



2023 COMMERCIAL WINE GRAPE REPORT



METHODOLOGY

The 2023 Commercial Wine Grape Report was conducted on behalf of the Virginia Wine Board with management from the Virginia Vineyards Association (VVA) and data collection by the Virginia Wine Board Marketing Office (VWBMO).

The VWBMO previously managed the survey from 2010-2015 and has since in 2021. 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.

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 June of 2023 and remained open until February 2024, receiving responses from 348 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 in November, the second survey collected online responses through February 2024 from 192 wine producers. These producers provided details on the tonnage of grapes processed at their facilities in 2023. Data collected included information on all varieties processed and the price paid for fruit that was contracted or purchased at market. Additionally, questions were added at the end of the survey to measure estimates on unreported tonnage from both wineries and growers. An additional 32 growers responded to these questions. Contact information for both surveys was compiled from membership databases from the VVA, VWBMO, and Virginia Wineries Association.



2023 VIRGINIA VINEYARD ASSOCIATION HARVEST RECAP

After the 2022 harvest, the VVA began asking if there was a grape shortage or a grape glut in Virginia. The question remains when reviewing the 2023 harvest and when looking ahead to 2024. The VVA Exchange Board was full of fruit-for-sale listings early in the season last year. Vineyard owners are looking to secure earlier contracts, some are looking for multi-year contracts. Based on survey responses, 86% of participants stated that they sold all of their fruit. The remaining respondents reporting losses due to lack of buyers or weather tallied to over 400 tons of unreported fruit which is shown in more detail on page six.

Interviews with vineyard owners and winemakers show that they are happy with the quality of the fruit in 2023 and looking forward to the wines produced. The fruit was very clean and ripe with most areas reporting lower than normal disease pressure this year. The yields were smaller due to less rainfall throughout the season. These lower yields along with a decline in new plantings and the removal of under performing vines resulted in the total tonnage being lower in 2023.

The yields for the Vinifera grapes went down to 2.3 tons per acre versus the 2.5 ton average in 2022. When accounting for the lost vinifera fruit reported, the yield was 2.4 tons per acre. The yield reduction for hybrids was more profound with 1.9 tons per acre versus 2.5 tons per acre in 2022. When adding back in the lost hybrid fruit the tons per acre increased to 2.0 tons per acre. The VVA took a closer look at the Vinifera data points and found the tonnage per acre numbers were reliable. Further surveying of the majority of larger vineyard sites in Virginia revealed that most were cropping their yields down to below 3 tons per acre at the winemaker's request. More research will be done on the hybrid yield numbers in the next survey.

Items of note from this year's data:

- Cabernet Franc is still the most widely planted grape varietal in Virginia
- Merlot and Petit Verdot both surpassed Chardonnay in total acreage
- When including estimates of non-respondent tonnage, Virginia had more than 9,000 tons of grapes processed in 2023
- There is half the non-bearing acreage in this year's report compared to 2021 and 2022, showing a slowdown in new plantings

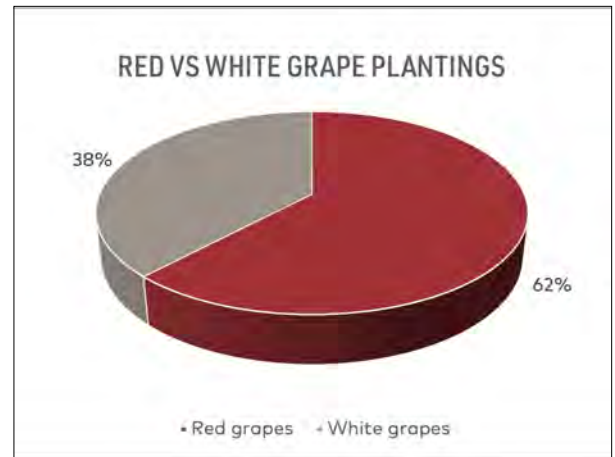
The VVA thanks everyone for participating in these surveys and contributing to the 2023 Virginia Commercial Wine Grape Report. Additionally, thank you to all who attended the 2024 VVA Winter Technical meeting where these topics were discussed. The VVA will again be working on this survey to produce the 2024 Virginia Commercial Wine Grape Report with support from the VWBMO. We will continue to aim for higher response rates to obtain accurate and valuable information for the industry.

