

Central Coast Insights





Generalized Market 2020 vs 2021

2020

- Over Supplied
- Price- CA Brand Driven
 - Off Premise
 - Removals
- JIT - Reactionary

2021

- Supply Moderating- Short
- Price – CA Brand Driven, Middle Tier Presence
 - Off Premise
 - Planting
- Proactive Sourcing



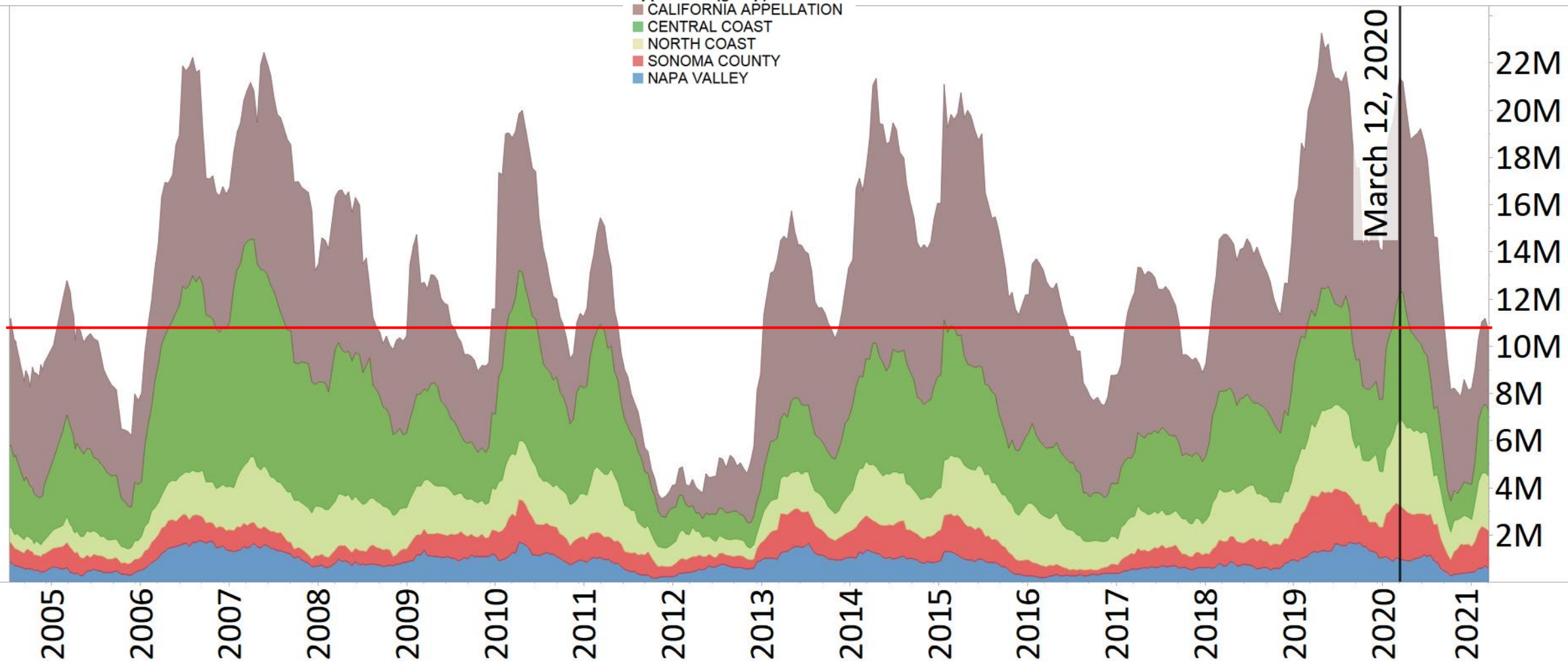
Tons Crushed by Region

	Tons Crushed 2020	Tons Crushed 2019	Net Gain/Loss	Equivalent Gallons	% Change	2020 %Δ to 5Y Avg
North Coast	364,380	524,942	(160,562)	(26,493,000)	-31%	-29%
Central Coast	403,959	480,478	(76,519)	(12,626,000)	-16%	-19%
Northern Interior	915,723	1,030,288	(114,565)	(18,903,000)	-11%	-8%
Southern Interior	1,704,384	1,854,984	(150,601)	(24,849,000)	-8%	-13%



