



# Navigating the Market Cycle

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PRESENTED BY:  
AUDRA COOPER & EDDIE URMAN



# About Us



**Established  
in 1973**



**Bulk Wine**



**Grapes**



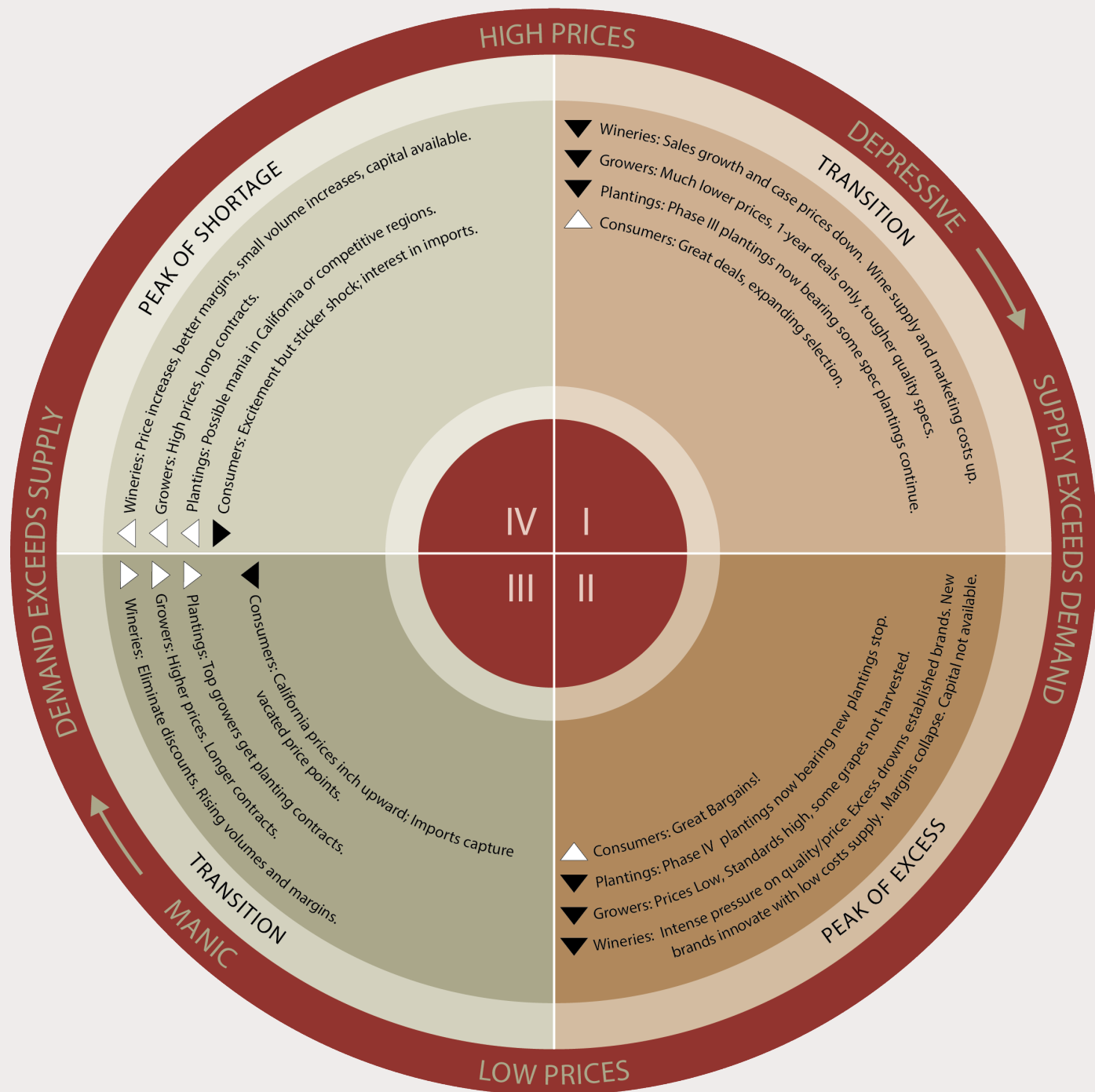
**Strategic  
Brands**



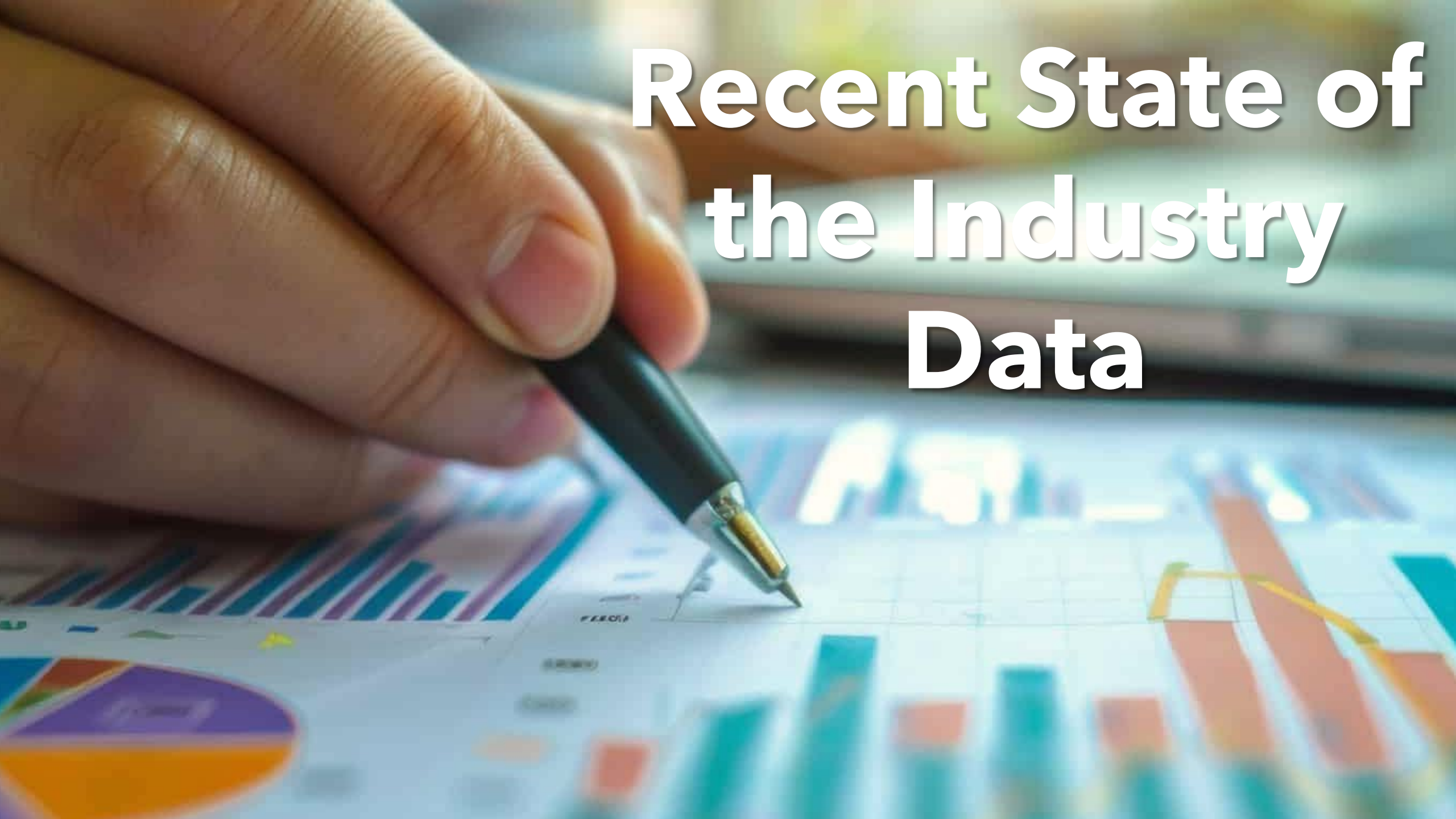
**Publishers of  
The  
Collateral  
Value Report**



# The Turrentine Wheel



# Recent State of the Industry Data



# May 12, 2026: OIV State of the World Wine Sector in 2025



- World wine consumption in 2025 is estimated at 208 mhl, a decrease of 2.7% compared to 2024.
- Steady decline: Global volumes fell 14% (2018–Present)
- U.S.A. largest wine market, consumes 45% more wine than the next closest country, France
- 6<sup>th</sup> consecutive year of global production decline



