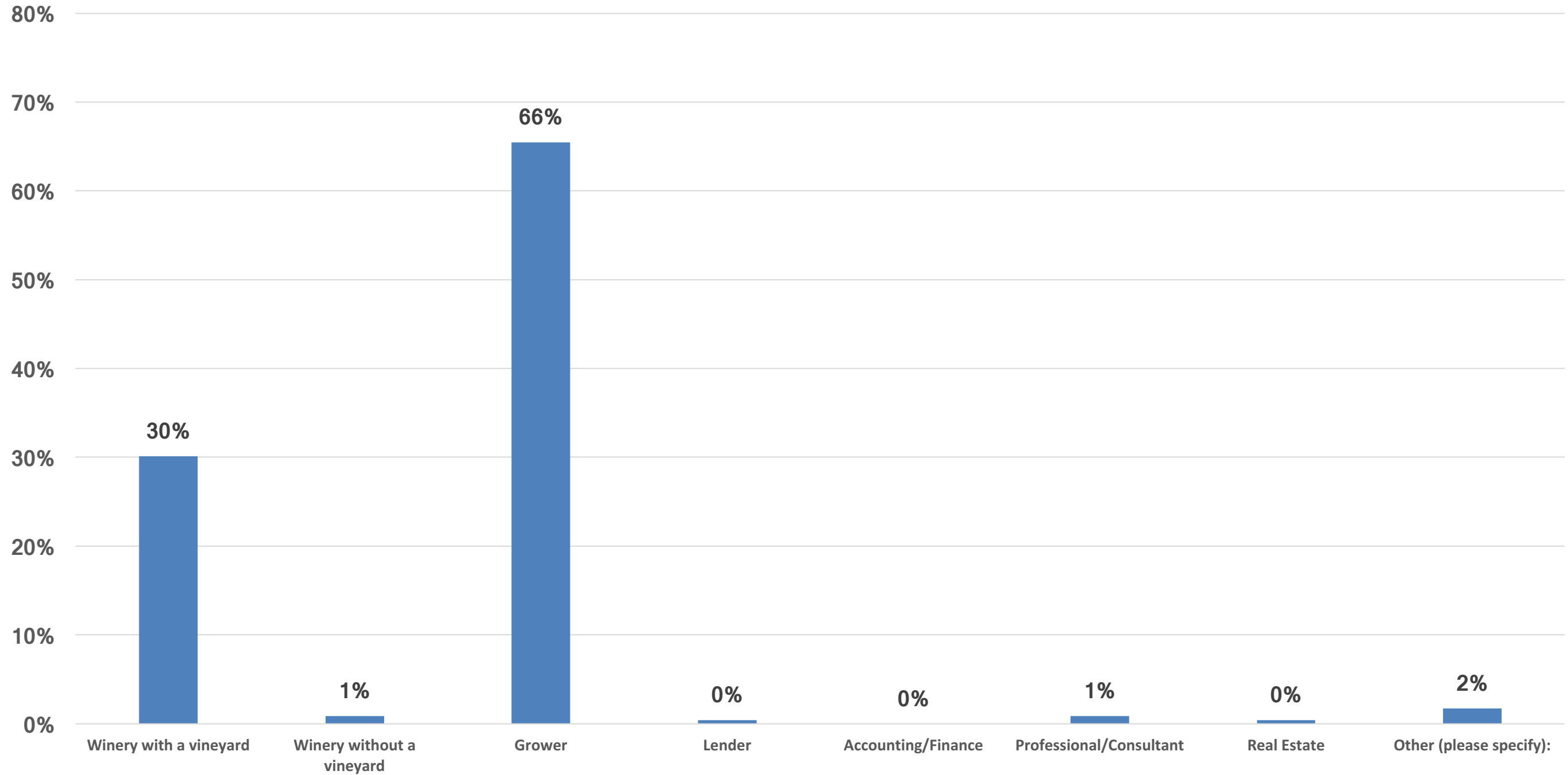


Lodi Vineyard & Wine
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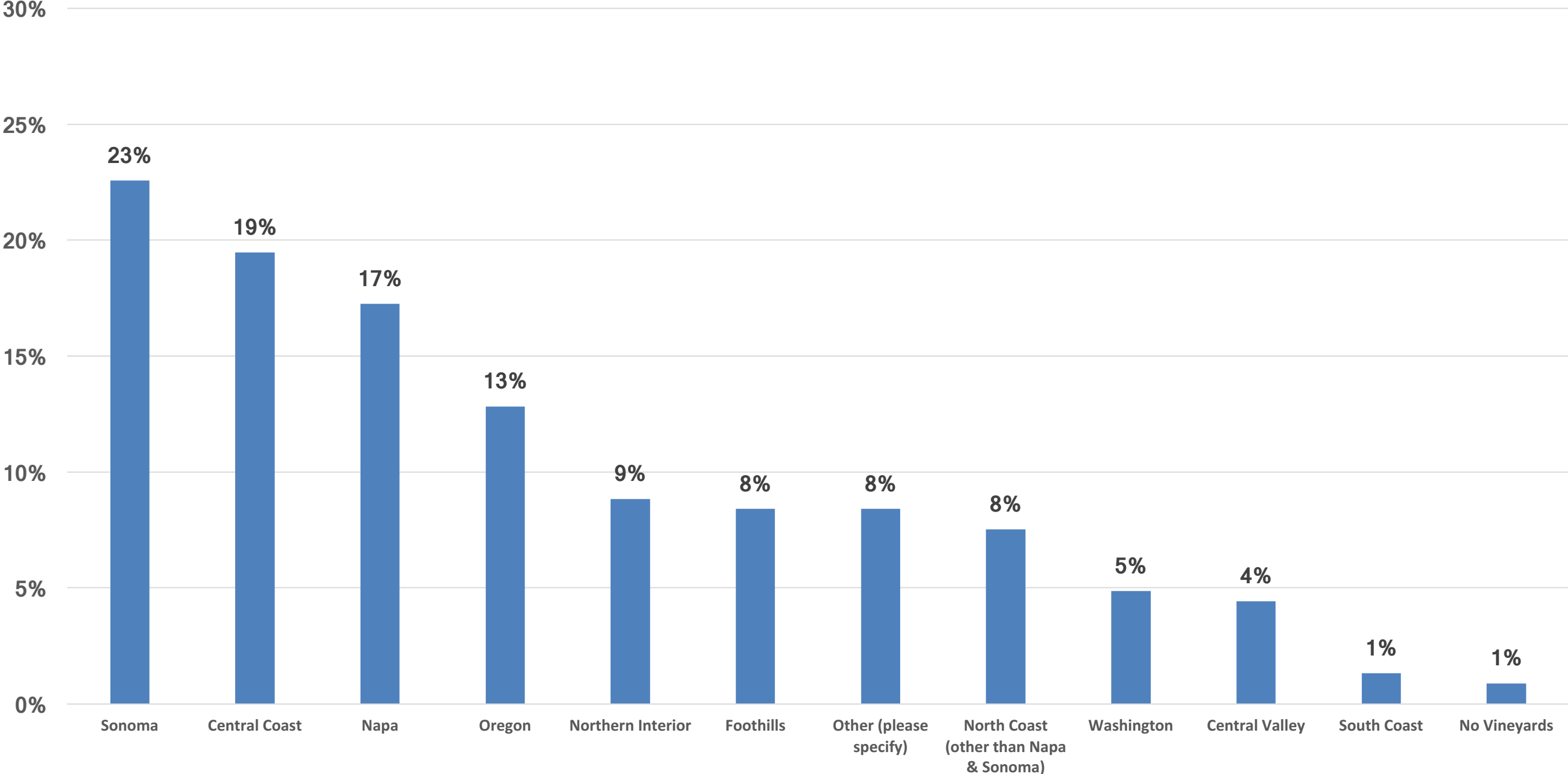
2018 Vineyard Economics Survey

- 229 respondents
- Approximately a third of the responders were wineries with vineyards
- Two thirds were growers
- Statewide and Oregon
- Northern Interior aka “Lodi”, Foothills and Other were 25%

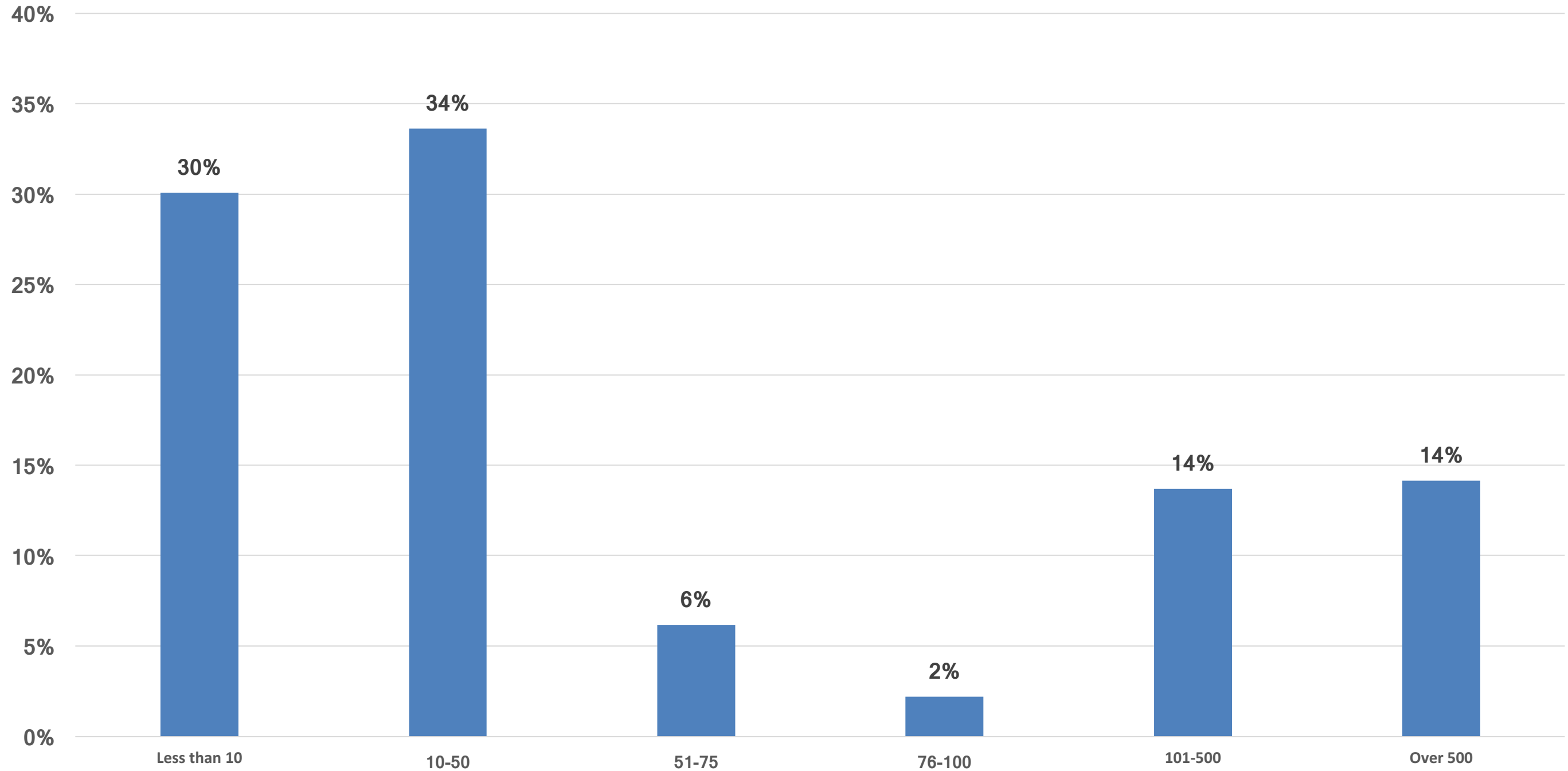
1) Which type of business best describes your company?