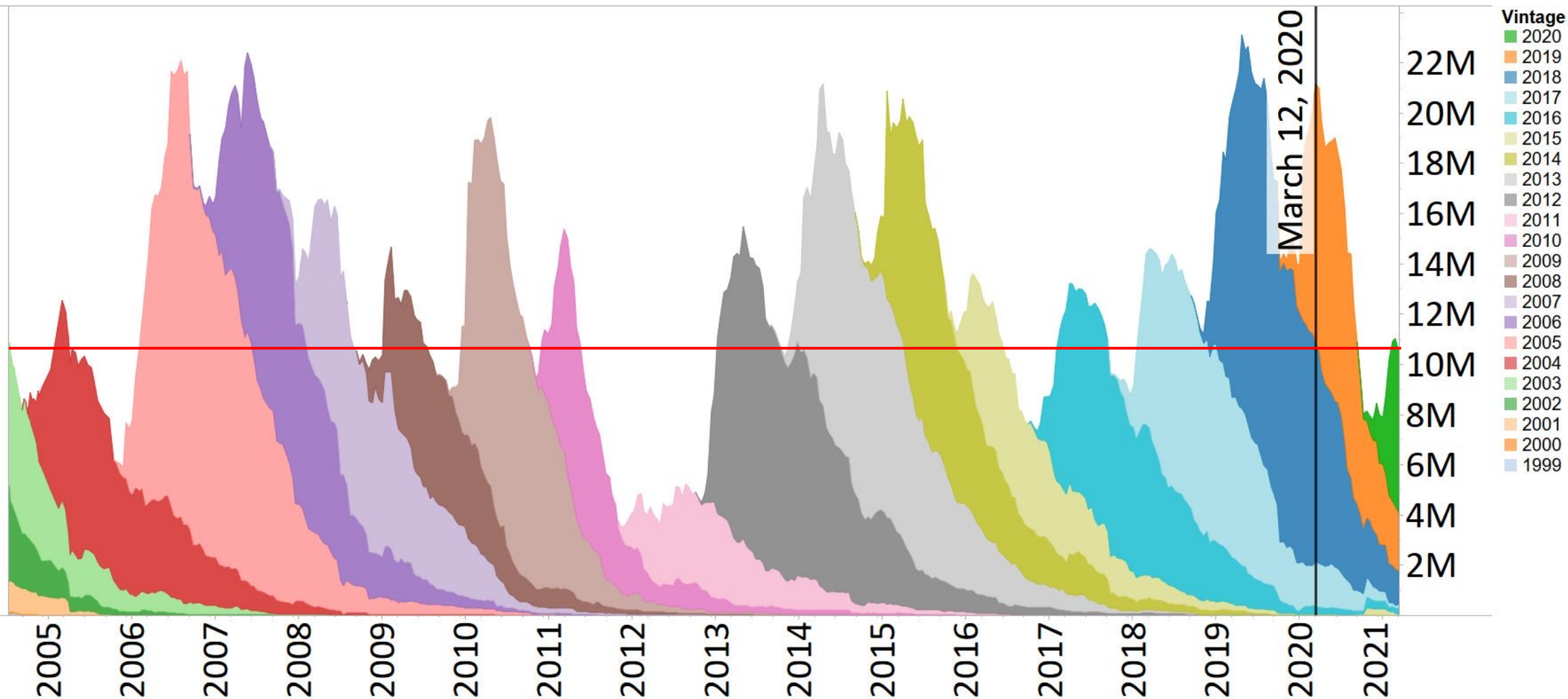
Bulk by Region

Appellation (group)
CALIFORNIA APPELLATION
CENTRAL COAST
NORTH COAST
SONOMA COUNTY
