

2021 Ohio Grape Pricing and Production Index

Dr. Maria Smith, Viticulture Outreach Specialist, Horticulture and Crop Science, The Ohio State University

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Since 2012 the Ohio wine industry has grown from 175 to over 380 licensed wine manufacturers. 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 11 May 2022 and 17 June 2022, an online Qualtrics survey was distributed to grape producers across Ohio. In this survey, growers were asked about their 2021 planted and bearing wine grape acreage, yield (tons), cost (\$ per ton or gallon), if wine grapes were directly sold or processed then sold, and plans for increasing acreage in 2023. The survey results below aim to provide an overview of grape production and pricing for the 2021 season and improve the multi-year grape production and pricing trends in Ohio.

Survey Response Summary Thirty-four participants (n = 34) responded to the 2021 survey, a number similar to 2020 (n = 37) and 2019 (n = 33) surveys. The participants represented vineyards (32.4%), A2/A2F permitted wine manufactures with vineyards (67.7 %), and one A2 wine manufacturer without a vineyard (3.0 %). Respondents reported individual vineyard sizes between 1 to 5 and 21 to 30 planted acres. Vineyard acreage was recorded for 25 Ohio counties (Fig. 1).

Production, Yield, and Pricing

Production (acreage): The sum of total vineyard acreage reported by n = 33 participants was between a minimum of 96 acres and a maximum of 220 acres, with an average individual vineyard size of 4.7 acres. Five vineyards reported acreage greater or equal to 11 to 15 acres. The median reported vineyard size is slightly smaller at 3 acres (n = 25). Bearing acreage accounted for 75.0% of the total planted acreage reported by n = 32 participants. Four participants did not report additional information related to bearing

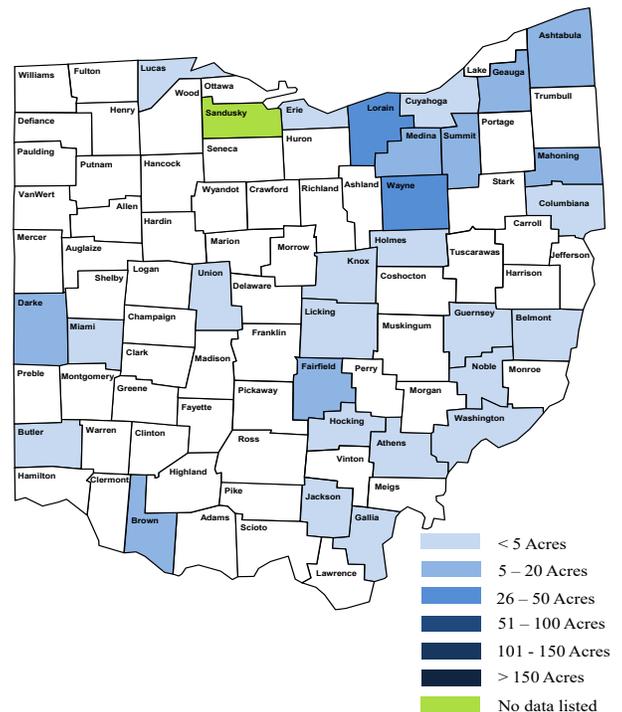


Fig 1. Distribution of reported grape acreage among 25 Ohio counties.



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acreage. In total, 43 different wine grape cultivars were reported across 158 planted vineyard acres (Fig. 2, Table 1). Grape cultivars represented native (*V. labrusca*), interspecific hybrid ('hybrid'), and *V. vinifera* ('vinifera') species. Hybrid grapes comprised the majority of reported acreage (49.4%), followed by *Vinifera* (26.7%), and natives (23.8%; Fig. 2). This is a change from the 2020 survey where *Vinifera* 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 2021 was 222.15 tons, a decrease from 918.4 and 382.9 tons reported in 2020 and 2019, respectively. Of the total yield, 93.6 tons were sold (42.1%). It was assumed that the remaining yield (128.6 tons) was used for estate wine making purposes. The highest percentage of yield-bearing cultivars were hybrids (54.3%), followed by *vinifera* (28.6%), and natives (17.1%).

Pricing (\$ per ton): Price data was reported for 15 cultivars. The average price per ton was generally lower for native cultivars and higher for hybrid cultivars (Table 1). There was no reported pricing for any *Vinifera* cultivars in 2021, although they have previously commanded the highest prices among cultivars.

The average price per ton ranged between \$508.30 (Concord) and \$1500 per ton (Traminette; Table 1). The average price per ton was \$1002.10 and \$1165.62 for native and hybrid grapes, respectively. Data was reported for sales of juice or bulk wine for 3 cultivars for 2021 (Table 1).

2023 acreage expansion: 30.3% of respondents (n = 10) indicated that they plan to expand planted acreage in the coming year. Of those, 4 were vineyard owners and 6 were a vineyard and winery. New plantings represented primarily native (Concord, Niagara, Concord) and hybrid (Marquette, Cayuga White, Noiret, Vidal blanc, Petite Pearl, and Frontenac) cultivars. One respondent plans to expand acreage with *vinifera* hybrid Regent.

Summary The number of respondents has remained consistent among surveys conducted since 2018, and the diversity of counties represented continues to remain diverse (2018 = 18, 2019 = 23, 2020 = 27, 2021 = 25). Although the participation rate has remained similar since 2018, the average vineyard sizes reported were smaller, which accounts for the substantial decrease in both acreage and yield reported for 2021.

