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California’s grape crush fell 7% in 2025

Soft demand and lower prices weighed on wine and raisin grapes even as table grape processing surged.

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California’s grape crush fell 7% in 2025, a sign that the state’s wine and raisin sectors continued to face softer demand and lower prices even as table grape processing surged, according to a report released by the California Department of Food and Agriculture.

Processors reported 2,761,914 tons of grapes crushed during the year, including fruit processed in season, purchased tonnage and pricing finalized before Jan. 31. White wine grapes remained the largest category at 1,324,465 tons, down 6% from 2024. Red wine grapes also declined, falling 11%. Raisin-type grapes dropped sharply to 11,541 tons, a decrease of 51%, while table grape crush rose to 124,218 tons, up 132%.

The report showed that average prices across all varieties slipped 4% to $977.76 a ton. White wine grapes averaged $706.10 a ton, down 1%, and red wine grapes averaged $1,280.66 a ton, down 4%. Raisin grapes averaged $312.75 a ton, up 6%, while table grapes averaged $201 a ton, up 33%.

The data point to a market in which growers and processors are still adjusting to uneven demand across categories. Chardonnay remained the leading variety by volume, accounting for 18% of total tonnage crushed. Cabernet Sauvignon followed at 15%. Grapes grown for raisins but crushed for wine represented just 0.4% of the total, while table varieties crushed for wine made up 5%.

Concentrate production accounted for 345,538 tons, or 13% of the total crush. The state report did not break out concentrate volumes by district or variety.

Regional results varied widely. District 13 in the Central Valley had the largest share of the state’s crush at 802,609 tons, with an average price of $333.73 a ton. In premium coastal areas, prices remained far higher. District 4 in Napa County posted the highest average price at $6,635.85 a ton, down 5% from the prior year. District 3, which includes Sonoma and Marin counties, averaged $2,762.88 a ton, down 6%.

Varietal prices also moved lower in several major categories. Chardonnay averaged $1,011.25 a ton, down 4%, while Cabernet Sauvignon averaged $2,122.49 a ton, down 3%. French Colombard averaged $290.69 a ton, down 6%, and Pinot Gris averaged $553.13 a ton, down 0.6%.

The figures come as California growers enter another season shaped by weather swings, shifting consumer demand and pressure on bulk wine prices. The state remains the country’s dominant grape producer, so changes in its crush numbers often influence contracts, inventories and pricing across the broader U.S. wine market.