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DISTRIBUTOR MARKET 2018



Top 10 Wine Distributors • Leveraging Regional Sales Success

SPECIAL ANNUAL REPORT

What keeps your winery from growing?

DISTRIBUTOR CONSOLIDATION



AGING EQUIPMENT

LONG CAPITAL CYCLES

MANAGING CASH FLOW

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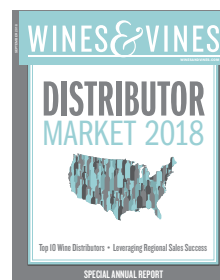
Careful vineyard management and spray programs help ensure high-quality yields in New York. *By Ray Pompilio*

CONTRIBUTORS

While the largest plantings of Pinot Gris in the United States are in Oregon, it now has a following in New York's Finger Lakes region as well. **Ray Pompilio** examines the challenges that the variety presents to growers in a region with cold winters and often wet summers. His article, "Pinot Gris in the Finger Lakes," (page. 60) discusses the vineyard management techniques two wineries employ to combat the disease pressure of downy and powdery mildew and to get the fruit to ripen. Pompilio will review the two wineries' experiences in vinifying Pinot Gris in a future article.

Writer **L.M. Archer** splits time between the Monterey Peninsula in California and the Pacific Northwest giving her an excellent vantage point on trends in grape growing and winemaking among U.S. specialists in Burgundian varieties. As part of her continuing coverage on sparkling wine, Archer explores what's new in terms of packaging in a report on page 54. In addition to her work for *Wines & Vines*, Archer's writing has appeared in *Oregon Wine Press*, *Meininger's Wine Business* and *France Today*.

Peter Mitham has written for *Wines & Vines* since 2000, primarily focusing on the wine industry in the Pacific Northwest. His work has taken him throughout the wine regions of British Columbia, Oregon and Washington where he recently visited the new Double Canyon winery that he covers in detail in a technical profile on page 38. Mitham is a seasoned business journalist and now does the majority of the Wine Industry Metrics reporting found on pages 12-13.



ON THE COVER

Graphic designer Rebecca Arnn created this month's cover image that continues the theme of the inaugural Distributor Market report from last year to illustrate the growing market coverage of the top wine distributors in the United States.

CORK BY THE NUMBERS



70%

of the world's wines
are sealed with cork.

88%

of Wine Spectator's 2016 & 2017
Top 100 Wines are sealed with cork.

6x

more wine drinkers say
natural cork indicates high quality,
as compared to screw caps.

9x

more wine drinkers say
screw caps indicate low quality,
as compared to natural cork.

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QUESTION FOR SEPTEMBER:

How have your filtration methods evolved during your time in the wine industry?



Emily Haines
winemaker
Terra d'Oro Winery
Amador, Calif.

FILTRATION HAS COME A LONG WAY

over my measly 11 years in the wine industry. The new technology becomes better each year, resulting in wines that have less negative filtration impact (thin, papery, hard, etc.) and “bounce back” more quickly post filtration. For myself, personally, moving from a production winemaking facility in Washington state to an artisan winemaking facility in Amador County, California, I’ve been able to move away from filtration.

In production, we utilized lees filtration, diatomaceous earth (DE) filtration, plate and frame pad filtration, crossflow filtration, sterile filtration and, at times, reverse osmosis (RO) for the removal of volatile acidity and/or alcohol. Of all of these, the biggest strides I saw were

in crossflow filtration and the “removal technologies.” In my first experiences with VA and alcohol removal, the resulting wines tasted flat and had pH issues that were hard to resolve. In my more recent experiences using newer equipment, they are far gentler on the wines and are redeeming for many reasons, even using alcohol removal on high tier blends to achieve the ideal alcohol balance.

Moving to Terra d’Oro Winery, I have been able to focus on wine quality, resulting in reduced filtration in my winemaking practices. I am able to clarify my wines through natural settling, for the most part. Still utilizing a crossflow in wine prep for bottling and a sterile filter on the bottling line as a security blanket for stability of bottled product.



David Ramey
owner and
winemaker
Ramey Wine Cellars
Healdsburg, Calif.

AT RAMEY, we don’t own a filter and have never filtered a Ramey wine. I am aware, though, of the evolution of filtration technology, which goes from DE filtration (not a good technique in my opinion), to plate and frame with pads (better, but still removes solutes (flavor, aroma, color) from wine (along with particles) to lenticular discs (pretty good, if you have to filter) to crossflow (the current state of the art).

Still, if the wine is dry and has completed malolactic fermentation, then with the aid of traditional fining agents (isinglass, casein, bentonite) one may polish a wine to bottle-ready clarity. It’s a shame that “unfined and unfiltered” have been joined at the hip — fining has been used for centuries to

craft handmade wines, while filtration is a modern, industrial process. Many winemakers feel safer filtering — at the expense of flavor, in my opinion.

For Cabernet Sauvignon, we use egg whites, an old-world method, to clarify the wine and eliminate filtration. A secondary benefit is to specifically target tannins; this polishes, refines and finishes the wine, making it more supple and silky. The third is to remove unstable tannin and color which may otherwise throw a deposit after two to three years in bottle. For our Chardonnay (100% malolactic), we fine with isinglass and milk or casein to achieve the same clarity and supple texture we strive for in our red wines.



Tim Slater
proprietor and
winemaker
Sarah's Vineyard
Gilroy, Calif.

THIS WILL BE MY 18TH HARVEST

and wine filtration has been an irritation since day one. We sterile filter most of our wines to minimize the potential for problems in the bottle, with a few exceptions. Since the early 2000s we’ve used a plate and frame filter and double passes to do a rough and then sterile filtration. It’s so irritating to have wine dripping out of those pads! Oxidation of the wine is always a worry for me. We tried getting a longer filter frame and a crossover plate, so we could load both rough and sterile filter pads and do both passes at the same time, but with poor results — the back pressure on

the sterile pads made the rough pads leak like crazy.

When the lenticular filters became available we were pretty excited at the potential for zero leakage and low oxygen pickup, but I’ve heard mixed reviews. Mostly the cost of the filter cartridges seemed prohibitive, so we never went that way.

Finally, about three years ago, we tried using a crossflow filtration service provided by DT Mobile Wine Services in San Jose, Calif., and have never looked back. The cost of the crossflow service is far outweighed by the convenience and the quality of the filtration. We hope to buy a small crossflow of our own in a few years.

WINES&VINES

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ADVERTISING

Vice President and Director of Sales

Jacques Brix
jbrix@winesandvines.com
(707) 473-0244

West

Lydia Hall
lydia@winesandvines.com
(415) 453-9700, ext. 103

Midwest

Hooper Jones
hooperhja@aol.com
(847) 486-1021

East (except New York)

Laura Lemos
laura@boja.com
(973) 822-9274

New York and International

Dave Bayard
dave@bayard.com
(973) 822-9275

Advertising Production Manager

April Kushner
ads@winesandvines.com
(415) 453-9700, ext. 114



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The End of an Era but the Start of Something Even Better

AT THE START OF AUGUST, *Wines & Vines* announced some transformative changes that I'm going to explain here in a little more detail.

Since 2004, this publication and *Wine Business Monthly* have been owned by Wine Communications Group. The rapidly changing publishing world and the realities of a business model supported by print advertising ultimately made it clear around the start of the year that it no longer made sense to continue to publish two wine industry trade publications that were essentially competing with each other.

The December edition of *Wines & Vines* magazine will be its last as it is being merged into the pages of *Wine Business Monthly*. The practical and informative content that has filled our magazine will be moving to that publication, which, undoubtedly, will become the industry's leading trade magazine. This is similar to how *Wines & Vines* absorbed *Wine East* and *Practical Vineyard & Winery* magazines. Linda Jones McKee will continue to cover the industry in the East, and Don Neel will coordinate the same kind of content we've published in our Practical section for *Wine Business Monthly*. Our annual Directory/Buyer's Guide will continue to be published in print and online as well.

It may be the end for *Wines & Vines* as a print magazine, but as part of an ongoing evolution, the publication will transition into Wines Vines Analytics

It may be the end for *Wines & Vines* as a print magazine, but as part of an ongoing evolution, the publication will transition into Wines Vines Analytics; a new company focused on providing the industry's best data and analysis. I will be heading up a new digital publication called the Wine Analytics Report that we plan to release in January. We're also hiring additional staff to support this publication and other enhanced database services.

I have been working with our Wine Industry Metrics since I joined the magazine in 2011 and have watched it become some of our most popular and sought-after content. These metrics include off-premise wine sales, direct-to-consumer shipments, winery hiring and total U.S. wine sales. The new analytics report will take all of this information and package it with more industry news, expert commentary and other analytical insights.

