



CALIFORNIA TABLE GRAPE COMMISSION

2022 INDUSTRY ANALYSIS

Completed in April 2023, this report provides a data analysis of the California table grape industry, including a detailed summary of the 2022 season and a look at some continued and emerging trends. Sources include the California Table Grape Commission (CTGC) Distribution Reports and reports from the United States Department of Agriculture (USDA) – Agricultural Marketing Service (USDA-AMS), USDA – Foreign Agricultural Service (USDA-FAS), and USDA – National Agricultural Statistics Service (USDA-NASS).



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Overview¹

The 2022 California table grape season ran from May 2022 into February 2023. The final shipped volume of California table grapes in 2022 was 95.1 million box units, down 1.9 percent from the volume in 2021 (97.0 million box units). Domestically, per capita consumption of table grapes in the U.S. was 10.1 pounds per person in 2022, an increase of 7 percent compared to 2021 (9.4 pounds). California table grapes represented 41 percent of the total U.S. consumption of table grapes in 2022. According to USDA, exported volume (including Canada) of California table grapes was 28.4 million 19-pound equivalents or roughly 30 percent of the total volume shipped in 2022.

The weighted average FOB box price of California table grapes, including extra services was \$22.49 per box in 2022, an increase of \$0.37 from the weighted average box price in 2021 (\$22.12).

At the 2022 season end, the California total table grape crop was valued at \$2.13 billion, a decrease of .3 percent from the previous season of \$2.14 billion.

THE 2022 CALIFORNIA TABLE GRAPE SEASON

- Volume was 95.1 million box units.
- Top export markets:
Canada, Mexico, Taiwan, Australia, Japan, and Vietnam.
- Weighted average FOB box price was \$22.49.
- Crop value was \$2.13 billion.

¹ See Methodology on page 25.

Sources: CTGC Distribution Reports 2021-22 and 2022-23; U.S. Census Bureau; and USDA (AMS, FAS, and NASS).



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Volume

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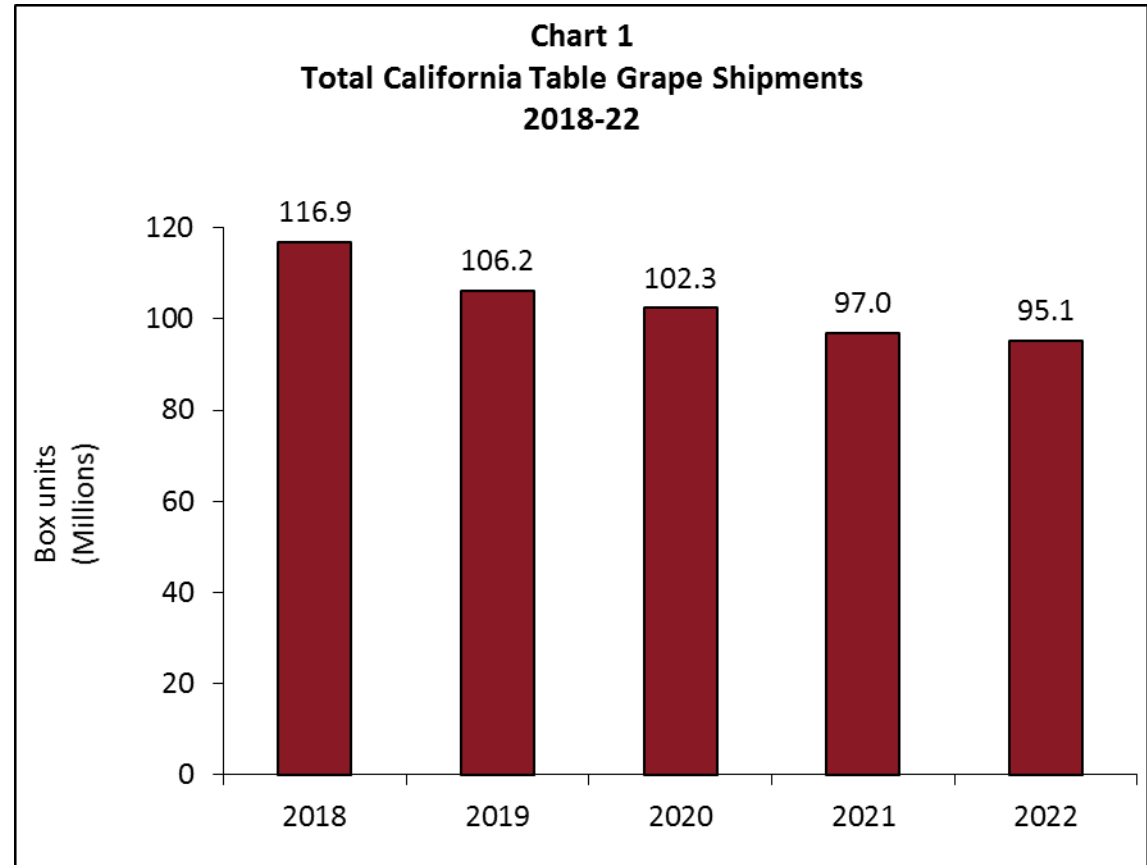


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Total Volume

Chart 1 shows the total season-end volume of California table grape shipments over the past 5 seasons.

In 2022, California table grape growers harvested 95.1 million box units¹, 1.9 percent less than the previous season of 97.0 million boxes.



¹ See Methodology on page 25.
Source: CTGC Distribution Reports 2018-22.

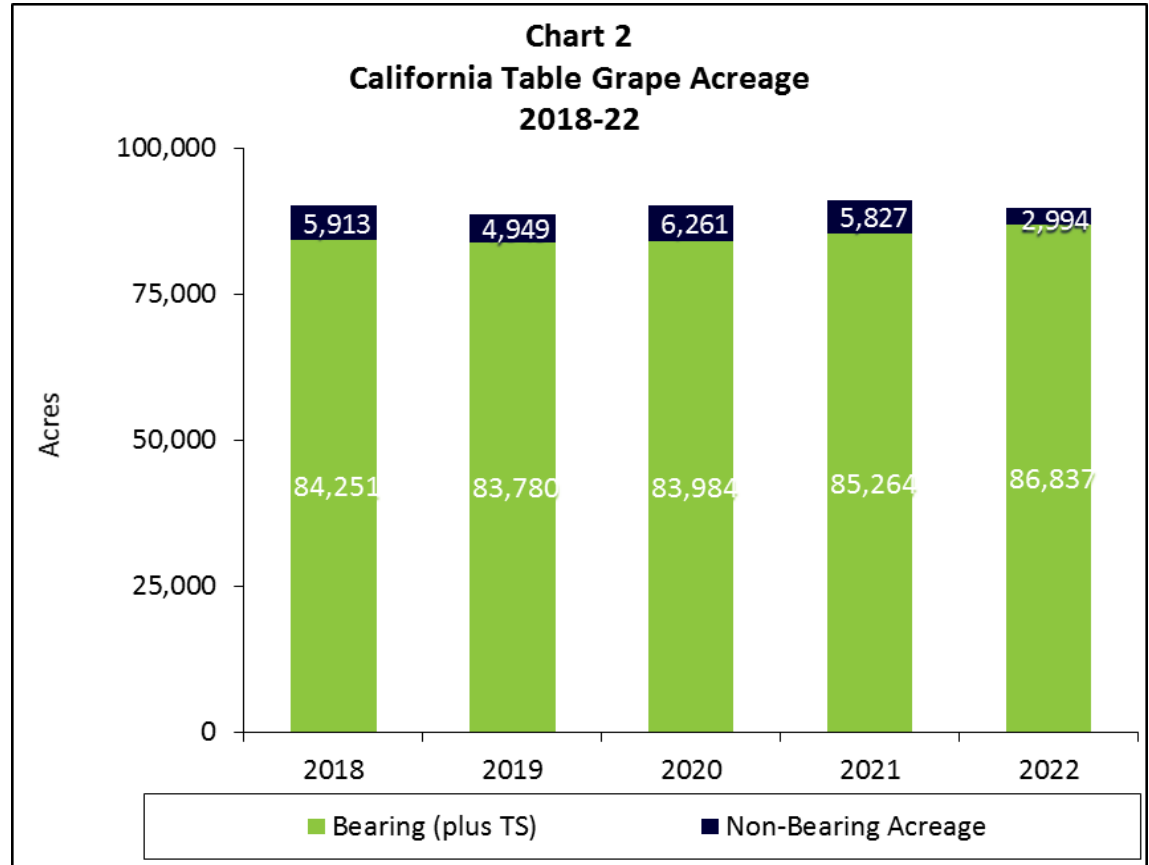


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Acreage

Chart 2 shows table grape acreage in California from 2018 to 2022.

