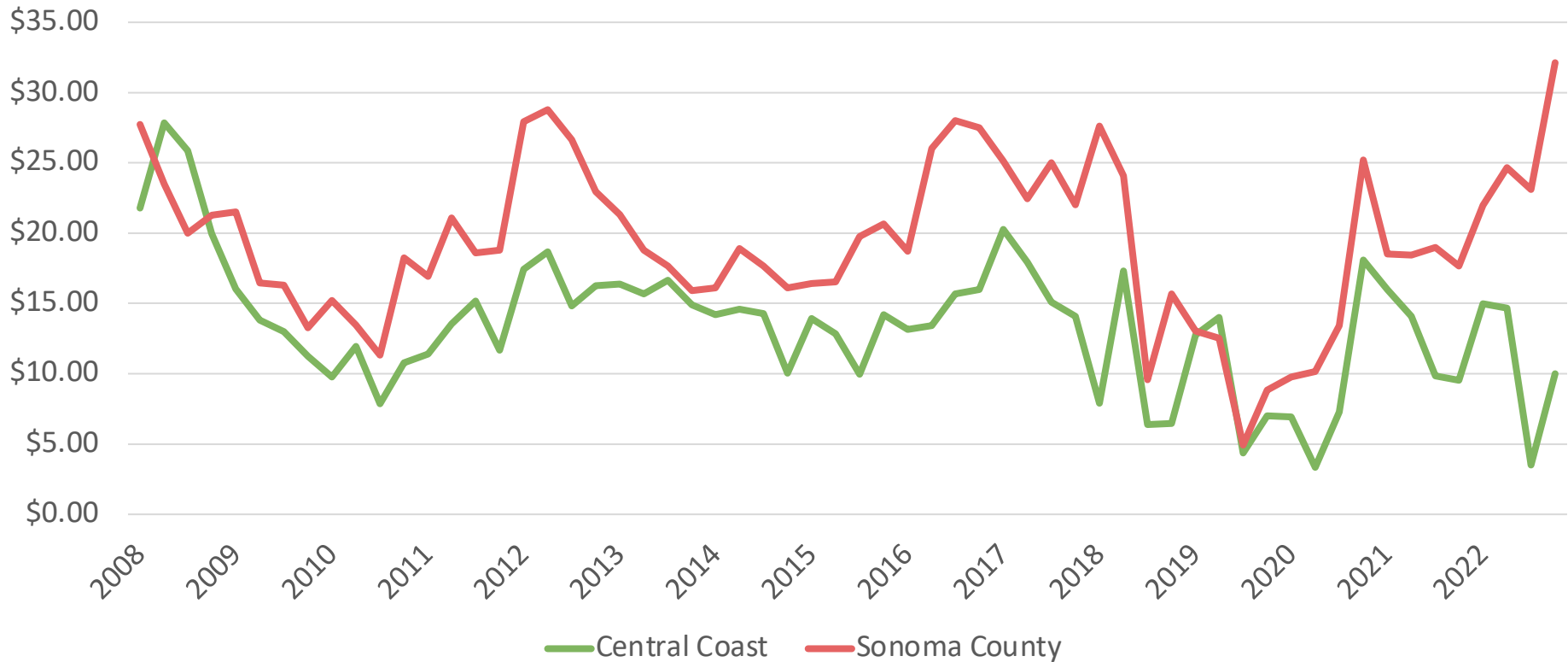
# Pinot Noir

## Bulk Gallons Actively for Sale





# Pinot Noir