

2020 Ohio Wine Grape Production and Pricing Index

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Over the past 10 years, the Ohio wine industry has grown from 124 to over 350 licensed wine manufacturers in 2021. As the wine industry continues growing, grape supply must concurrently rise in order to meet winery demands. A major challenge towards achieving this goal is ensuring profitability for wine grape production. As a commodity, grapes have high start-up costs, several years from planting until productive bearing, annual vineyard labor and supply costs, and high risks of crop loss that limit profitability. Therefore, grape prices should reflect not only the available supply and demand but also production costs.

Between 07 May 2021 and 04 June 2021, an online Qualtrics survey was distributed to grape producers across Ohio. In this survey, growers were asked about their 2020 planted and bearing wine grape acreage, yield (tons), cost (\$ per ton or gallon), if wine grapes were directly sold or processed and sold, and plans for increasing acreage in 2022. The survey results below aim to provide an overview of grape production and pricing for the 2020 season and improve the multi-year grape production and pricing trends in Ohio.

Survey response summary

Thirty-seven participants (n = 37) responded to the 2020 survey, a 12.1% increase from 2019 (n = 33). The participants represented vineyards (40.1%) and A2/A2F permitted estate wineries (59.5%). Respondents reported individual vineyard sizes between 1 to 5 and > 50 planted acres. Vineyard acreage was recorded for 27 Ohio counties, up from 23 in 2020 and 18 in 2019 (Fig. 1).

Production, yield, and pricing

Production (acreage): The sum of total vineyard acreage reported by n = 34 participants was between a minimum of 217 acres and a maximum of 460 acres, with an average individual vineyard size of 10.5 acres. Seven vineyards reported a size greater than 11 to 15 acres. The median reported vineyard size is smaller at 3 acres (n = 23). Bearing acreage

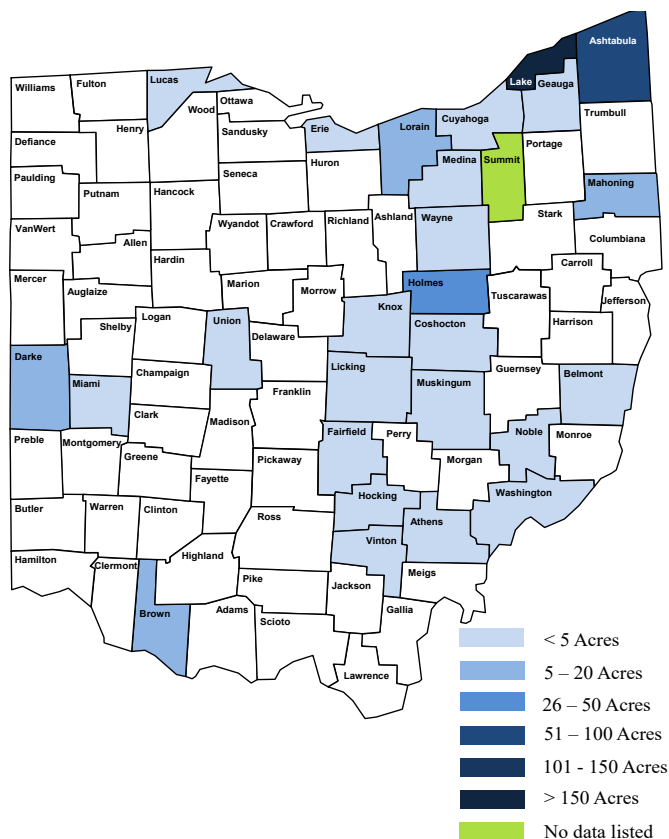


Fig. 1 Distribution of reported grape acreage among 27 Ohio counties. Average planted acreage was summed across the total number of survey participants that reported for each county.

accounted for 85.6% of the total planted acreage reported by n = 34 participants. Three participants (n = 3) did not report additional information related to bearing acreage. In total, 49 different wine grape cultivars were reported across 282.5 planted vineyard acres (Fig. 2, Table 1). The wine grape cultivars represented native (*V. labrusca*), interspecific hybrid ('hybrid'), and *V. vinifera* ('vinifera') species. Vinifera grapes comprised the majority of reported acreage (36.9%), followed by hybrids (34.7%), and natives (28.4%; Fig. 2). This is a significant shift from the 2018 and 2019 surveys where



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native grape cultivars represented the majority of reported planted acreage.