NAPA VALLEY





Bulk by Vintage



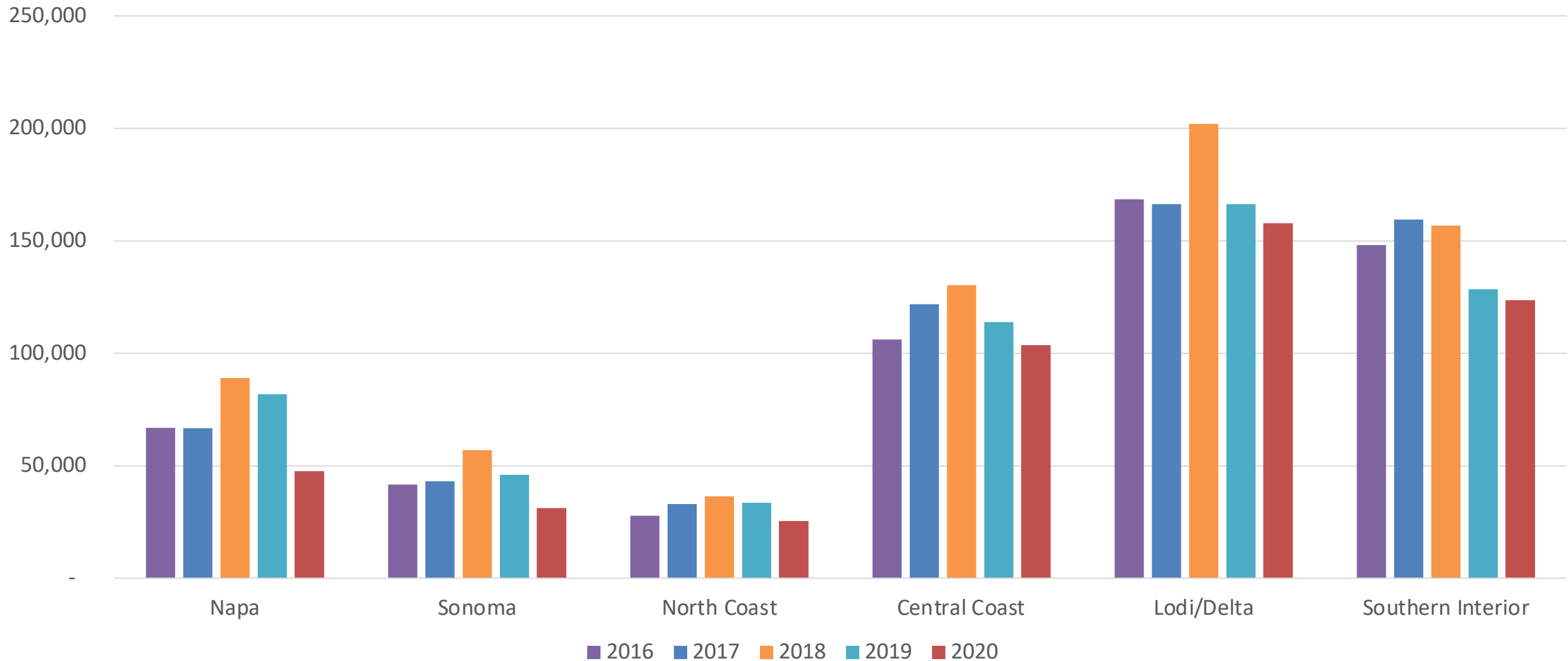


Cabernet Sauvignon



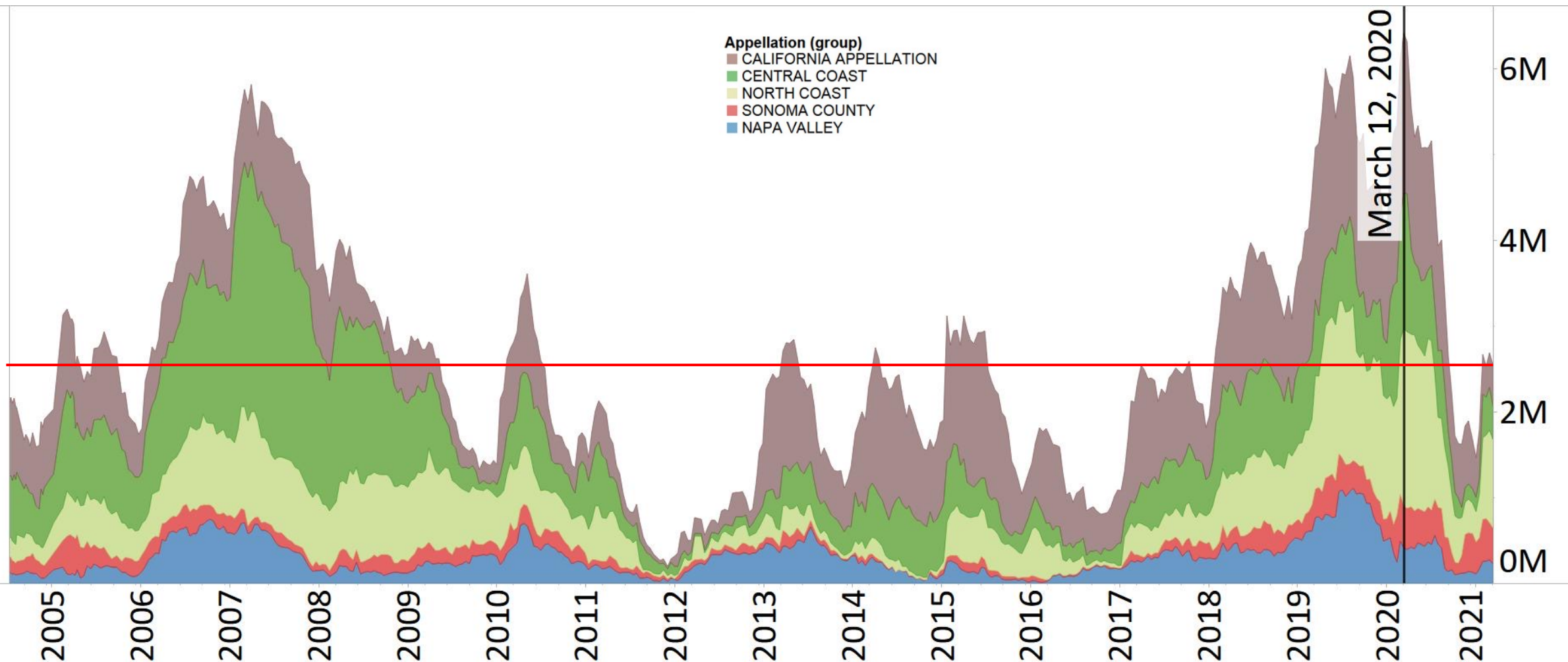