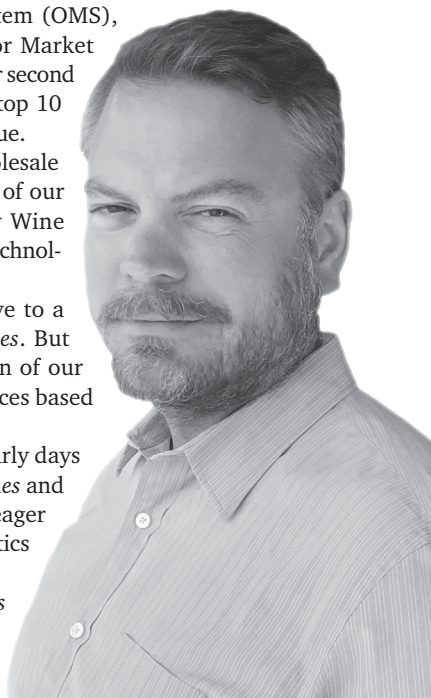
In addition to the report, Wines Vines Analytics is bolstering our other data services that include the Online Marketing System (OMS), brewer and distributor databases and the Distributor Market Service (DMS). The DMS is what we used to produce our second special report on the wholesale market including the top 10 largest U.S. wine distributors that you'll find in this issue.

We'll also be incorporating the industry's best wholesale data from Gomberg, Fredrikson & Associates, and all of our services will support the many events produced by Wine Communications Group including the Wine Industry Technology Symposium, Innovation + Quality and others.

It has not — and won't be — easy to say goodbye to a publication with as long of a history as *Wines & Vines*. But these changes are part of a larger, strategic transition of our company into one that provides a wider range of services based on what we do best.

Many of you are likely in the midst of the hectic, early days of harvest, but be assured that the team of *Wines & Vines* and all our colleagues at Wine Communications Group are eager to continue to provide you the best news, data analytics and events and these changes will help us do that.

—Andrew Adams



WINES & VINES

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President & Publisher

Chet Klingensmith

Chairman Hugh Tietjen

Publishing Consultant Ken Koppel

Associate Publisher Tina Vierra

Publishing Assistant Ian Fadden

EDITORIAL

Editor Andrew Adams

Editor at Large Jim Gordon

Staff Writer Stacy Briscoe

Northwest Correspondent

Peter Mitham

Columnists

Andy Starr, Cliff Ohmart

and Glenn T. McGourty

Contributing Writers Laurie Daniel, Richard Smart, Richard Carey, Jaime Lewis, Chris Stamp, Andrew Reynolds, Ray Pompilio and Fritz Westover

Practical Winery & Vineyard (PWV)

Editor Don Neel

Wine East Editor Linda Jones McKee

DESIGN & PRODUCTION

Graphic Designer Rebecca Arnn

DATABASE DEVELOPMENT – INFORMATION TECHNOLOGY

Vice President — Data Management

Lynne Skinner

Project Manager Liesl Stevenson

Database & Web Development

James Rust, Peter Scarborough

Research Assistant Sara Jennings

CONTACT US

SUBSCRIPTIONS

Email: subs@winesandvines.com

Online: winesandvines.com/subscribe

Phone: (866) 453-9701

EDITORIAL

Email: edit@winesandvines.com

MAIL

65 Mitchell Blvd., Suite A
San Rafael, CA 94903

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Key Indicators

Complete data is available
at winesandvines.com/metrics.

U.S. Wine Sales

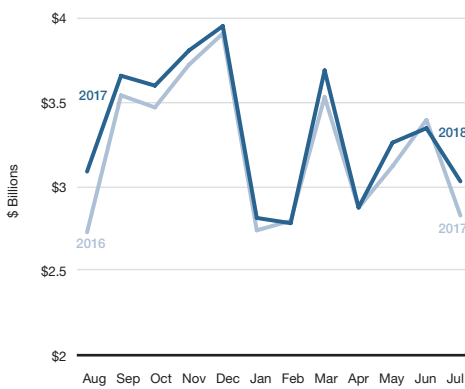
MONTH

July 2018	\$3,012M	2%↑
July 2017	\$2,960M	

12 MONTHS

July 2018	\$46,072M	3%↑
July 2017	\$44,582M	

MONTHLY SALES



Source: bw166.com, Wines Vines Analytics. Domestic table and sparkling wine sales on-premise and off-premise.

Off-Premise Sales IRI Channels

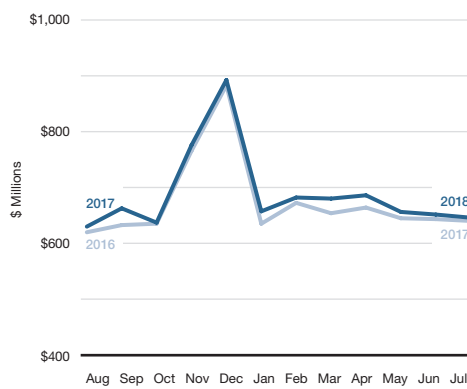
MONTH

July 2018	\$656M	1%↑
July 2017	\$640M	

12 MONTHS

July 2018	\$8,953M	2%↑
July 2017	\$8,758M	

MONTHLY SALES



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ended July 15, 2018.

Direct-to-Consumer Shipments

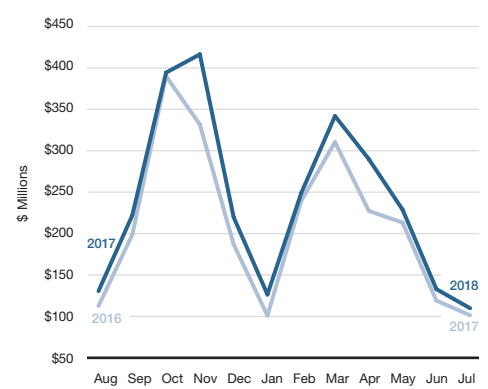
MONTH

July 2018	\$109M	8%↑
July 2017	\$100M	

12 MONTHS

July 2018	\$2,858M	13%↑
July 2017	\$2,529M	

MONTHLY SHIPMENTS



Source: Wines Vines Analytics/ShipCompliant by Sovos.

Winery Job Index

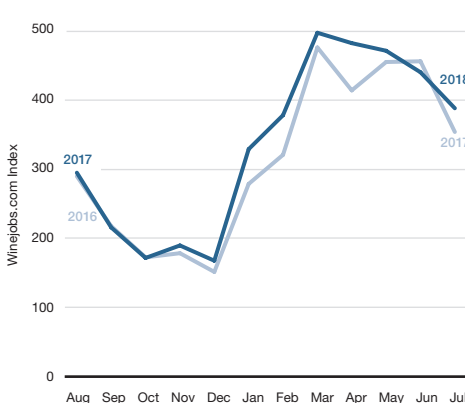
MONTH

July 2018	388	10%↑
July 2017	354	

12 MONTHS

July 2018	336	7%↑
July 2017	314	

MONTHLY INDEX



Source: winejobs.com

U.S. Wine Sales

Wine Sales Up 2%, Imports Boost Total

U.S. wine sales totaled \$3 billion in July, market research firm bw166 reported, up 2% versus a year ago. Domestic table wine sales increased 2% in the month, while domestic sparkling wines saw sales increase 3%. Imported sparkling wines saw the strongest growth in the month, rising 10%.

The latest 12 months saw domestic wine sales increase 3% to \$46 billion, while sales of packaged imports rose 7% to exceed \$23 billion. All told, wine sales in the U.S. totaled \$69 billion in the latest 12 months, an increase of 5% from a year ago. Driving the increase were imports, led

by rosé (a trend borne out by off-premise sales) and sparkling wines, fuelled by favorable exchange rates. While fresh data releases from the TTB honed the picture of what was selling in the first half of the year, bw166 analyses indicated that the contribution of packaged imports continues to exceed that of domestic wines, which typically account for two-thirds of wine sales in the U.S. Packaged imports increased \$1.6 billion in real dollar terms in the 12 months ended July, for example, while domestic wines including bulk imports increased by \$1.5 billion.

—Peter Mitham

TOTAL WINE SALES

	\$ Millions			
	2017	2018	Change	% Change
Domestic Table, Sparkling & Imported Bulk	\$44,582	\$46,072	\$1,489	3%
Packaged Imports & All Other Wines	\$21,612	\$23,209	\$1,598	7%
Total Wines	\$66,194	\$69,281	\$3,087	5%

Source: bw166.com, Wines Vines Analytics. Consumer expenditures for all wines on-premise and off-premise, 12 months through July 2018. Excludes cider.