Total bearing acreage of California table grapes was calculated at 86,837 acres in 2022. Adding non-bearing acres for 2022 brings the grand total to 89,831 acres¹.



¹ Bearing acreage includes Thompson Seedless (TS), which is not listed as a table grape variety in the USDA/NASS California Grape Acreage Report. TS acreage is based on current year TS shipments and an estimate of 800 box units produced per acre for 2018-22. Sources: USDA-NASS California Grape Acreage Reports (acreage); CTGC Distribution Reports 2018-22 (TS volume).



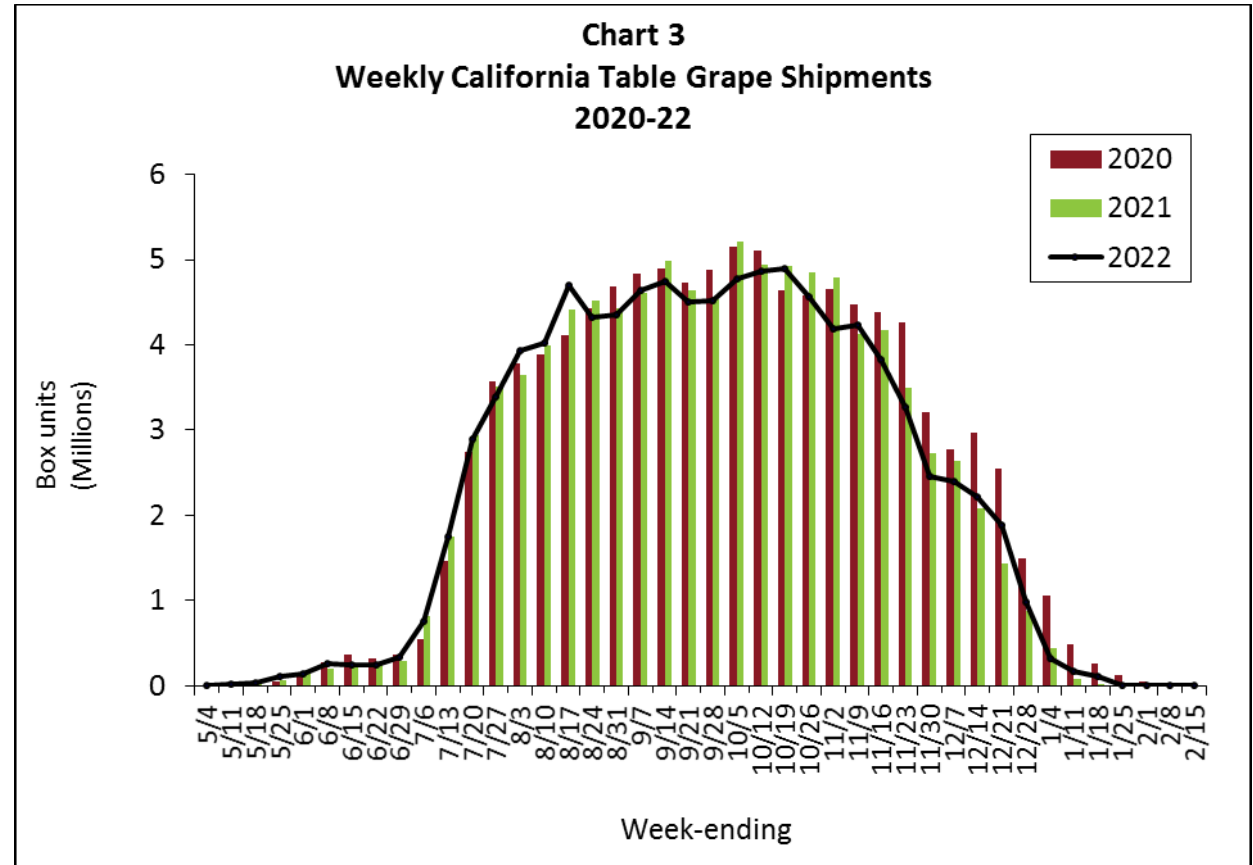
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Seasonal Flow

Shipments during the 2022 California table grape season began in May 2022 and ended in early February 2023.

The 2022 season saw a period of 14 consecutive weeks with more than 4 million box units shipped per week (August 4 thru November 9). The largest ship weeks of 4.8 million box units each occurred consecutively from October 6 through October 19, 2022.

In 2022, 33 percent of the crop shipped from May through August, while 67 percent shipped after September 1. Of that total, about 24 percent of the volume shipped in November through December, and less than 1 percent shipped after January 1.





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Volume by Variety

Table 1 shows the top 15 California table grape varieties by volume during the 2022 season. These 15 varieties represented more than 76 percent of the total season volume of 95.1 million box units.

The top 5 varieties – Autumn King, Scarlet Royal, Sheegene-20¹, Flame Seedless, and Sheegene-21² – represented just under 47 percent of the total volume in 2022.

In total, 90 varieties of California table grapes were shipped during the 2022 season.

Table 1
Top 15 Varieties by Volume in 2022
2020-22 (Box Units)

Rank in 2022	Variety	2022	2021	2020
1	Autumn King	13,168,112	13,187,523	14,084,627
2	Scarlet Royal	9,402,368	10,181,541	12,093,084
3	Sheegene-20 ¹	8,276,564	8,333,416	7,827,427
4	Flame Seedless	7,285,773	7,239,856	8,649,218
5	Sheegene-21 ²	6,485,123	5,837,259	5,351,528
6	Sheegene-17 ³	4,182,214	4,742,183	4,511,871
7	Sugrathirtyfive ⁴	3,533,035	4,198,066	3,115,379
8	Sugraone ⁵	3,439,984	3,605,345	2,878,576
9	Blanc Seedless ⁶	3,398,477	3,379,905	4,074,582
10	IFG Ten ⁷	3,028,259	2,413,583	2,150,941
11	Sheegene-12 ⁸	3,024,481	3,017,151	3,136,025
12	IFG 68-175 ⁹	2,153,302	1,997,190	2,343,462
13	Autumn Royal	1,963,035	2,019,883	2,236,405
14	Sheegene-13 ¹⁰	1,888,395	2,092,521	3,010,355
15	IFG Nine ¹¹	1,705,637	1,450,383	1,378,398

¹ Some fruit sold under names Allison® and Fall Bliss

² Some fruit sold under names Ivory®, Marlana, Sugar Crunch®, Summer Crunch®, Summer Diamond®, and Yummy Crunch®

³ Some fruit sold under names Great Green®, Great White, Green Emerald Seedless®, and Green Envy®