Yield (tons): Participants reported yield for 43 wine grape cultivars (**Fig. 2, Table 1**). Total reported yield for 2020 was 918.4 tons, an increase from 382.9 and 507.1 tons reported in 2019 and 2018, respectively. Of the total yield, 217.7 tons were sold (23.7%). It was assumed that the remaining yield (700.7 tons) was used for estate wine making purposes. The highest percentage of yield-bearing cultivars were vinifera grapes (36.3%), followed by natives (31.9%), and hybrids (31.8%).

Pricing (\$ per ton): Price data was reported for 23 cultivars. The average price per ton was generally lowest for native cultivars and highest for vinifera cultivars (**Table 1**).

The average price per ton ranged between \$500 (Concord) and \$1966.67 per ton (Riesling; **Table 1**). The average price per ton was \$734, \$1086.67, and \$1883.33 for native, hybrid, and vinifera grapes, respectively. Data was reported for sales of juice or bulk wine for 15 cultivars for 2020 (**Table 1**).

2021 acreage expansion: 24.3% of respondents (n = 9) indicated that they plan to expand planted acreage in the coming year. Of those, 4 were vineyard owners and 5 were a vineyard and winery. New plantings represented native (Catawba), hybrid (Itasca, Frontenac, Frontenac gris, LaCrescent, Chambourcin, Noiret), and vinifera (Regent, Cabernet Franc, Cabernet Sauvignon, Pinot gris, Gewurztraminer, Viognier) cultivars.

Summary

The number of respondents has remained consistent year-over-year between 2018 and 2020 (2018 = 40, 2019 = 33, 2020 = 37), the diversity of counties represented continues to increase (2018 = 18, 2019 = 23, 2020 = 27). Despite the increase in total reported yield, the approximate grape tonnage reported for sale in 2020 (217.7 tons) remains similar for 2018 (207.4 tons) and 2019 (224.8 tons).

The results of the 2020 survey represents approximately 29.7% of the total grape acreage (1500 acres) reported in the 2017 USDA-NASS/OGIC grape production survey that includes wine and juice/table grapes. Similar to 2018 and 2019, only a subset of the Ohio grape industry is represented by this survey. As the number of wineries continues to grow, the importance of understanding and identifying trends in the distribution, production, and availability of Ohio grown wine grapes will continue to grow with it.

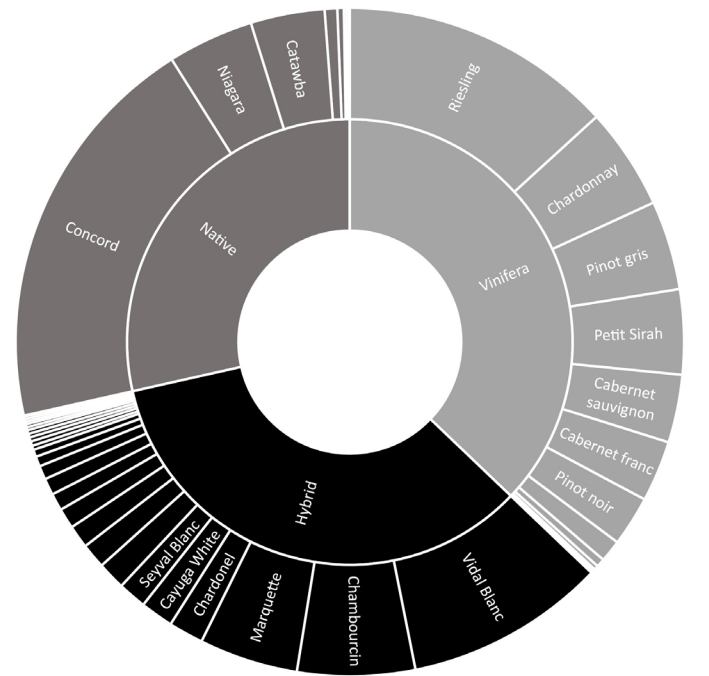


Fig. 2 Proportion of total planted acreage of production by classification (Vinifera, Hybrid, Native; inner circle), and proportion of total planted acreage by cultivar (outer circle).