Spot Market Bulk Wine Prices





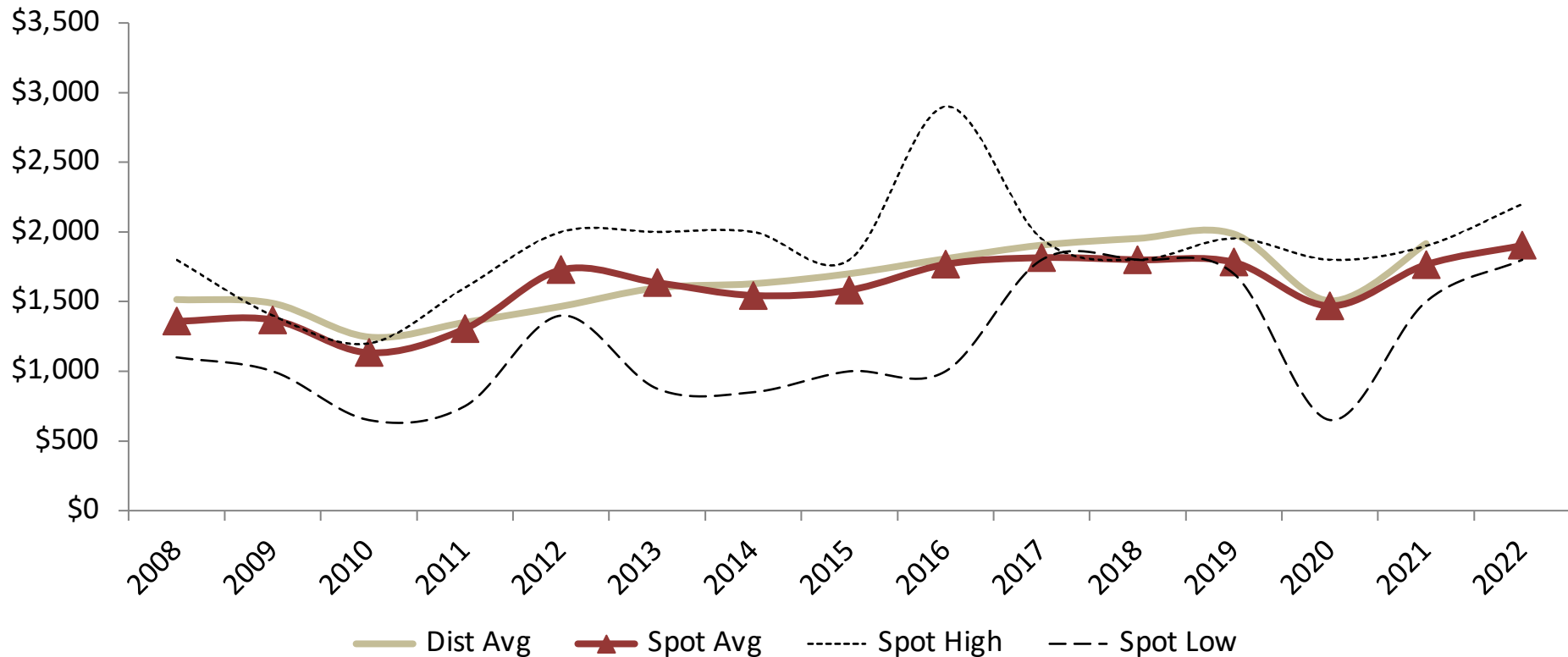
# Merlot





# Sonoma County