- Virginia Vineyards Association Board

2023 PRODUCTION SUMMARY

In 2023, over 4,300 acres of grapes and nearly 9,000 tons of processed fruit were reported during data collection. The total acreage marks a 364 acre decrease from 2022, nearly 100 of which were reported as being removed plantings, 70 acres were removed due to duplicate data and the remaining acreage belonged to non-respondents. The decrease in processed tonnage in 2023 can be partially attributed to the decrease in acreage but also lower yields from the 2023 harvest.

Cabernet Franc remains the most planted variety, with Merlot and Petit Verdot following as the varieties with the next highest total acreage planted. In 2023, there was a 123 acre decrease in reported plantings of Chardonnay. These changes impact the ratio of red to white grapes planted across the state. Red grapes have higher acreage historically, but 2023 shows an even greater gap with 62% of total acres planted belonging to red grape varieties.



Vinifera grapes make up 81% of plantings with hybrid grapes accounting for 15% 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.

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. In 2023, there were instances of significant last-minute price decreases on select varieties. These occurrences were not included in the aggregate data. Price points less than \$2,000 for Vinifera and under \$1,000 for Hybrid varieties were removed from the data set. Impacted varieties are marked in the charts below. The approach to these data points will be reevaluated if discounts occur again in 2024.

2023 PRODUCTION SUMMARY

VARIETY	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS
Vinifera	3,485	3,232	253	7,420
Hybrid	643	621	22	1,205
American	190	178	12	291
Total	4,318	4,031	287	8,916

PRODUCTION BY VARIETY- VINIFERA

VARIETY	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	PRICING			
					WEIGHTED MEAN	MEDIAN	25TH PERCENTILE	75TH PERCENTILE
Vinifera	3,485	3,232	253	7,420	\$2,728	\$2,800	\$2,600	\$2,970
Cabernet Franc	661	615	46	1,318	\$2,677	\$2,700	\$2,500	\$2,900
Merlot ¹	463	406	57	1,097	\$2,706	\$2,750	\$2,650	\$2,800
Petit Verdot ¹	447	424	23	857	\$2,868	\$2,800	\$2,650	\$3,083
Chardonnay ¹	445	424	21	1,107	\$2,583	\$2,600	\$2,500	\$2,700
Viognier ¹	300	285	15	539	\$2,699	\$2,750	\$2,700	\$3,000
Cabernet Sauvignon ¹	276	262	14	520	\$2,656	\$2,800	\$2,500	\$2,800
Petit Manseng ¹	200	185	15	379	\$2,763	\$2,800	\$2,700	\$2,988
Sauvignon Blanc	99	90	10	321	\$2,860	\$2,900	\$2,600	\$3,050
Pinot Grigio/ Gris	83	74	9	131	\$2,706	\$2,500	\$2,500	\$3,000
Tannat ¹	78	76	2	222	\$3,035	\$3,000	\$2,900	\$3,188
Albariño	60	51	9	96	\$2,670	\$2,800	\$2,600	\$2,950
Riesling	53	53	-	75	\$2,330	\$2,400	\$2,200	\$2,950
Pinot Noir	41	30	11	80	-	-	-	-
Nebbiolo	39	36	3	60	-	-	-	-
Malbec	28	28	-	70	\$2,813	\$2,800	\$2,800	\$2,805
Touriga Nacional	18	15	3	49	-	-	-	-
Blafränkisch	18	18	-	23	-	-	-	-
Roussanne	15	14	1	42	-	-	-	-
Syrah/Shiraz	14	11	4	33	-	-	-	-
Barbera	13	12	1	19	-	-	-	-
Grüner Veltliner	11	11	-	41	\$2,700	\$2,750	\$2,650	\$2,838
Other Vinifera	123	113	10	341	-	-	-	-