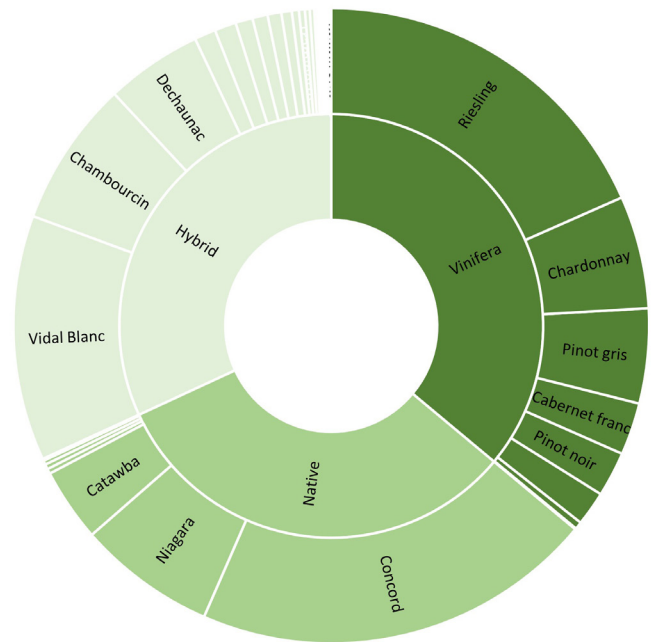


Fig. 3 Proportion of total yield (tons) by classification (Vinifera, Hybrid, Native; inner circle), and proportion of total yield by cultivar (outer circle).

Table 1 2020 Grape acreage, yield, and pricing by cultivar. Blank spaces indicate no data provided.

Species group	Cultivar	Planted acres	Yield harvested (tons)	Yield sold (tons)	Average price per ton (USD)	Average price per gallon (juice; USD)	Average price per gallon (bulk wine; USD)
Native	Alexander	0.1	0.01				
	Catawba	8.17	34.1	9	750	7.45	9.45
	Concord	51.1	244	176.5	263		8.45
	Delaware	1.5	2.25				
	Diamond	0.3	0.9	0.8	1000		
	Niagara	10.16	64.2	7	500	5.95	8.95
	Norton (Cyanthiana)	24.4	2.3				
	Steuben	0.75	1.9				
Hybrid	Aromella	0.35	0.26				
	Cayuga white	3.89	4.95	0.25			
	Chambourcin	13.85	67.85	43.14	1050	8.45	10.95
	Chancellor	0.35	0.18				
	Chardonel	4.1	10.01	7	900	8.45	10.95
	Corot noir	1.6	0.8				
	DeChaunac	8.1	45	10	700	6.95	8.95
	Edelweiss	0.3	1	0.9	1000		
	Elvira	0.3	3.2	3	1000		
	Frontenac	3.3	7.95	2.5	1200		
	Frontenac blanc	0.5	0.75				
	Frontenac gris	1.2					
	Itasca	1.38	0.32				
	LaCrescent	2.4	6.4	3.5	1000		
	Leon Millot	0.5	2.3	2.2	1200		
	Marechal Foch	2	10	2	700	6.95	8.95
	Marquette	11.67	7.06	2.4	1200	9.00	10.00
	Melody	0.44	1.34				
	Noiret	2.95	2				
	Petite Pearl	0.1	0.86				
	Prairie Star	0.5	0.5				
	Seyval blanc	3.35	0.6				
	St. Croix	0.44	0.63	2.2	950		
Traminette	2.7	2.81	0.5	1200			
Valvin Muscat	0.33	0.3					
Vidal blanc	23.65	114.26	39.54	900	7.95	9.95	
Vidal blanc (ice wine)	2				8.65	10.00	
Vignoles	0.84	0.7					
Vinifera	Cabernet Franc	7.2	24.33	8	1850	14.95	16.95
	Cabernet Sauvignon	8	16	4	1900	14.95	17.95
	Chardonnay	12	52.53	18	1900	13.95	15.95
	Dornfelder	0.25					
	Merlot	0.5					
	Petit Sirah	10					
	Pinot gris	10.5	44	3	1800	14.95	16.95
	Pinot noir	5.9	21				
	Regent	2.6	3.51	3	2000		
	Riesling	32.2	168	30	1967	19.85	15.32
	Sauvignon blanc	0.3	0.3				
	Syrah	1	4				