Merlot

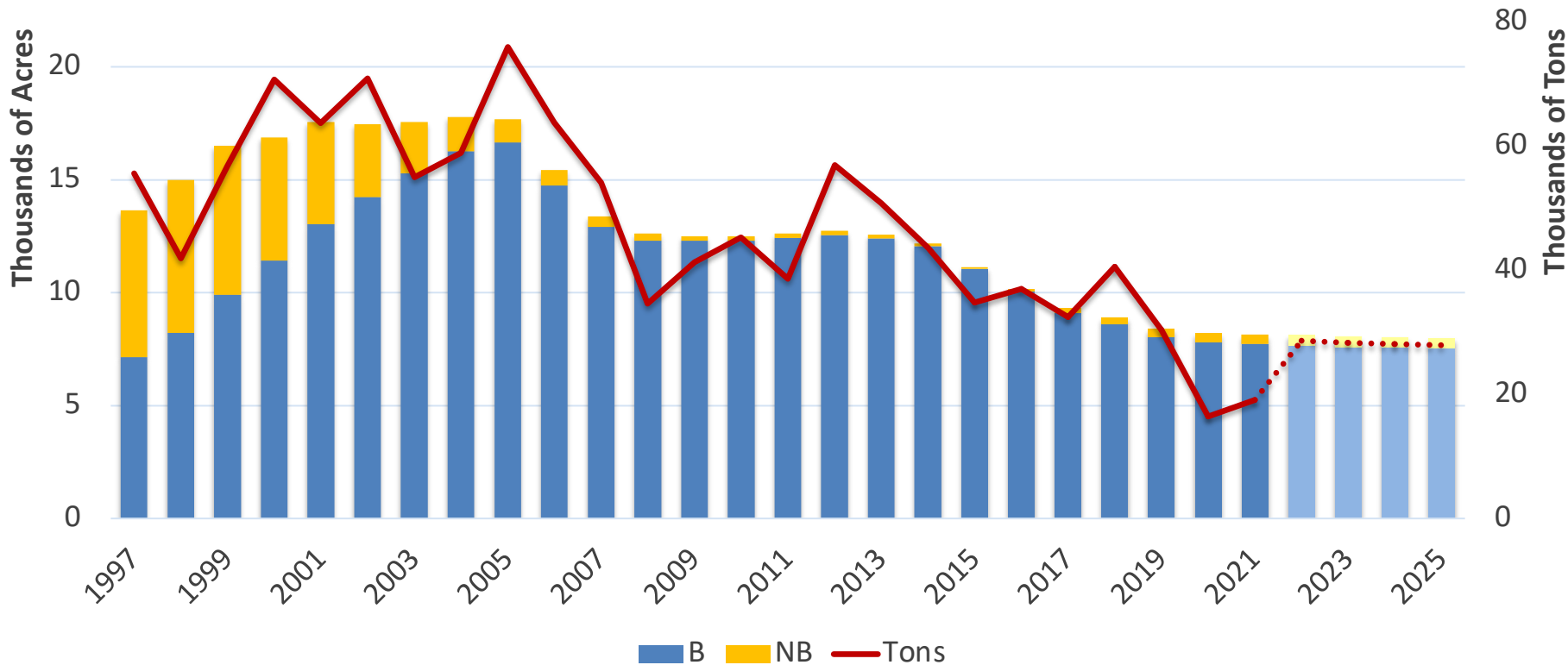
## Spot Market vs. District Average Grape Price