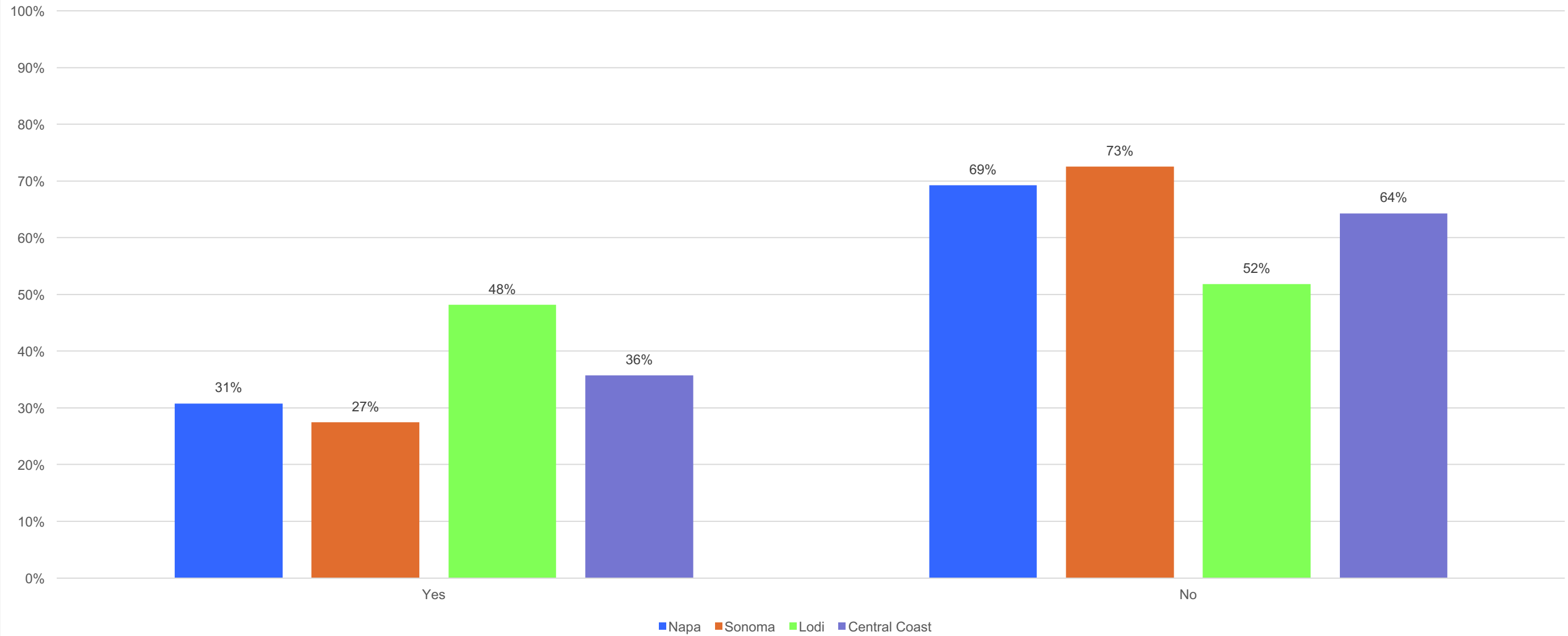
2) Where are your vineyards located? (Please choose as many as apply)



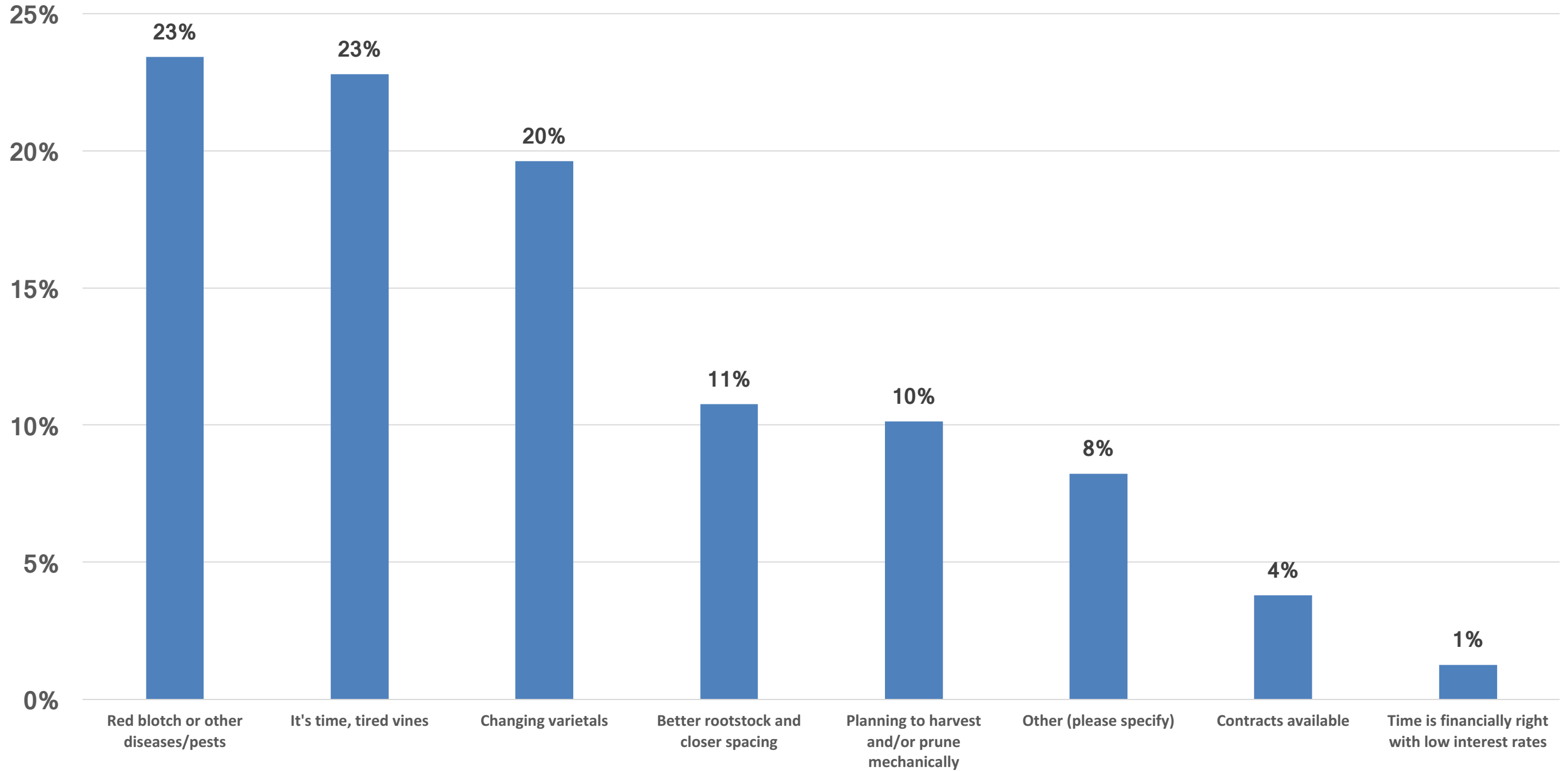
3) How many acres do you have planted now?



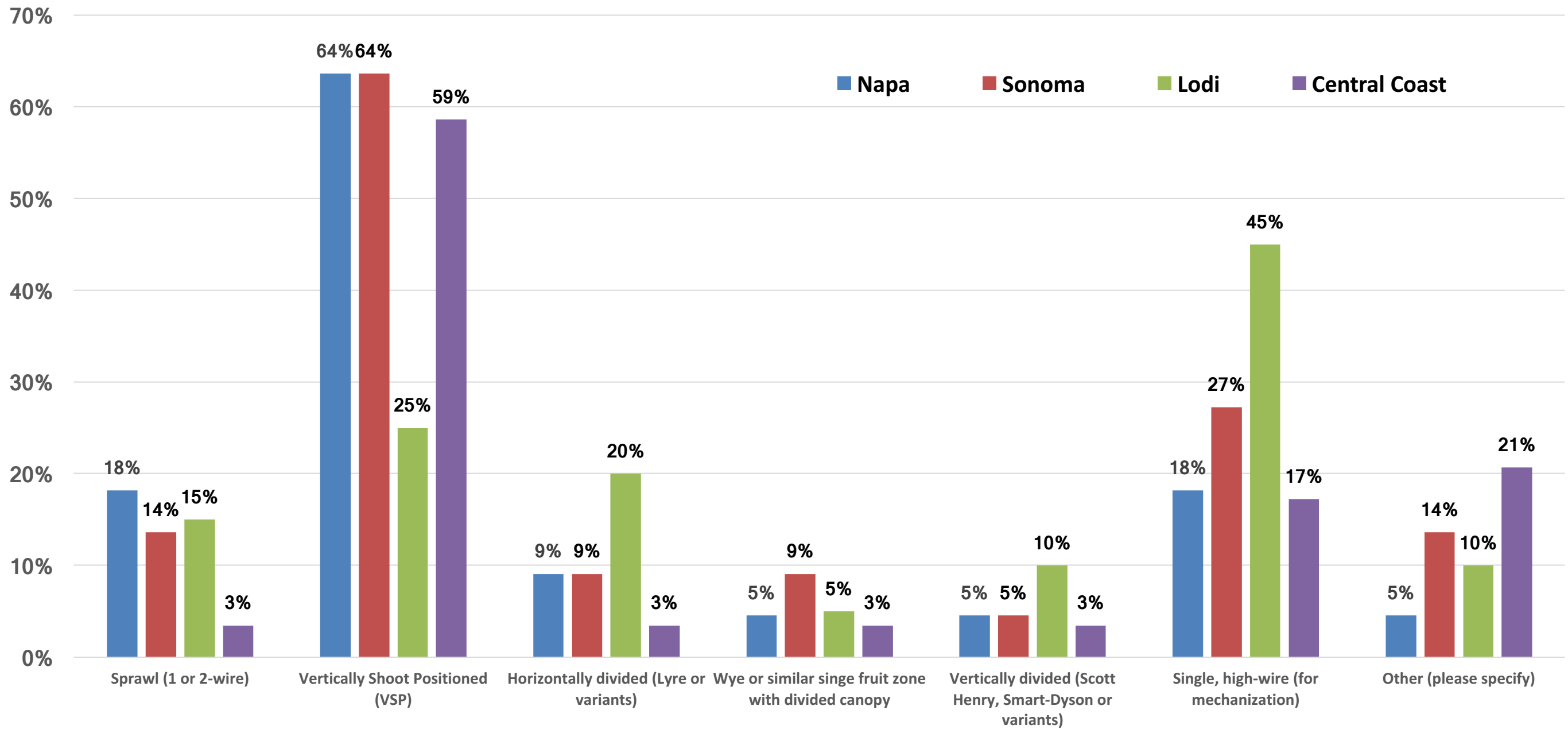
4) Will you be planting new acreage this year?
By Region (Napa, Sonoma, Lodi, Central Coast)