PRODUCTION BY VARIETY- HYBRID & AMERICAN

VARIETY	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	PRICING			
					WEIGHTED MEAN	MEDIAN	25TH PERCENTILE	75TH PERCENTILE
Hybrid	643	621	22	1,205	\$1,710	\$1,750	\$1,600	\$1,800
Chambourcin ¹	211	204	7	412	\$1,668	\$1,738	\$1,700	\$1,800
Vidal Blanc	200	192	8	436	\$1,719	\$1,789	\$1,675	\$1,800
Traminette	98	98	-	120	\$1,624	\$1,725	\$1,538	\$1,800
Chardonnay	51	49	2	129	\$1,895	\$1,800	\$1,600	\$2,000
Seyval Blanc	48	48	1	96	-	-	-	-
Other Hybrid	35	30	5	12	-	-	-	-
American	190	178	12	291	\$2,485	\$2,650	\$2,329	\$2,800
Norton	130	124	5	245	\$2,626	\$2,750	\$2,555	\$2,850
Niagara	39	38	1	15	-	-	-	-
Other American	22	16	6	32	-	-	-	-
Total	4,318	4,031	287	8,916				

¹Indicates varieties with discounted fruit price points removed from the data set. See production summary on page four for additional details.

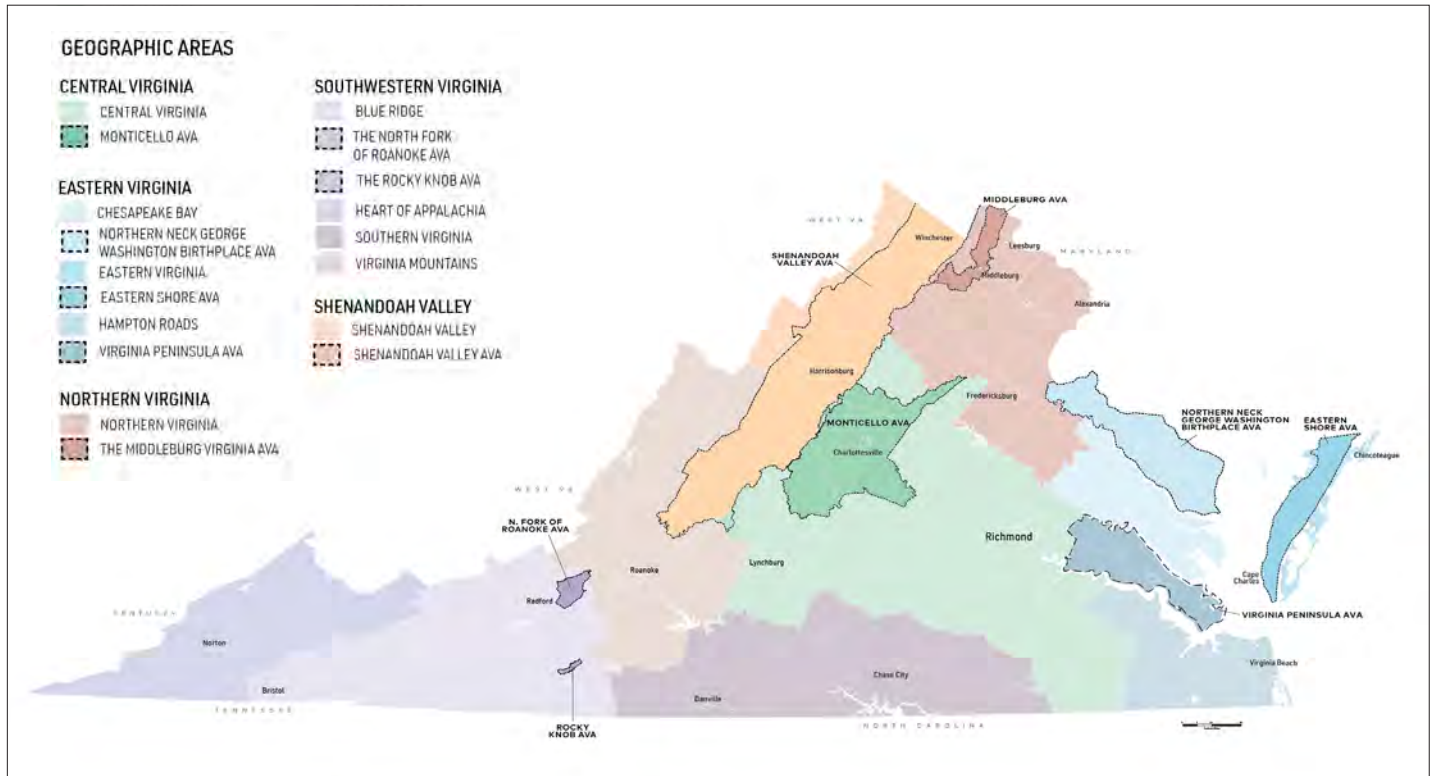
2023 FRUIT LOSS

Data was collected to estimate the tonnage of fruit lost during the growing season either due to weather issues or a lack of buyer. Overall, 86% of respondents had no unreported fruit. Of the 18 respondents who lost fruit, 83% was due to a lack of buyer. These 'lack of buyer' responses totaled to 409 tons of fruit that were not sold in 2023. The breakdown of these unsold varieties can be seen in the chart to the right.