Cabernet Sauvignon Recent Tons Crushed





Cabernet Sauvignon Bulk Gallons Actively for Sale



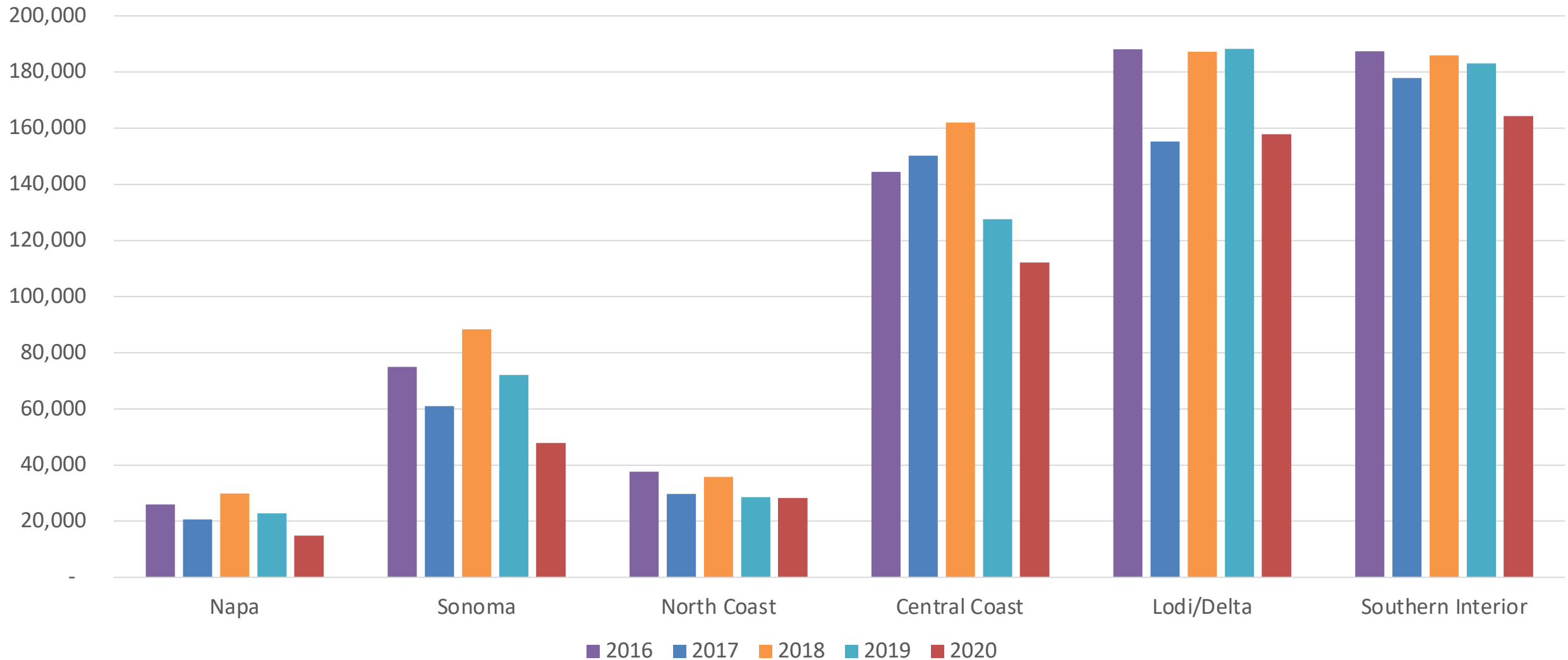


Chardonnay



Chardonnay