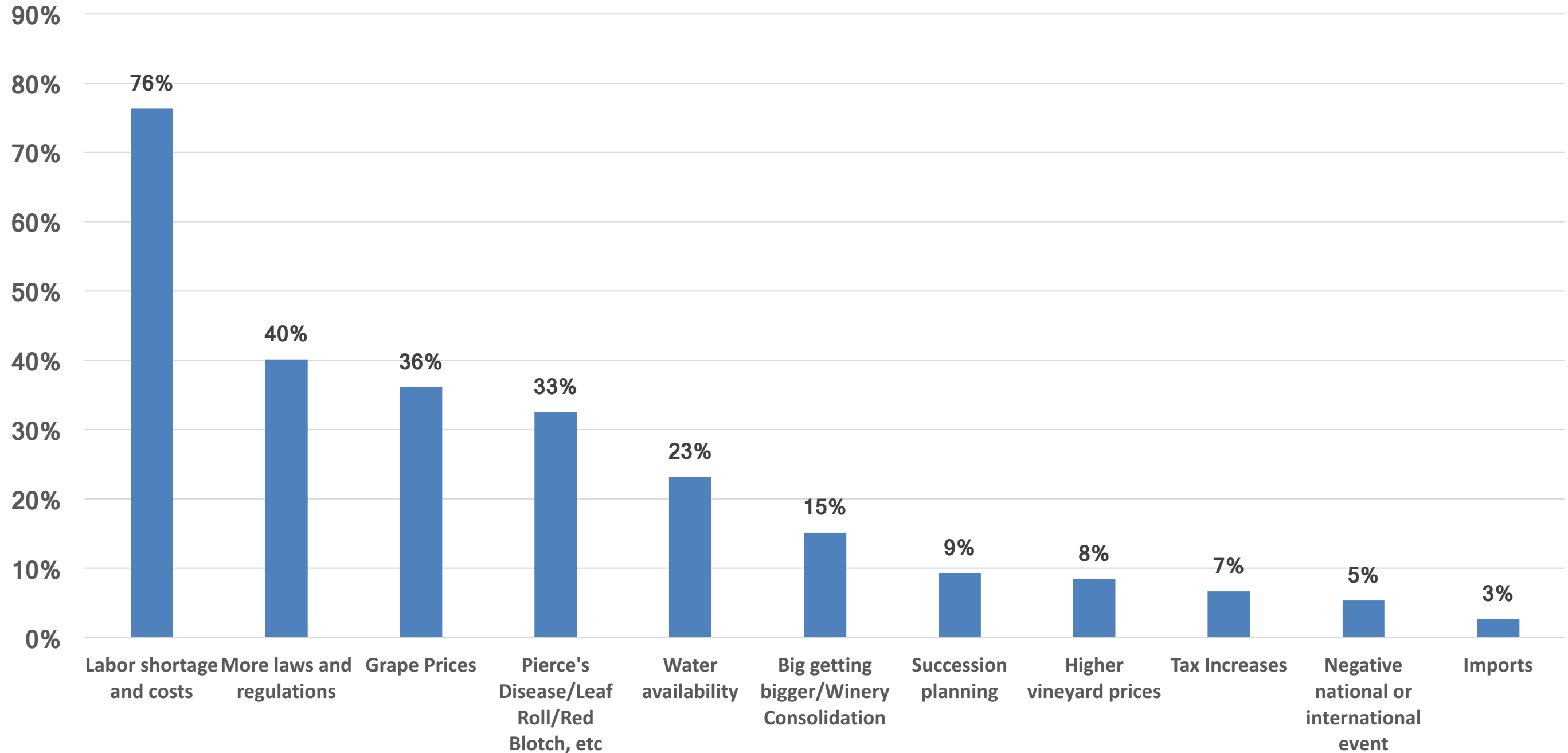
5) Why are you replanting or re-developing your vineyard(s) this year?



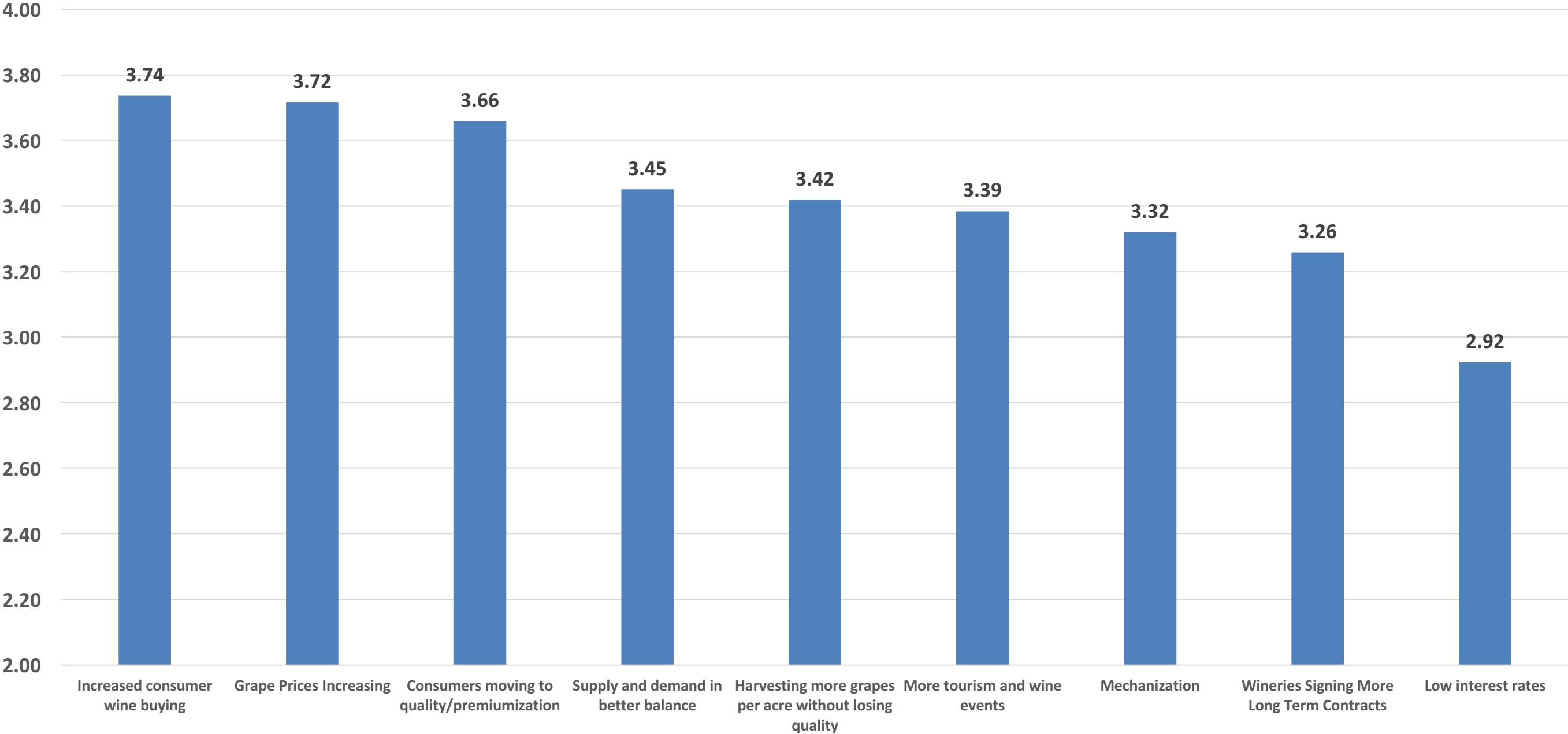
6) If you are planting or replanting, what trellising system are you deploying?
By Region (Napa, Sonoma, Lodi, Central Coast)



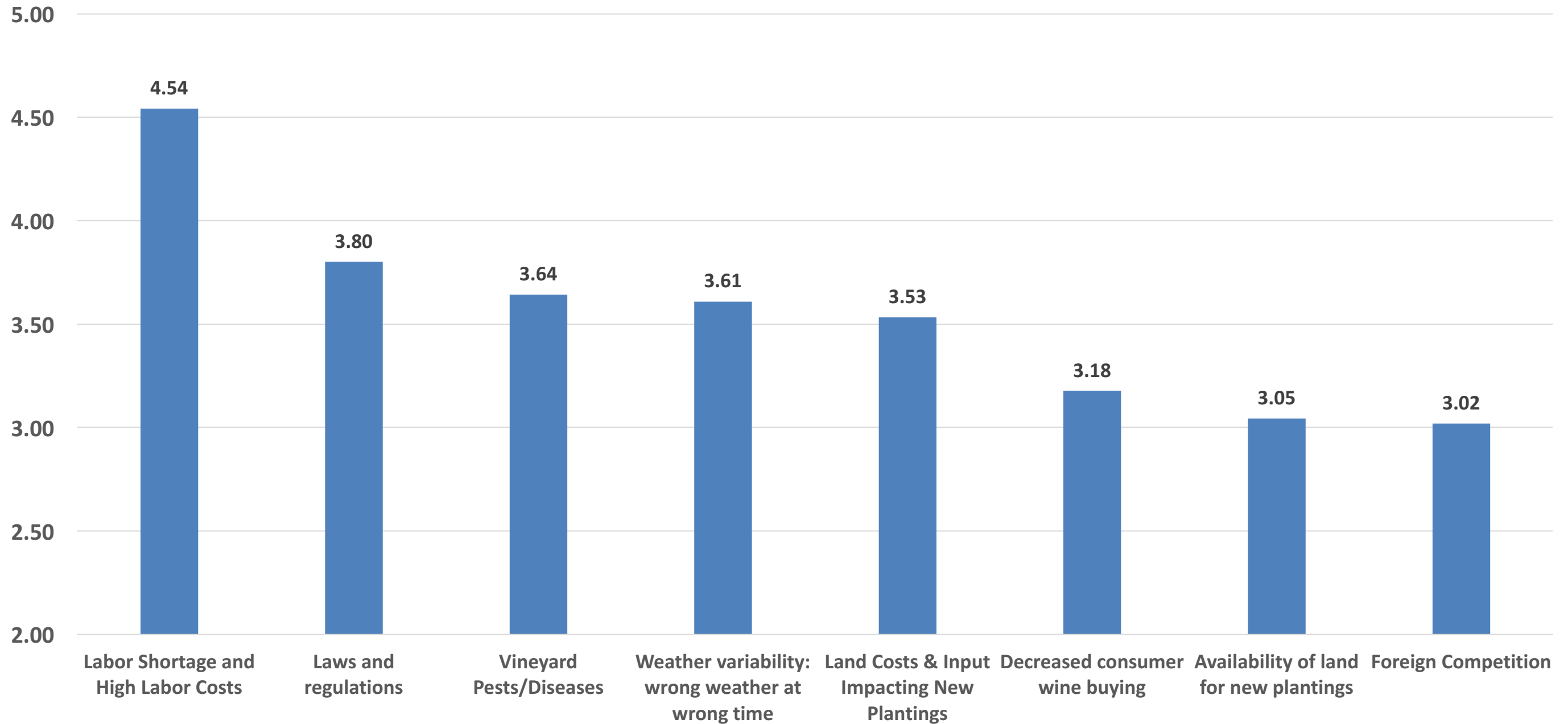
10) What are your Top Concerns of 2018 (choose 3)



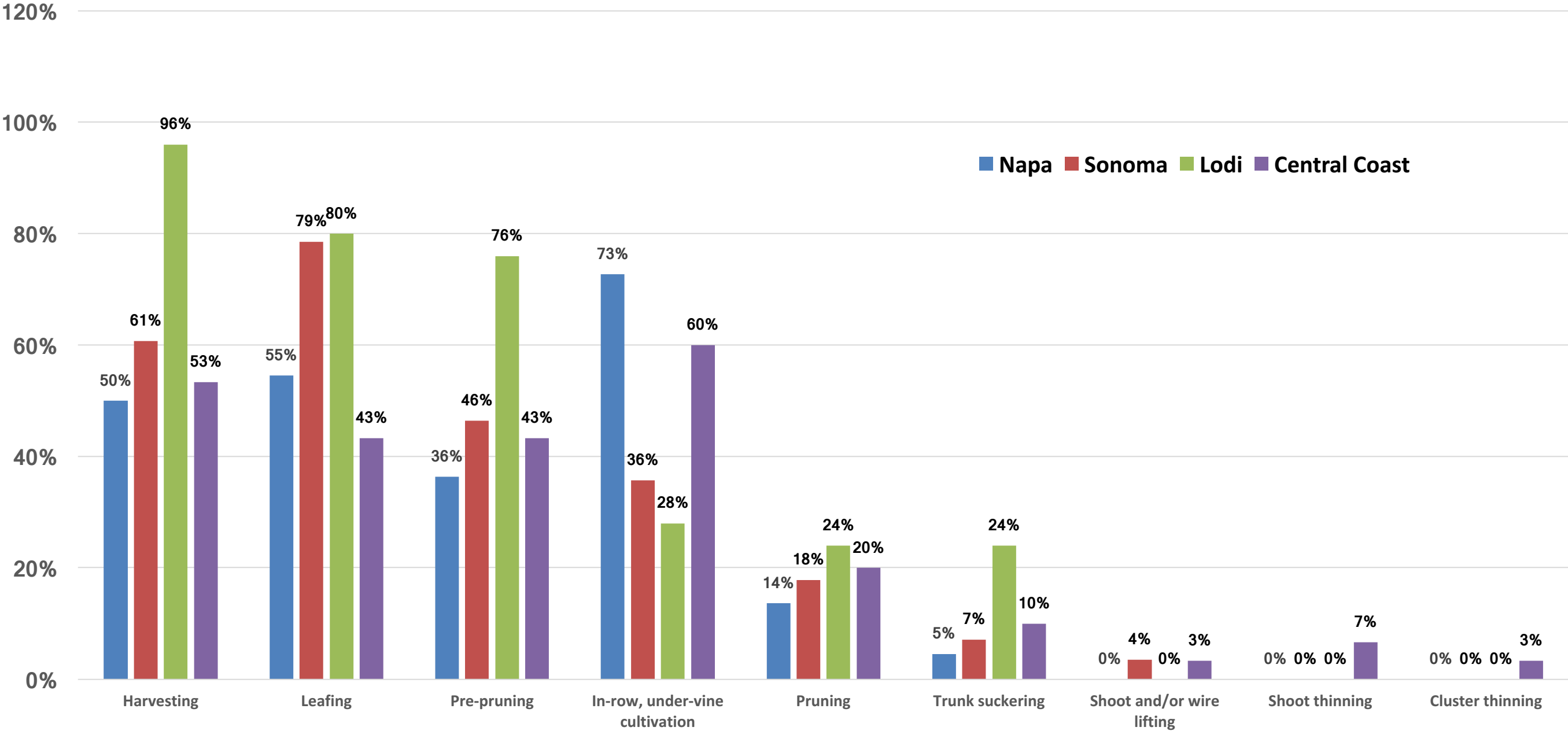
11) Which of the following do you believe will have a POSITIVE impact on California GRAPE GROWERS 2018?
(Scale of 1 to 5: 1 = No Impact, 5 = Major Impact)