Off Premise

Rosé Leads as Off-Premise Sales Rise 1%

Off-premise sales through multiple-outlet and convenience stores in the four weeks ended July 15 totaled \$646 million, market research firm IRI reported. This was up a scant 1% versus a year earlier, and even with growth in case volumes that totaled 8.2 million. Sales in the latest 52 weeks rose 2% to approach \$9 billion.

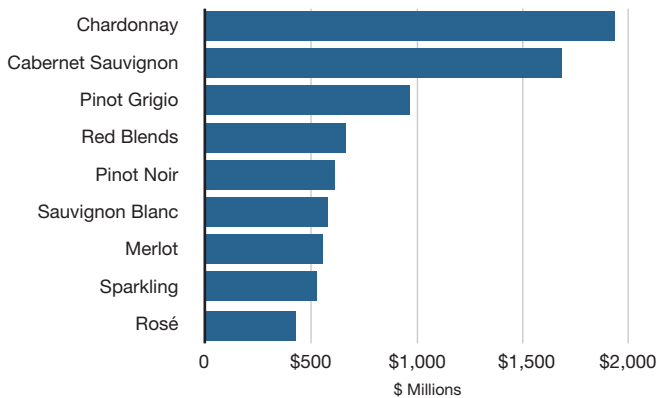
Domestic sparkling wine sales continued to experience the strongest off-premise growth, rising 2% in both the latest four weeks and the latest 52 weeks. Domestic table wine sales rose just 1% in the month and 2% for the year, consistent with last month.

Drilling into varietal performance, rosé led

with 52-week sales rising 34% to \$442 million. Sauvignon Blanc increased 7% to step over Merlot, which saw sales decline 6% -- the only major varietal to lose ground. Cabernet Sauvignon, the top-selling varietal, saw sales grow 5%, followed by red blends at 4%.

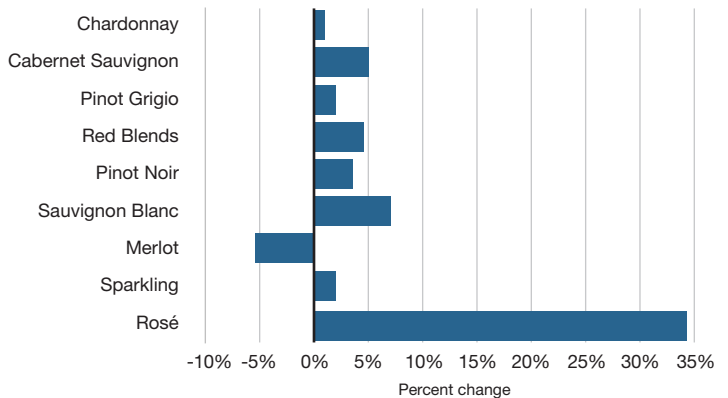
—Peter Mitham

OFF-PREMISE SALES BY VARIETAL



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, 52 weeks ended July 15, 2018.

OFF-PREMISE SALES GROWTH RATE BY VARIETAL



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, 52 weeks ended July 15, 2018.

Direct to Consumer

Zinfandel Zooms as DtC Shipments Rise 8% in July

July direct-to-consumer (DtC) shipments rose 8% in terms of both value and volume, Wines Vines Analytics/ShipCompliant by Sovos reported. Shipments totaled nearly \$109 million on a volume of 296,810 cases. The onset of a dry, hot summer made the month the least active this year to date.

A subtle moderation of DtC shipment

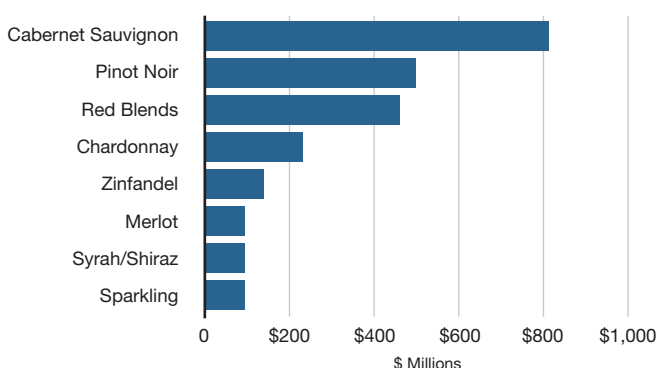
growth in July relative to previous months wasn't borne out in annual figures for the major varietals. DtC shipments in the 12 months ended July approached \$2.9 billion, up 13% from a year earlier. Cabernet Sauvignon – the top varietal by value, at \$809 million – and Merlot both posted 9% growth while all other varietals saw double-digit growth, led by Zinfandel at 27% and sparkling

at 21%. The two fastest-growing varietals were just a quarter of the value of Cabernet Sauvignon shipments but together claim 60% of the top varietal's case volume.

Pinot Noir and red blends, the second and third most-shipped varietals, logged \$475 million in shipments (up 15%) and \$449 million (up 10%), respectively.

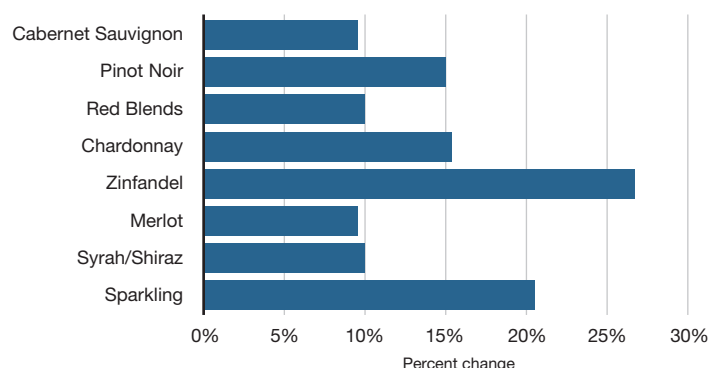
—Peter Mitham

DTC SHIPMENTS BY VARIETAL



Source: Wines Vines Analytics/ShipCompliant by Sovos; 12 months ended July 2018.

DTC SHIPMENTS GROWTH RATE BY VARIETAL



Source: Wines Vines Analytics/ShipCompliant by Sovos; 12 months ended July 2018.

Top Stories

The month in perspective

Optimism swells for 2018 vintage

In July the early prediction for California's wine grape harvest was between 4 and 4.25 million tons, and by mid-August growers affirmed the state's vineyards were right on track with average yields and good quality. Despite raging wildfires in the Northern half of the state, most said the smoke was far enough away or came early enough so smoke taint is as of yet not a major concern. See page 15.

Rodney Strong Wine Estate's director of marketing Erica Odden accepts the awards.



Wines & Vines held its fifth annual wine packaging conference on Aug. 9 in Napa Valley and announced the winners of its wine packaging design contest. Rodney Strong Wine Estate's Upshot brand won gold in the classic category and also was named Best in Show by the panel of judges. See page 18.

An invasive pest in the East Coast could cause billions of dollars in economic damage, according to experts who convened a special meeting in July to discuss the threat of the spotted lanternfly (*Lycorma delicatula*) that is a voracious eater and uses its piercing-sucking mouthparts to feed on grapevines, apples, hardwoods and more than 70 other plant species. See page 59.

Precept buys Truett-Hurst wholesale business

Truett-Hurst wine company in Healdsburg, Calif., announced it sold its wholesale wine business to Seattle, Wash.-based Precept Wine Brands for \$18 million in cash. Truett-Hurst, a publicly traded wine company, announced the deal in an Aug. 13 statement. After paying off taxes, bank loans and other expenses, Truett-Hurst expected to have \$5.6 million in cash and to own the 22.6-acre Truett-Hurst estate with 13.5 planted acres and Healdsburg tasting room outright. The wholesale business consisted of bottled wine inventory and brands, supplies, bulk wine and intellectual property used

for private label wine brands for mainly national retail chains. The sale is intended to enable Truett-Hurst to focus all of its resources on direct-to-consumer sales of the core brands Truett-Hurst and VML. Paul Dolan was also appointed as the company's interim chief executive officer.

Summit acquires Beau Vigne

Summit Vineyards, a venture formed by partners Don Dady and Jason Kyle, acquired Beau Vigne winery from Edward and Trish Baily Snider. Beau Vigne produces around 4,000 cases a year, has a tasting room in Yountville, Calif., and is currently building a new

winery in Napa Valley. The new owners are both based in Arizona. Dady is the founder of a financial services company and Kyle is part owner of a coffee company and a former NFL long snapper who won a Super Bowl in 2010 with the New Orleans Saints.