⁴ AutumnCrisp®

⁵ Some fruit sold under name Superior Seedless®

⁶ Pristine®

⁷ Some fruit sold under names Sorbet® and Sweet Globe®

⁸ Some fruit sold under names Krissy® and Summer Bliss®

⁹ Sweet Celebration®, sometimes sold as IFG Three

¹⁰ Some fruit sold under names Cerise and Timco®

¹¹ Jack's Salute®

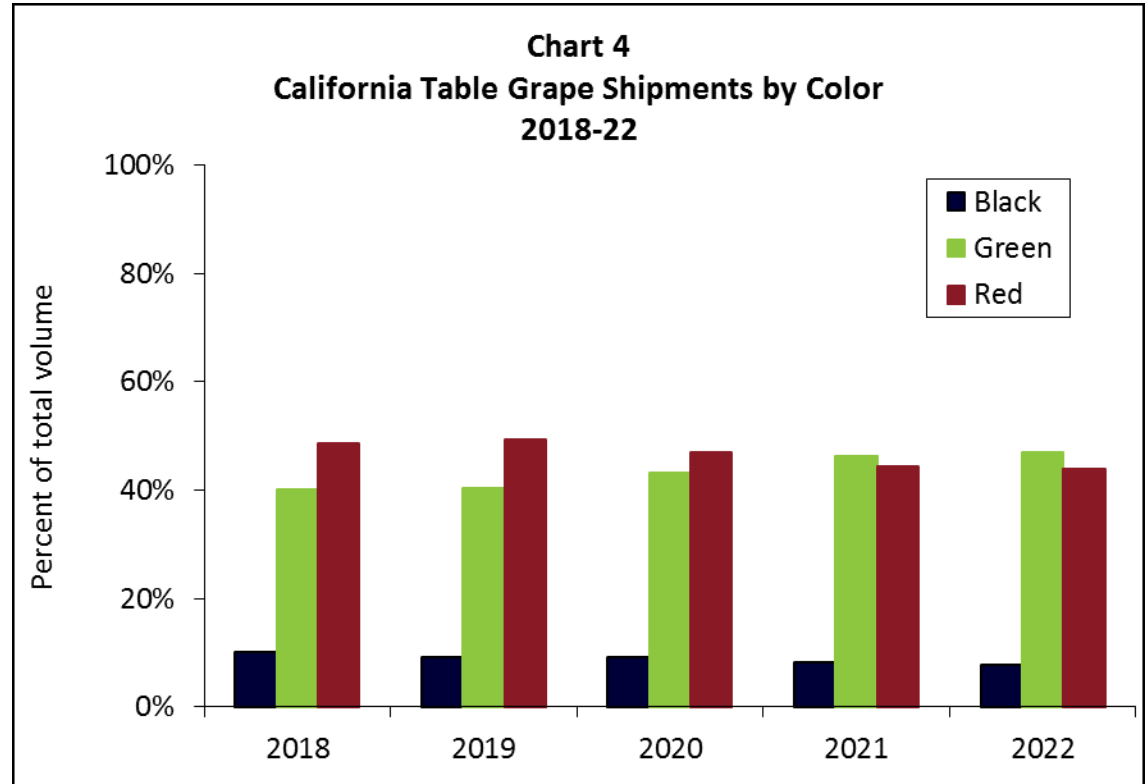


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% Volume by Color

Chart 4 shows the percentage of total shipments by 3 color classifications – black, green, and red – from 2018 to 2022.

In 2022, 44 percent of the 95.1 million box units were red table grapes, 47 percent were green, and 8 percent were black (1 percent were other, which includes bi-color, experimental, and mixed varieties).



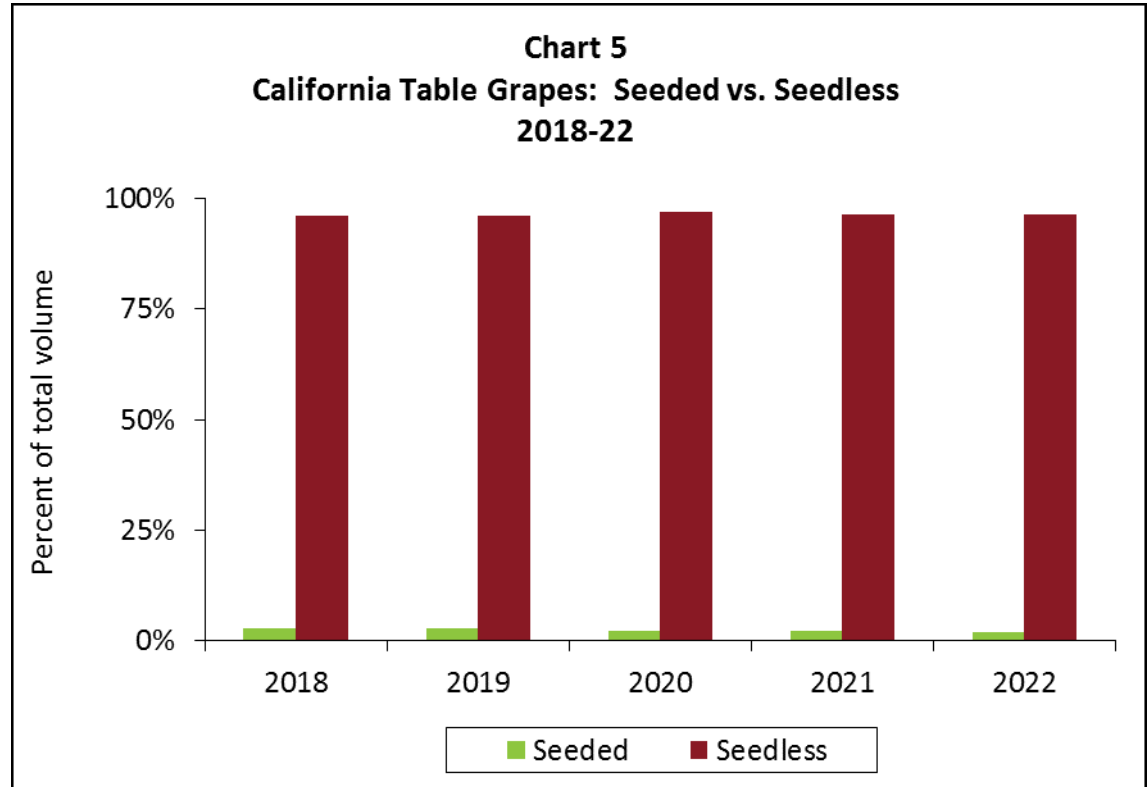


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% Seeded vs. Seedless

Chart 5 shows total volume by seeded and seedless varieties from 2018 to 2022.

In 2022, 97 percent of the 95.1 million box units were seedless varieties, and 2 percent were seeded (2 percent were unidentified, which includes bi-color, experimental, and mixed varieties).





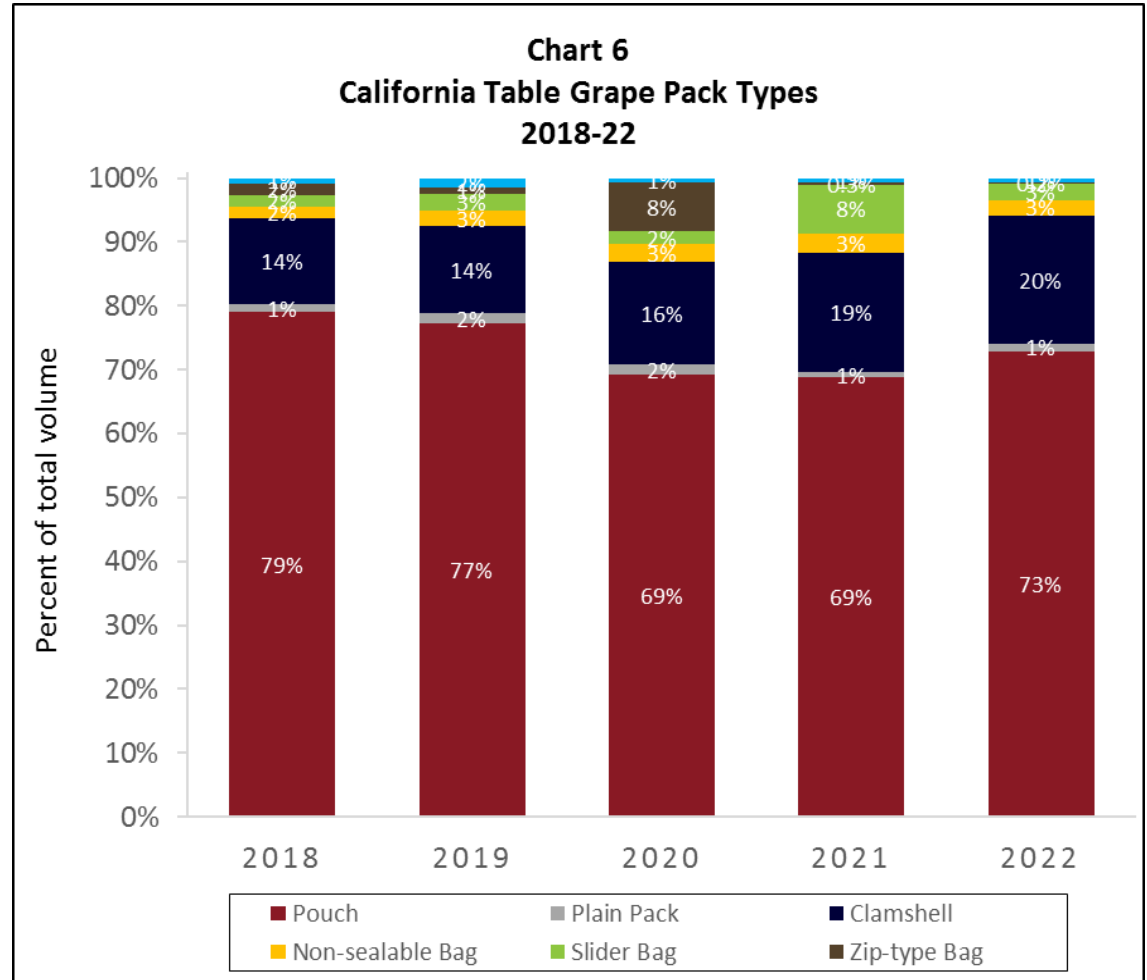
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% Volume by Pack Type

Chart 6 shows the main pack types for California table grapes.