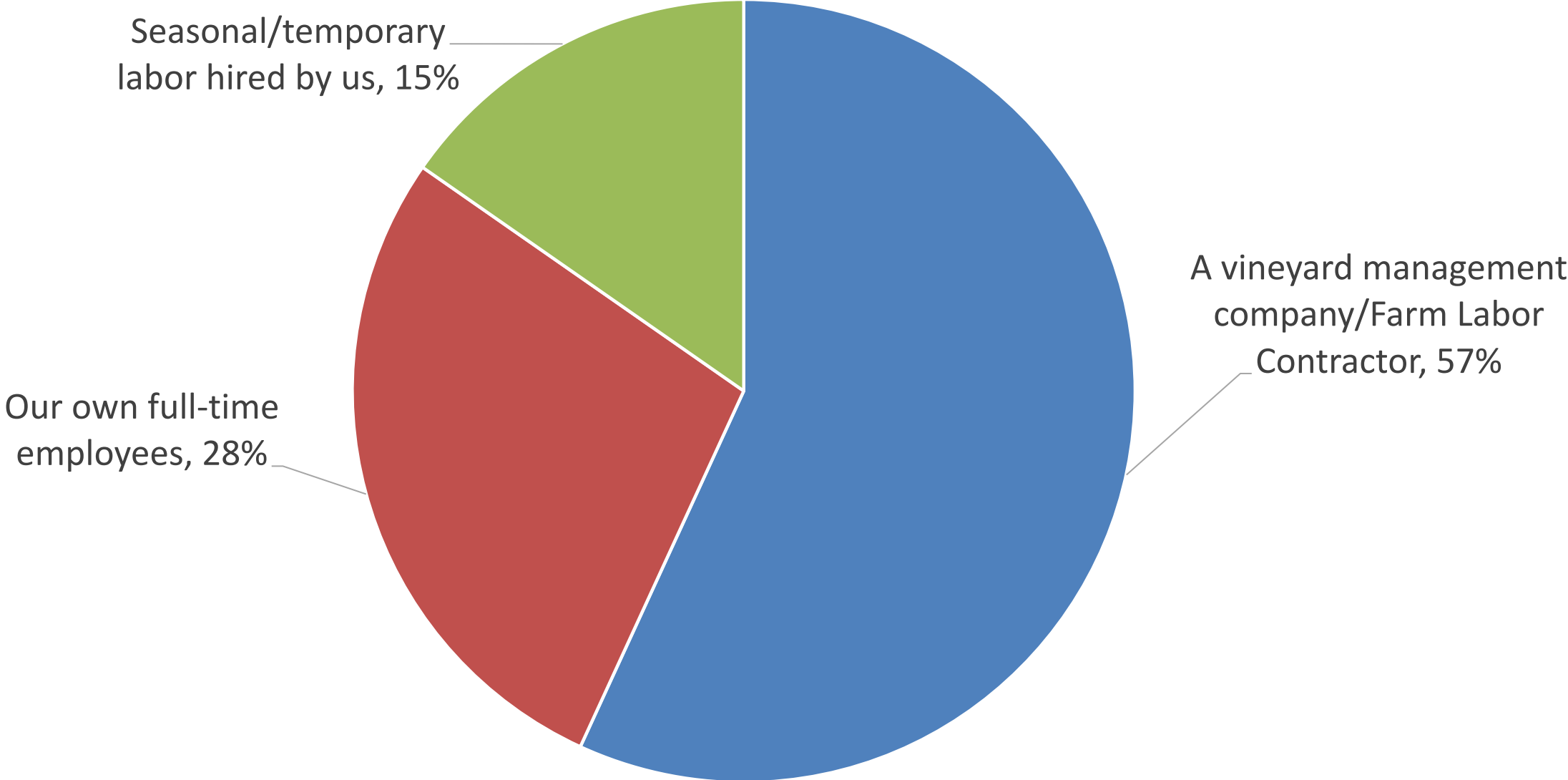
12) Which of the following do you believe will have a **NEGATIVE** impact on California grape growers in 2018?
(Scale of 1 to 5: 1 = No Impact, 3 = Steady and 5 = Major Impact)



13) What have you mechanized in the vineyards? (Please choose all that apply)
By Region (Napa, Sonoma, Lodi, Central Coast)

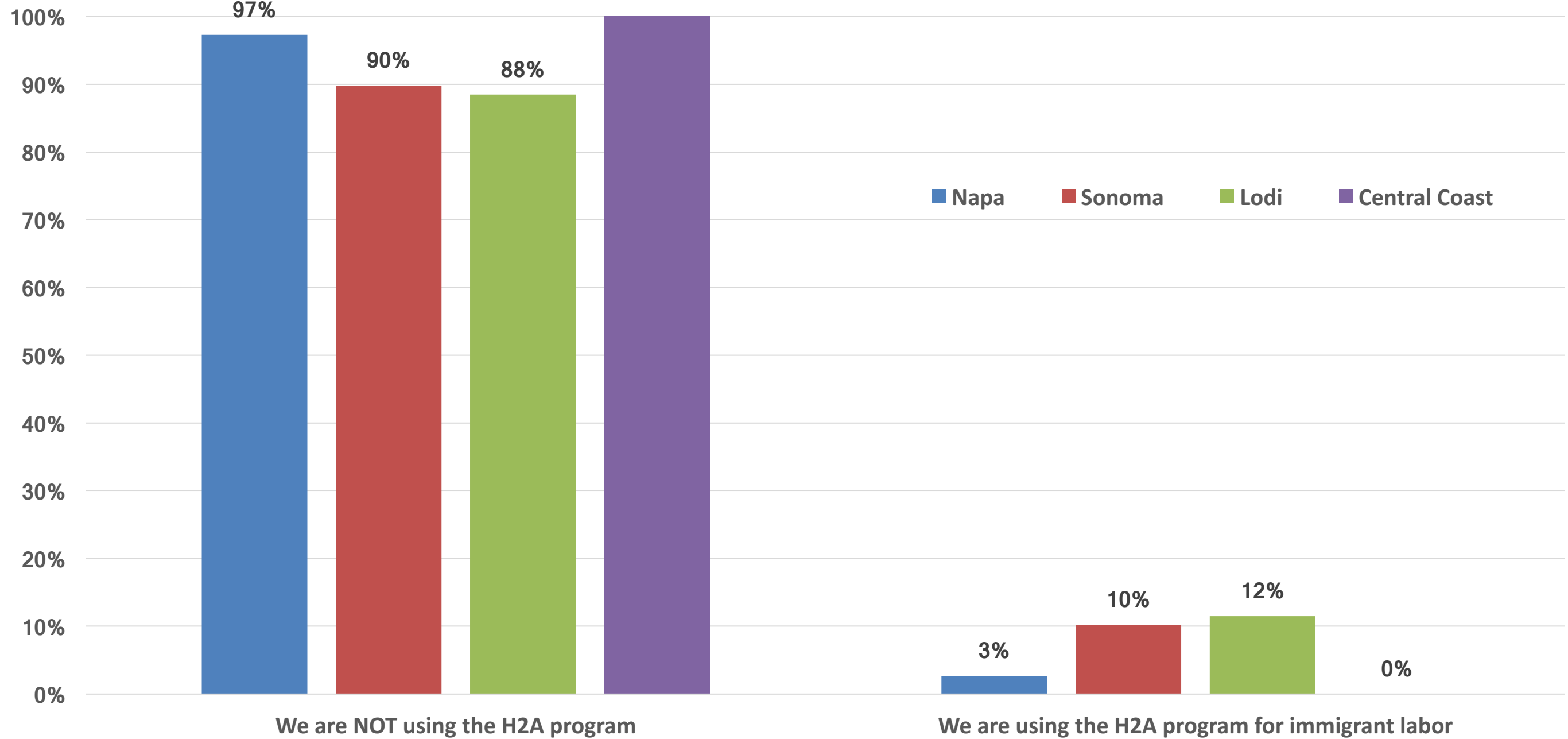


14) What percentage of the labor you use in your vineyard comes from the following sources?

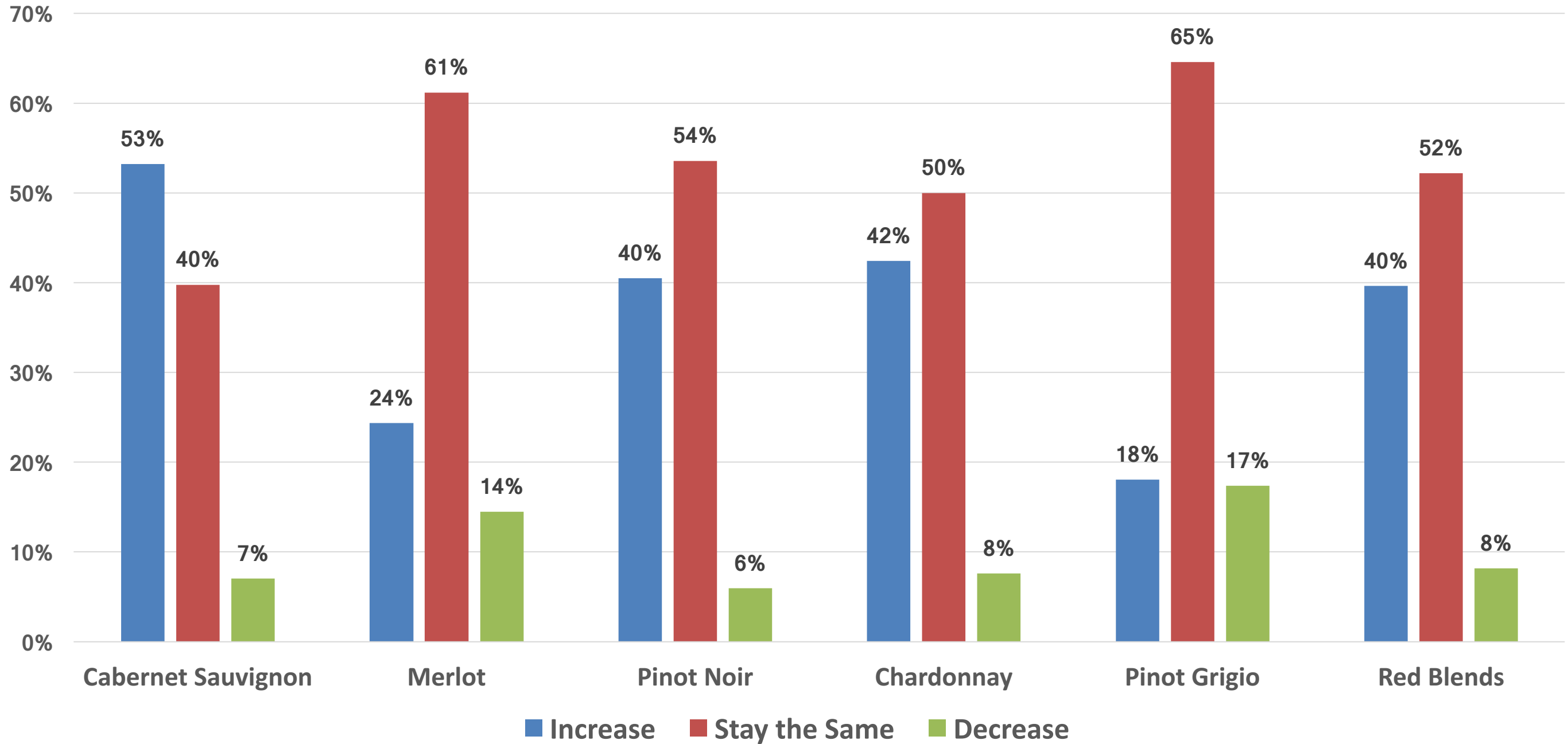


15) Are you engaging in the H2A program for immigrant labor? If so, what percent of your labor force is through that program? By Region