New winemaker, winery at Hudson

Clayton Kirchoff is the new winemaker at Hudson Vineyards in Napa, Calif. Kirchoff has worked at Hudson for the past five years and previously gained experience at Failla Wines, Realm Cellars and Chateau Boswell. The company hired Skip Karabian as brand director. Prior to joining Hudson, Karabian worked at Wilson Daniels as



brand manager as well as Regusci Winery in Napa Valley. The winery also announced it has expanded its operations to include a new winery and a hospitality facility that it planned to open on Sept. 1.

Constellation Brands invests \$4 billion in Cannabis firm

Constellation Brands, the third largest wine company in the United States, announced it is increasing its stake in the Canadian cannabis company Canopy Growth through a \$4 billion investment. According to the statement announcing the deal, Constellation will acquire a 38% stake in the company and expects to position it as "the global leader in cannabis production, branding, intellectual property and retailing." The investment, which was described as the largest in cannabis to date, is expected to be used for strategic acquisitions or to build assets to serve the nearly 30 countries considering legalizing

cannabis for medicinal use and any new markets for recreational use. Canopy already operates in 11 countries including Canada, which is poised to legalize recreational use of marijuana in October. "Over the past year, we've come to better understand the cannabis market, the tremendous growth opportunity it presents, and Canopy's market-leading capabilities in this space," said Constellation Brands CEO Robert Sands. "We look forward to supporting Canopy as they extend their recognized global leadership position in the medical and recreational cannabis space."

New winemaker at Far Niente

Far Niente Family of Wineries and Vineyards in Oakville, Calif., named Andrew Delos as the new director of winemaking. Delos has been with the company for 14 years, first as assistant winemaker at Nickel & Nickel, then as winemaker of EnRoute since its first vintage in 2007. In his new position, Delos will continue as EnRoute winemaker, while managing overall production capabilities and coordinating best practices among the winemakers for the entire Far Niente group.

Ehlers names new winemaker

Laura Diaz Muñoz is the new winemaker and director of operations of Ehlers Estate winery in Napa Valley. Muñoz has spent the last ten years at Jackson Family Wines, where



she was the associate winemaker for Cardinale & Lokoya, Mt. Brave Wines and La Jota Vineyard Co.

LATEST NEWS

More detail on the news at winesandvines.com.

TOP STORY

As 2018 Harvest Begins, Growers Remain Optimistic for Good Yields and Quality

Bins of sparkling wine grapes have started to hit crush pads in the North Coast of California signaling the start of the 2018 harvest.

Growers throughout California are optimistic regarding both the quality and quantity of grapes based on conditions through the spring and early summer. Other states, such as Texas, are deep into the harvest and report an exceptional year, while growers in the Northwest are just hitting the midpoint of *veraison* and there too the mood is optimistic.

The only dark cloud, both literally and figuratively, are towering pillars of smoke from raging wild fires that have spread into remote parts of Northern California and elsewhere.

The Mendocino Complex fire, which includes the River Fire and much larger Ranch Fire were of the most concern in early August as the flames came close to vineyards and populated areas of Mendocino and Lake county. Firefighters were able to check the blazes but they then advanced deep into more remote areas. The River Fire was 100% contained as *Wines & Vines* went to press but had burned nearly 50,000 acres, while the Ranch Fire was only 64% contained and had become the state's largest fire in history at nearly 315,000 acres according to CalFire. Six firefighters have died in California this year.

While the fires have covered much of the state's premier wine regions in smoke or haze, most growers and winemakers are hoping it came early enough in the vintage to miss the worst effects of smoke taint.

Jon Ruel, CEO and former viticulturist for Trefethen Family Vineyards, said in late July that some smoke was visible in the sky above the Oak Knoll estate and toward the east.

During *veraison*, grapes are



The 2018 harvest kicked off for Mumm Napa with an early morning pick of Pinot Noir for sparkling wine on Aug. 15.

more susceptible to smoke taint: as the fruit matures, the skin gets softer and compounds called volatile phenols found in fire smoke can easily permeate that supple skin, manipulating the molecular compositions, causing what is known as smoke taint.

Ruel said none of the fires or resulting smoke are close enough to the Trefethen estate vineyards to make him or his vineyard management team worried about the 2018 harvest. "That said, with the devastating fires around Napa and Sonoma Counties last year, we are all certainly on edge," he said.

When asked about this year's harvest, Ruel remains happily optimistic. "The 2018 vintage is looking very good!"

Pinot Noir and Chardonnay grapes saw "typical timing" for bud break in late March, followed shortly thereafter by the Bordeaux varieties in late March, Ruel said. However, he said the spring temperatures were overall cooler than

average, thus growth was slow. "One of the benefits of the slow growth was that it made it easier for our crews to keep up with suckering the vines," he said.

Ripening just a few days behind normal

But, as for timing, Ruel said that overall the vines are still running a few days behind due to those cool temperatures in April. "It's only a few days, maybe a week, behind," he said. "But it feels like much more because the last few vintages were all so early."

Up Valley, Sam Kaplan, winemaker and vineyard manager at Arkenstone Vineyards, has a similar story. "At this point, I'm very optimistic that we're on track for a great harvest," he said. Arkenstone's Howell Mountain estate vineyards are 13 acres of predominantly Bordeaux varieties.

Kaplan said at the beginning of the growing season, due to cooler than average spring tem-

peratures, he thought the vines were tracking about 10 days behind previous vintages, but a July heat spike, with days warming to between 80° F and 90° F, have "let the vines catch up." "We're expecting a normal start time to harvest," he said, which, atop Howell Mountain, is usually the first week of September.

And the crop at Arkenstone looks healthy. "It's not too heavy, not too light, clusters are open but not too huge, which is typically nice for quality," Kaplan said. He estimates his vines will yield between 2.5 to 3 tons per acre — a low but healthy yield he said is on par with the past few vintages.

Conditions favorable in Sonoma County

In Sonoma County, John Olney, COO and winemaker for Ridge Vineyards Lytton Springs, said Sonoma's Dry Creek Valley experienced a completely dry February,

which lead to concerns about moisture in the soil as the vines entered the growing season. But because of a “few good soakings” in March, those concerns were alleviated — though bud break occurred later than anticipated in early April.

Olney said things have evened out temperature-wise. “There have been a few heat spikes with temperatures over 100,” he said, “but July has been pretty moderate, especially over the last two weeks.”

He added he expects that harvest won’t begin in the estate vineyards until Sept. 10.

Olney said that there’s been a lot of steady, periodic wind during the growing season that’s helped limit the occurrence of mildew. And though there have been a few mealy bug sightings, the vineyard team has released predatory wasps to sustainably take care of that issue.

In Sonoma County’s Russian River Valley, Nicole Bacigalupi, third generation owner of Bacigalupi Vineyards, said, “All varieties



Many growers in Oregon and Washington have been dropping green clusters as they plan for bountiful harvest in the Northwest.

across the board look better than last year.”

The family’s estate vineyards, located on Westside Road where they also own and operate their winery and tasting room, are planted to 121 acres of predominantly Pinot Noir and Chardonnay, as well as Zinfandel and Petite Sirah.

Though Bacigalupi said they’re “right on track with ‘normal’” this year, she noted that there’s been significantly less fog in the Russian River Valley than in past years. “This may make our picking dates slightly earlier than we would have had with a similar temperature year with fog,” she said.

Bacigalupi said the vines’ yields are slightly up from last year in most blocks of Pinot Noir, Zinfandel and Petite Sirah, with estimates of 4 to 5 tons per acre. Chardonnay, she said, is about on par with last year, and is expected to yield about 3 tons per acre.

Large crop predicted in the Northwest

All signs are pointing to an above-average wine grape crop in the Northwest, and growers from British Columbia to Oregon were busy thinning clusters in mid-August as *veraison* kicked in.

Some of the biggest numbers are likely to come out of Washington state. A preliminary forecast from the Washington Winegrowers Association, which represents growers across the state, puts the 2018 crop at a potential 268,255 tons. This is on par with the 2016 record of 270,000 tons but 17% above last year’s harvest of 229,000 tons.

By contrast, Oregon harvested more than 85,000 tons,

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on par with 2015's record crop, while British Columbia growers picked a new record of 32,700 tons last year. "For the past couple of years, several new vineyards have been planted. This year's estimate reflects the newer acres coming into production," said Vicky Scharlau, the Washington association's executive director.

The harvest will come from approximately 58,208 acres this year, up 4% from 56,073 acres in 2016. The new acreage to date has been in established viticultural areas such as the Yakima Valley AVA, in particular Red Mountain, as well as Walla Walla and the Horse Heaven Hills. However, new areas along the Columbia River are also opening up with five new AVAs planned, the most recent being an application perfected in March for Goose Gap around Badger and Candy Mountains in Benton County.