Pouches¹ comprised 73 percent of the total volume of 95.1 million box units in 2022.

Clamshells represented 20 percent of the total volume, while bags (non-sealable, zip-type, and slider) accounted for 5 percent. Rounding out the volume were plain packs and unknown/other² packaging each accounting for 1 percent.



¹ The category of pouches includes flat-bottom, gusset, handle, pouch, and stand-up bags.

² The category unknown/other includes cup, lunch bunch, single-serve bag, snack pack, top seal, tote, tray, and wrap.

Note: Percentages may not add up to exactly 100% due to rounding.

Source: CTGC Distribution Reports 2018-22.



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A close-up photograph of a bunch of grapes. Some grapes are bright red, while others are a deep purple. The background is dark and out of focus, with some green leaves visible on the left side.

Prices

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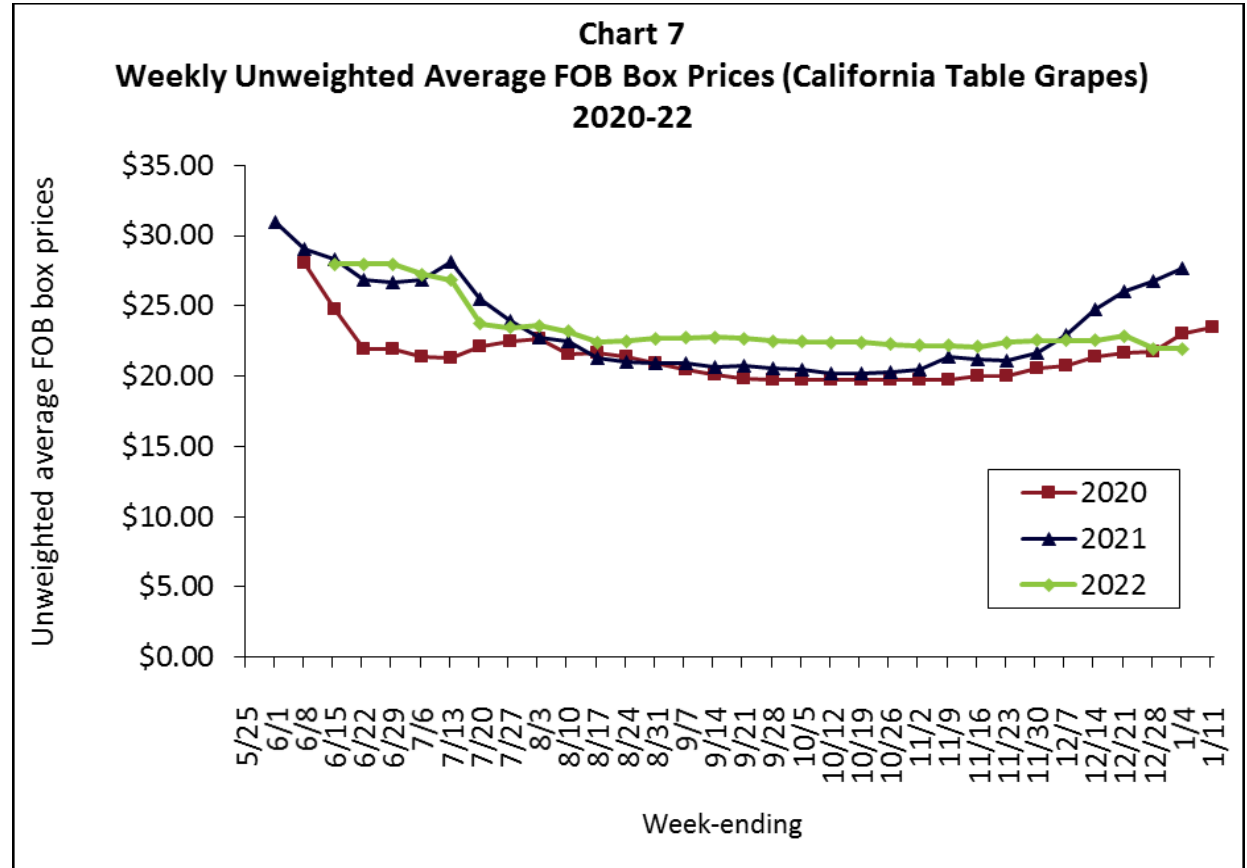


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Weekly Unweighted Average FOB Box Prices

Chart 7 shows weekly unweighted average FOB box prices of California table grapes from 2020 to 2022.

The 2022 weekly unweighted average FOB box prices ranged between \$21.95 per box and \$27.95 per box, including extra services.



Note: FOB prices include extra services. See Methodology on page 25.
Sources: USDA-AMS Fruit and Vegetable Market News Portal.



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Total Weighted Average FOB Box Price

Using the following USDA-tracked FOB box prices, the weighted average box price of the total California table grape volume was calculated at \$22.49 per box in 2022, including extra services, an increase of \$0.37 from the weighted average box price in 2021.

A total of 20 varieties were tracked by USDA and represented 77 percent of the total volume of 95.1 million box units in 2022.

Table 2
Total Weighted Average FOB Box Price 2022
California Table Grapes (including extra services)

Variety	Average Box Price (With XS)	Volume (Box Units)	Volume Weight	Weighted Average Calculation
Autumn King	\$22.03	13,168,112	0.14	\$3.05
Autumn Royal	\$21.95	1,963,035	0.02	\$0.45
Black Seedless ^{1, 1A}	\$22.11	1,874,851	0.02	\$0.44
Flame Seedless	\$23.50	7,285,773	0.08	\$1.80
Red Globe	\$23.91	1,421,942	0.01	\$0.36
Red Seedless ^{2, 2A}	\$23.23	15,471,531	0.16	\$3.78
Scarlet Royal	\$20.27	9,402,368	0.10	\$2.00
Sheegene-21 ³	\$21.20	6,485,123	0.07	\$1.45
Sugraone ⁴	\$24.57	3,439,984	0.04	\$0.89
Summer Royal ⁵	\$23.58	832,577	0.01	\$0.21
White Seedless Type ^{6, 6A}	\$23.17	12,243,821	0.13	\$2.98
Other Varieties ⁷	\$22.49	21,534,009	0.23	\$5.09
All Varieties		95,123,126	1.00	\$22.49

¹ USDA-tracked variety Black Seedless includes Beauty Seedless, IFG Six, Sugrathirteen, and Summer Royal (Coachella region only) ^{1A} Some fruit sold under names Sweet Sapphire® and Midnight Beauty®

² USDA-tracked variety Red Seedless includes IFG Nine, Sheegene-12, Sheegene-13, Sheegene-20, and Sheegene-3

^{2A} Some fruit sold under names Jack's Salute®, Krissy® and Summer Bliss®, Cerise and Timco®, Allison® and Fall Bliss; and Magenta Red

³ Some fruit sold under names Ivory®, Marlana, Sugar Crunch®, Summer Crunch®, Summer Diamond®, and Yummy Crunch®

⁴ Some fruit sold under name Superior Seedless® ⁵ Volume shown is less boxes recorded as Black Seedless for Coachella region

⁶ USDA-tracked variety White Seedless Type includes IFG Ten, Sheegene-17, Sheegene-2, and Sugrathirtyfive

^{6A} Some fruit sold under names Sorbet® and Sweet Globe®; Great Green®, Great White, Green Emerald Seedless®, and Green Envy®; Timpson®; and AutumnCrisp®

⁷ Includes all other varieties. Average box price for this category is assumed to equal the weighted average box price of the USDA-tracked varieties.