VARIETY	% OF TOTAL
Cabernet Franc	21%
Vidal Blanc	18%
Chardonnay	17%
Merlot	10%
Cabernet Sauvignon	8%
Other Vinifera	25%
Other Hybrid	1%

2023 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 Mountains regions. Any county with less than three reporting operations were merged together and labeled "other" within their respective regions.



GEOGRAPHIC PRODUCTION SUMMARY

AREA	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	% OF TOTAL ACRES
Central Virginia	1,702	1,572	130	4,271	39%
Eastern Virginia	354	317	37	447	8%
Northern Virginia	1,293	1,236	57	2,768	30%
Shenandoah Valley	633	593	40	1,016	15%
Southwestern Virginia	336	314	23	414	8%
Total	4,318	4,031	287	8,916	-

PRODUCTION BY COUNTY

AREA	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	% OF TOTAL ACRES
Albemarle County	779	711	68	2,405	18%
Loudoun County	776	748	29	1,795	18%
Orange County	324	296	28	685	8%
Shenandoah County	283	267	16	339	7%
Fauquier County	267	244	23	613	6%
Nelson County	262	248	14	671	6%
Central Virginia Region- Other Counties	172	162	11	199	4%
Rappahannock County	150	145	6	265	3%
Blue Ridge Region- Other Counties	142	139	3	178	3%
Madison County	129	120	9	229	3%
Chesapeake Bay Region- Other Counties	125	106	18	63	3%
Northern Virginia Region- Other Counties	99	99	-	95	2%
Rockingham County	91	84	7	217	2%
Augusta County	90	88	2	266	2%
Hampton Roads Region- Other Counties	83	69	14	112	2%
Westmoreland County	64	60	4	96	1.5%
Southern Virginia Region- Other Counties	60	44	16	10	1.4%
Rockbridge County	52	39	13	52	1.2%
New Kent County	51	50	1	68	1.2%
Frederick County	51	51	-	26	1.2%
Botetourt County	47	47	-	27	1.1%

PRODUCTION BY COUNTY

AREA	TOTAL ACRES	BEARING ACRES	NON-BEARING ACRES	TONS	% OF TOTAL ACRES
Mecklenburg County	41	38	3	164	1.0%
Amherst County	36	35	1	82	0.8%
Warren County	35	33	2	87	0.8%
Eastern Shore Region- Other Counties	32	32	-	108	0.7%
Clarke County	29	29	-	29	0.7%
Bedford County	24	24	-	14	0.6%
Heart of Appalachia Region- Other Counties	11	11	-	20	0.3%
Virginia Mountain Region- Other Counties	11	11	-	1	0.3%
Shenandoah Valley Region- Other Counties	3	3	-	-	0.1%
Total	4,318	4,031	287	8,916	-

BREAKDOWN OF GEOGRAPHIC AREAS

Central Virginia

- Albemarle County
- Amherst County
- Madison County
- Nelson County
- Orange County
- Central Virginia Region- Other

Eastern Virginia

- New Kent County
- Westmoreland County
- Chesapeake Bay Region- Other
- Eastern Shore Region- Other
- Hampton Roads Region- Other

Northern Virginia

- Fauquier County
- Loudoun County
- Rappahannock County
- Northern Virginia Region- Other

Shenandoah Valley

- Augusta County
- Clarke County
- Frederick County
- Rockbridge County
- Rockingham County
- Shenandoah County
- Warren County
- Shenandoah Valley Region- Other

Southwestern Virginia

- Bedford County
- Botetourt County
- Mecklenburg County
- Blue Ridge Region- Other
- Heart of Appalachia Region- Other
- Southern Virginia Region- Other
- Virginia Mountain Region- Other

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
2023	4,318	4,031	287	8,916

** 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.*

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.