The results of the 2021 survey represents approximately 10.5% 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 surveys conducted since 2018, only a subset of the Ohio grape industry is represented by this survey, with limited participation from larger vineyards in the state.

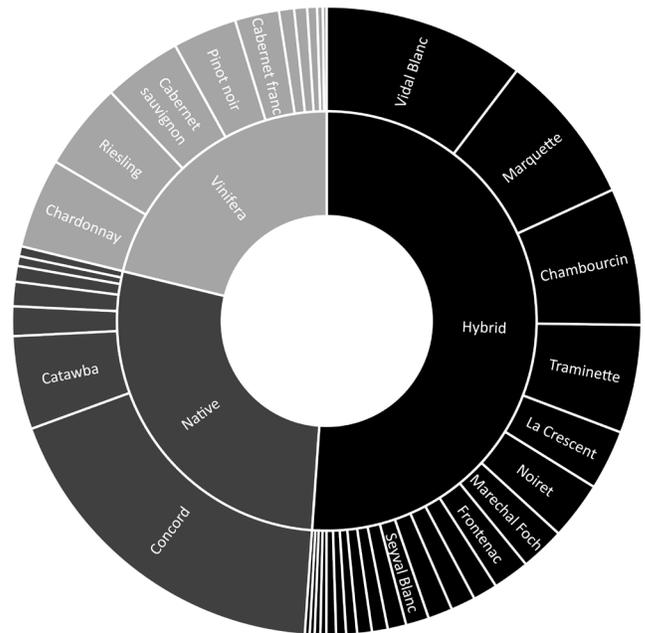


Fig 2. Proportion of total planted acreage of production by classification (*Vinifera*, Hybrid, Native; inner circle) and proportion of total planted acreage by cultivar (outer circle).

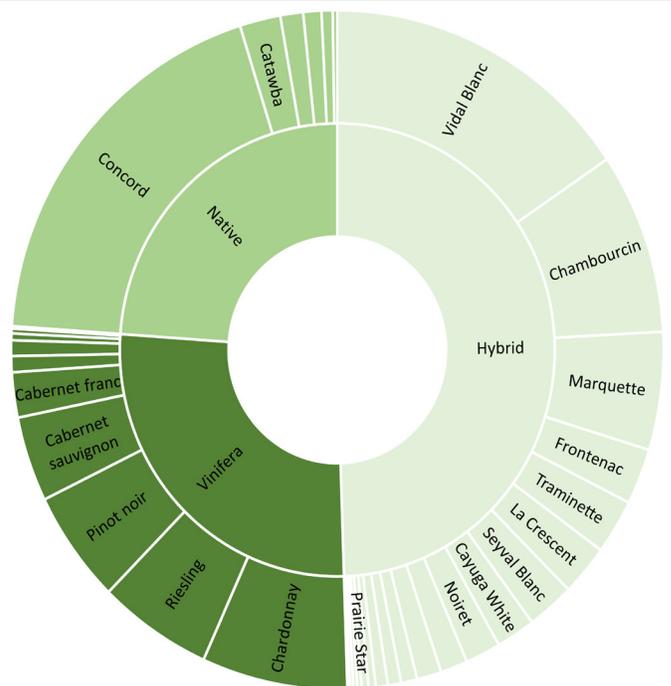


Fig 3. Proportion of total yield (tons) by classification (*Vinifera*, Hybrid, Native; inner circle) and proportion of total yield by cultivar (outer circle).

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)
	Catawba	4.76	4.49	2	1000	8.50	9.50
	Concord	18.17	42.28	30	508.30	7.00	9.50
	Delaware	1.5					
	Diamond	0.8	2	1.5	1000		
	Niagara	1.25	2.48				
	Norton (Cyanthiana)	0.5	1	1	1500		
	Steuben	0.5	1.23				
Hybrid	Aromella	0.75			1200		
	Bianca						
	Cayuga white	0.95	4.3				
	Chambourcin	7.01	19.17	15.5	1237.50		
	Chancellor	0.3	0.37				
	Chardonel	1.25	3				
	Corot noir	1.6	0.8				
	Edelweiss	0.42	1.8	1.5	1000		
	Elvira	0.28	3.2	3	1000		
	Frontenac	1.86	5.9	2.5	1200		
	Frontenac blanc	1.25	1.47				
	Frontenac gris	1.25	1.47				
	Itasca	0.25					
	LaCrescent	3.05	5.4	5	1000		
	Leon Millot	0.56	2.7	2	1200		
	Marechal Foch	2.25					
	Marquette	8.25	12.45	2.42	1267.67		
	Noiret	2.75	3.87				
	Petite Pearl	0.25	1.33				
	Prairie Star	0.5	0.75				
	Seyval blanc	1.18	5.2	5.2	1100		
	Traminette	5.52	5.8	1.37	1500		
	Vidal blanc	10.25	34.38	20.6	1167.67	9.00	
	Vignoles	0.5	0.5				
Vinifera	Cabernet Franc	2.25	4.76				
	Cabernet Sauvignon	4	9				
	Chardonnay	4.6	16				
	Dornfelder	0.25					
	Gewurtztraminer	0.66	0.71				
	Merlot	0.77	1.66				
	Pinot gris	0.29	1.69				
	Pinot noir	3.27	11.91				
	Riesling	4.47	12.54				
	Sauvignon blanc	0.2	0.25				
	Semillon						
	Zweigelt	0.1	0.33				