Note: FOB prices include extra services. See Methodology on page 25.

Note: Weighted Average Calculation uses unrounded Volume Weight numbers, therefore it may not add up exactly to what is shown due to rounding.

Sources: USDA-AMS Fruit and Vegetable Market News Portal (FOB prices); CTGC Distribution Report 2022-23 (volume).



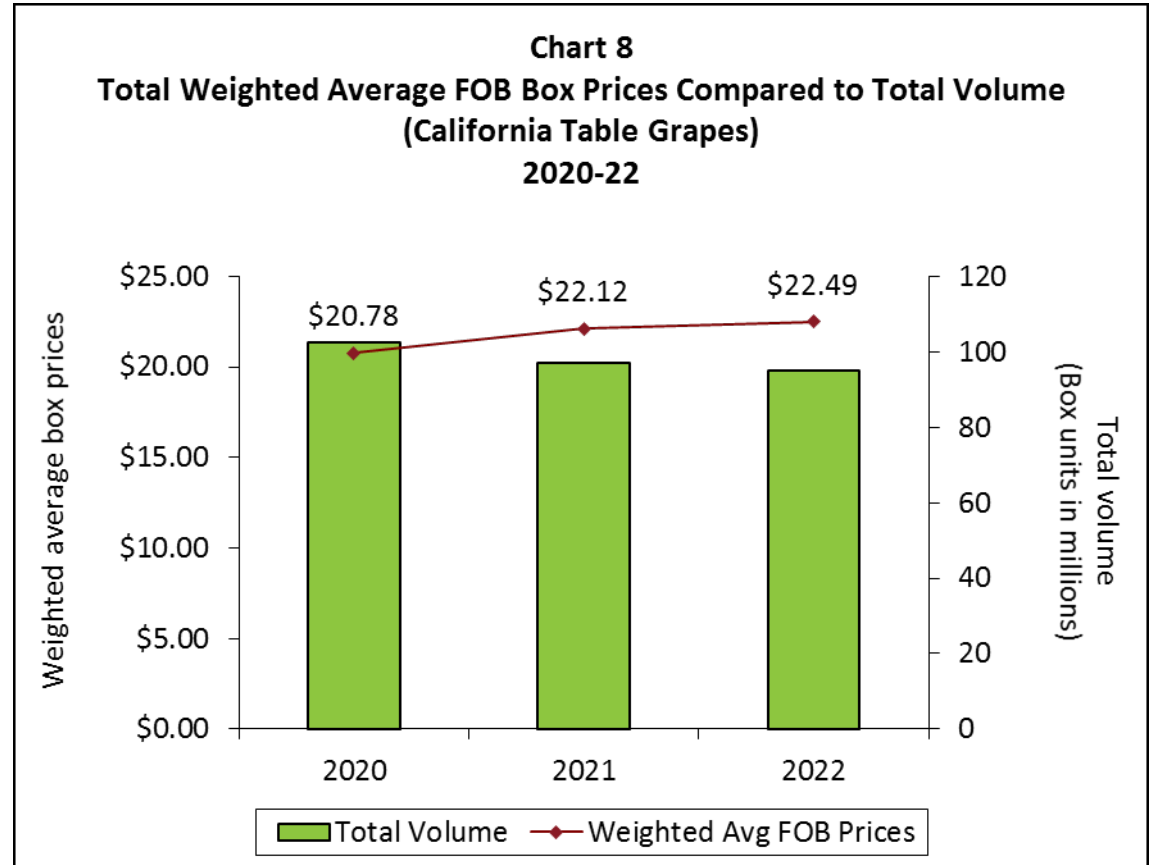
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Total Weighted Average FOB Box Prices Compared to Total Volume

Chart 8 compares the total weighted average FOB box price to the total volume from 2020 to 2022.

Total volume in 2022 of 95.1 million boxes decreased 3 percent compared to the 3-year average volume of 98.1 million box units.

The 2022 average weighted FOB of \$22.49 increased 1.7 percent from the previous season and 3 percent compared to the 3-year average weighted FOB of \$21.80.





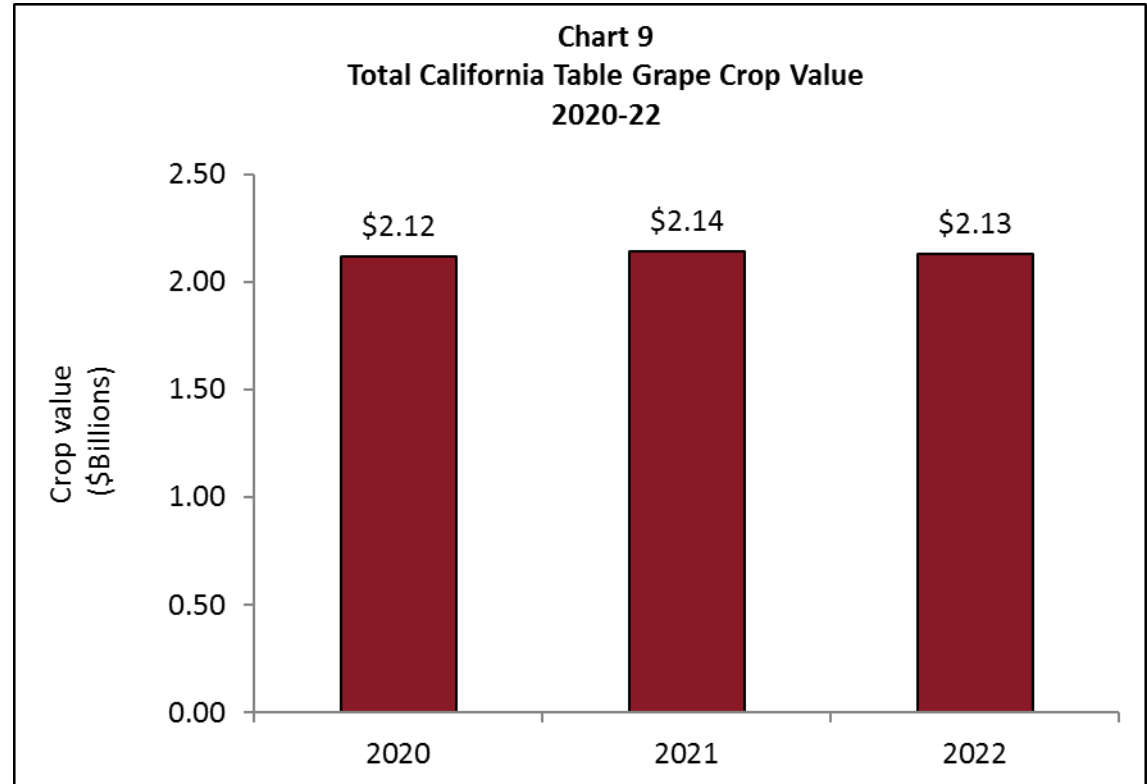
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Crop Value

Chart 9 shows the California table grape crop value for the last 3 seasons.

The 2022 season produced a crop value¹ of \$2.13 billion, a decrease of .3 percent from the prior season of \$2.14 billion, but an increase of .1 percent when compared to the total crop 3-year average.

Over the past 3 seasons, the total crop value of California table grapes has averaged \$2.13 billion.



¹ Crop value is based on the total volume multiplied by the weighted average FOB box price (including extra services) for each season.
Sources: USDA-AMS Fruit and Vegetable Market News Portal (FOB prices); CTGC Distribution Reports 2020-22 (volume).