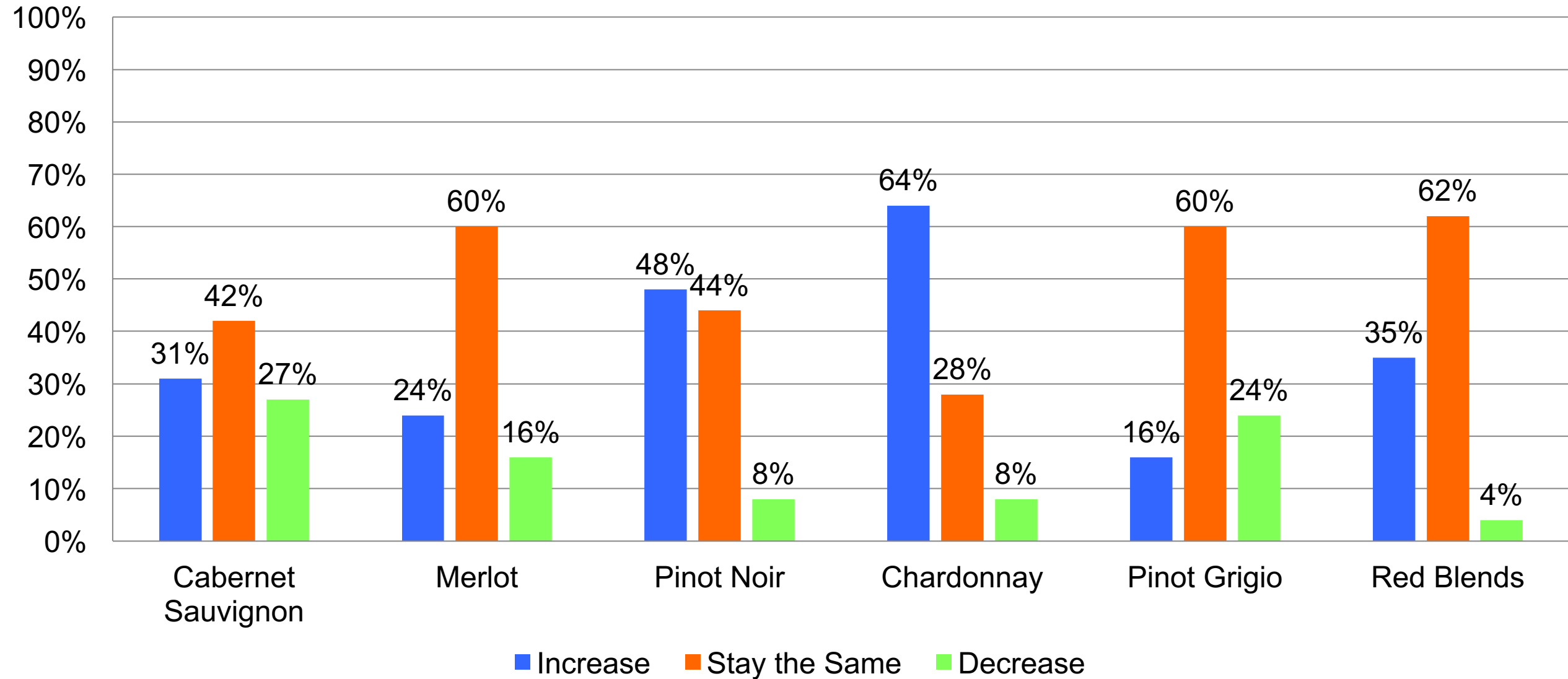
(Napa, Sonoma, Lodi, Central Coast)



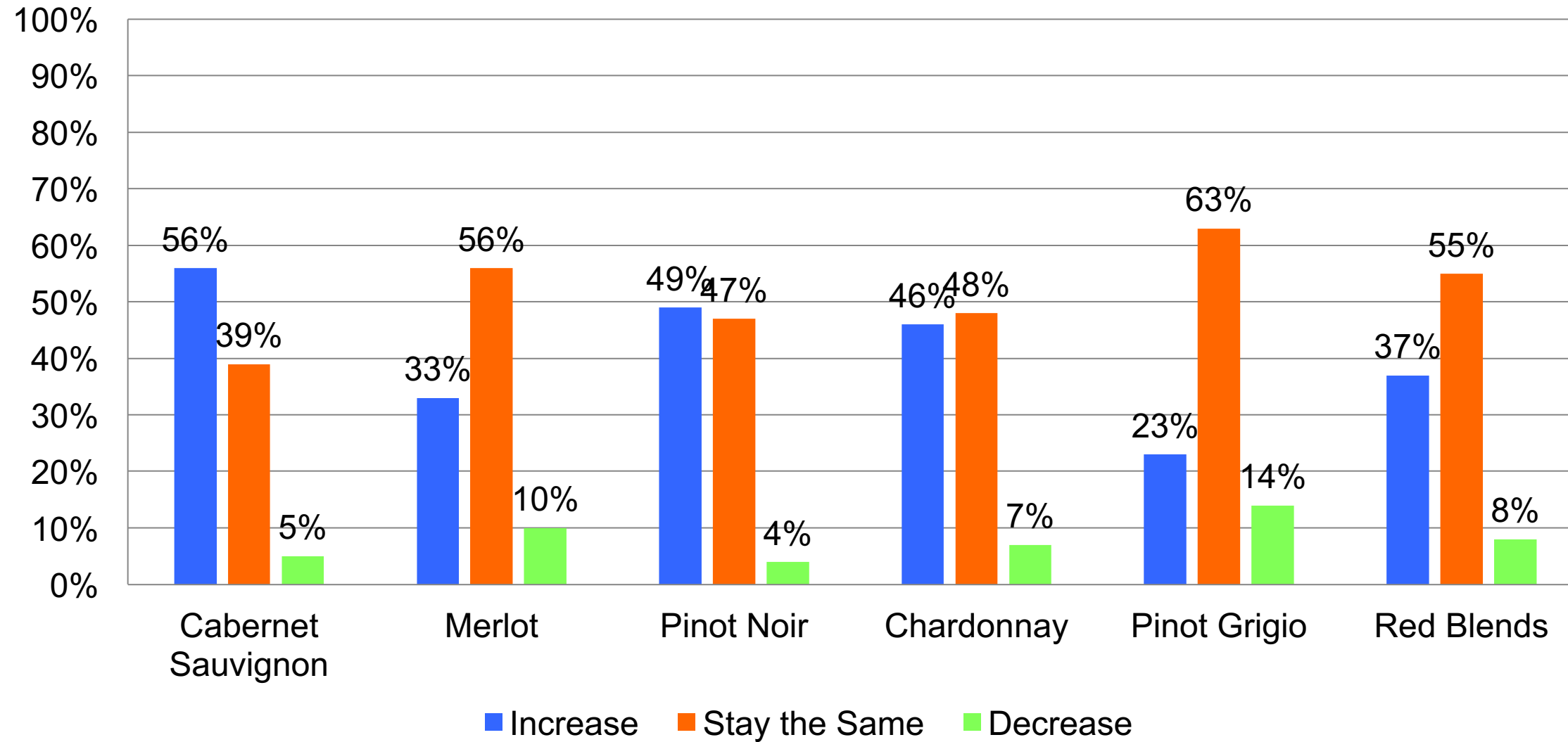
17) For each of the varieties listed below, how will demand for grapes in 2018 compare with 2017?



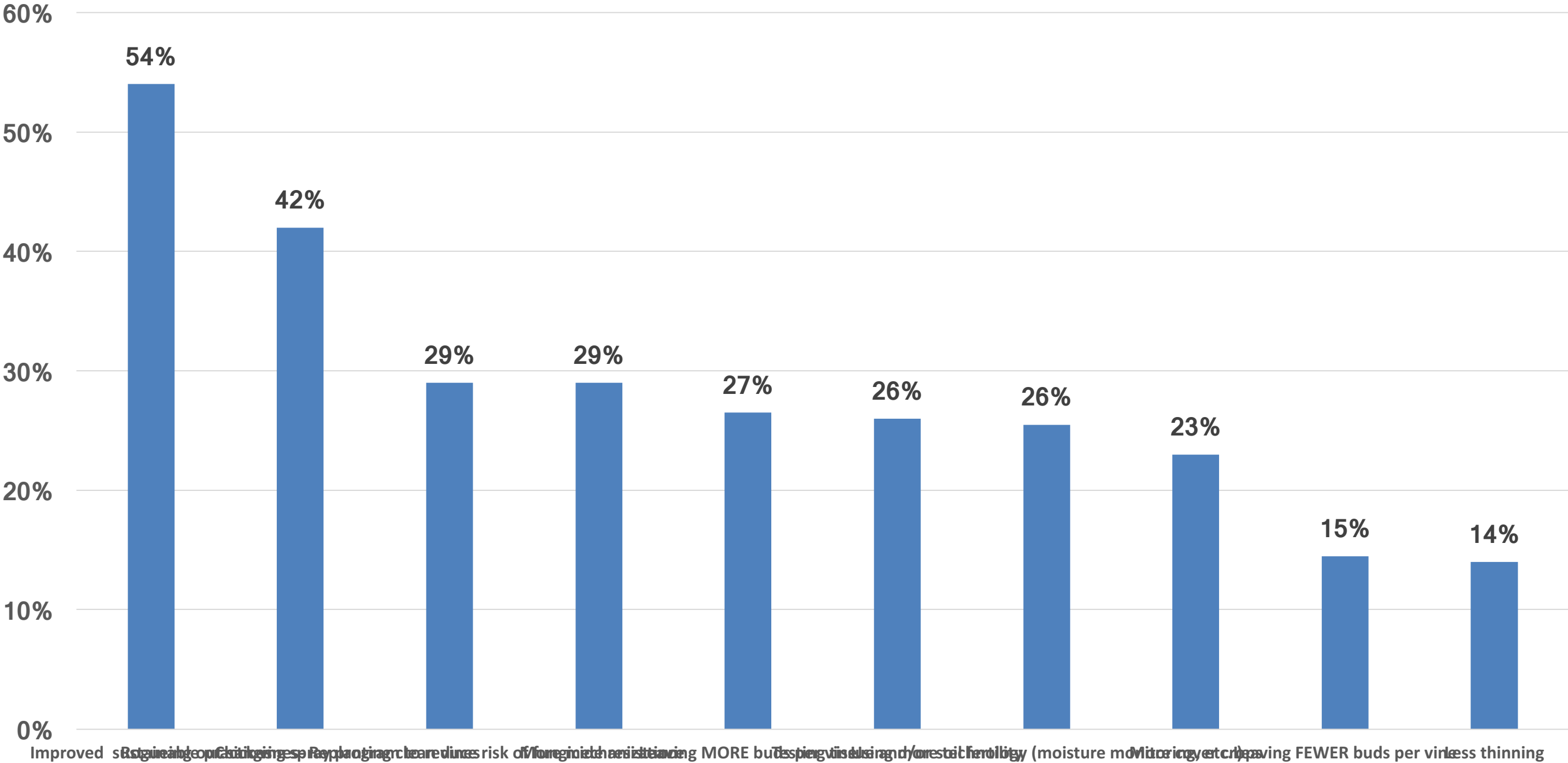
17) For each of the varieties listed below, how will demand for grapes in 2018 compare with 2017?
Lodi



