



2024 Washington State Bulk Wine and Wine Grape Supply

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State of the Industry

- Volume/Value Price Tier in Steep Decline
- Growth in Premium and Luxury Brands
- Growth of mid-sized wineries
- Restaurant Staff Ripple Effect
- Industry renegades from other fields with new ideas about packaging and marketing



Oversupply Market

- Washington bulk wine volumes may well rival or surpass California volumes.
- CAWG recommends CA remove 30,000 acres of wine grapes. Insiders say that number may really be as large as 100,000 acres (20% of grape production), Modesto-South
- Washington is likely at least 20% over supplied. 10,000-12,000 acre removal would return the market to balance. 10,000 acres @ 6 tons per acre would represent 10,000,000 gallons of wine, representing approximate current wine in storage over the past 2 vintages.

Buy Side of Market

Early interest in WA 2023 vintage

Freeze events may drive market into opportunity spaces

Sauvignon Blanc demand remains strong



Bulk Wine as Opportunity Cost

- 20M gallons
 - limits throughput in wineries
 - stainless cooperage is finite
 - supply pressure exerted on grape market
 - demand doesn't meet supply, and value declines
 - buyers don't exist to remedy supply
 - large buyers in WA all in sales decline
 - ditto large buyers in CA



Change of Direction

- Cooperative Distillation could create new opportunities, be well received by younger consumers
- New smoke taint technology requires large volume of high proof
- RTDs, alcohol related products, vodka
- Re-sized grape market could raise pricing, imaging
- New packaging and marketing ideas from industry outsiders has momentum
- Diversity, Health, and Sustainability are important to new consumers



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