



2022 COMMERCIAL WINE GRAPE REPORT



METHODOLOGY

The 2022 Commercial Wine Grape Report was conducted on behalf of the Virginia Wine Board with management from the Virginia Vineyards Association and data collection by the Virginia Wine Board Marketing Office.

The VWBMO previously managed the survey from 2010-2015 and again in 2021 and 2022. The 2016-2020 reports were produced by outside agencies and should be used with caution as lower response rates resulted in decreased aggregate data points.

The 2021 report saw a substantial increase in participation, and therefore this year's methodology was kept the same with the addition of a few survey questions. All data in this report was collected from Virginia grape growers and wineries in two surveys. The first survey was shared digitally with all known Virginia vineyards in September 2022 and remained open until February 2023, receiving responses from 384 vineyard sites. This initial survey collected

details on bearing acres (planted 3+ years) and non-bearing acres (planted 1-2 years), with a minimum acreage requirement of 0.25 acres planted per variety. The second survey acted as a crush report and was shared amongst all known wine producers in Virginia. Opening at the end of November, the second survey collected online responses through February 2023 from 207 wine producers. These producers provided details on the tonnage of grapes processed at their facilities in 2022. Data collected included details on all varieties processed and the price paid for fruit that was contracted or purchased at market. Additionally, new questions were added to the track estimated fruit loss in the vineyards and causes. Contact information for both surveys was compiled from membership databases from the VVA, VWBMO, and Virginia Wineries Association. It is conservatively estimated that a minimum of 513 total acres are unreported from 76 vineyard non-respondents and 622 additional tons were processed by 60 non-responding winery operations. These estimates were calculated based on existing industry data and knowledge.



2022 HARVEST

Grape shortage or grape glut? The VVA Exchange Board was filled with listings both looking for and selling grapes in 2022. While more than 50% of the reported crop loss this year was due to weather related issues, 25% was due to the lack of labor or no buyers for fruit. Virginia had a solid production year with over 10,000 reported tons. There appear to be over 200 acres of bearing vineyards coming into production each year for the next several years. Many vineyards are seeking to contract their fruit earlier than usual.

Downy mildew and the increasing coverage of the Spotted Lanternfly were of high concern in 2022. Additionally, the threat of Hurricane Ian resulted in many varieties being harvested earlier than desired. For growers who could wait, the outcome was high quality wines.

Based on responses this year, it is estimated that over 90% of vineyards responded with 22 new vineyards sites included this year. Additionally, it is estimated that reported tonnage accounts for 80% of winery facilities but we extrapolate that we are covering more than 90% of the tonnage processed in Virginia. The 11 largest winery survey respondents for this survey reported over 4,000 tons of fruit alone.

Some items of note from this year's data:

- Virginia has more than 5,000 acres of vineyards planted
- Virginia has 11 varieties with more than 100 acres planted including Cabernet Franc, Chardonnay, Petit Verdot, Merlot, Cabernet Sauvignon, Viognier, Vidal Blanc, Petit Manseng, Chambourcin, Norton, and Sauvignon Blanc
- Virginia's tonnage production was more than 10,000 tons both this year and last
- The average yield per acre in Virginia is 2.5 tons per acre with the Central and Northern Virginia regions averaging 2.7 tons per acre each with Eastern, Shenandoah, and South-Western Virginia closer to 2 tons per acre
- Both Hybrids and Vinifera grapes averaged 2.5 tons per acre. American Grape varieties were the lowest at 1.6 tons per acre
- The varieties with the largest plantings and highest yields per acre include Tannat at 4.1 tons/acre, Sauvignon Blanc at 3.4 tons/acre, Seyval Blanc at 3.1 tons/acre, Chardonnay at 3 tons/acre, and Merlot at 2.9 tons/acre
- There were four varieties with a median sales price over \$3,000 per ton, including Tannat and Sauvignon Blanc, both of which had higher tonnages, Albariño and Riesling

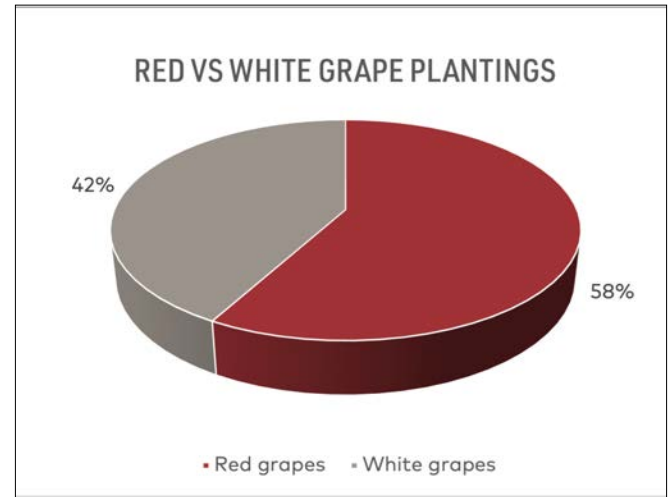
The VVA thanks everyone for participating in these surveys and contributing to the 2022 Virginia Commercial Wine Grape Report. Additionally, thank you to all who attended the 2023 VVA Winter Technical meeting where all these issues were discussed. The VVA will again be working on this survey to produce the 2023 Virginia Commercial Wine Grape Report with support from the VWBMO. We will continue to push for higher reporting numbers which will give more accurate and valuable information.