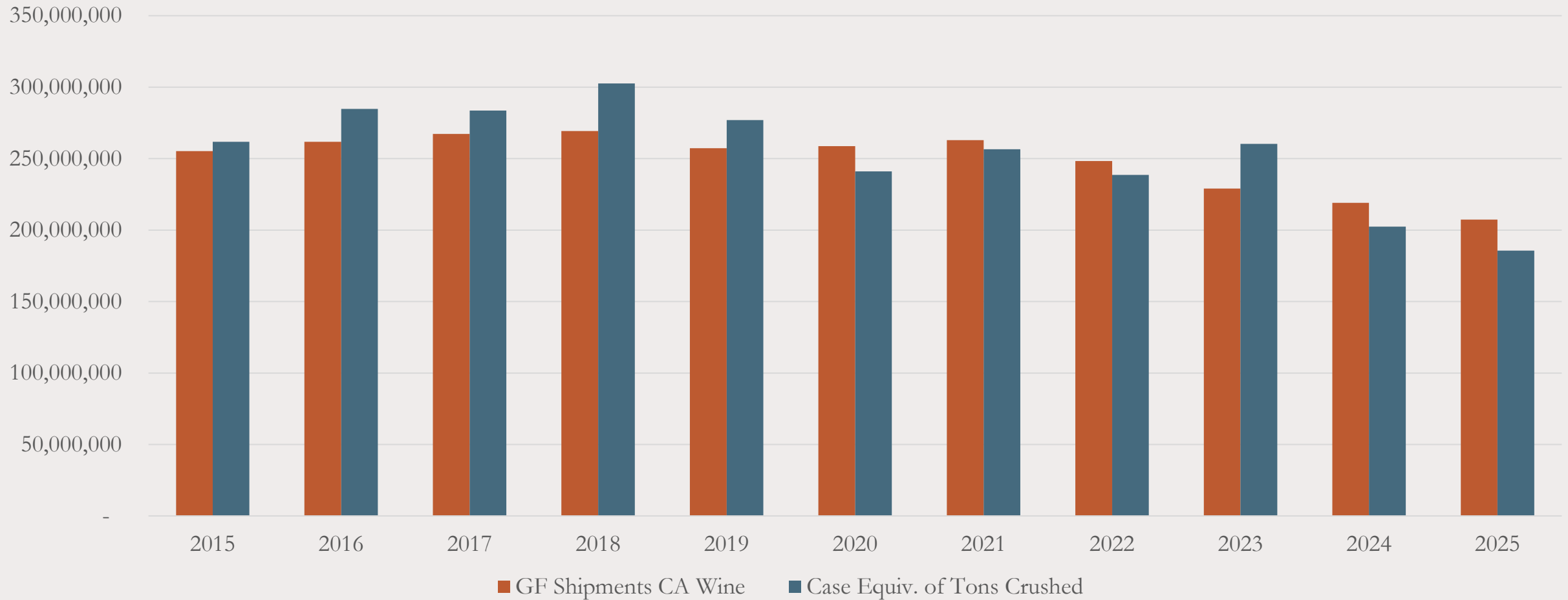


# May 12, 2026 BMO Wine Market Report

- The US wine market in 2025:
  - Increased to \$115 billion +3%
  - Declined to 362 million cases -4%
  - CA wine entering the market has declined by 25% over the last ten years
  - Nearly 25% of wineries surveyed reported losing a primary distributor in 2025 (for CA 31%)
  - Flavored wines saw a 12% growth in 2025



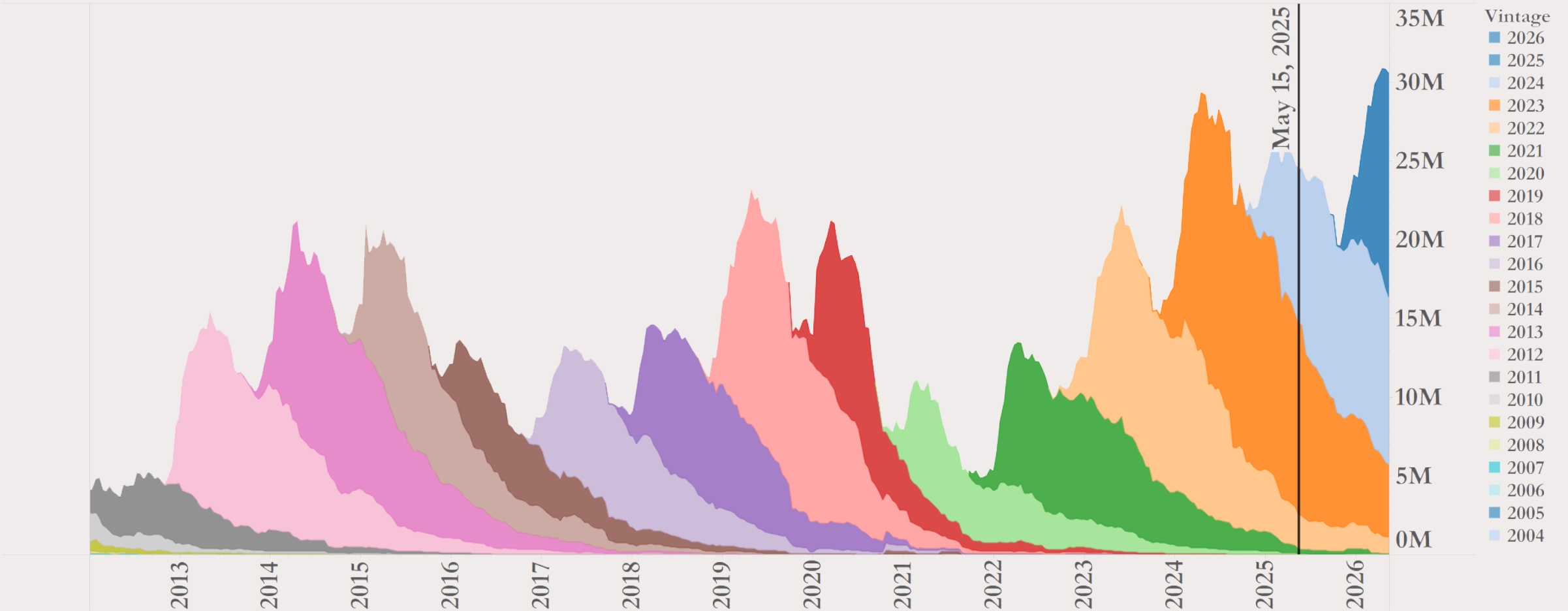
# Cases Shipped vs. Equivalent Tons Crushed