A working group of growers and vintners develops the estimate, the association explained,

as an early indicator of crop size, by variety, for growers and vintners to use as a management tool. "[It] is not intended to be a prediction of crush," the winegrowers communications manager Katlyn Straub emphasized.

Quality and quantity in Texas

After a second warm winter in a row (2017-18 was the "hottest on record") and earlier than normal tornados and hail in late March, Texas enjoyed a grape growing season that was quite nice, with no "untimely" rains or other widespread problems, said Justin Scheiner, assistant professor and extension viticulture specialist in the Department of Horticultural Sciences at Texas A&M University.

Messina Hof Cellars, located in Bryan is now about 25% through harvest, according to Paul Bonarrigo, the winery's owner and winemaker. So far 300 tons have been harvested, and he expects to process a total

of 1,100 tons. The drought is making ripening happen faster and, he said, "the quality is incredible. There's a nice balance of Brix and acid."

Bonarrigo summarized the Texas harvest as being "excellent, exceptional" in quality, and noted that it will probably be the highest tonnage that Texas has ever produced.

Ed Hellman, professor of viticulture and Enology at Texas Tech University's campus in Fredericksburg, said the harvest across Texas is earlier this year because of the heat and the drought. However, he is less certain that yields overall will be much more than normal. "That remains to be seen," he said. "Last year there was a bit of overproduction. But there is more new acreage producing this year. Will that new production balance out the lower yield from smaller berry size?"

Hellman said the grapes are "clean as can be," with no disease, and small berries can be a

good thing, especially for the quality of red wines. Tempranillo is just starting to be harvested in the High Plains, and he reports that the color on those grapes "is awesome!"

According to Wines Vines Analytics, Texas currently has 324 wineries producing 1.9 million cases per year. The state's grape and wine industry has a \$13.1 billion economic according to an economic impact report from WineAmerica in 2017.

What is much less certain is the exact number of vineyard acres in the state. Hellman said counting wineries has always been easier than vineyard acres, but he added grower Andy Timmons, who owns one of the larger vineyards in the High Plains AVA, reported last year that 5,000 acres were harvested in that appellation alone. Based on that, Hellman said he believes Texas now has between 8,000 and 9,000 acres in total.

—Stacy Briscoe, Peter Mitham and Linda Jones McKee

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Rodney Strong Wins Best of Show in Packaging Design Contest

Experts in design and the wine trade evaluated 179 entries to this year's Wines & Vines Packaging Design Contest and selected winners in five categories as well as Best of Show. The top 50 entries were also presented at the fifth annual Wines & Vines conference held Aug. 9. The conference, which featured a keynote address by vintner Randall Grahm, drew more than 400 people to the Lincoln Theater in Yountville, Calif.

Photos of all the winners can be seen at winesandvines.com or wvpack.com.

The competition included five competing categories, and this year's winners include:

Classic

(Classic entries were judged on visual appeal, design functionality, appropriateness for price and

creative utilization of standard wine packaging.)

Gold & Best in Show: Rodney Strong Vineyard Upshot, Rodney Strong Wine Estates, Healdsburg, Calif.

Silver: Deep Sea entered by Conway Family Wines, Buellton, Calif.

Bronze: Stokes' Ghost, entered by Scheid Family Wines, Greenfield, Calif.

Luxury

(The luxury design category was open to any wine packaging for a brand that retails for \$40 and more.)

Gold: Liquid Farm Winery, Lompoc, Calif.

Silver: Reynolds Family Winery, Napa, Calif.

Bronze: Dry Creek Vineyard, Healdsburg, Calif.

Redesign

(Judges reviewed the original

wine packages and redesigned packages side by side. Entries were judged on the successfulness of the redesign, visual appeal, design functionality and appropriateness for the price segment.)

Gold: Hedgeline Vineyards, entered by WX Brands, Novato, Calif.

Silver: Cline Old Vine Zinfandel entered by Affinity Creative Group, Mare Island, Calif.

Bronze: Murphy-Goode Winery, entered by Jackson Family Wines, Santa Rosa, Calif.

Series

(Entries to this category consisted of two or more brands with packaging designed to work together as a whole.)

Gold: Menagerie, entered by Nomadica, Los Angeles, Calif.

Silver: Bonny Doon Vineyard, Santa Cruz, Calif.

Bronze: Artesa/Club Wines, entered by Mucho, San Francisco, Calif.

Alternative

(The Alternative Format category was open to any packaging not in a standard glass bottle.)

Gold: Wine By Joe, Dundee, Ore.
Silver: Francis Coppola Diamond Collection Sauvignon Blanc, Francis Ford Coppola Winery, Geyserville, Calif.

Bronze: The "Pink River" Rose, entered by Nomadica Wine, Los Angeles, Calif.

People's Choice

Conference attendees voted on the top 50 entries in the contest to determine the winner of the People's Choice award, which went to Final Cut by Francis Ford Coppola. The Final Cut bottle features a plastic sleeve wrapped around it and when twisted makes images appear printed on the bottle as if they are moving.

—Stacy Briscoe

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Reflecting on a Career of Wine Packaging

Randall Graham, well-known winemaker and one of the original Rhône Rangers, kicked off the conference with a keynote speech covering his experiences, successes and missteps in packaging, design and brand marketing.

Graham is known for standout wine labels incorporating everything from pop art to fine art, intellectual plays on words to “doon” right dirty jokes. But the truth is, as a young winemaker entering the industry, Graham’s not-so-simple goal was to craft Californian Pinot Noir as elegant and refined as those found in Burgundy. And his wine labels reflected, what he called, this “naïve” goal: simple, elegant wine with simple, elegant labels. “I thought, ‘let the wine do the salesmanship,’” he said.

But there was nothing about the fine script relaying basic wine

facts — name, varietal, vintage — that spoke to the wine consumers: nothing that told the story of what was in the bottle; nothing that told Graham’s story as a winemaker.

Through the course of his speech, Graham illustrated his evolution as a winemaker. He found that California *terroir* (defined by Graham as “the reflection of nature’s order”) was more suitable to the wines of southern France, namely Châteauneuf-du-Pape (CdP) and the Rhône varieties Bonny Doon is now so well known for.

Playing with what was back in the 1980s, “unconventional” grape varieties, Graham realized he needed a way to speak to consumers to tell them, “it’s ok to try this unknown.”

But, how does one tell the story of the CdP on the confines of a wine label? For those who aren’t familiar with the story behind Graham’s famed Cigare Volant, the

name — and subsequently the label illustration — is connected to the local CdP government’s regulation banning flying saucers (*cigare volants*) from flying over the vineyards:

“The flying overhead, landing and taking off of aeronautical machines called ‘flying saucers’ or ‘flying cigars,’ of whatever nationality they may be is strictly forbidden on the territory of the commune of Châteauneuf-du-Pape.”

Bringing a bit of French history, wit and of course a comedic illustration (showcasing a flying saucer hovering over a vineyard), Graham was able to play down the stereotypes of pretension surrounding French and French-inspired wines.

Using humor to contextualize the unknown created an inclusive relationship between winemaker and wine drinker. Graham and his roster of well-known artists such as

Chuck House and Wendy Hook among many others have continued this tactic to the delight of consumers and critics alike.

But when asked “what’s next” in the world of packaging design, Graham admitted, “I don’t know.” He said that in a day and age when everyone is being clever, being clever isn’t necessarily going to make a label stand out.

Graham apologized for his reputation for often times irreverent label art. “I owe the wine world a formal apology for my onslaught of goofiness,” he said. “Forgive me world, I have committed a ‘Cardinal Zin.’”

Jokes aside, Graham’s key takeaway was about the ability of the bottle to form a relationship with potential buyers. “The important thing to remember is that creating a package is a partnership between the design and the consumer,” said Graham. Create that relationship, solidify that partnership and those are the building blocks to a successful brand.

— Stacy Briscoe



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How Supreme Court Ruling Affects Wineries

A U.S. Supreme Court decision earlier this summer gives states the option to collect sales taxes from online retailers, which is expected to create a new compliance and financial hurdle for many e-commerce sellers who have gotten used to a free ride.

The ruling in *Wayfair vs. South Dakota* on June 21 will apply to wineries' out of state shipments in addition to deliveries from Amazon, Wal-Mart, Staples and Nordstrom, to name a few of the biggest online retailers.