- Virginia Vineyards Association Board

2022 PRODUCTION SUMMARY

In 2022, over 4,600 acres of grapes were reported, a 7% increase in the submitted acreage reported in 2021. Following the trend of the 2021 report, Cabernet Franc is the most widely planted grape and saw an 8% increase in bearing acres planted and an 11% increase in non-bearing acres. Additional vinifera varieties with notable increases in total acreage planted included Petit Manseng (21 acres, 12% increase), Viognier (29 acres, 10% increase), Cabernet Sauvignon (28 acres, 9% increase) and Petit Verdot (32 acres, 7% increase).

Plantings between red and white grapes are comparable but red grapes have a slight majority at 58% of the total acreage in the state. Vinifera grapes make up 82% of plantings with hybrid grapes accounting for 14% and American grapes at 4%. These grape categories are represented in individual charts below with variety specific breakouts. All varieties with a minimum of 10 total acres planted are listed individually, anything less is merged into an "other" category. The charts reflecting production by variety are sorted by largest to smallest total acres planted.



In order to improve the accuracy of reported pricing, any pricing for fruit that was self-grown or internally transferred was not included in aggregate data calculations. All varieties with pricing details listed had a minimum of three reported price points for fruit that was either contracted or purchased at market.

2022 PRODUCTION SUMMARY TABLE

VARIETY	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS
Vinifera	3,844	3,373	471	8,575
Hybrid	671	610	61	1,548
American	168	158	10	253
Total	4,683	4,141	542	10,376
<i>Estimated Actual Total*</i>	5,196	-	-	10,998

*It is estimated that a minimum of 513 total acres are unreported from 76 vineyard non-respondents and 622 additional tons were processed by 60 non-responding winery operations. These estimates were calculated based on existing industry data and knowledge.

PRODUCTION BY VARIETY- VINIFERA

VARIETY	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	PRICE MEAN*	PRICE MEDIAN	25TH PERCENTILE	75TH PERCENTILE
Vinifera	3,844	3,373	471	8,575				
Cabernet Franc	701	607	94	1,501	\$2,800	\$2,664	\$2,500	\$3,100
Chardonnay	568	532	36	1,355	\$3,189	\$2,500	\$2,400	\$2,940
Petit Verdot	487	418	69	970	\$3,055	\$2,800	\$2,600	\$3,005
Merlot	480	415	65	1,200	\$2,900	\$2,650	\$2,500	\$3,075
Cabernet Sauvignon	343	303	40	700	\$2,681	\$2,600	\$2,488	\$3,010
Viognier	332	320	12	810	\$2,717	\$2,675	\$2,638	\$3,000
Petit Manseng	200	166	34	428	\$2,704	\$2,800	\$2,500	\$3,000
Sauvignon Blanc	115	101	14	342	\$2,998	\$3,000	\$2,788	\$3,225
Tannat	77	66	11	267	\$2,893	\$3,000	\$2,900	\$3,000
Pinot Grigio/ Gris	69	66	3	124	-	-	-	-
Albariño	65	39	26	69	\$3,887	\$3,200	\$2,700	\$3,200
Riesling	53	50	3	65	\$3,220	\$3,500	\$3,500	\$3,500
Nebbiolo	50	34	16	59	-	-	-	-
Pinot Noir	48	42	6	106	-	-	-	-
Malbec	45	36	9	81	-	-	-	-
Roussanne	19	17	2	37	\$2,833	\$2,800	\$2,650	\$3,000
Syrah/Shiraz	17	14	3	32	\$2,736	\$2,750	\$2,586	\$2,900
Blafränkisch	14	7	8	12				
Grüner Veltliner	13	9	4	29	\$2,140	\$2,200	\$2,000	\$2,600
Barbera	11	9	1	27	-	-	-	-
Rkatsiteli	11	11	0	29	-	-	-	-
Other Vinifera	131	111	20	331	-	-	-	-