Source: Gomberg Fredrikson, CDFA Grape Crush Report

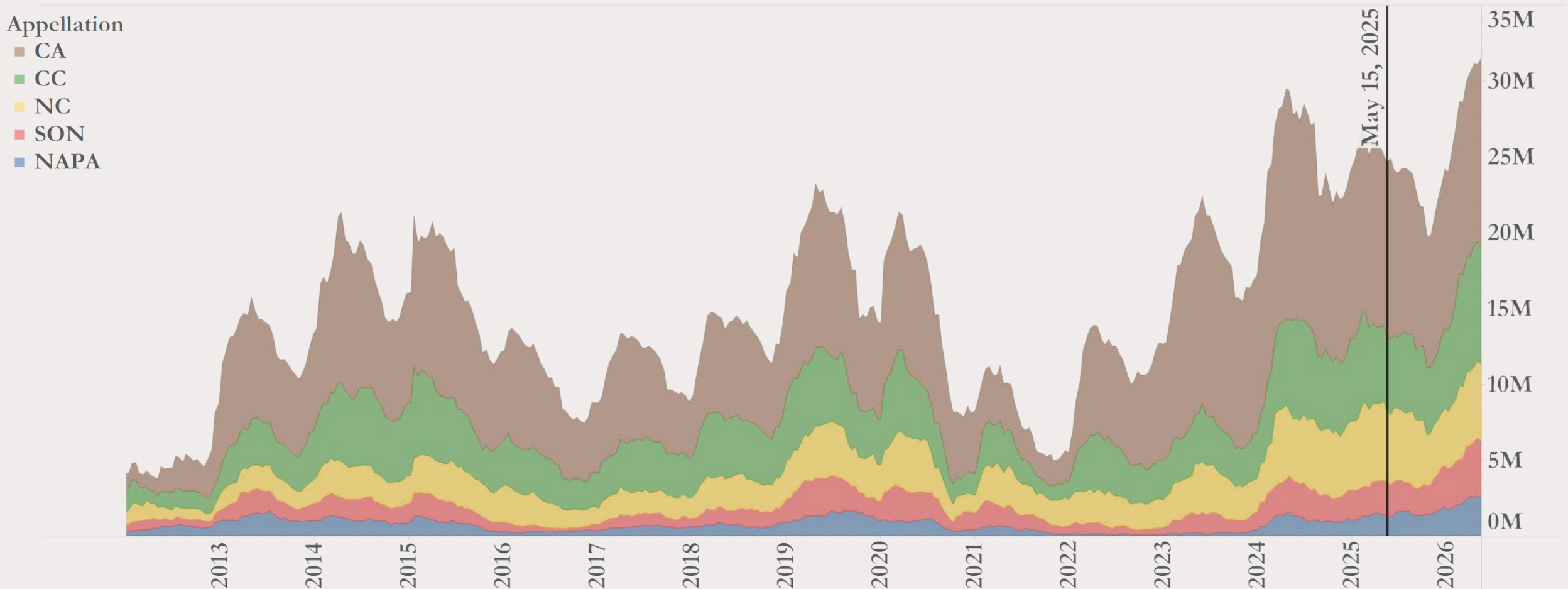


# Bulk by Vintage

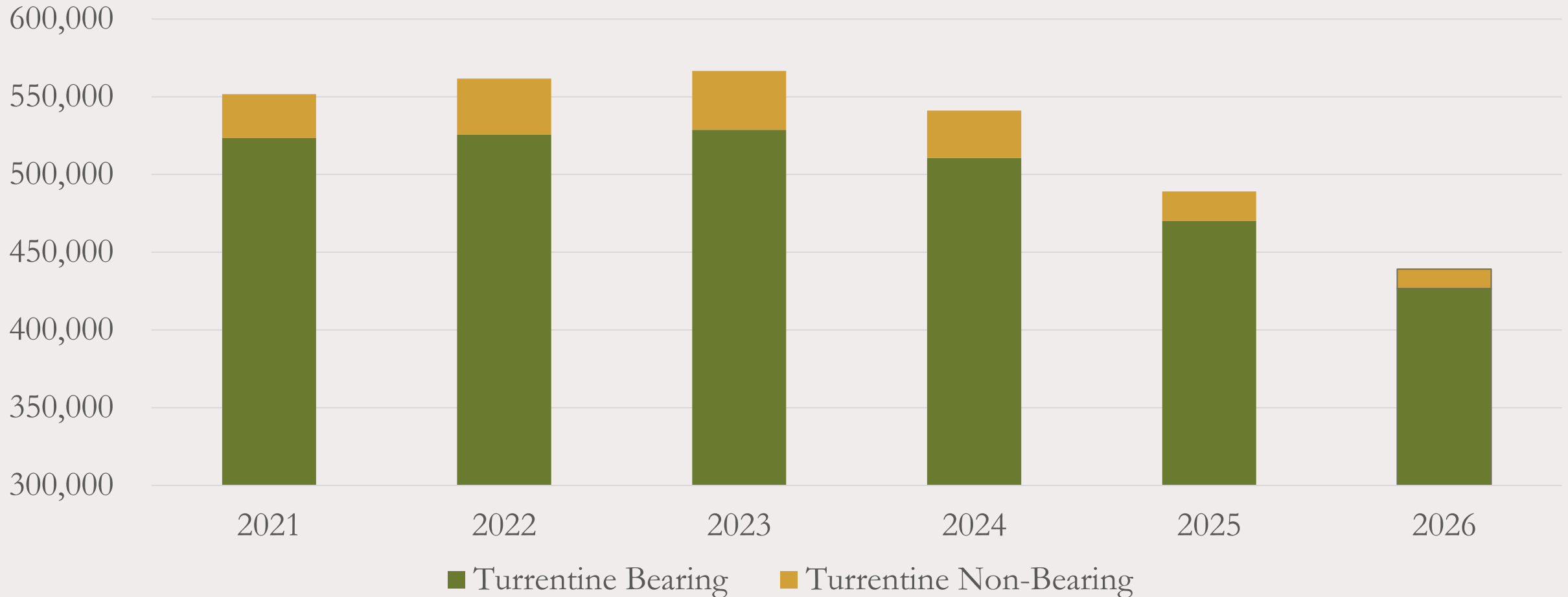




# Bulk by Region



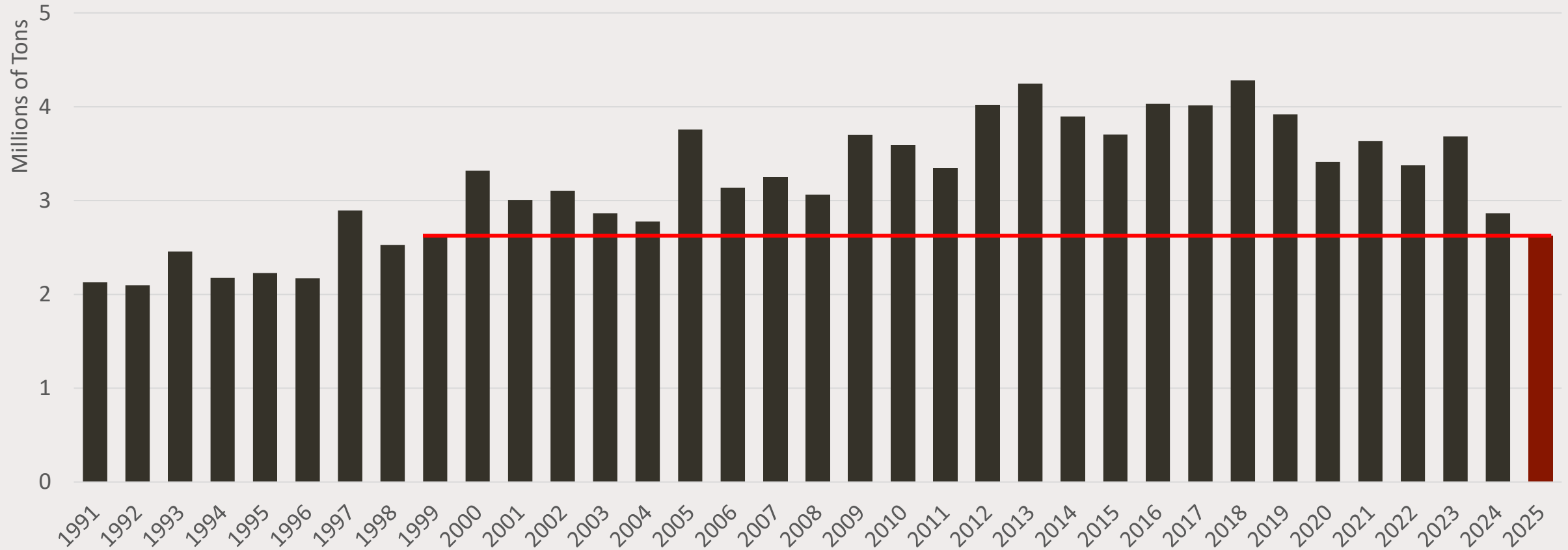
# Statewide Acreage Looking Into 2026



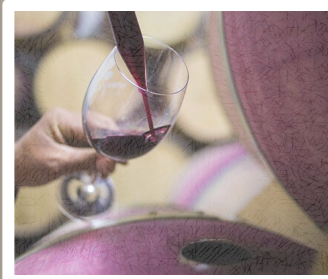
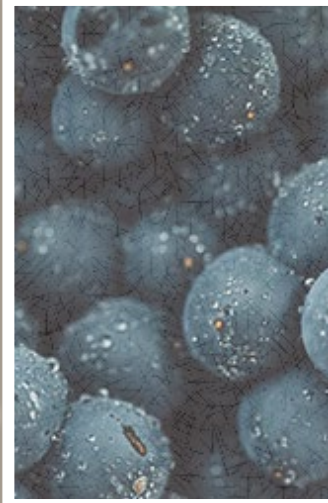