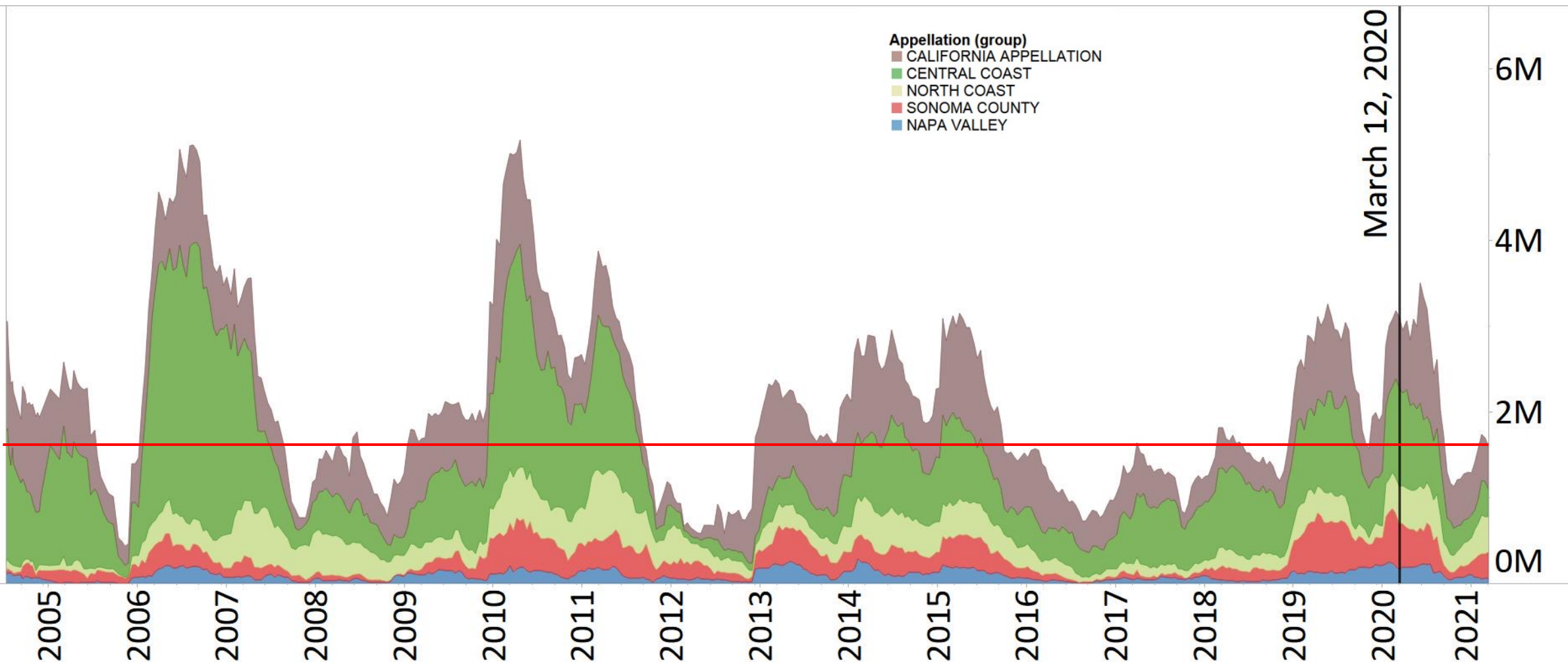
Recent Tons Crushed





Chardonnay

Bulk Gallons Actively for Sale



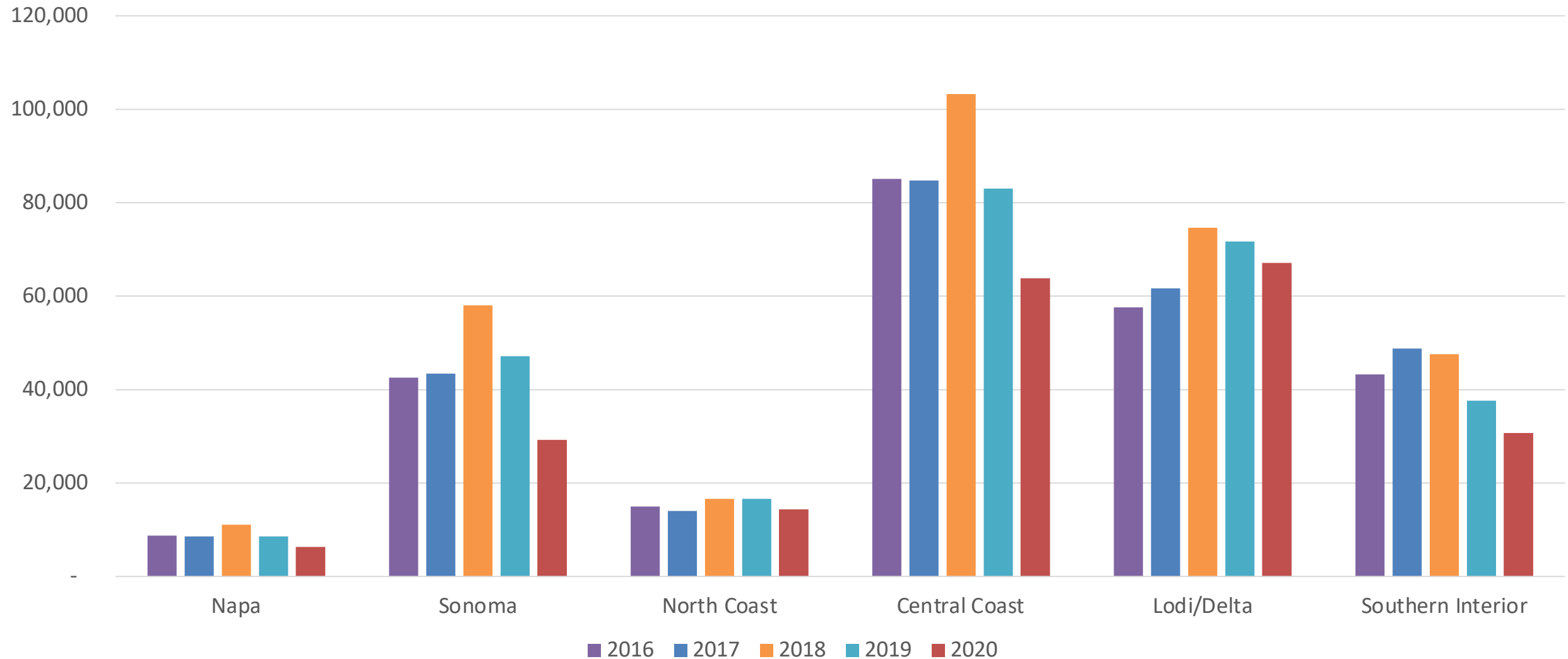