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U.S. Consumption

Chart 10: Monthly Consumption in the U.S. by Origin (Jan-Dec, 2022)

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Chart 11: U.S. Consumption of Imported Grapes (Jan-Dec, 2020-22)

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Chart 12: U.S. Per Capita Consumption (Jan-Dec, 2018-22)

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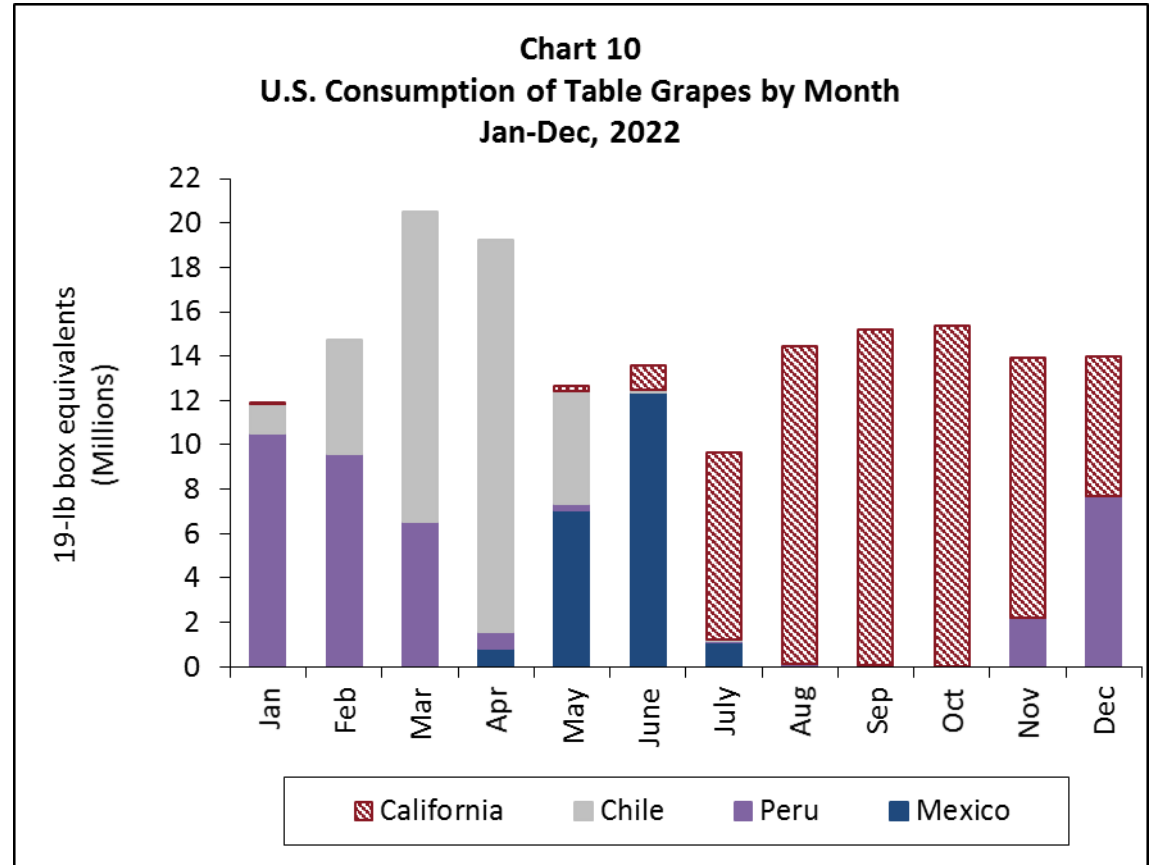
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Monthly Consumption in the U.S. by Origin

Chart 10 shows U.S. consumption of table grapes by origin from January to December in 2022.

In 2022, the main competitive origins for California table grapes in the U.S. were Chile, Peru, and Mexico, listed in order by greatest volume.

California grapes are typically available for consumption from May through January. Chilean grapes appeared in the U.S. market beginning in January, with most importing completed by mid June. Mexican grapes entered the U.S. market beginning in April and were available into early September. Grapes from Peru were predominantly available in the U.S. market at the end of the California season, beginning in November through April.



Note: A minimal amount (2.4 percent) of imports in 2022 included shipments from Brazil, Canada, Italy, South Africa, South Korea, and Spain.
Sources: USDA-AMS Fruit and Vegetable Market News Portal (imports); CTGC Distribution Reports 2021-22 and 2022-23 (California volume – U.S. destination shipments).



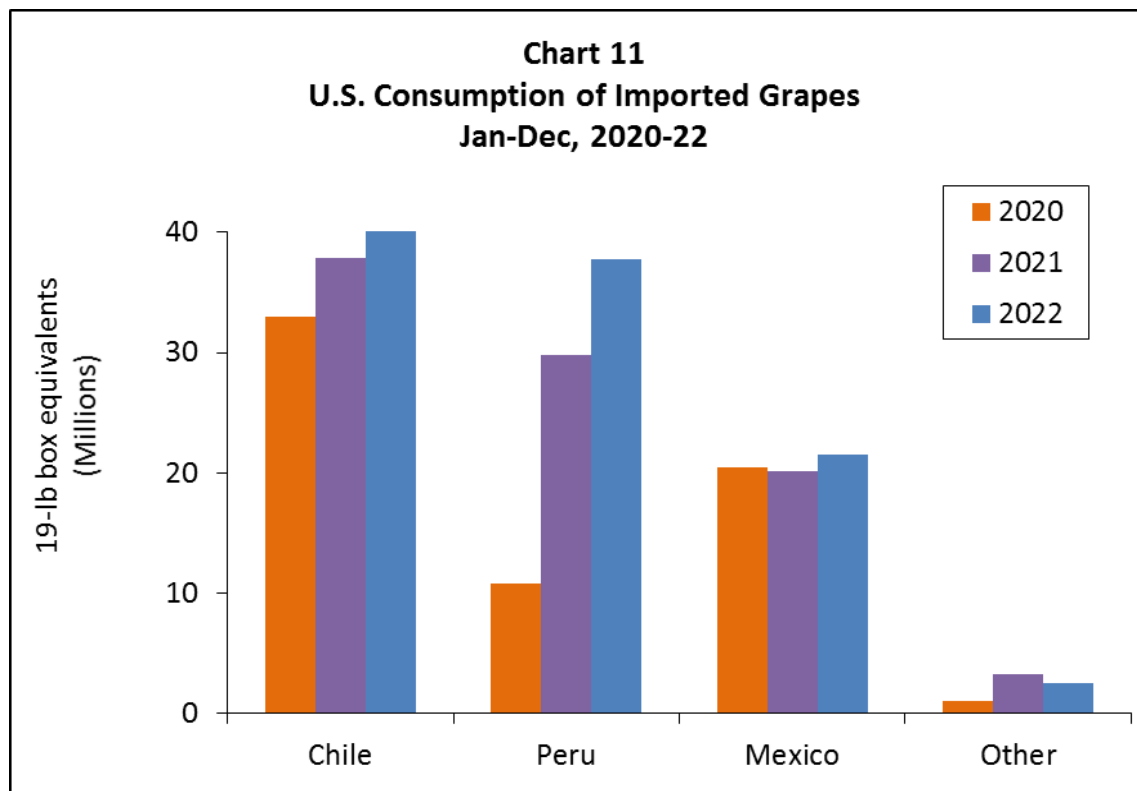
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U.S. Consumption of Imported Grapes

Chart 11 shows U.S. consumption of imported table grapes by origin from 2020 to 2022.

In 2022, 105 million 19-pound box equivalents of table grapes were imported into the U.S., up 15.5 percent from 2021 (90.9 million). More than half of the increase in 2022 occurred in the months of April and May.

In 2022, Chilean grapes represented 41 percent, Mexican grapes represented 20 percent, and Peruvian grapes 35 percent of total imports. Other grapes¹ comprised predominantly of Brazilian and South African grapes accounted for 2 percent of imports.



¹ Other imports include those from Brazil, Italy, South Africa, South Korea, and Spain (2020-22); Moldova (2021), and Canada (2022).

Note: Percentages may not add up to exactly 100% due to rounding.

Source: USDA-AMS Fruit and Vegetable Market News Portal.