# Statewide Tons Crushed

2.626M Tons Crushed in 2025

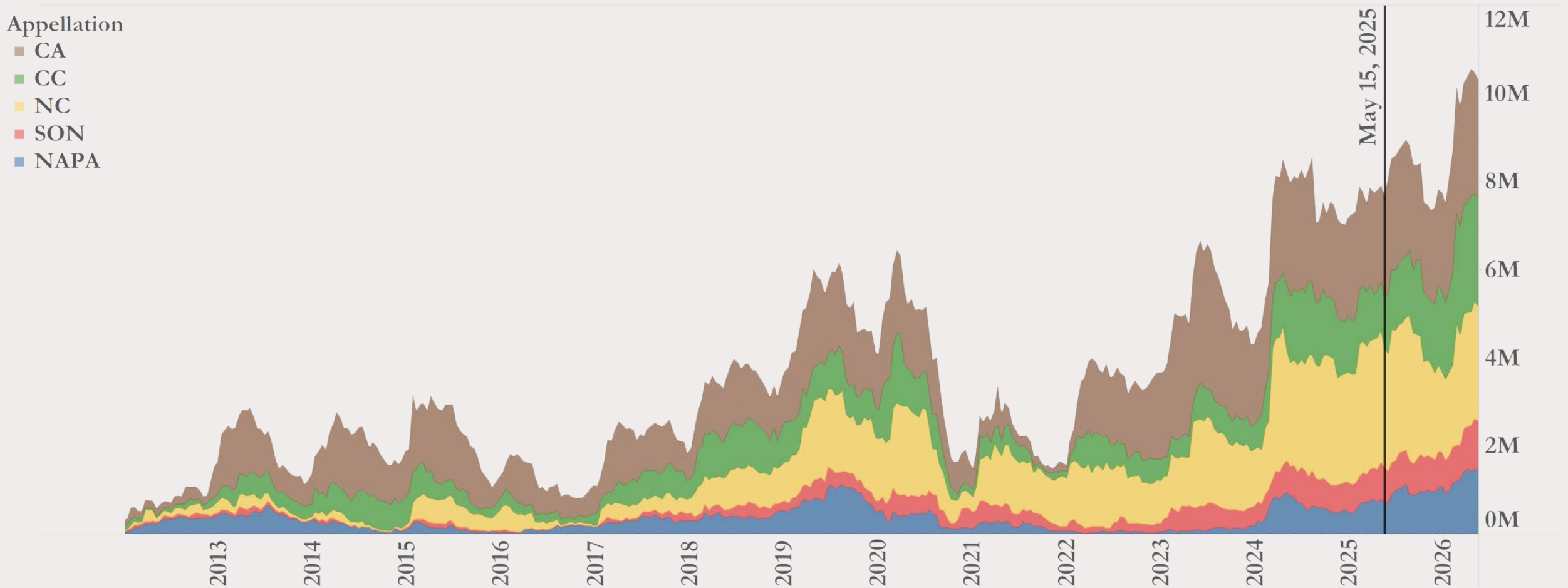


Source: CDFA Grape Crush Report

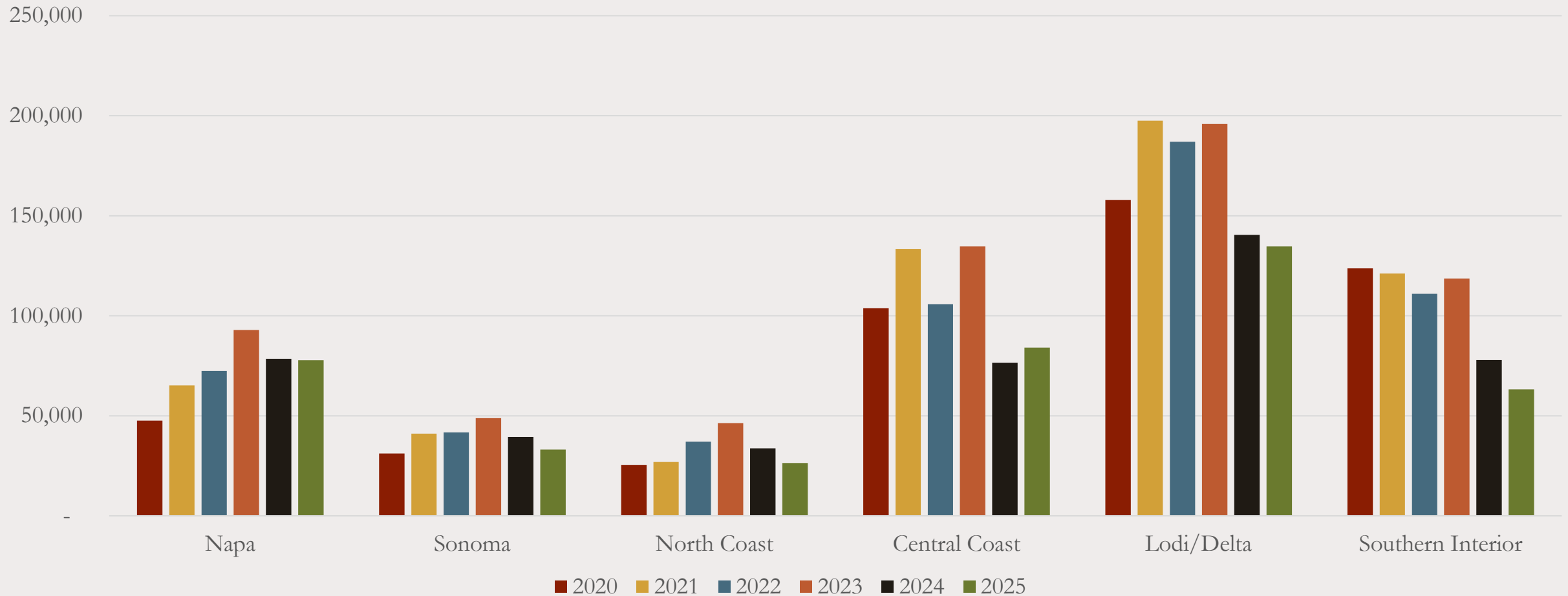


# Cabernet Sauvignon

# Cabernet Sauvignon Bulk Gallons Actively for Sale

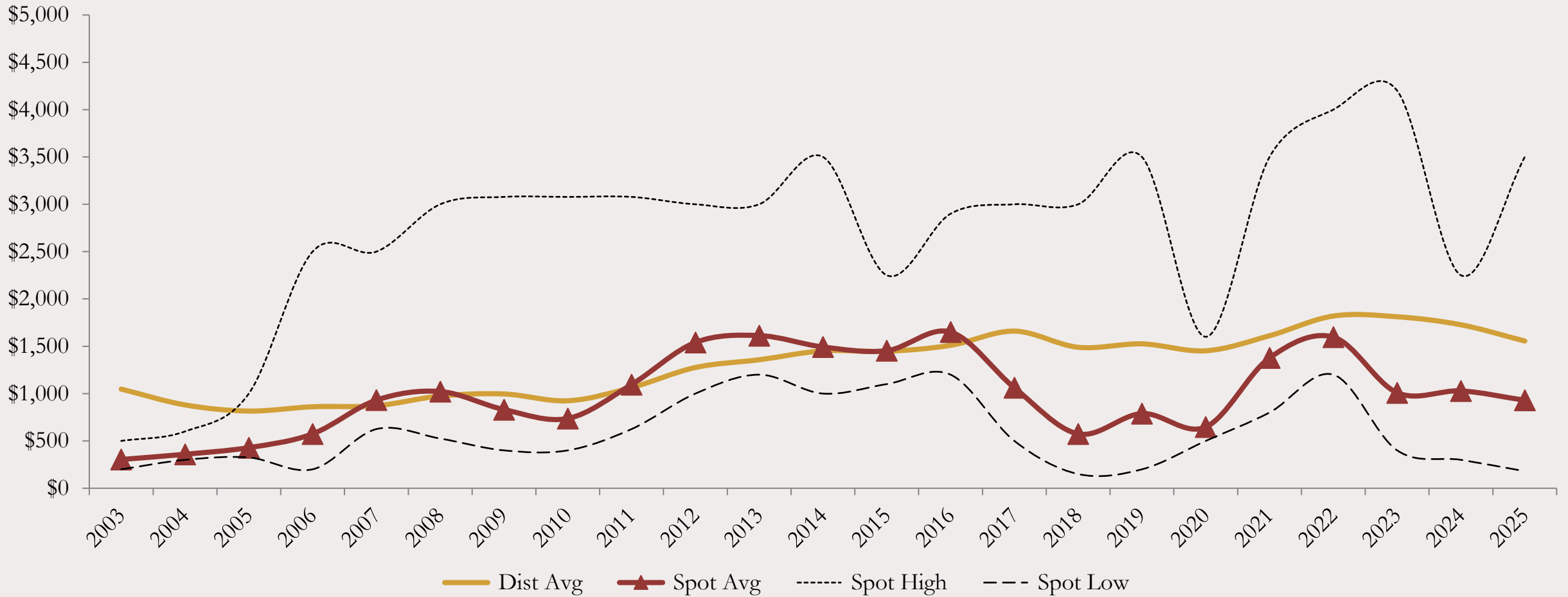