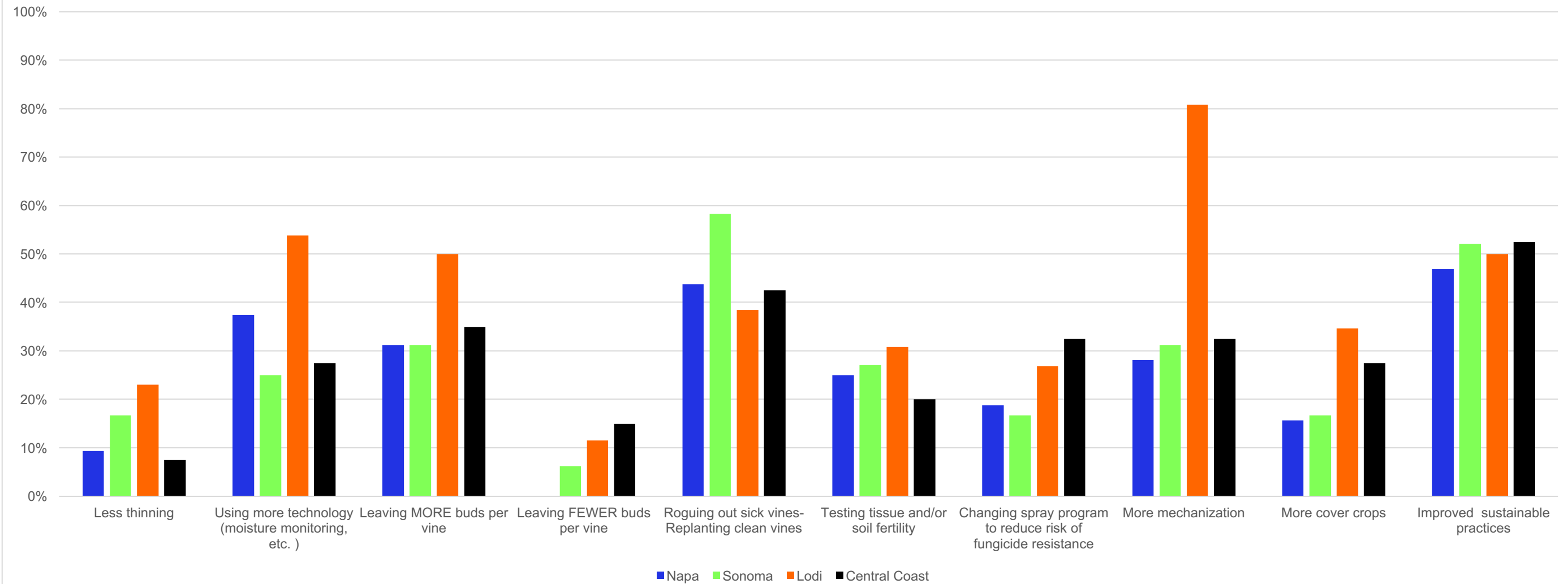
**17) For each of the varieties listed below, how will demand for grapes in 2018 compare with 2017?
Sonoma**



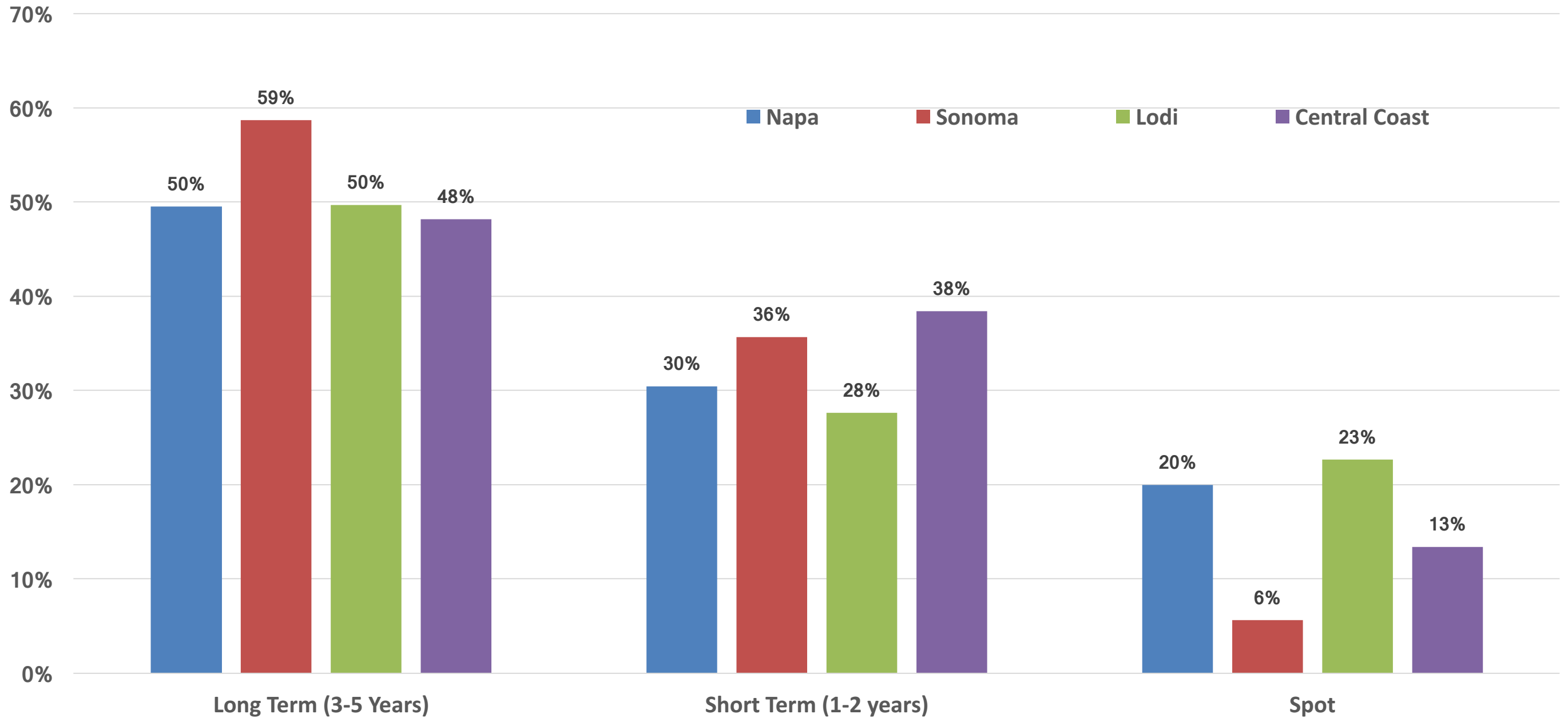
18) What are you doing different from 2017 in the vineyard? (Please choose all that apply)



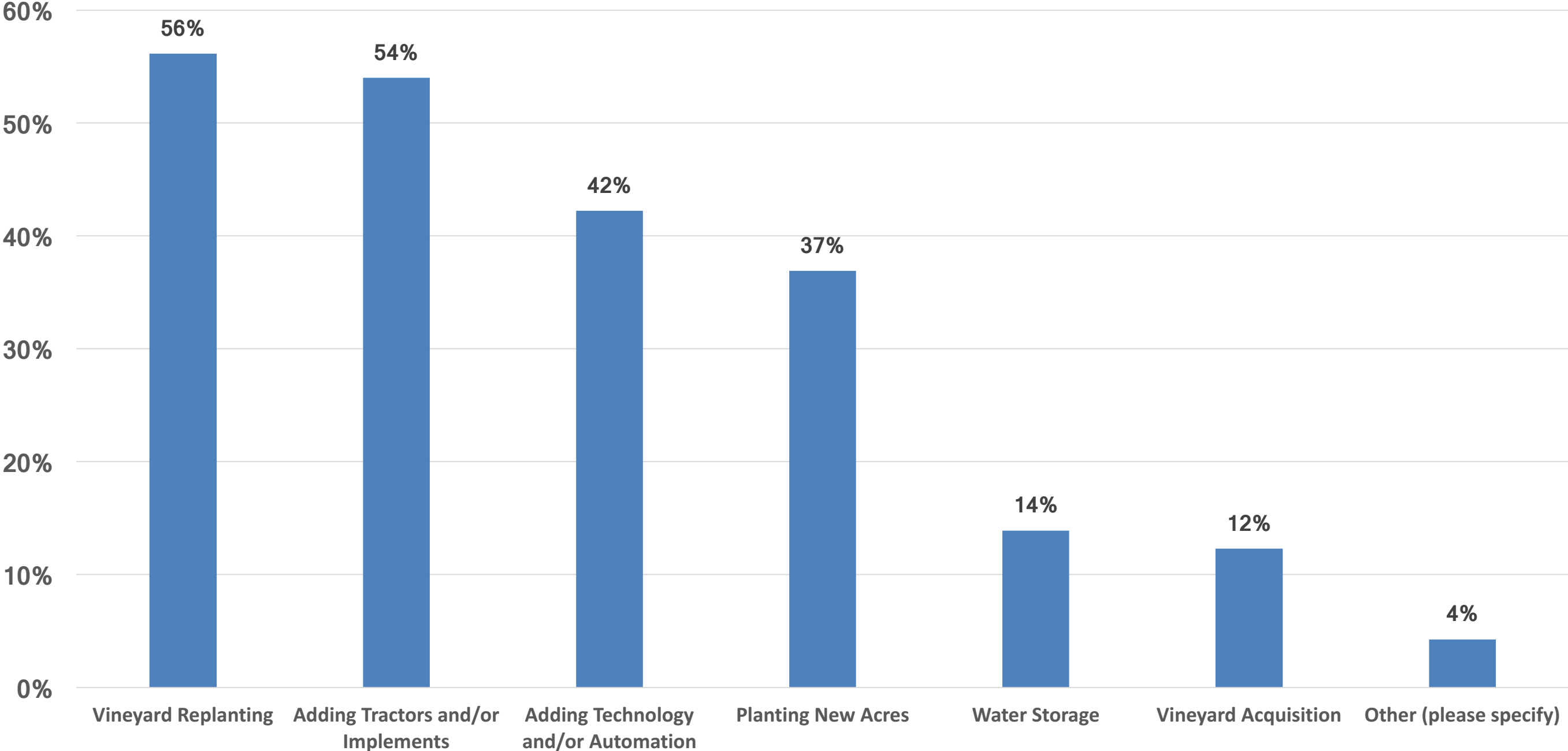
18) What are you doing different from 2017 in the vineyard? (Please choose all that apply)
 By Region (Napa, Sonoma, Lodi, Central Coast)
 1 of 2