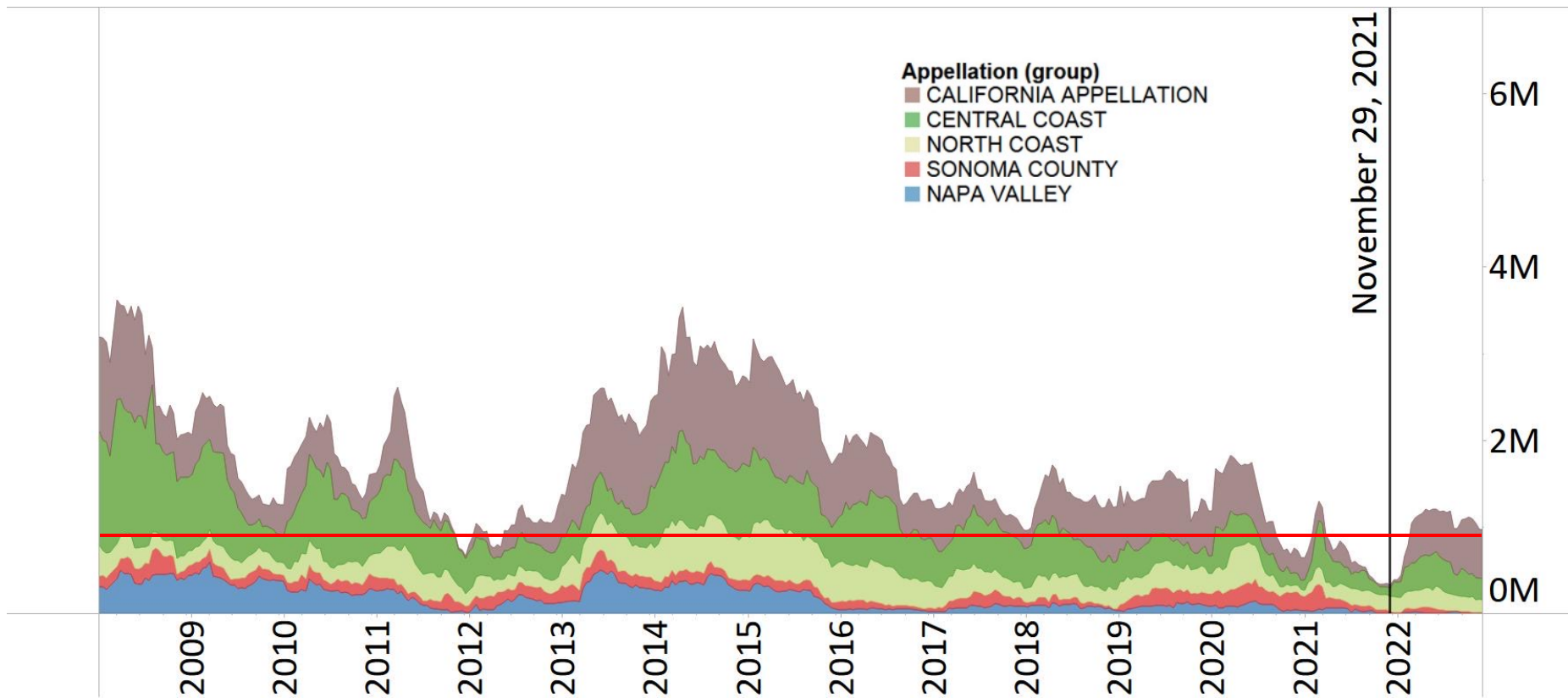
# All North Coast Merlot Bearing vs. Non-bearing Acres & Tons Crushed