# Cabernet Sauvignon Recent Tons Crushed



Source: CDFA Grape Crush Report

# District 8 Cabernet Sauvignon Spot Market vs. Dist. Avg. Grape Price

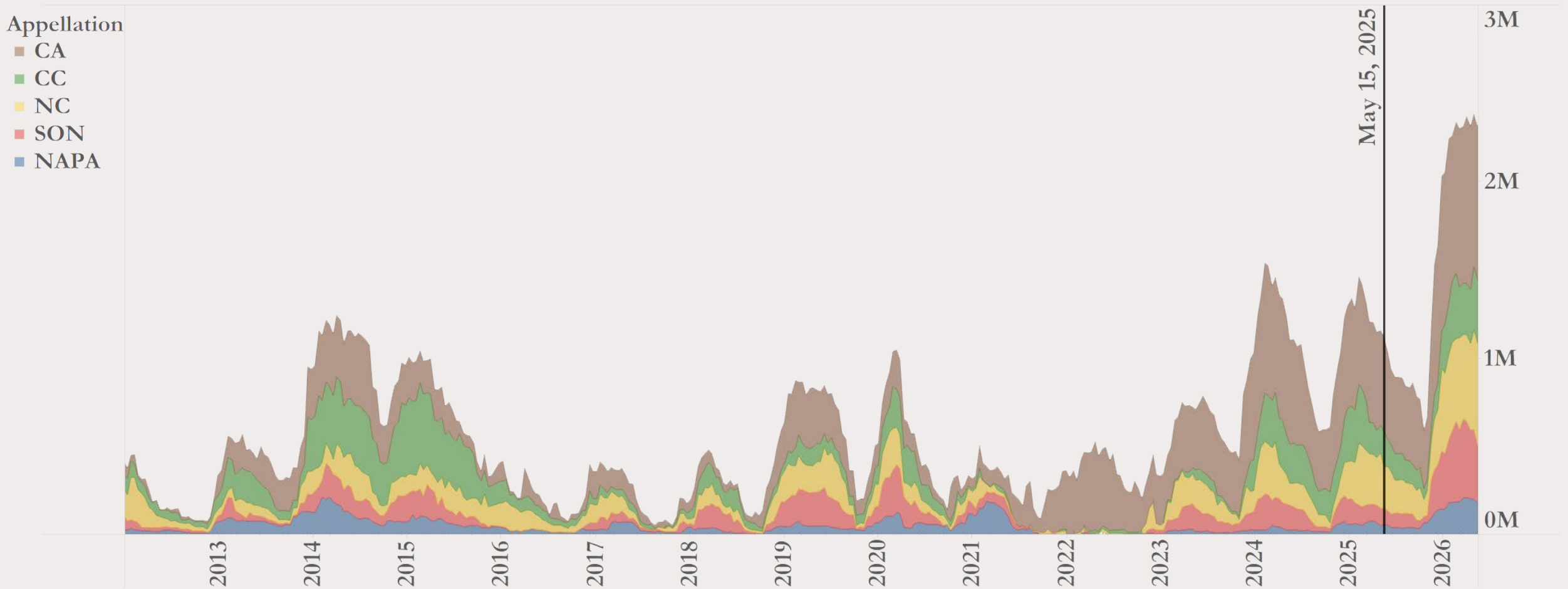




# Sauvignon Blanc

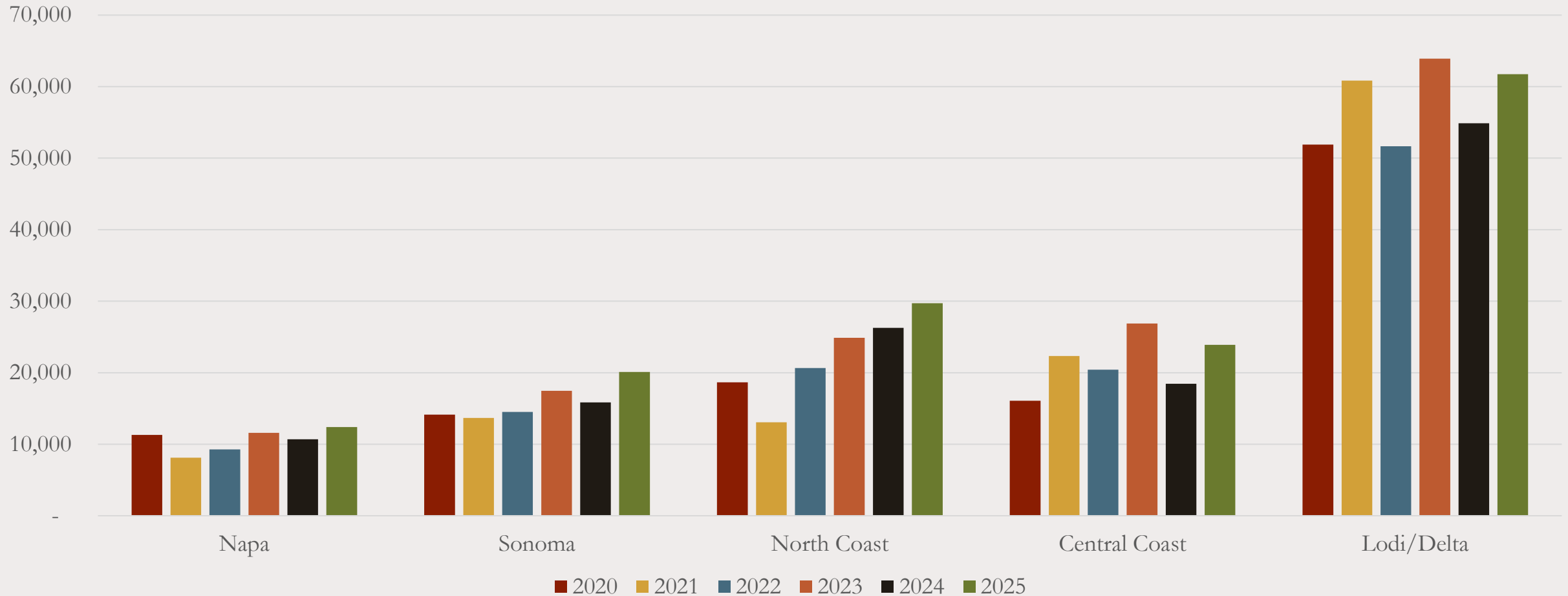


# Sauvignon Blanc Bulk Gallons Actively for Sale



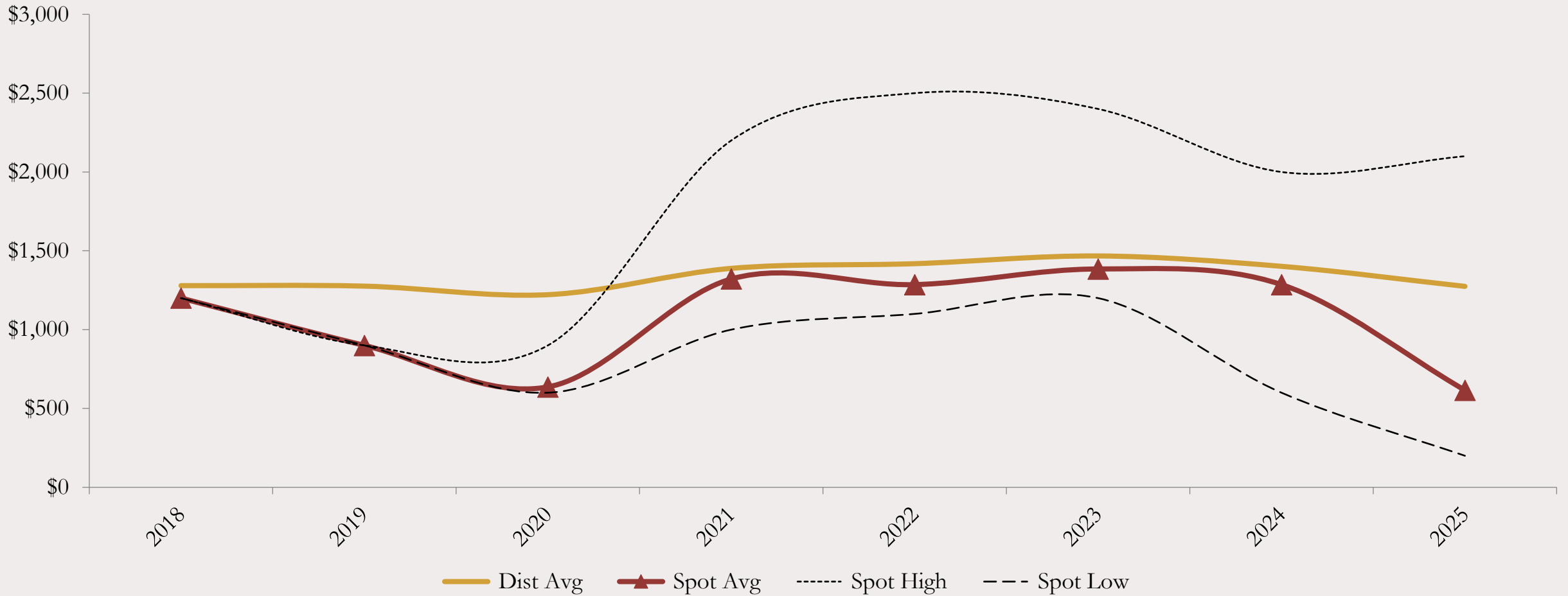