PRODUCTION BY VARIETY- HYBRID & AMERICAN

VARIETY	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	PRICE MEAN*	PRICE MEDIAN	25TH PERCENTILE	75TH PERCENTILE
Hybrid	671	610	61	1,548				
Vidal Blanc	240	223	17	601	\$2,395	\$1,680	\$1,605	\$1,750
Chambourcin	199	179	20	497	\$1,768	\$1,750	\$1,600	\$1,925
Traminette	89	83	6	155	\$1,666	\$1,650	\$1,500	\$1,725
Chardonnell	48	39	9	118	\$2,020	\$1,800	\$1,700	\$2,400
Seyval Blanc	46	44	2	134	\$2,123	\$1,650	\$1,500	\$1,750
Other Hybrid	50	42	8	44	-	-	-	-
American	168	155	10	253				
Norton	118	114	4	218	\$2,883	\$2,800	\$2,500	\$3,000
Niagara	20	19	1	27	-	-	-	-
Other American	30	25	5	9	-	-	-	-
Total	4,683	4,141	542	10,376				

*All pricing data reflects a minimum of 3 responses per variety for grapes that were either contracted or purchased at market.

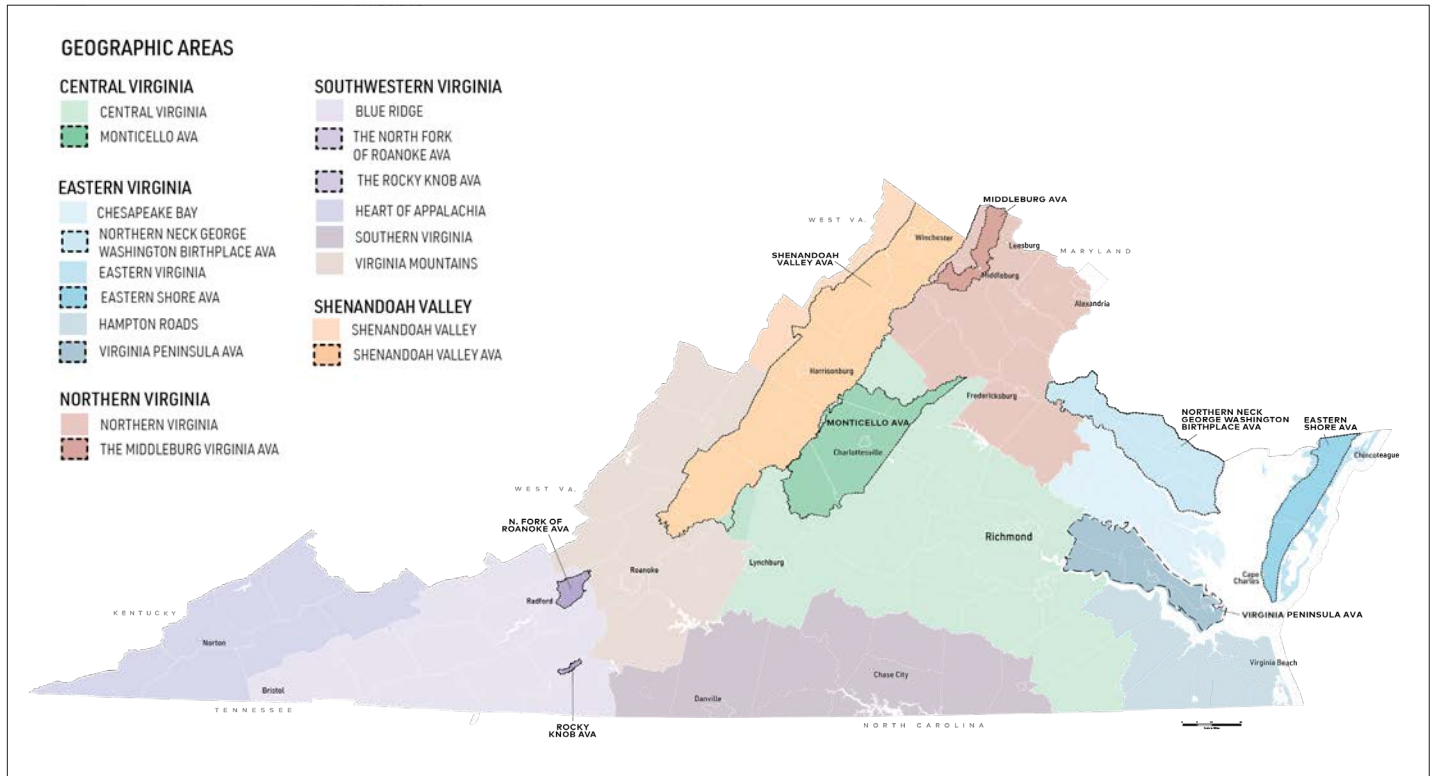
2022 FRUIT LOSS

CAUSE	COUNT OF RESPONSES	% OF TOTAL
Frost	32	24%
Weather event (non-frost)	23	17%
Labor shortage	18	14%
No buyer for fruit	15	11%
Disease	11	8%
Other	33	25%

Data was collected to estimate the tonnage of fruit lost during the growing season and the causes. **In total, 106 respondents estimated a total of 675 tons being lost.**

2022 PRODUCTION BY GEOGRAPHY

The geographic areas in the report follow the map below. The Central Virginia, Northern Virginia and Shenandoah Valley regions are broken into individual sections. The Eastern Virginia area includes the Eastern Shore, Chesapeake Bay and Hampton Roads regions. The Southwestern Virginia area includes the Blue Ridge, Heart of Appalachia, Southern Virginia and Virginia Mountain regions. Any county with less than three reporting operations were merged together and labeled "other" within their respective regions.