Pinot Noir



Pinot Noir

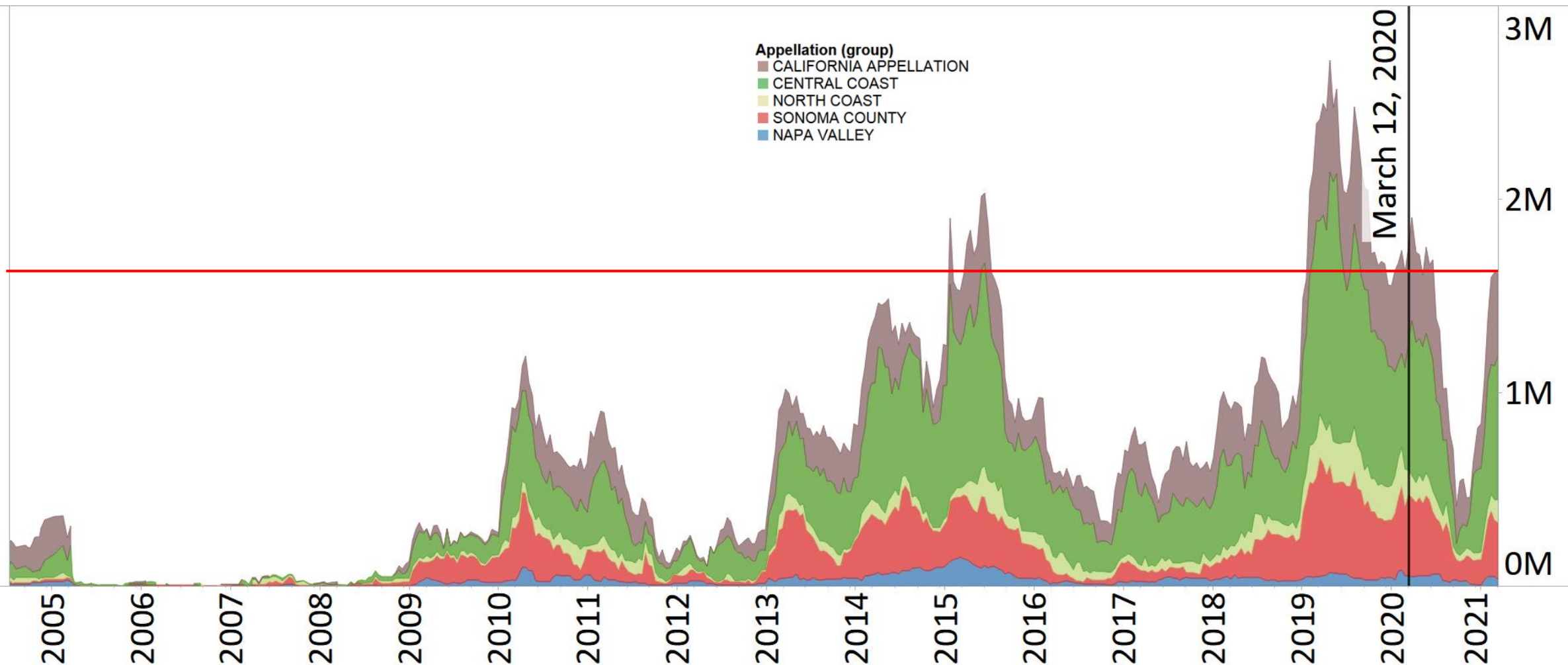
Recent Tons Crushed





Pinot Noir

Bulk Gallons Actively for Sale