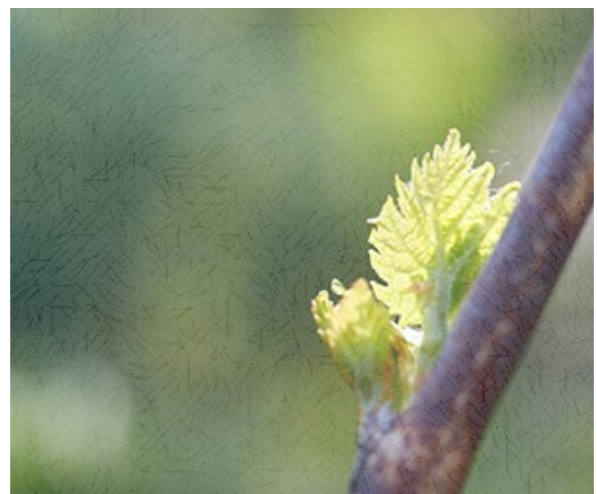
# Sauvignon Blanc Recent Tons Crushed



Source: CDFA Grape Crush Report

# Central Coast Sauvignon Blanc Spot Market vs. Dist. Avg. Grape Price

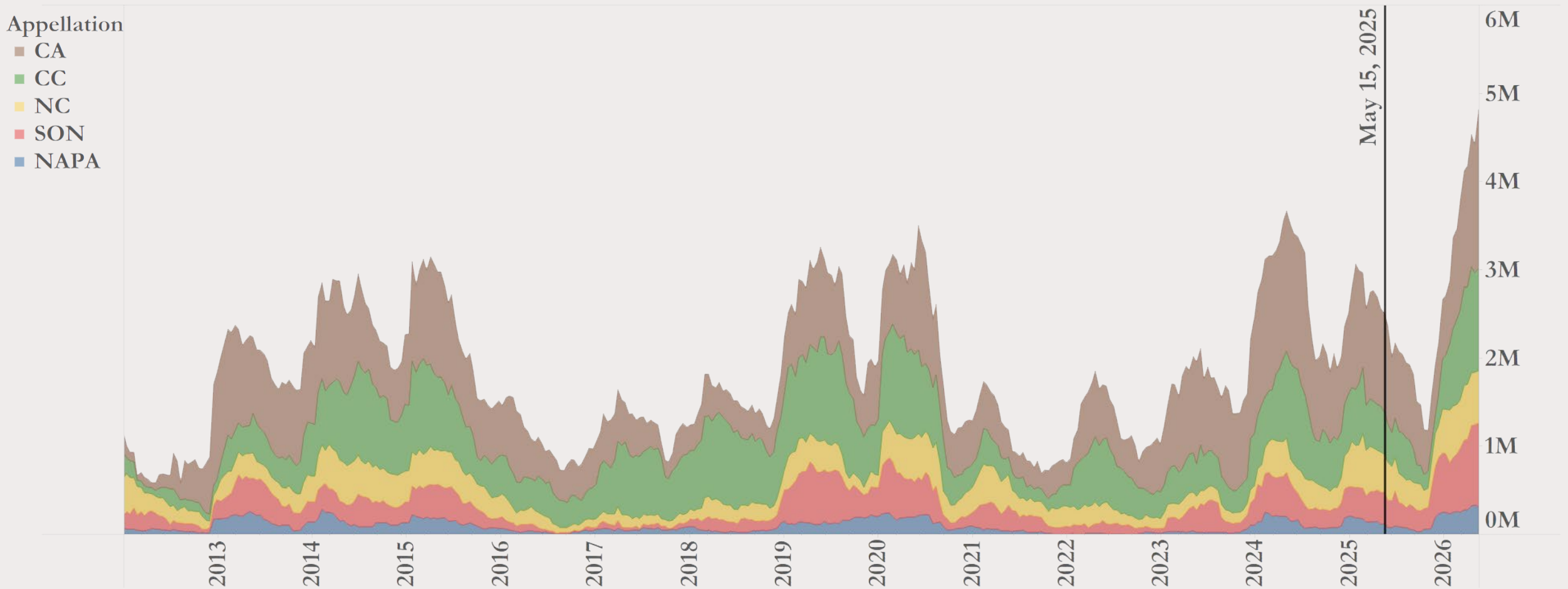




# Chardonnay



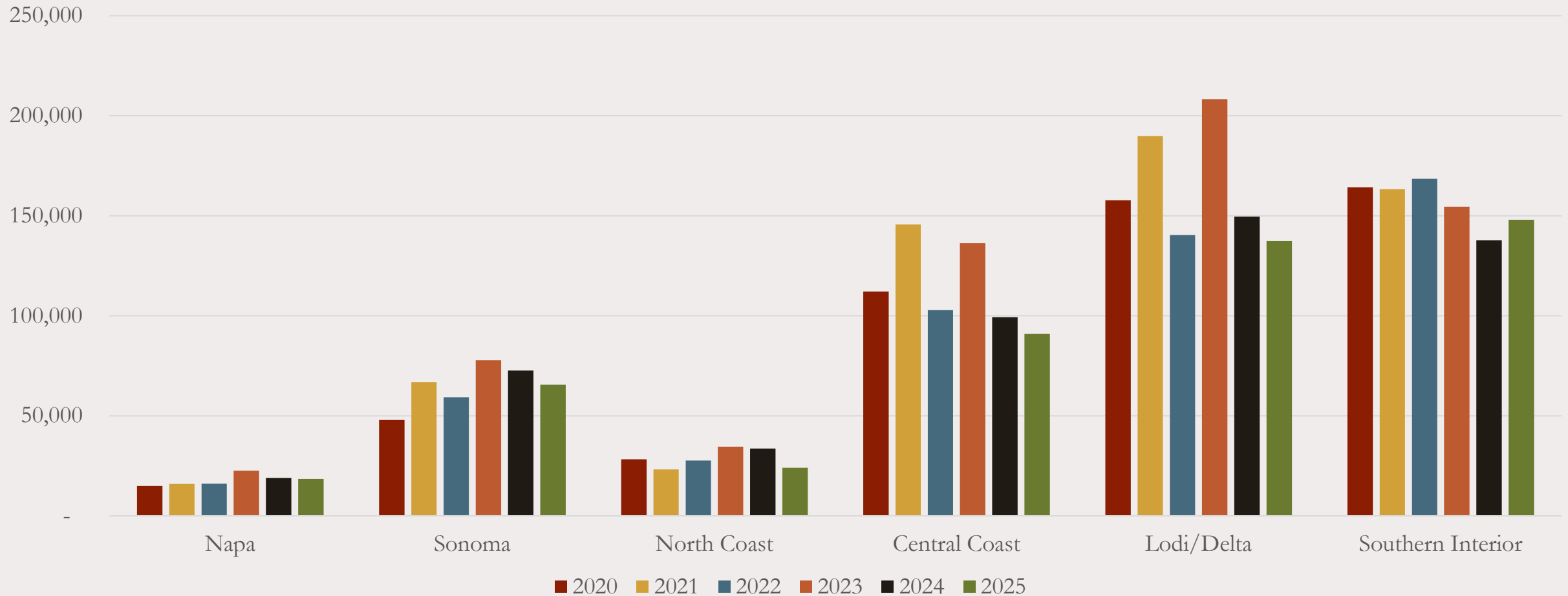
# Chardonnay Bulk Gallons Actively for Sale





