Looking ahead to the Growing Season: Central Coast Market Update

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As vineyards move into the 2026 growing season, the recently released 2025 California Grape Crush Report offers important context for current market conditions across the Central Coast.

Production in District 8 increased modestly in select areas due to improved yields; however, total tons crushed remained well below recent peak levels as overall demand for winegrapes continued to soften. Total crop value declined slightly year over year, reflecting continued pressure on pricing and reduced buying activity statewide.

Varietal trends remain mixed across the region. Cabernet Sauvignon production increased in parts of Paso Robles, even as statewide sales value for the variety has declined since 2023. Sauvignon Blanc plantings continue to expand; however, unharvested tonnage reported in 2025 suggests that supply growth may be outpacing demand in some segments of the market.

Pinot Noir and Chardonnay continue to be key drivers of both production and value within District 8. Market activity is increasingly influenced by specific sub-AVAs, with areas such as the SLO Coast and Sta. Rita Hills, while demand across broader Santa Barbara County appellations has softened. Vineyard removals are continuing throughout the region as growers make difficult farming and long-term planning decisions.

An early start to the season has been observed across much of the Central Coast, with many varieties already at bud break and development running approximately three weeks ahead of normal. As the growing season progresses and marketing decisions take shape,

growers are encouraged to stay in close communication with their Turrentine brokerage partners.

For additional regional insights or to discuss current market conditions, please contact Turrentine Brokerage.