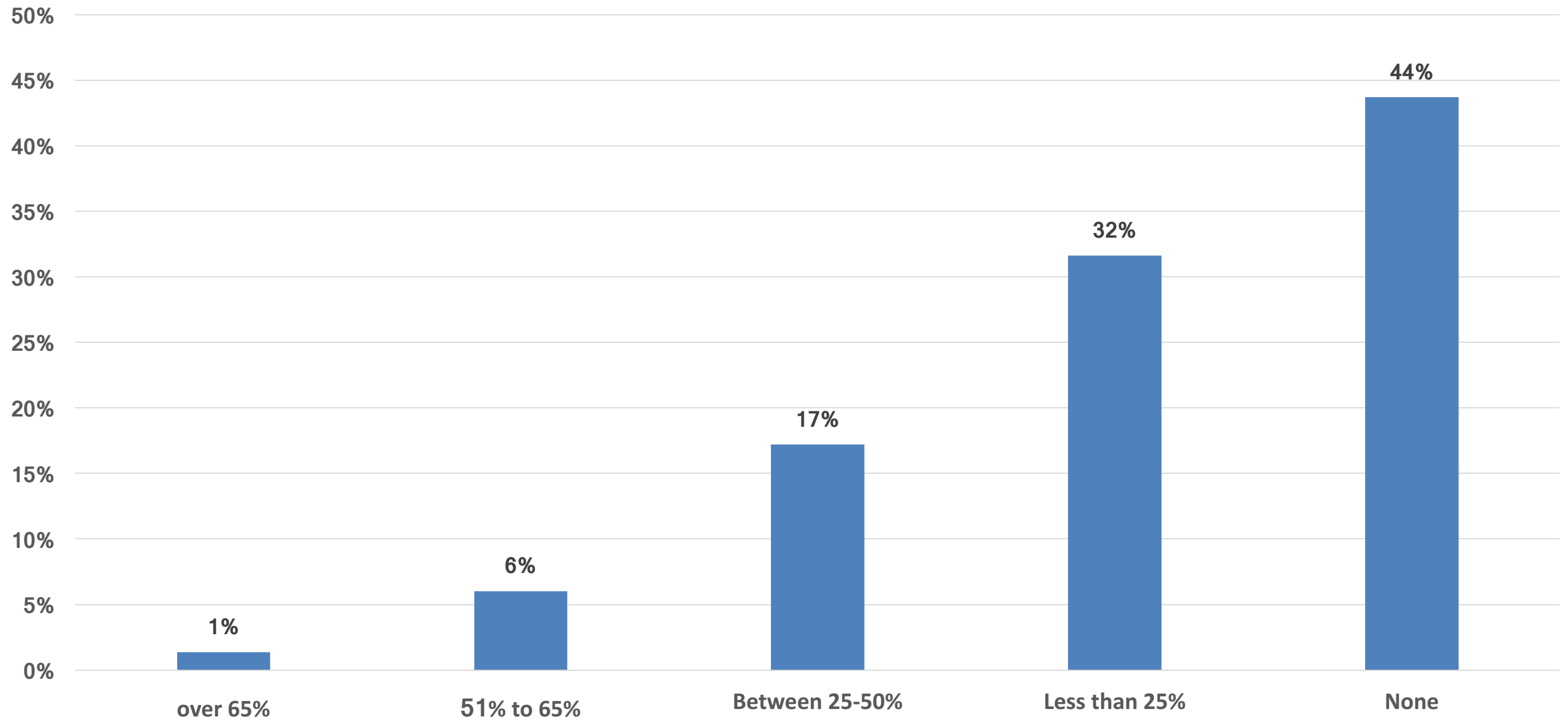
19) What length of contracts do you currently have?
By Region (Napa, Sonoma, Lodi, Central Coast)



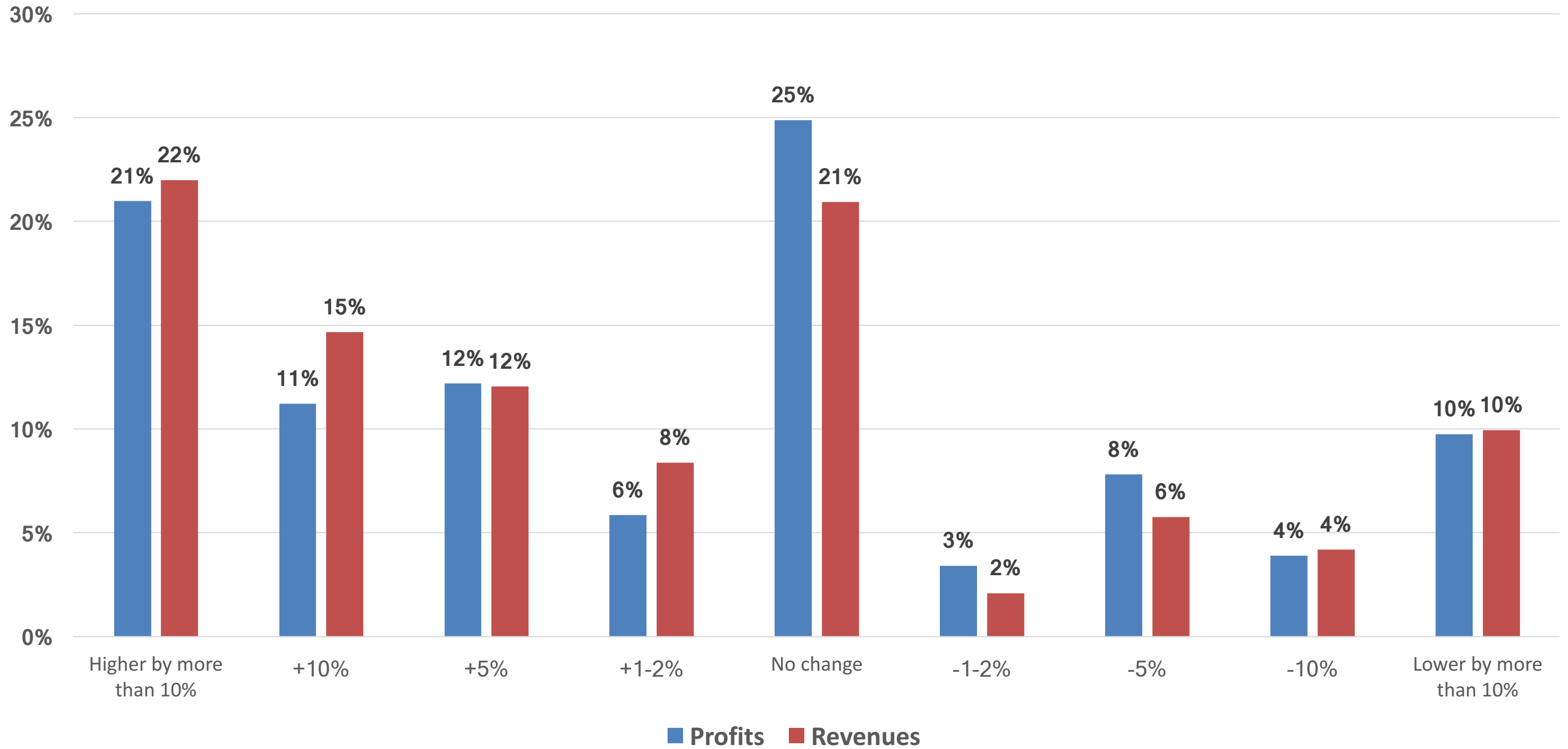
20) Which areas of your vineyard business will require capital over the next three years?



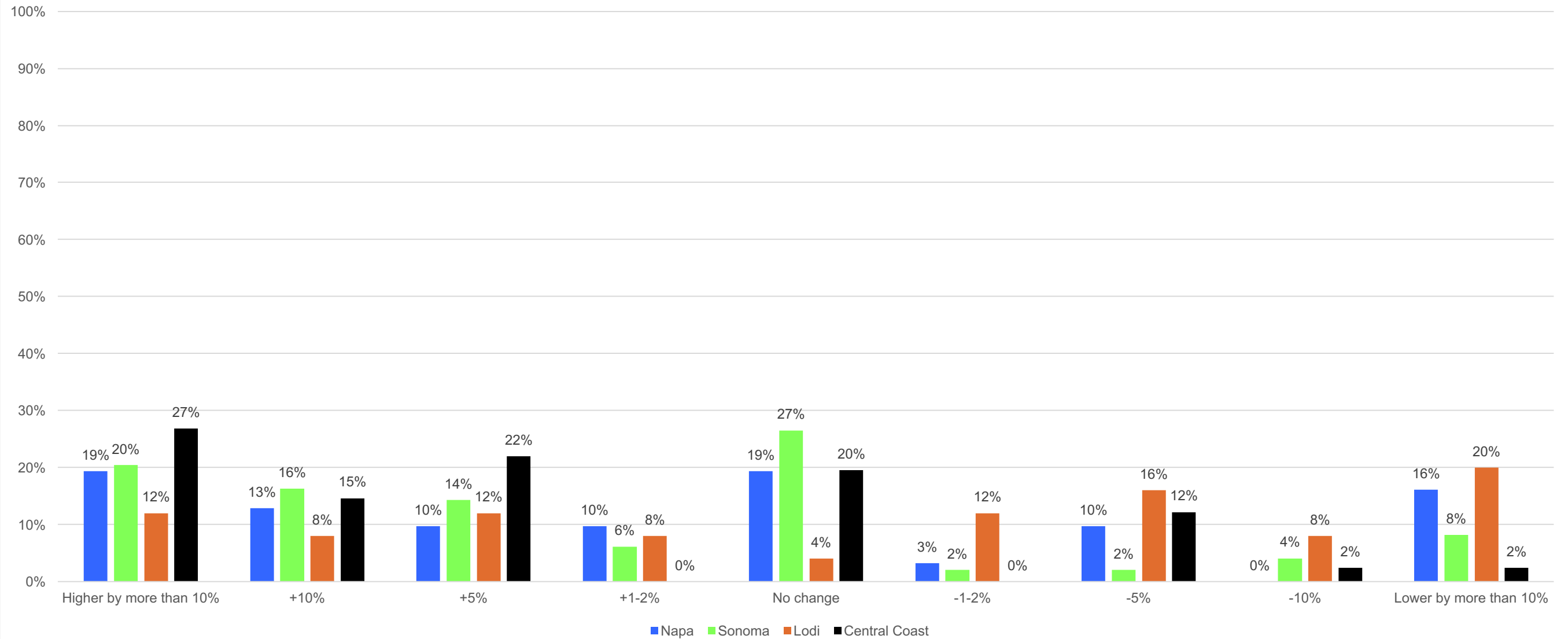
21) Relative to the current estimated value of your vineyards, how much debt do you carry? (Total vineyard debt divided by total vineyard value)