# Chardonnay

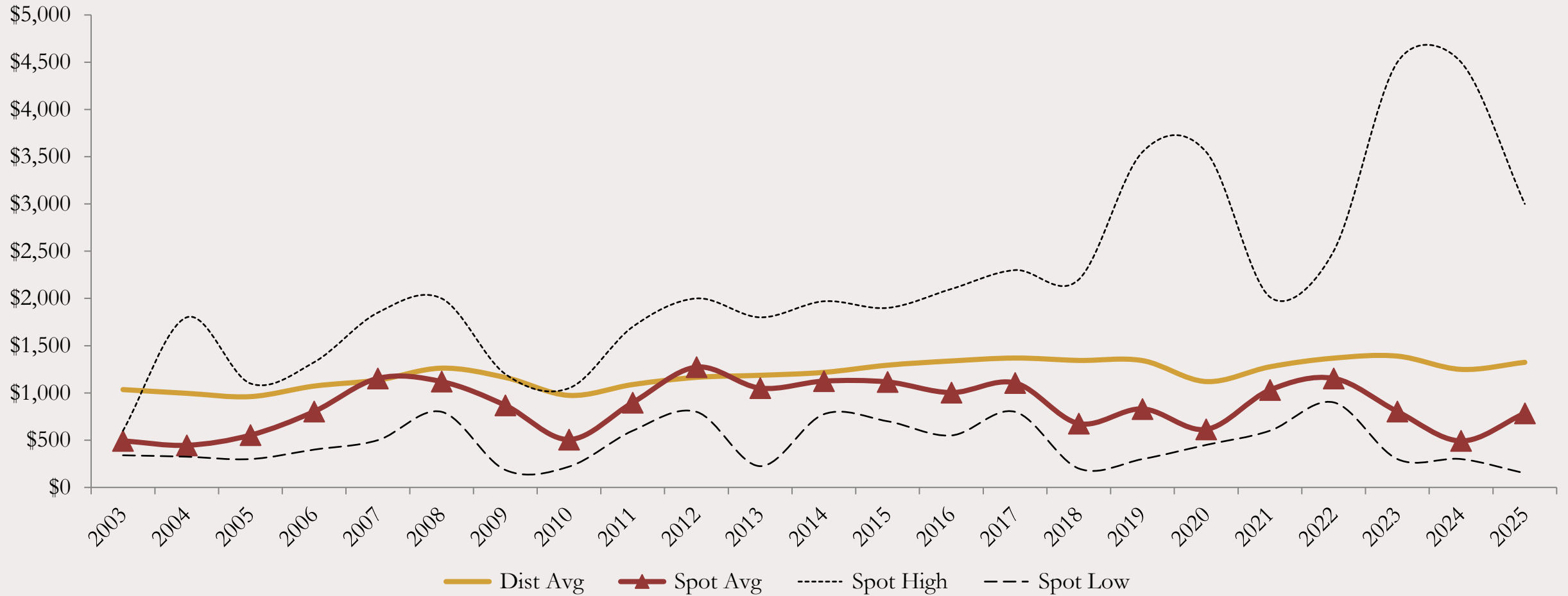
## Recent Tons Crushed



Source: CDFA Grape Crush Report



# Central Coast Chardonnay Spot Market vs. Dist. Avg. Grape Price



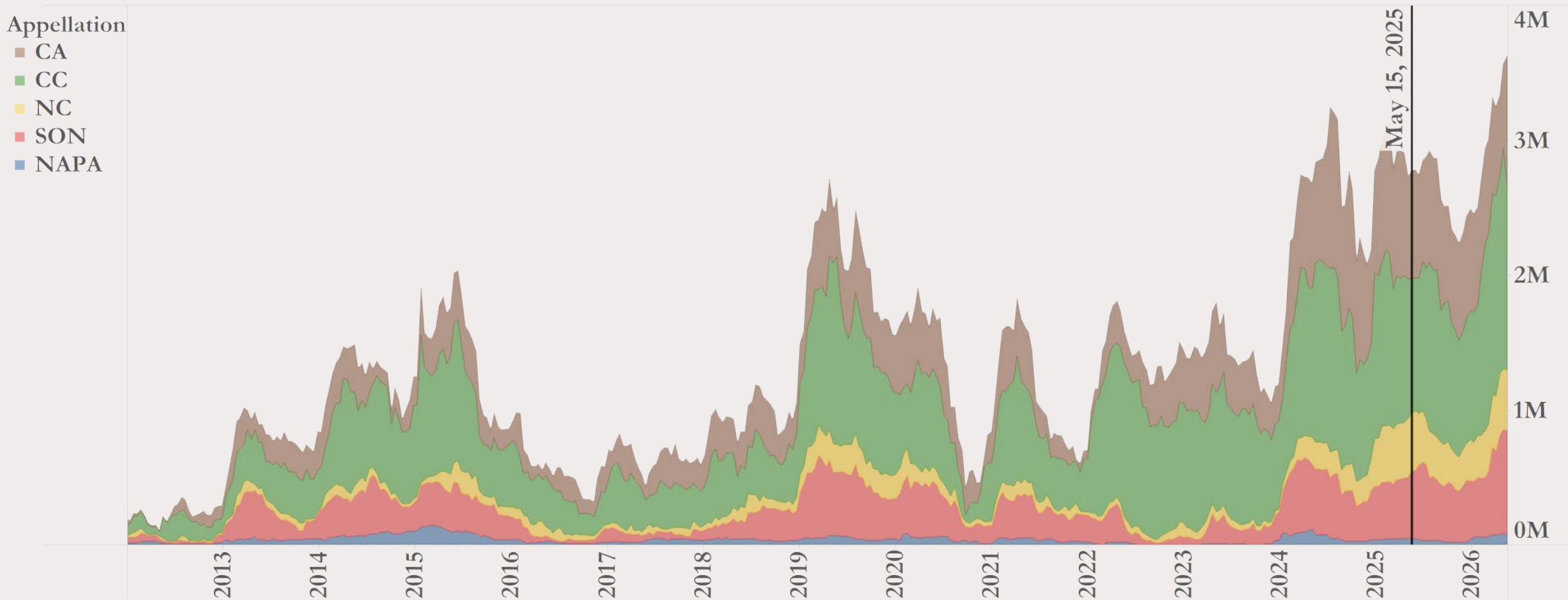


# Pinot Noir



# Pinot Noir

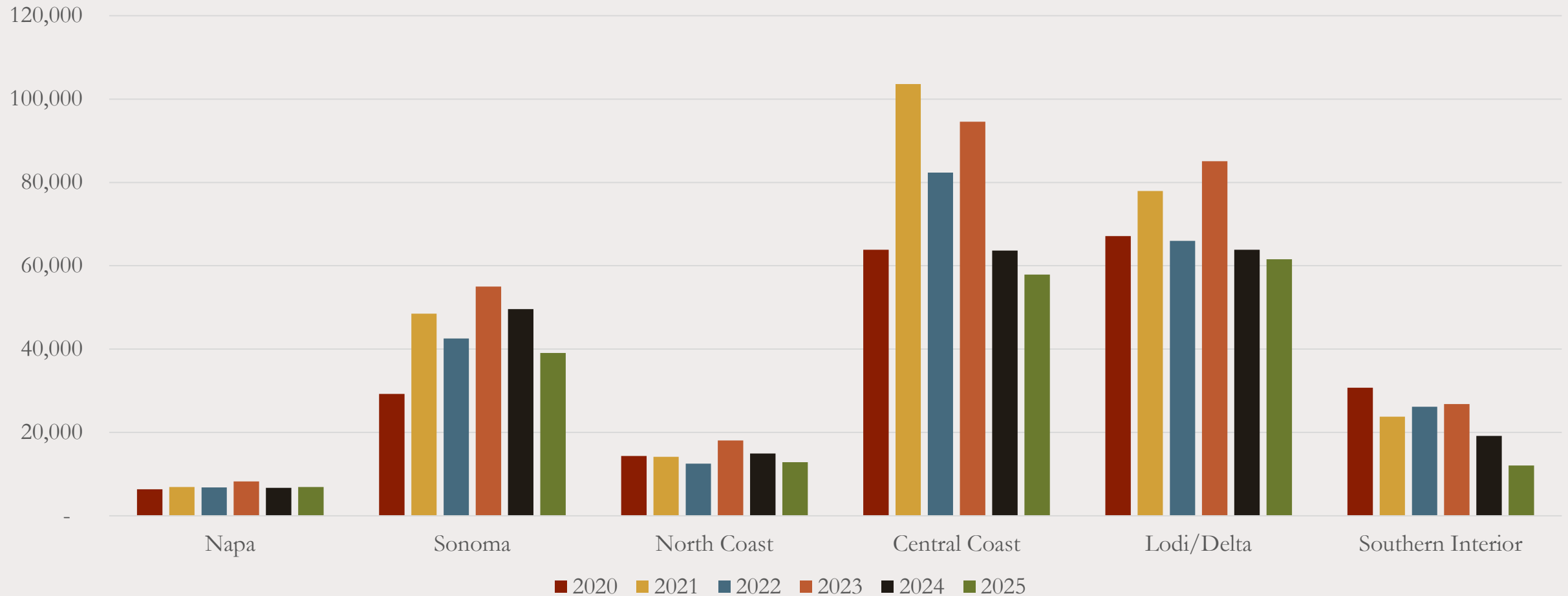