# Merlot

## Bulk Gallons Actively for Sale





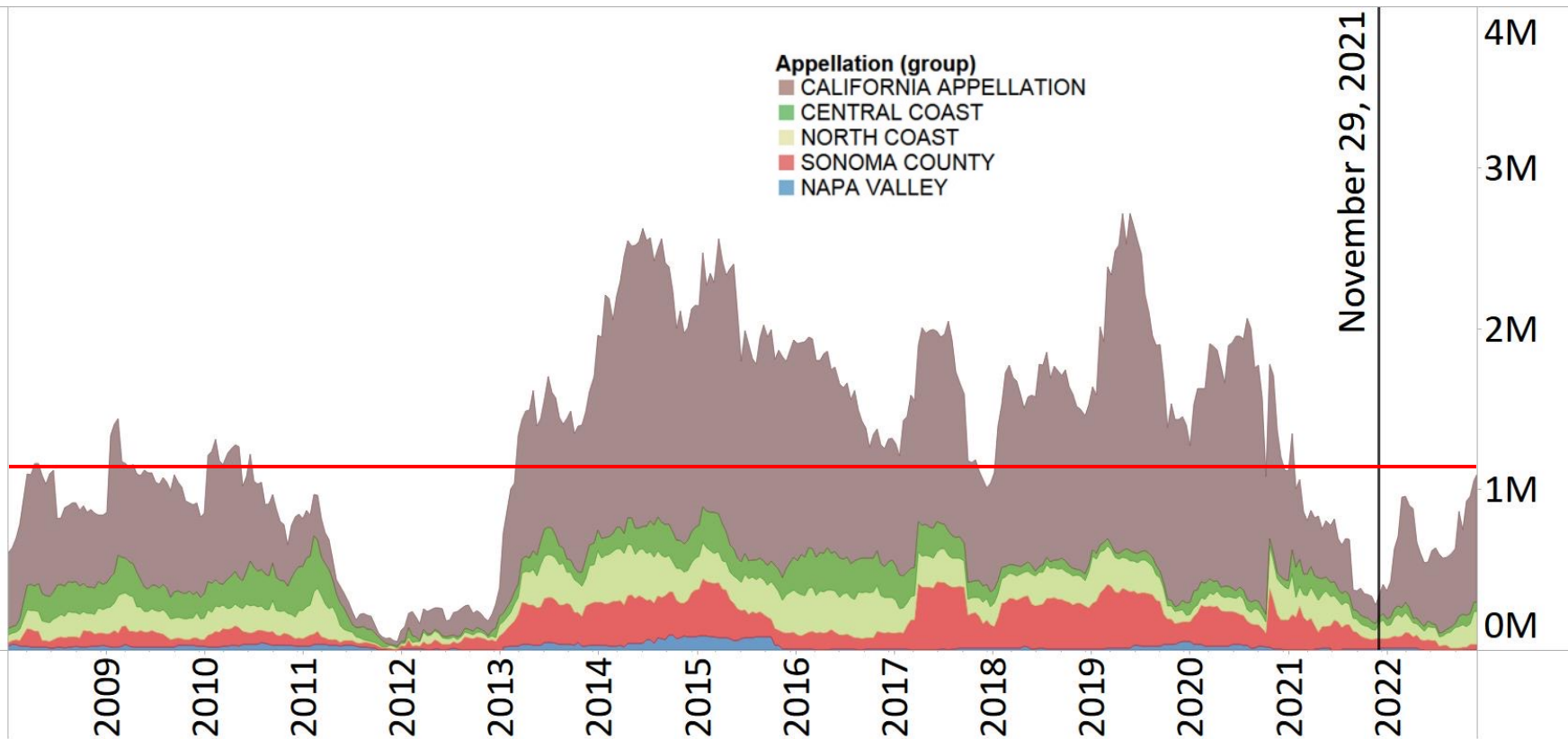
# Zinfandel





# Zinfandel

## Bulk Gallons Actively for Sale





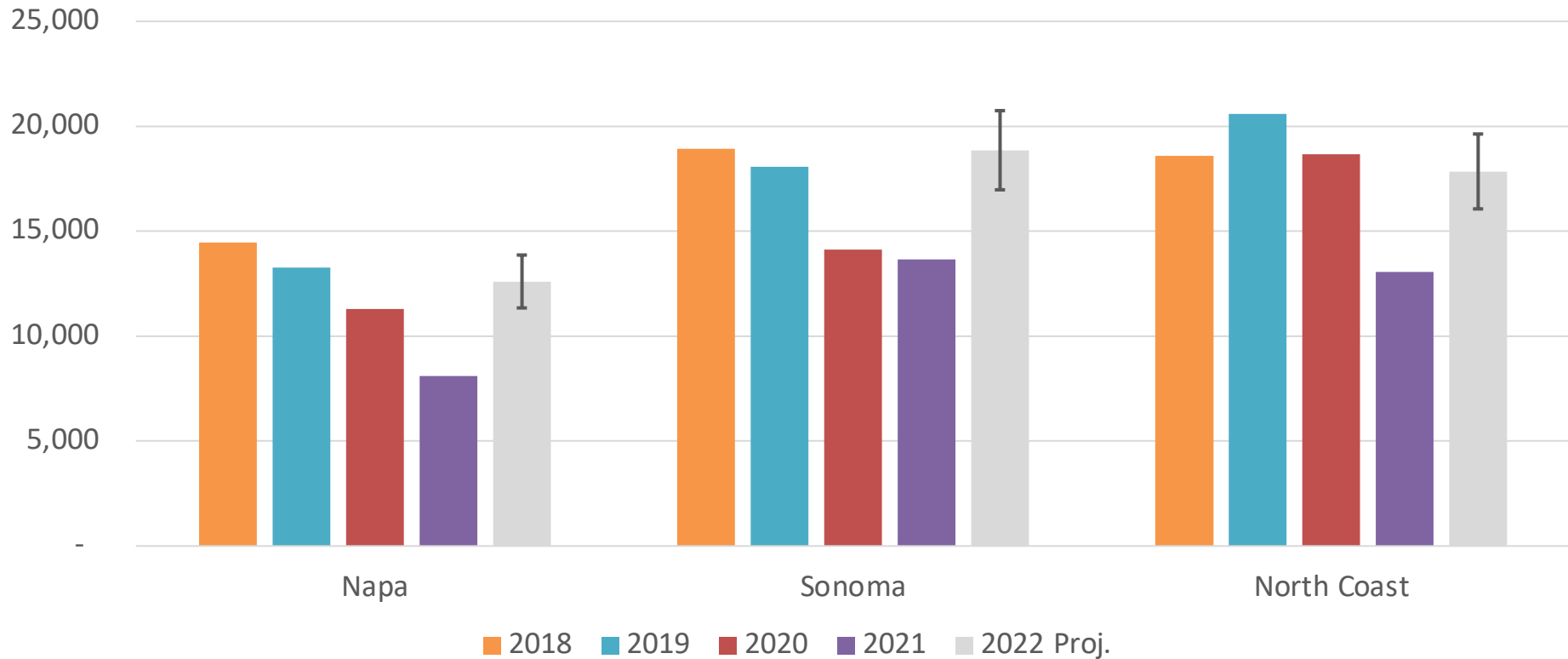
# Sauvignon Blanc





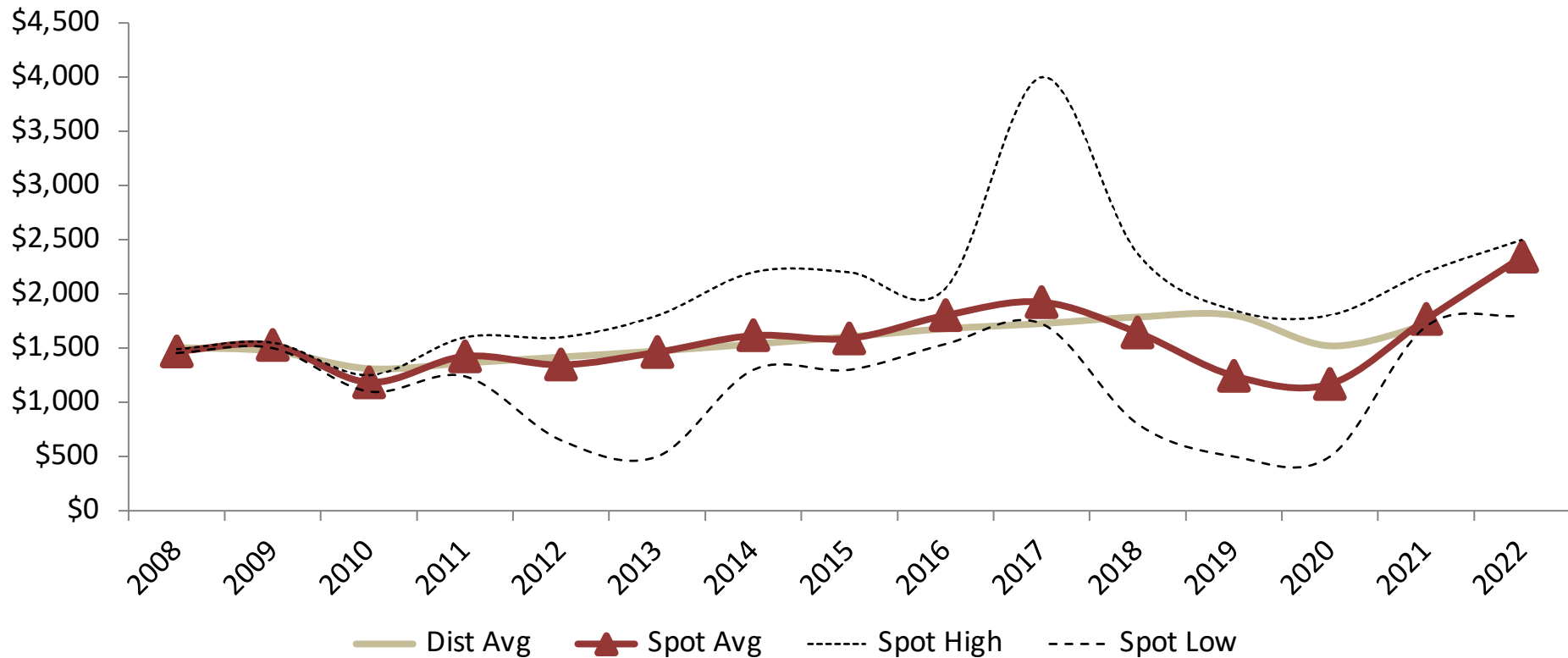
