



2026 Annual Grower Seminar

Chad Clark
Director of North Coast Operations
Allied Grape Growers
(707) 328-8017
chad@alliedgrapegrowers.org



2026 Annual Grower Seminar

-2025 Tonnage Review

-2025 Price Review

-2026 Market Activity



2026 Annual Grower Seminar

-Tonnage Review-

AGG 2025 Delivered Tonnage vs. AGG 2024 Delivered Tonnage (% change)

	Mendocino	Lake	Sonoma	Napa	Solano
CS	n/a	n/a	-65%	-27%	-2%
CH	-100%	n/a	-46%	n/a	-12%
PN	n/a	n/a	31%	n/a	n/a
SB	-19%	-10%	-38%	-18%	-12%
ZN	-64%	n/a	-71%	-24%	25%
PS	-89%	-100%	-77%	86%	-77%

-AGG North Coast total tonnage **DOWN 24%**

-Suisun Valley & Green Valley of Solano **down 3%**

-Double digit tonnage **decreases** in **most** varieties for **all** North Coast counties.

-**AVG+** crop, **extended** growing season, mid/late season heat wave & late season rains caused several blocks to not meet minimum contract parameters and were **rejected**





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Price Review-Weighted Avg Pricing (North Coast)

Variety	2024 TABLE	% CL, YTD '24	2023 TABLE	% CL, YTD '23	2022 TABLE	% CL, YTD '22	2021 TABLE	% CL, YTD '21	2020 TABLE	% CL, YTD '20	2019 TABLE	% CL, YTD '19
CRABAPPLE	\$2,852.87	15.2%	\$2,452.71	15.2%	\$2,182.45	5.3%	\$2,372.42	5.4%	\$2,538.88	5.4%	\$2,378.55	5.3%
CROWN BLANC	\$4,135.33	1.3%	\$4,135.33	1.3%	\$4,174.88	1.8%	\$4,174.88	1.8%	\$4,174.88	1.8%	\$4,135.33	1.3%
SARFICAN BLANC	\$4,535.54	15.7%	\$4,535.54	15.7%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%
CABERNET SAUVIGNON	\$4,388.38	17.8%	\$4,388.38	17.8%	\$4,388.38	5.3%	\$4,388.38	5.3%	\$4,388.38	5.3%	\$4,388.38	5.3%
CHENIN BLANC	\$4,734.34	11.5%	\$4,734.34	11.5%	\$4,734.34	5.3%	\$4,734.34	5.3%	\$4,734.34	5.3%	\$4,734.34	5.3%
CHARDONNAY	\$4,476.34	8.8%	\$4,476.34	8.8%	\$4,476.34	5.3%	\$4,476.34	5.3%	\$4,476.34	5.3%	\$4,476.34	5.3%
HERBET	\$4,535.54	15.2%	\$4,535.54	15.2%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%
PETITE SIRAH	\$4,535.54	15.2%	\$4,535.54	15.2%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%
PIRAT GRIS	\$4,135.33	17.3%	\$4,135.33	17.3%	\$4,135.33	5.3%	\$4,135.33	5.3%	\$4,135.33	5.3%	\$4,135.33	5.3%
SARFICAN BLANC	\$4,535.54	15.2%	\$4,535.54	15.2%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%
SYRAH	\$4,135.33	15.2%	\$4,135.33	15.2%	\$4,135.33	5.3%	\$4,135.33	5.3%	\$4,135.33	5.3%	\$4,135.33	5.3%
TIBBALLE	\$4,535.54	15.2%	\$4,535.54	15.2%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%	\$4,535.54	5.3%

-A LOT of red or decreased percent changes in '24 v '23 average pricing

-Alternative varieties are some of the only varieties with consecutive year price increases (table 8/10).

-Grape Crush Report has been pushed back 1 month beginning v2025 to allow for more accuracy (Errata?)





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-North Coast Price Projections-

2026 Projected Price/Ton

Whatever price works for the intended wine program and allows the grower to operate at a financially sustainable return.



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-word on the street-

- **Early 2026 Coastal Grape market has been quiet and mostly inactive**
- **Suisun Valley/Green Valley of Solano have been the “knights in shining armor” throughout the North Coast AVA’s**
- **Slight/Minimal activity at high end markets (vyd designate/DTC)**
- **Alternative variety markets continue to strengthen with smaller tonnages**
- **Planting opportunities are mostly nonexistent throughout North Coast**
- **Wineries have been pushing price & tonnage decreases and contract buyouts**
- **Multiyear terms are uncommon in current negotiations with new relationships**
- **Several evergreen notices are being given, in all counties and varieties**
- **Max tonnage constraints have become “the norm”... again!**
- **Minimum ripening requirements (brix, TA, pH, etc) will be monitored closely with likelihood of rejection if minimum requirements are not met**
- **...2026 is a year of sustainable relationship building.**





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-word on the street-



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