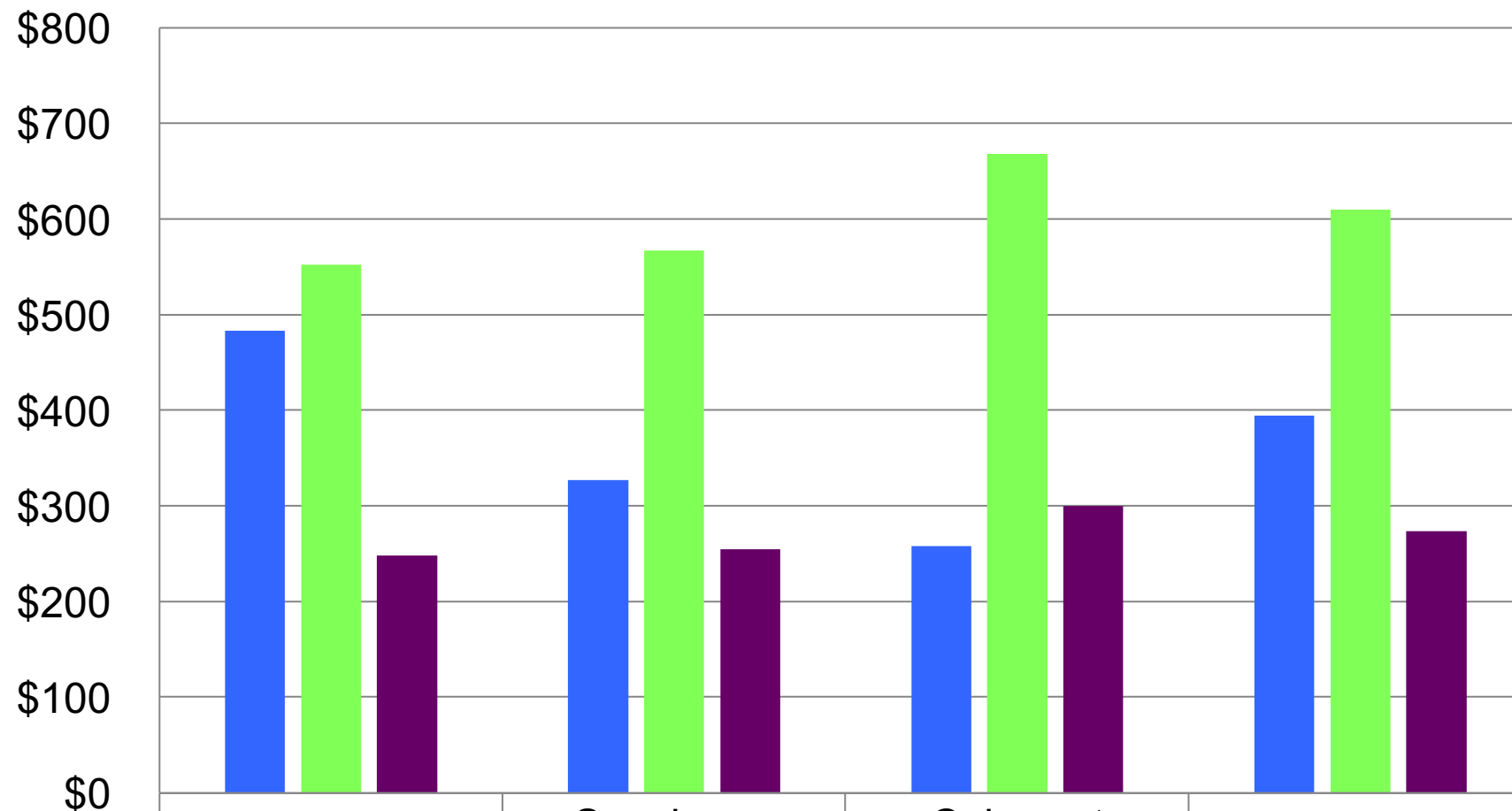
22) How were your Profits and Revenues in 2017 compared with 2016?



22) How were your Profits in 2017 compared with 2016?
PROFITS
 By Region (Napa, Sonoma, Lodi, Central Coast)
 1 of 2



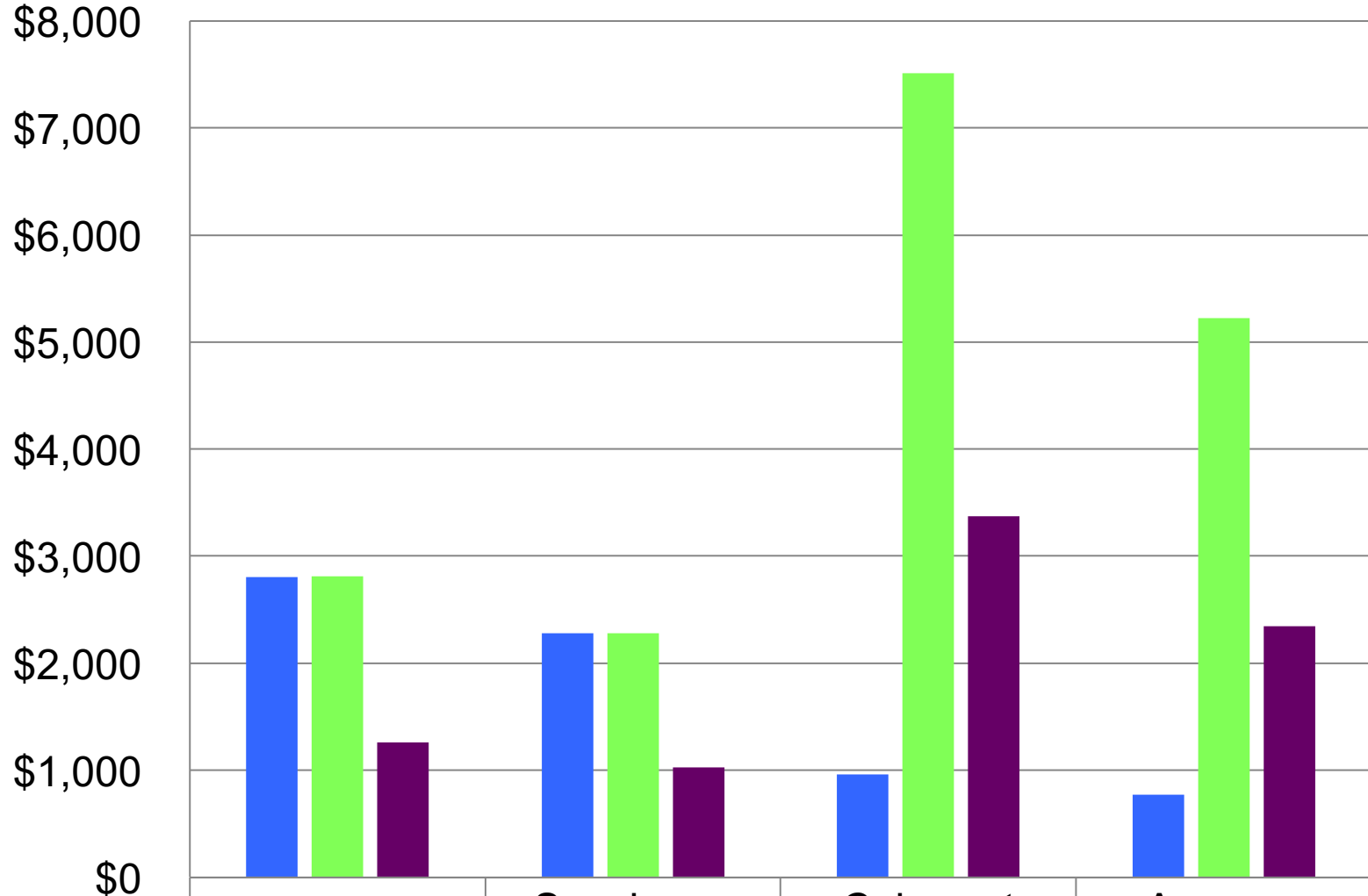
Average Price Per Ton (CPI Adjusted) for Lodi



	Chardonnay	Sauvignon Blanc	Cabernet Sauvignon	Average Price
■ 1986	\$483	\$327	\$258	\$395
■ Actual 2017	\$552	\$567	\$668	\$610
■ CPI Adjusted Average aPrice	\$248	\$255	\$300	\$274

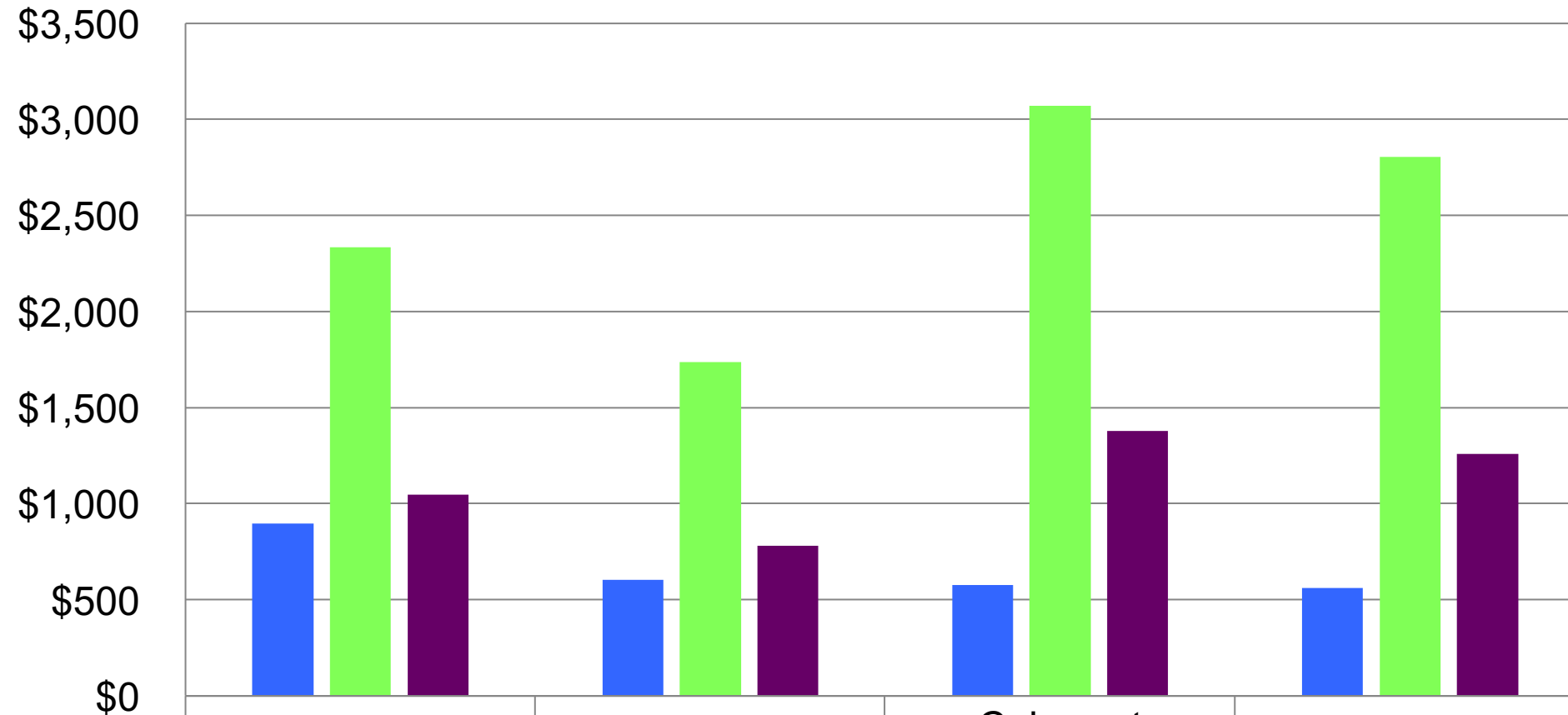
■ 1986 ■ Actual 2017 ■ CPI Adjusted Average aPrice

Average Price Per Ton for Napa (CPI Adjusted) from 1986 to 2017



■ 1986	\$2,809	\$2,280	\$962	\$774.64
■ Actual 2017	\$2,811	\$2,282	\$7,509	\$5,225
■ CPI Adjusted Average aPrice	\$1,263	\$1,025	\$3,373	\$2,347

Average Price per Ton of Sonoma Grapes (CPI Adjusted) from 1986 to 2017



	Chardonnay	Sauvignon Blanc	Cabernet Sauvignon	Average Price
■ 1986	\$898	\$604	\$579	\$563
■ Actual 2017	\$2,335	\$1,737	\$3,073	\$2,806
■ CPI Adjusted Average aPrice	\$1,049	\$780	\$1,380	\$1,260

■ 1986
 ■ Actual 2017
 ■ CPI Adjusted Average aPrice

Looking For Profit In Lodi

Vintage	2012	2013	2014	2015	2016	2017	Average
Price point	\$700+	\$710+	\$720+	\$720+	\$725+	\$750+	
Dist 11 Total							
Harvest Tons	767,340	802,827	674,177	670,576	802,122	743,360	743,400
White	16,439	15,018	11,739	9,437	9,942	3,307	10,980
Percent	2.1%	1.9%	1.7%	1.4%	1.2%	0.4%	1.5%
Zinfandel	112,472	90,052	66,360	58,053	66,550	39,565	72,175
Percent	14.7%	11.2%	9.8%	8.7%	8.3%	5.3%	9.7%
All Other Reds	131,683	85,009	64,858	72,821	90,570	71,142	86,014
Percent	17.2%	10.6%	9.6%	10.9%	11.3%	9.6%	11.5%
Total amount equal to or greater price point							
price point	260,594	190,079	142,957	140,311	167,062	114,014	169,170
Percent	34.0%	23.7%	21.2%	20.9%	20.8%	15.3%	22.7%

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