# Sauvignon Blanc

## Recent Tons Crushed & 2022 Projection



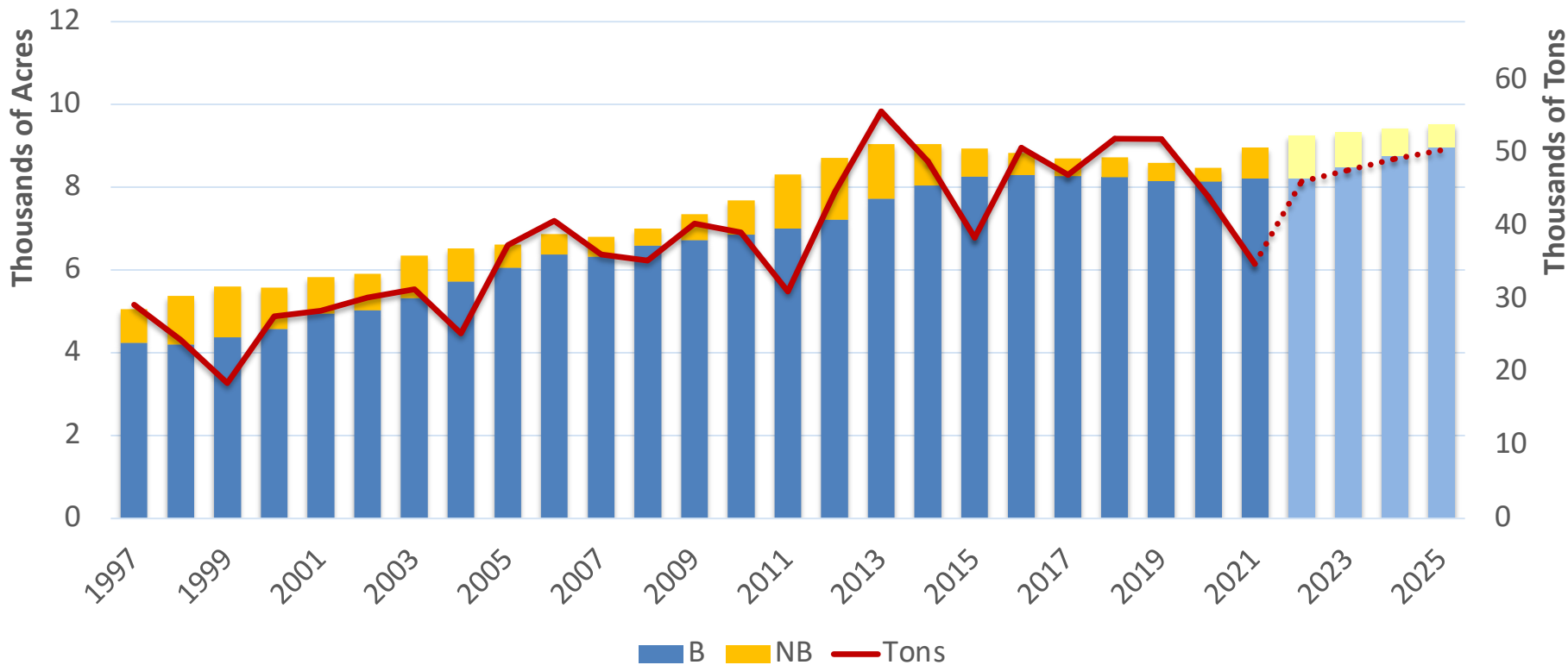


# Sonoma County Sauvignon Blanc Spot Market vs. District Average Grape Price





# All North Coast Sauvignon Blanc Bearing vs. Non-bearing Acres & Tons Crushed