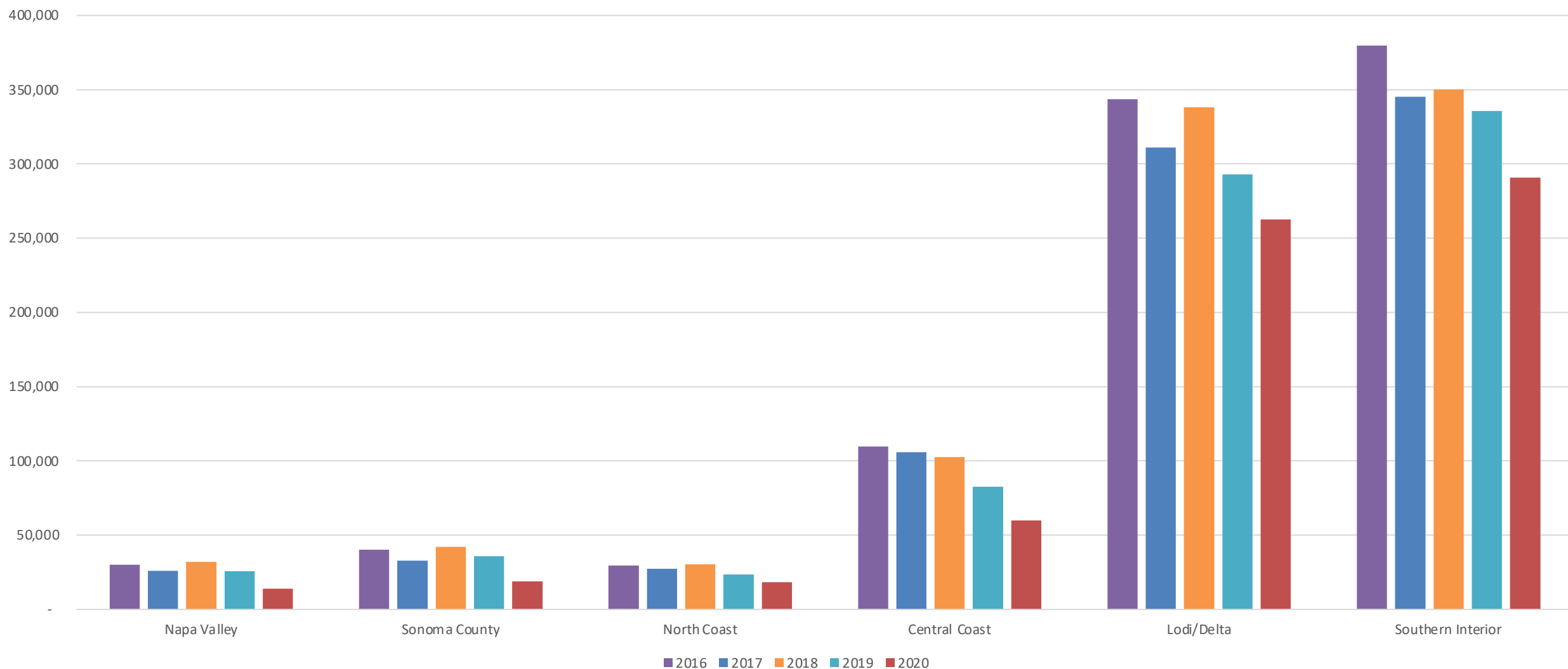
Red Blenders





Red Blenders

Recent Tons Crushed





Leaving 2020 Behind Us

- Value Brands
- Vineyard Evolution
- Balancing of Inventories
- Integrated Approach to Sourcing (New)
- Economic Uncertainty
- Price vs Quality- Divergence

Thank You!