Wineries, however, have little to worry about immediately. "To be honest I think the wine industry is a little ahead of the game because we've been paying sales taxes already," said Steve Gross, vice president of state relations for California's Wine Institute. "We don't see it as the kind of sea change that it is for many other retailers."

The ruling is a victory for states, which can now tax catalog and web-based retailers in states where they don't have a physical presence or "nexus." Gross said each state now has the opportunity to review its laws and decide if and how to amend them via legislation to

add sales taxes and said the Wine Institute will notify the industry of any major changes that would affect wineries.

"If they were to amend their nexus laws to go after remote sellers, then wineries would be as impacted as any other seller."

—Alex Koral, ShipCompliant

Wineries, being licensed alcohol sellers already, have long been required to get permits, file reports and pay excise and sales taxes in many states. But the Supreme Court decision means that several states that have not required sales taxes in the past may now add them.

Alaska, Colorado, Florida, Iowa, Minnesota, Missouri and the District of Columbia currently don't collect state sales taxes from licensed di-

rect-to-consumer wine shippers, although four of these states do collect excise taxes. Florida and Colorado are among the top 10 destination states for DtC shipments, accounting for 8% of shipments nationwide, according to Wines Vines Analytics and ShipCompliant by Sovos.

Alex Koral is the expert on the topic at ShipCompliant by Sovos, a firm that helps wineries comply with all laws and regulations when sending wine DtC across state lines. "At present, none of these states have yet indicated how they'll respond to the *Wayfair* decision," Koral said, "but if they were to amend their nexus laws to go after remote sellers, then wineries would be as impacted as any other seller."

State excise taxes range from \$.20 per gallon in Texas and California up to \$2.25 in Florida and \$2.50 in Alaska. Koral estimated that state and local sales taxes combined vary from about 4% to 12%. Wineries may also be affected if states that currently only levy state sales tax on DtC shipments start allowing city or other local sales taxes to be added, a move that Koral said would open up a "wild west scenario."

—Jim Gordon



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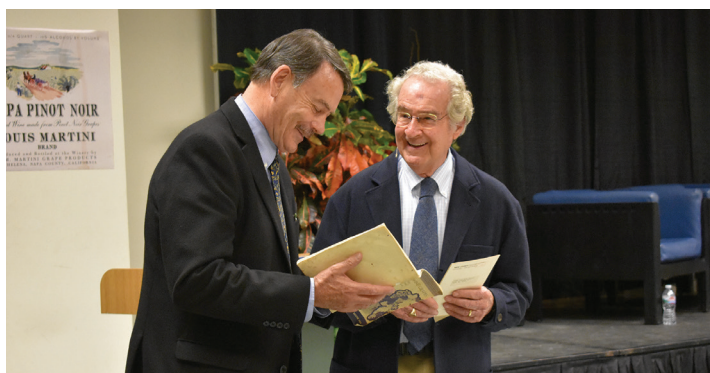


Winiarski Gives \$3.3 Million for Wine Writing Library

Warren Winiarski, the founder of Stag's Leap Wine Cellars, committed \$3.3 million to build what's being touted as the world's most comprehensive collection of wine writing at the University of California, Davis.

According to a news release by UC Davis, the gift by the Winiarski Family Foundation will preserve and increase access to the works of Hugh Johnson, Jancis Robinson and other celebrated wine writers including book authors, editors, wine journalists, critics, columnists, bloggers and the creators of other editorial content.

"My hope for this gift is that it will create a powerful resource for people who want to see how writers helped develop the wine industry itself and how they influenced the aesthetics of wine," Winiarski said in the UC Davis statement. "Wine writers didn't write just about the



Warren Winiarski (right) and professor Roger Boulton with the University of California, Davis.

regions or types of wine. They gave winemakers the tools they needed to make wines better."

British wine writer Hugh Johnson has described the UC Davis' current collection as "the greatest wine library in the world."

The library holds more than 30,000 wine books and special collections of manuscripts, maps and

other materials on wine dating back as far as 1287. Its collections also include papers and books from wine notables such as Robert Mondavi, Leon D. Adams, Roy Brady and Robert Thompson, among others.

Winiarski, was the first winemaker of Robert Mondavi Winery in 1966, and said wine writers helped identify and winemaking styles that

were used by winemakers.

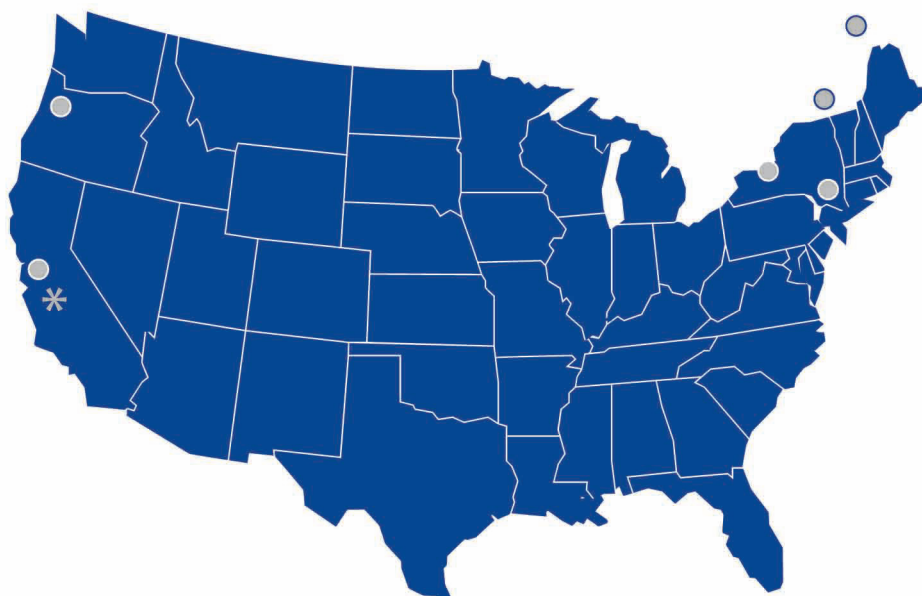
Winiarski said he hopes the UC Davis library's wine writer collections will leverage the works of these authors so they can be used to create even better wines in the future. "It's about helping to refine truth through history," he said. "It's not just about preserving their work, but also building a home where something new can be created from the past. We need to continue to get more finesse in our wines and I'm hoping that this collection will help bring about those developmental benefits for the industry for many years to come."

Winiarski's earlier gifts to the library have totaled nearly \$400,000. In addition to supporting the wine writer collections, the funds will also support the Warren Winiarski Wine Writer Collection Fellow to help curate, manage and promote the collection.

—Wines & Vines staff

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Regional News

CALIFORNIA

Matchbook hires Brandon Reitz as winemaker

Matchbook Wine Company in Zamora named Brandon Reitz as the company's new winemaker. Reitz has spent the last five years in Napa at Bin to Bottle, most recently as assistant director of winemaking. Reitz will be working alongside head winemaker Dan Cederquist.

New chair, faculty at Fresno State

The Department of Viticulture and Enology at California State University, Fresno hired Luca Brillante as viticulture professor and Bronco Wine Co. viticulture research chair. The department also announced that Anil Shrestha, a plant science professor at Fresno State, is the new chair of the department. Shrestha is the department's first permanent chair in about three years.

Whitaker named assistant winemaker at Frank Family

Corey Whitaker is the new assistant winemaker at Frank Family Vineyards in Napa Valley. Whitaker joined Frank Family in 2016 as enologist and previously was a lab technician at Ferrari-Carano Vineyards & Winery in Sonoma County.



Corey Whitaker

Waverly Accurso, who most recently was an enologist at Roederer Estate in Philo, is taking over the role of enologist at Frank Family.

Master Somm Dame joins DAOU

DAOU Vineyards announced

master sommelier Fred L. Dame joined the company as its global wine ambassador. Dame will work with founders Georges Daou and Daniel Daou to bring the Adelaida District of the Paso Robles AVA to the attention of the global wine trade and to enhance international awareness of DAOU wines.

Fayard joins Krupp Brothers as winemaker

Krupp Brothers announced Julien Fayard as its new winemaker. Fayard, who is originally from the Provence region of France, trained in Bordeaux working for Château Lafite-Rothschild and Smith Haut Lafitte where he oversaw vineyard management and developed his winemaking skills. After moving to Napa in 2006, Fayard worked alongside Philippe Melka as director of winemaking at Atelier Melka before launching his own brand Azur Wines.