GEOGRAPHIC PRODUCTION SUMMARY TABLE

AREA	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	% OF TOTAL ACRES
Central Virginia	1,924	1,705	218	4,578	41.1%
Eastern Virginia	323	262	61	535	6.9%
Northern Virginia	1,433	1,274	159	3,499	30.6%
Shenandoah Valley	692	630	62	1,256	14.8%
Southwestern Virginia	312	270	42	508	6.7%
Total	4,683	4,141	542	10,376	-

PRODUCTION BY COUNTY

AREA	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	% OF TOTAL ACERS
Central Virginia	1,924	1,705	218	4,578	41.1%
Albemarle County	1,043	904	140	2,528	22.3%
Amherst County	41	40	1	92	0.9%
Goochland County	39	29	10	17	0.8%
Greene County	29	21	8	38	0.6%
Madison County	108	85	24	218	2.3%
Nelson County	267	255	12	793	5.7%
Orange County	281	272	9	634	6.0%
Central Virginia Region- Other Counties	115	99	16	258	2.5%
Eastern Virginia	323	262	61	535	6.9%
New Kent County	41	30	12	92	0.9%
Westmoreland County	58	55	3	123	1.2%
Chesapeake Bay Region- Other Counties	87	74	13	98	1.8%
Eastern Shore Region- Other Counties	34	33	1	122	0.7%
Hampton Roads Region- Other Counties	104	71	33	100	2.2%
Northern Virginia	1,433	1,274	159	3,499	30.6%
Fauquier County	311	276	36	733	6.6%
Loudoun County	867	775	93	2,324	18.5%
Prince William County	16	16	1	5	0.3%
Rappahannock County	147	128	19	373	3.1%
Spotsylvania County	34	29	6	48	0.7%
Northern Virginia Region- Other Counties	58	52	7	15	1.2%

PRODUCTION BY COUNTY

AREA	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	% OF TOTAL ACERS
Shenandoah Valley	692	630	62	1,256	14.8%
Augusta County	99	82	17	165	2.1%
Clarke County	42	42	0	70	0.9%
Frederick County	49	49	0	46	1.0%
Rockbridge County	43	36	7	72	0.9%
Rockingham County	87	81	7	278	1.9%
Shenandoah County	337	315	22	549	7.2%
Warren County	33	24	9	57	0.7%
Shenandoah Valley Region- Other Counties	3	3	0	18	0.1%
Southwestern Virginia	312	270	42	508	6.7%
Bedford County	27	23	4	25	0.6%
Botetourt County	66	47	19	17	1.4%
Mecklenburg County	40	37	3	148	0.9%
Blue Ridge Region- Other Counties	105	99	6	204	2.3%
Heart of Appalachia Region- Other Counties	5	4	2	13	0.1%
Southern Virginia region- Other Counties	41	33	8	27	0.9%
Virginia Mountain Region- Other Counties	27	27	0	74	0.6%
Total	4,683	4,141	542	10,376	-

YEARLY COMPARISONS

YEAR	TOTAL ACREAGE	BEARING	NON-BEARING	TONS
2011	3,157	2,784	373	7,749
2012	3,466	2,974	492	7,532
2013	3,446	3,088	358	6,862
2014	3,569	3,144	425	8,039
2015	3,844	3,172	672	8,682
2016*	3,007	2,562	445	6,530
2017*	3,005	2,484	521	7,761
2018*	2,710	2,366	344	4,709
2019*	3,744	2,969	775	7,412
2021	4,386	3,855	531	9,791
2022	4,683	4,141	542	10,376
2022 Estimated**	5,196	-	-	10,988

* When comparing previous reports, 2016-2019 should be used with caution as lower response rates resulted in decreased aggregate data points. A full report was not published in 2020.

**It is estimated that a minimum of 513 total acres are unreported from 76 vineyard non-respondents and 622 additional tons were processed by 60 non-responding winery operations. These estimates were calculated based on existing industry data and knowledge.

In order to obtain the most accurate data, industry-wide participation is key. Thank you to all of this year's participants for contributing to this report. For additional information please email, information@virginiawine.org.