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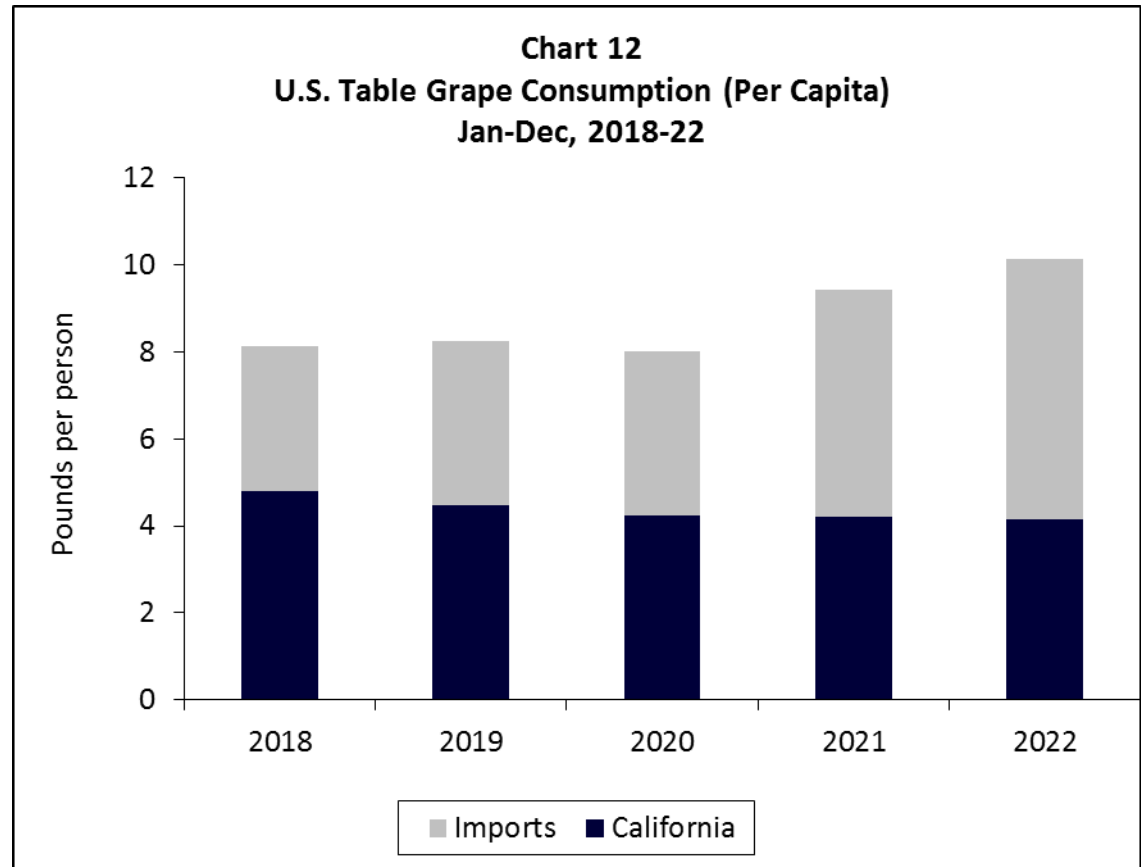
U.S. Per Capita Consumption

Chart 12 tracks the per capita consumption of table grapes in the U.S. each year, comparing consumption of California table grapes to imported table grapes.

The per capita consumption of table grapes in the U.S. was 10.1 pounds per person in 2022 (Jan-Dec), up 7 percent compared to 2021 (9.4 pounds). Total grape volume of California grapes and imported grapes in 2022 (Jan-Dec), was 8 percent higher than the previous year.

California represented 41 percent of the total U.S. consumption of table grapes and the other 59 percent were from import origins.

Between May and December of 2022, 66 percent of the table grapes consumed in the U.S. were from California; between July and December, 85 percent of the table grapes consumed in the U.S. were from California (see Chart 10).



Note: Imports include those from Brazil, Italy, South Africa, South Korea, and Spain (2018-22); Moldova (2021); and Canada (2022).

Sources: USDA-AMS Fruit and Vegetable Market News Portal (imported grapes); CTGC Distribution Reports 2018-22 (California grapes); U.S. Census Bureau.



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International

Chart 13: Worldwide Production and Consumption (2022-23)

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Chart 15: Leading Export Markets (2020-22)

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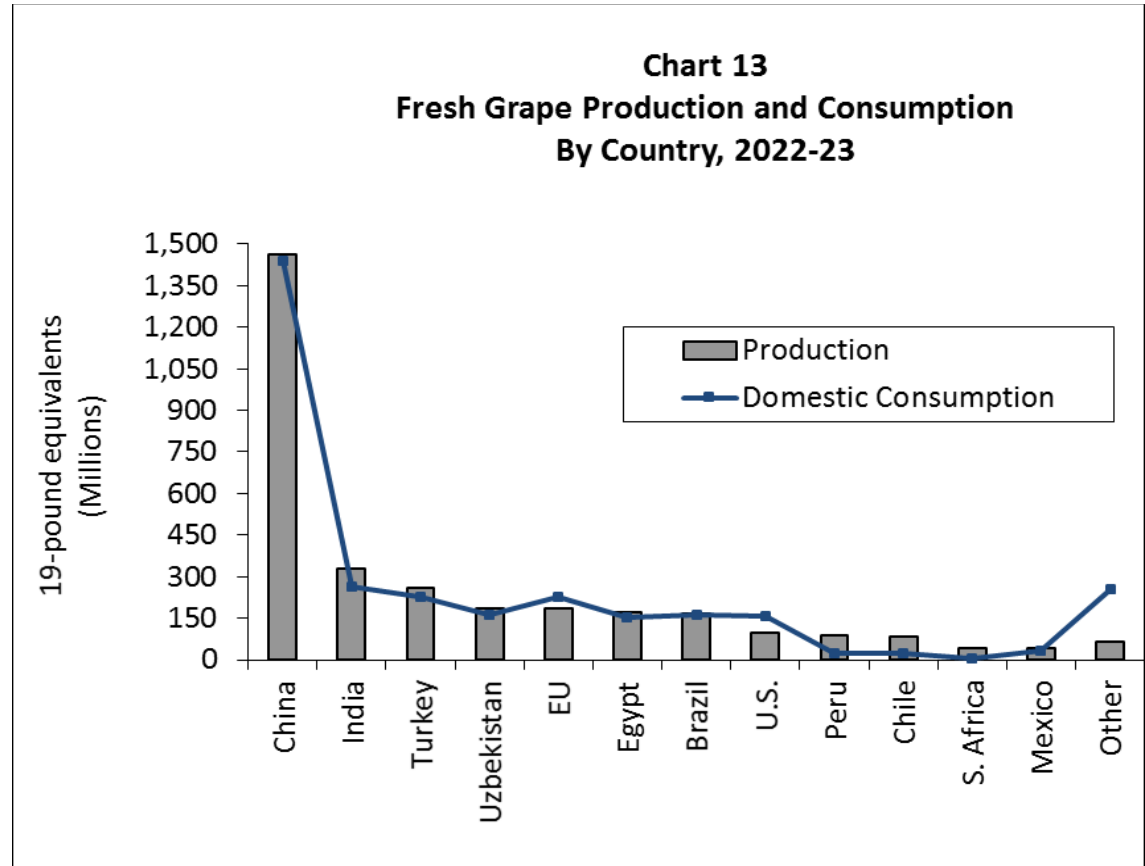


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Worldwide Production and Consumption

Chart 13 shows the top 12 countries/regions in production of fresh grapes in 2022, and shows domestic consumption of fresh grapes in those countries.

According to the USDA Foreign Agricultural Service Fresh Apples, Grape, and Pears report, it is estimated that 3.1 billion 19-pound box equivalents of table grapes were produced worldwide in 2022.



Note: The order of countries listed is by 2022 production.

Note: EU stands for the European Union.

Sources: USDA-FAS Fresh Apples, Grapes, and Pears: World Markets and Trade (December 2022).