Sonoma Winegrowers move to new office

The Sonoma County Winegrowers announced it moved its offices to a new workspace at Sunnyview Vineyard. The organization plans to host all future committee and board meetings on-site. Located on Guerneville Road in Santa Rosa, the property includes a vineyard and a 2,700-square-foot building for offices and a board room. Additional warehouse space exists for storage and classroom space for grower education. Previously, the winegrowers had been sharing office space with the Sonoma County Vintners and Sonoma County Tourism in the American Ag Credit Building on Aviation Boulevard in Santa Rosa.

Napa Vintners donates \$2.5 million

The Napa Valley Vintners provided \$2.5 million in grant funding for children's education in Napa County. The funds were distributed to nearly a dozen community groups that support youth education and other services to children. The group has also provided \$4 million to support the

construction of two new Boys & Girls Clubs facilities in American Canyon and Calistoga.

NORTHWEST

New winemakers at Okanagan Crush Pad

Steven Latchford and Lynzee Schatz joined the winemaking team at Okanagan Crush Pad in



Steve Latchford (left), Matt Dumayne (center), and Lynzee Schatz

Summerland, B.C. Latchford will manage the winery's custom crush business while Schatz will oversee sparkling wine production. Latchford has worked at various wineries in the Okanagan Valley since 2007, and Schatz previously was at Vancouver Urban Winery. Both winemakers will work closely with chief winemaker Matt Dumayne. Latchford and Schatz replace Jordan Kubek and Tyler Knight who are planning to open a new winery with Ron Kubek in Summerland.

Montinore hires viticulturist

Karen Peterson is the new viticulturist at Montinore Estate in Forest Grove, Ore. Peterson comes to Montinore Estate after working at Domaine Drouhin Oregon as a vineyard assistant and later at A to Z Wineworks as a viticulturist. Peterson will be responsible for Montinore's 250 acres of vineyards.

Columbia Crest announces new winemaker

Columbia Crest Winery in Paterson, Wash., appointed Katie Nelson as senior director of winemaking. In her new role, Nelson will be responsible for all winemaking decisions across the entire range of Columbia Crest wines, including the Reserve, H3 and Grand Estate tiers. She will also manage

other innovation projects. Nelson previously worked for Ste. Michelle Wine Estates from 1999 to 2015.

Chehalem earns B Corp certification

Chehalem winery in Newberg, Ore., announced it achieved B Corp Certification status. The certification assesses companies to ensure they meet a high standard of verified social and environmental performance, public transparency and legal accountability. Chehalem joins its sister winery Stoller Family Estate along with A to Z Wineworks, Sokol Blosser Winery, Winderlea Vineyard & Winery and Patton Valley Vineyard, making it the sixth Oregon winery and 114th company in Oregon to attain the status.

Road 13 named No. 1 in Canada

Road 13 Vineyards in Oliver, B.C., received the title of No. 1 Winery in Canada after ten consecutive years placing within the Top Ten Winery in Canada list by the National Wine Awards of Canada, which has been managed by Wine Align since 2013. According to a press release, Road 13 Vineyards is the only winery in Canada to win both platinum and a top-ten national spot for six consecutive years.

Delicato, Mercer collaborate on wine brand

Delicato Family Vineyards and Mercer Wine Estates in Prosser, Wash., announced the launch of a collaborative new wine produced with Washington grapes. The new, national brand, Mercer Family Vineyards, is a partnership between the two fourth-generation family-owned wine companies. The inaugural release includes a Chardonnay, Cabernet Sauvignon, red blend and reserve Cabernet Sauvignon. A Sauvignon Blanc, Merlot, Malbec and reserve red blend is planned for the Pacific Northwest market.

Washington golf tourney raises nearly \$60,000

The Washington Wine Industry Foundation announced the group's 18th annual Wine Cup golf tournament raised more than \$58,000 for

the foundation's programs, which are intended to develop sustainable solutions to industry challenges. The foundation also announced winners of its scholarship program, awarding \$38,000 to 12 Washington-based students pursuing careers in the wine industry.

CENTRAL

Stone Hill wins at state wine competition

Stone Hill Winery's 2015 Chambourcin won Best of Class Dry Red and the winery won The Governor's Cup, the highest award in the Missouri Wine Competition. "Winning the Missouri Governors Cup two years in a row is a huge thrill and an incredible honor. I'm very proud of the dedication and hard work of our vineyard and winemaking team, they deserve all the credit," said Jon Held, president and owner of Stone Hill Winery in a statement.

Freeman wins best sommelier at TEXSOM

Kenneth Freeman of Sixty Vines in Dallas, Tex., was named 2018 TEXSOM Best Sommelier. Freeman topped 25 other competitors in a three-part wine examination involving service, blind tasting and theory. The competition is open to residents of Arkansas, Louisiana, Oklahoma, New Mexico or Texas who have not passed the Court of Master Sommeliers' Advanced Sommelier Examination or previously won the competition. In addition to the title, Freeman received a scholarship of \$2,500 from SOMMFoundation to be used for a Court of Master Sommeliers certification program.

EAST

Greenhill Winery partners with Michael Shaps

Greenhill Winery & Vineyards in Middleburg, Va., partnered with Michael Shaps of Michael Shaps Wineworks in Charlottesville, Va. Shaps, along with his vineyard management team, will collaborate with Greenhill's associate winemaker, Ben Comstock, and general manager, Jed Gray. Shaps plans to continue to produce Greenhill's current flagship labels, as well as expand the winery's portfolio to include a wider range of single varietal labels.

New Lake Erie Wine Country director

The board of directors of Lake Erie Wine Country announced Monica Lee Mazur as the group's new executive director.



Mazur has been in the communication, sales and project management fields since 2004.

Wine Enthusiast names new tasting director

Alexander Peartree is the new tasting director of *Wine Enthusiast* magazine in New York. Peartree had previously worked closely with the former tasting director Lauren Buzzeo, who has taken on the role of managing editor for *Wine Enthusiast*. Peartree will be guiding and managing the reviewers of the magazine, assuring ratings and reviews provided by each are unbiased, consistent and in accordance with the standards set forth by *Wine Enthusiast*.

Awards and scholarships from ASEV-East

The American Society for Enology and Viticulture-Eastern Section (ASEV-ES) presented its Outstanding Achievement Award to Terry Acree, professor of food science at Cornell University, during the group's annual conference banquet on July 11. Acree has been a member of the Cornell faculty for his entire career and became professor in 1981, focusing his research on flavor chemistry with an emphasis on aroma chemistry. Joseph Fiola, specialist in viticulture at the University of Maryland Extension in Keedysville, Md., was the recipient of the 2018 ASEV-ES Distinguished Service Award. Fiola coordinates a statewide research and extension program that con-

centrates on grape variety testing including small batch winemaking of those varieties.

SUPPLIERS

Winemakers to tout corks in commercials

The Portuguese Cork Association (APCOR) produced a series of television commercials that will feature prominent winemakers discussing why they continue to prefer and use natural cork closures. The commercials began to air in August and feature Corey Beck of Francis Ford Coppola Winery in Geyserville, Calif., Richie Allen of Rombauer Vineyards in Napa Valley, Katie Madigan with St. Francis Winery & Vineyards in Santa Rosa, Calif., and Tim Bell of Dry Creek Vineyard near Healdsburg, Calif. The commercials will air in Sonoma, Napa and Santa Rosa on Comcast channels. APCOR also announced a survey found corks seal 88% of top wines as selected by *Wine Spectator* in 2015, 2016 and 2017. The information collected in the survey was conducted through individual phone calls and emails to the wineries, importers and distributors listed in the magazine's Top 100 List.

Saverglass Group Opens factory in Mexico

Saverglass Group opened a new factory in Mexico. The new facility is the company's third factory location, with the other two in France and the United Arab Emirates. According to a statement released by the company, Saverglass invested \$120 million in the state of Jalisco and created 400 jobs in the construction and operation of the glass and decoration plant, which opened in June. The factory's location provides a convenient shipping point to other Mexican states, the United States, Canada, the Caribbean and Central America. With the new factory, Saverglass increases bottle production by 120 million units per year, boosting overall annual production to 720 million bottles over time.

Screwcaps account for 30% of closures market

A recent survey by Euromonitor found that aluminum screwcaps

account for nearly 30% of the global wine market, according to a statement released by the trade group Aluminum Closures Group. The survey found the world's wine market came to around 30 billion bottles sold in 2016 and about 9 billion of those were sealed with a screwcap.

Metis opens Portland office

Metis, a Pacific Northwest mergers and acquisitions advisory firm specializing in the hospitality, wine and beverage alcohol industries, announced it has opened a new office in Portland, expanding its footprint into Oregon. With offices already in Seattle and Walla Walla, Wash., the new location is meant to bring more localized service to clients in the Oregon market. The office is headed by managing director Andy Steinman, who joined Metis in 2017.