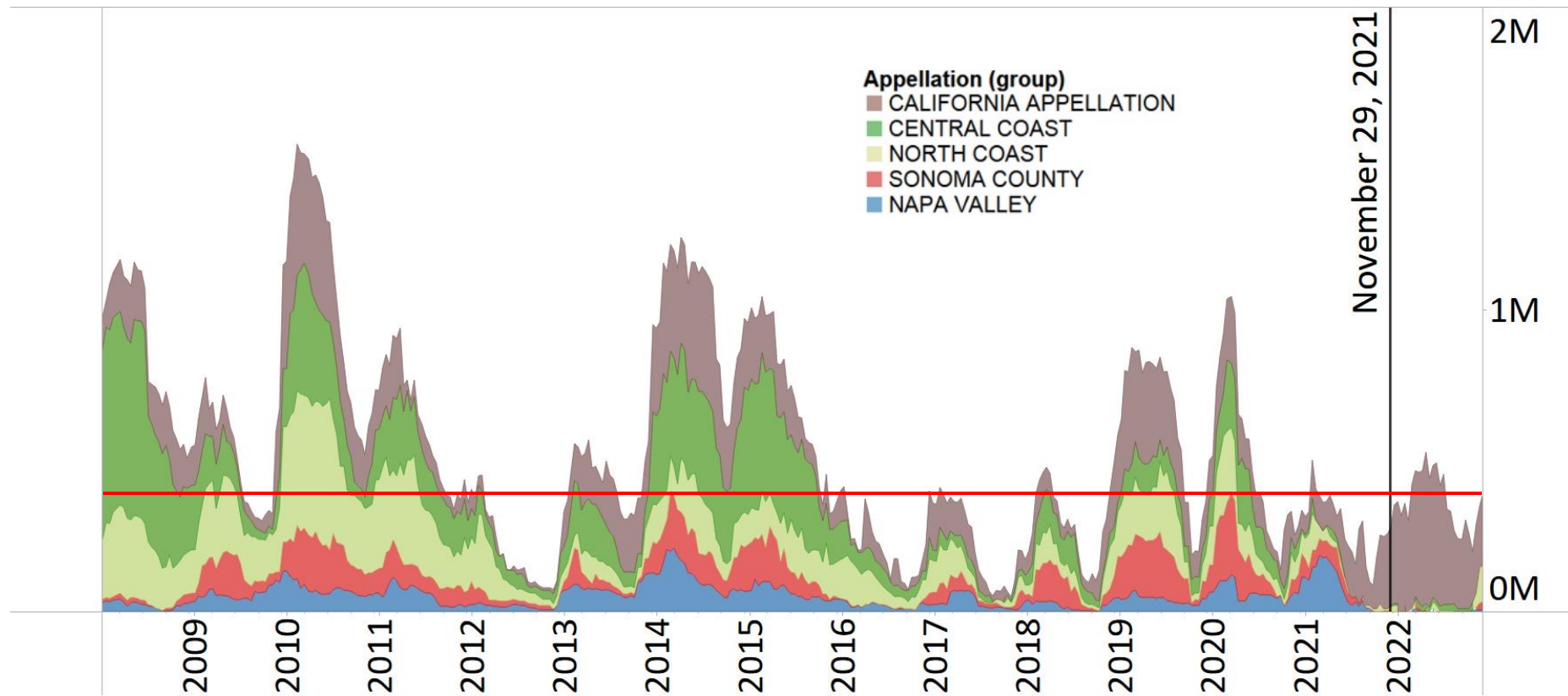






# Sauvignon Blanc

## Bulk Gallons Actively for Sale





# Summary

- Harvest not a lot of uniformity in yields 3<sup>rd</sup> year in a row
- Market more balanced due to short-term supply not Consumer Demand
- Challenges to costs of operation and inflation for all

# Thank you.

Christian Klier, North Coast Grape Broker  
Marc Cuneo, Bulk Wine Broker



# Thank You to Our Sponsors!

Strategy & Leadership  
Track  
Presented by:



Silver Sponsors



Additional Sponsors