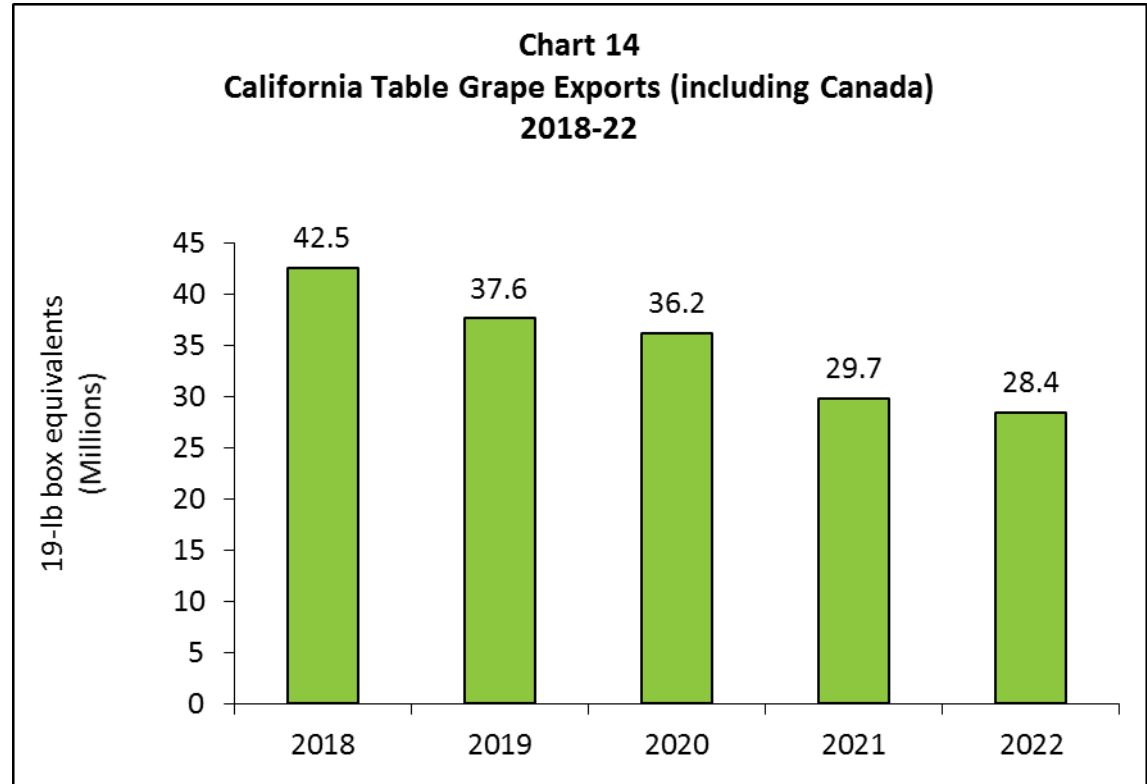


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Total Exports

Chart 14 shows total California table grape exports (including Canada) from 2018 to 2022.

In 2022, 28.4 million 19-pound box equivalents of California table grapes were exported to 50 countries around the world. This represented 30 percent of the total volume¹.



¹ Excluding Canada, 17.7 million 19-pound box equivalents or 18.9 percent of total volume was exported in 2022.
Source: USDA data May through January (export data); CTGC distribution data 2018-22 (total volume).

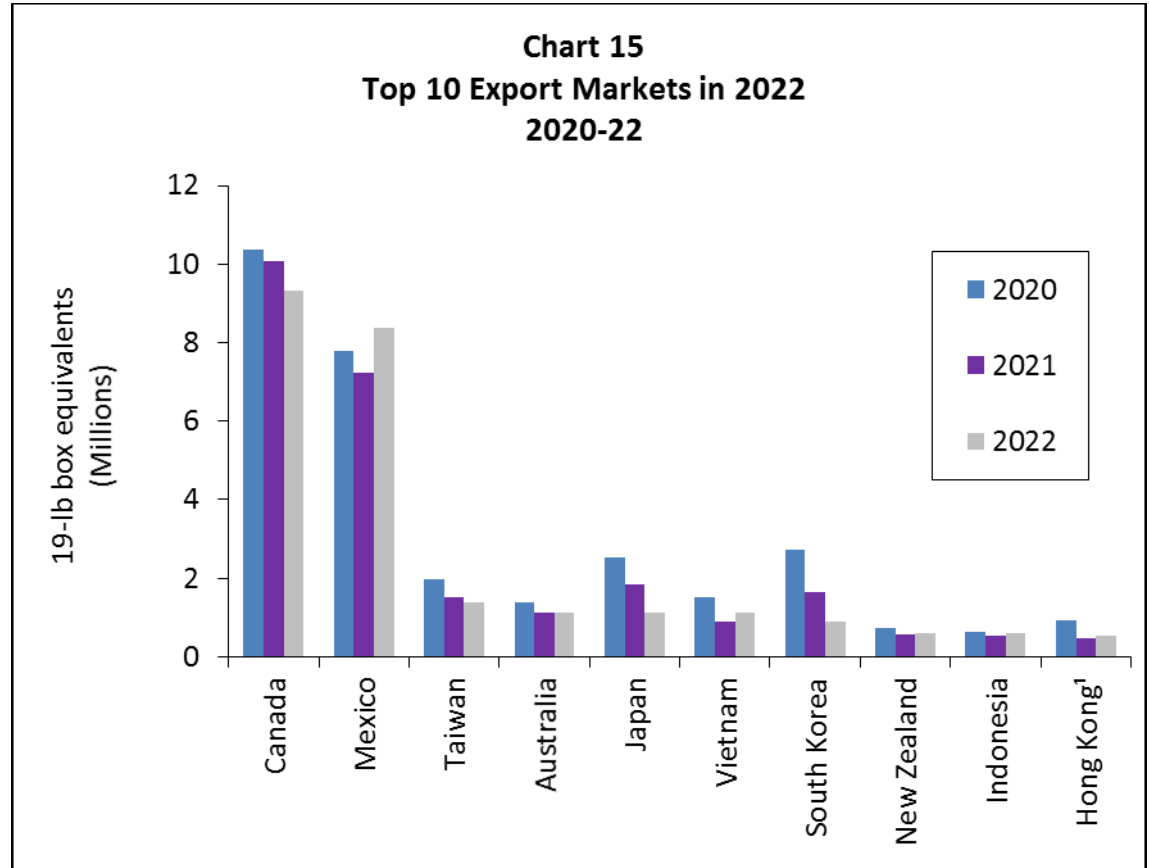


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Leading Export Markets

Chart 15 shows the top 10 volume export markets for California table grapes in 2022, with volume included for years 2020 to 2022.

Canada was the top volume export market in 2022 at 9.3 million 19-pound box equivalents, followed by Mexico (8.3 million), Taiwan (1.3 million), and Australia, Japan, and Vietnam (1.1 million each).



¹ Volume for Hong Kong is calculated using import and export data June through December as reported in the Global Trade Atlas. Calculations result in an estimated 6 percent of volume transshipped from Hong Kong to China in 2021 and 2022, and 14 percent in 2020. Sources: USDA Volume and Value reports May through January.



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Methodology/Definitions

Volume	This report uses the commission Distribution Report published in March of each year for California table grape volume. Less than 1 percent of the total volume is typically added/subtracted after the Distribution Report is published. Similarly, USDA volume data is recorded as of publication date of the Industry Analysis. Updates to Distribution Report and USDA data that occur after publication of the Industry Analysis do not significantly change the report's statistics.
Box Units	To convert to 19-pound equivalents, multiply box units by 98.4138% for 2022.
Acreage	Acreage data was collected from the USDA-NASS California Grape Acreage Reports. Acreage for Thompson Seedless, which is not listed as a table-type grape by USDA, is derived using commission shipment data and an estimate of 800 box units produced per acre.
Unweighted Average Box Price	USDA contacts shippers on a daily basis to gather daily FOB prices when there is sufficient volume in the market. Unweighted average daily FOB prices by variety are gathered from the USDA-AMS Fruit and Vegetable Market News Portal. This report averages the USDA-tracked varieties by the same week-ending date each year for comparison purposes.
Weighted Average	The volume weight for each USDA-tracked variety is derived from the individual volume of that variety, divided by the total volume of all varieties; both volume numbers are as reported to the commission. The Other Variety volume is the total of the remaining varieties – those not tracked by USDA – divided by the total volume. Variety contribution to the weighted average box price is calculated using the volume weight multiplier times the average box price, including extra services, as reported by USDA-AMS.
Extra Services	Extra services per FOB box is defined by USDA as precooling and palletization.
Crop Value	Crop value is based on total volume multiplied by the weighted average box price, which includes extra services.
Imports	All import data collected for this analysis is from USDA-AMS.
Exports	Source for California table grape exports: USDA data May through January.