## Bulk Gallons Actively for Sale





# Pinot Noir

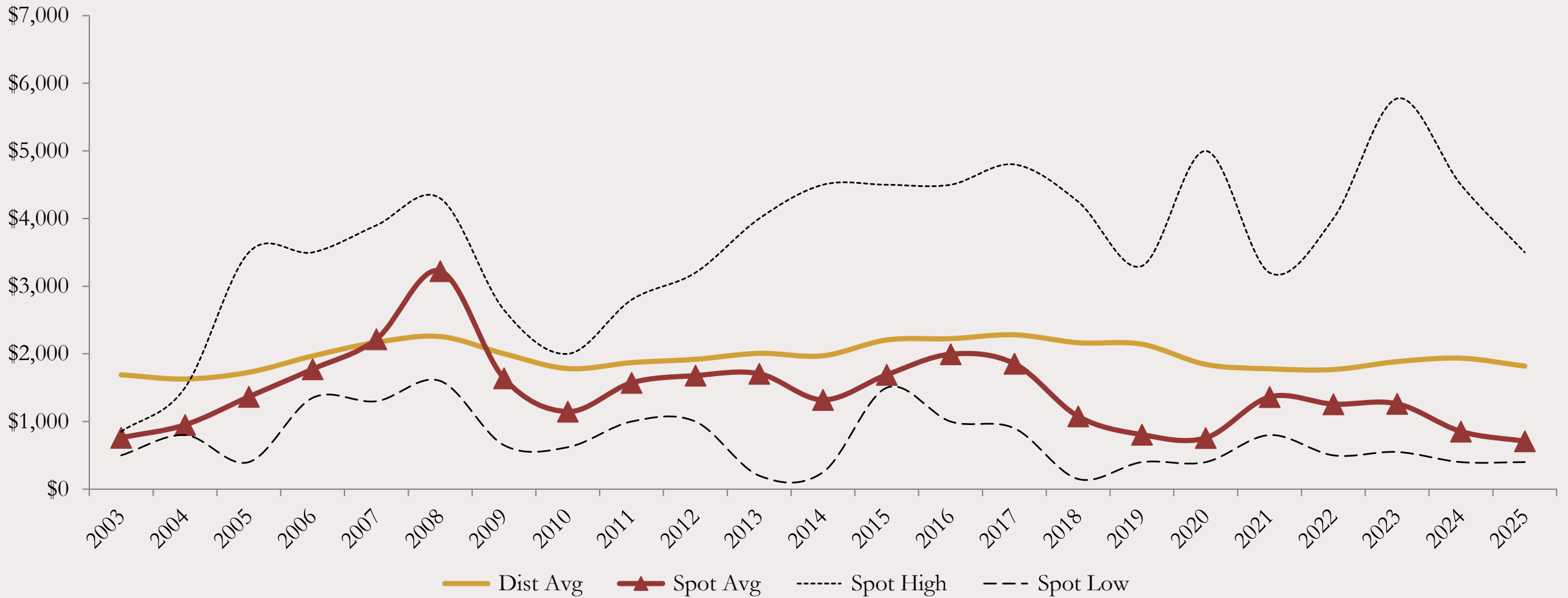
## Recent Tons Crushed



Source: CDFA Grape Crush Report

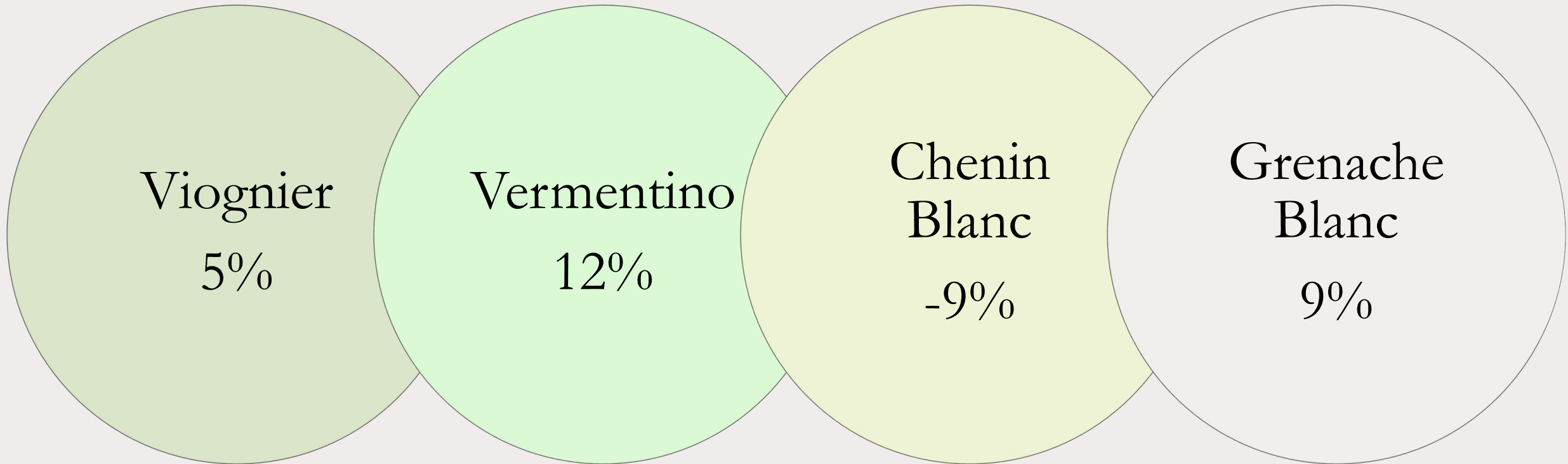


# Central Coast Pinot Noir Spot Market vs. Dist. Avg. Grape Price





# Alternative Whites





**What to  
Expect for the  
Rest of 2026**



**Q&A**