WineDirect and Tock partner

WineDirect and Tock announced an exclusive partnership to fully integrate the companies' software systems to improve hospitality and sales at wineries throughout North America. According to a statement announcing the partnership, the integration will enable clients to leverage deeper customer insights, improve efficiencies in the tasting room, reduce no-shows and increase direct-to-consumer (DtC) sales.

La Garde hires California reps

Canadian-based La Garde, a division of SML Stainless Steel Group, hired two new California sales representatives for its U.S. team. Jason Pepper will cover Napa County and the Lodi area and Scott Pelletier will cover coastal California — including Sonoma and Monterey counties and Paso Robles — as well as Washington and Oregon.

Tonnelliere Vicard names new manager

Tonnellier Vicard announced the hiring of Trent Ghiringhelli as its West Coast business development manager to sell the Tonnellier Vicard range of Barrels, formerly distributed by the Bouchard Cooperages.

Product News

Latest offerings and announcements

Remote helicopter for vineyard applications



Yamaha announced that its FAZER remote-operated helicopter earned an exemption from the Federal Aviation Administration to be used for agricultural spraying. According

to the supplier, the FAZER is Yamaha's latest unmanned helicopter to receive FAA approval in the United States. The FAZER features a 50% increase in payload capacity, improved control with a re-designed transmitter, cleaner exhaust emissions and quieter operation because of a fuel-injected, four-stroke engine. An older model, the RMAX, has already been used for fungicide applications on wine grapes. "We have found the Yamaha RMAX aerial applications to be a novel, efficient and effective approach to controlling fungal pathogens in some of our most challenging vineyard blocks," said Caleb Mosley, senior viticulturalist for Michael Wolf Vineyard Services, in a statement released by Yamaha.

yamahamotorsports.com

Depalletizer for canning lines

SKA Fabricating released the Half Pint de-palletizer for mobile canning operations or facilities with space restrictions. The Half Pint can depalletize half pallets of aluminum cans at rates of 10 cases per minute to 60 cpm. Designed for low-clearance areas, the device does not need to be installed and can be moved where needed. skafabricating.com

Empty bottle grinder

Expleco developed a GLSand device that grinds empty glass bottles into sand to reduce the volume of waste in areas where recycling is not convenient or an option. Empty bottles are inserted into the GLSand, which employs "precision cut hammers" to reduce waste volume by 90% while turning bottles into a fine sand or grit in seconds. expleco.com

Water-powered weed abatement

iTek Wine is now distributing the Acqua Knife weed abatement cul-

tivator produced by the Italian firm Caffini. The company touts the Acqua Knife as an organic alternative to herbicide sprays. The machine employs high-pressure water jets to till the soil and pulverize weeds. Developed six years ago, it has proved popular with organic growers in Europe, according to iTek. The Acqua Knife has its own water tank mounted on a trailer and employs a piston pump powered by a tractor PTO to deliver 15,000 PSI jets of water that can penetrate the soil to a depth of 2 inches. itekwine.com

Barrel cradles for seismic stability

Wilhelmsen Industries unveiled its newly designed barrel cradles to support barrel stacks and provide



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improved seismic stability. The 13-inch cradles are produced with 304 stainless steel and shaped to fit the curve of a barrel. The cradles also feature rubber pads where they contact barrels to provide further stability. Wilhelmsen reports that the cradles were tested at the University of California, Berkeley's seismic-testing facility using two six-barrel-tall pyramids that did not collapse. wilhelmsenindustries.com

Tool for tax rates

Compli and Commerce7 collaborated to develop a platform to enable winery staff to calculate the correct destination sales tax rates quickly. The platform "allows customers to not only charge accurate sales tax at the time of transaction, but also to easily file monthly tax returns using Compli's software-enabled services," said Jeff Carroll, vice president of product and marketing at Compli. commerce7.com

pH meter for wine

Hanna Instruments introduced a new pH probe, HI981033, engineered to solve the challenge of measuring samples with a higher solids content such as must or unfiltered juice. The probe features a "Clogging Prevention System" that resists clogging "up to 20x" longer and a spherical glass



tip design to enable direct contact with the sample and a wider sample area for a quicker pH measurement. The probe's glass body is designed to be easy to clean and resistant to chemicals. hannainst.com

Yeast strain to boost aromatics

Scott Laboratories released a new range of yeast products from Lallemend. According to Scott Labs, the Stimula products

are 100% yeast autolysates designed to stimulate yeast by increasing their ability to produce desirable aromatic compounds by supplying the optimal levels of specific amino acids and sterols, along with the natural vitamins and minerals. When used at specific times in the winemaking process, the Stimula products also can promote the uptake and revelation of aromatic thiols as well as the production of volatile esters. scottlab.com

Remote irrigation control

WaterBit introduced a new valve controller to enable the remote operation of pressure-actuated valves through a smartphone or computer. The device pairs with Carbon node and can be operated via the WaterBit dashboard app. waterbit.com

Stainless steel filters for steam

Amazon Filters introduced a 3-micron rated version of its SupaMesh stainless-steel filter cartridge that the supplier says will provide 2-micron retention, even when wet, for the production of dry, saturated steam. According to Amazon Filters, the "exceptional flow capacity" and a design featuring either cylindrical or pleated configurations provides the same level of retention at higher filter efficiencies. The SupaMesh fiber filter cartridges also can be retrofitted into existing systems. amazonfilters.com

Integrated systems for DtC sales

WineDirect and Tock announced an exclusive partnership to fully integrate the companies' software systems to improve hospitality and sales at wineries throughout North America. According to a statement announcing the partnership, the integration will enable clients to leverage deeper customer insights, improve efficiencies in the tasting room, reduce no-shows and increase direct-to-consumer (DtC) sales. Tock provides a reservations and hospitality-management system to restaurants, pop-ups and wineries in 18 countries and more than 100 cities around the globe. winedirect.com, exploretock.com



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■ ROWENA CURLEWIS

10 Common Wine Packaging Blunders

To the untutored eye, there might not seem to be all that many variables when it comes to designing a wine brand. But that doesn't mean there aren't plenty of ways to get it wrong. Here, in no particular order, are my top 10 ways to trip up with your wine packaging.

Reinventing the wheel

When a brand's performance starts to slide, too many people press the panic button and opt for a complete packaging redesign to halt the decline. But this can result in losing important assets that consumers recognize and love. Take a breath! It's often possible to refresh the packaging design without having to throw out these valuable elements.

Using your hairdresser's cousin

Lots of people have a connection to the design world. It's cheaper to use your hairdresser's cousin or your nephew's girlfriend, who might have a certificate in design. But this approach is almost always a false economy. The design of your packaging can actively influence 64% of consumers with their decision-making process (Nielsen, 2016), so you've got to give it your best shot. Using a professional who understands the market, the consumer, the retailers and the packaging codes in wine design can hugely increase your chances of success.



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Being literal

Designs that imply are often more effective than those that bludgeon with literal messages. Imagine if Yellow Tail featured an illustration of a map of Australia. Yes, it would be crystal-clear that Yellow Tail was a proud product of Australia, but the use of an Aboriginal-styled kangaroo connects to Australia and forces consumers to think about the connection. Having to go through this thinking process will help lodge the brand into their memory bank.

Listening too much

Deep down, everyone's a designer at heart. If you ask 20 people, you'll get 20 views. Every man and his dog have an opinion. But the one that matters the most is yours; you have to love your label design. It is something you should feel proud of and passionate about every time you pour a glass for a consumer or show a retailer. You might not fit the profile of your target audience, but that's not the point – you should still love the design.

Skimping on cost

Don't underestimate the importance of how a label feels in the hand. Does it feel plastic or naturally textured? What does this say about the product inside? What does this say about what the winemaker thinks of the product? Does he or she care? Did he skimp on the wine quality, too?

Standing out for the sake of it

OK, so the label is fluorescent pink and features unicorns. It stands out on the shelf like the proverbial sore thumb. But is it appealing? Would you really want it on your dining table? Does it make you want to try the wine that lies within? Of course, it's important to have a distinctive presence on the shelf, but it's even more important to appeal to your target customers.

Copying others

Just as your wine should be an individual reflection of you, where you're from, and your winemaking skills, so, too, should your design. Settling for being a "me, too" of an existing brand is not only lazy, but it also opens you up to accusations of infringing someone else's copyright.

Being too conservative

You've got to know when to be brave and do something radical. If you don't want to change 95% of your existing label, don't expect to double your sales with a new design.

Leaving the design too late

Leaving the design of your new rosé brand until after you've finished picking the fruit, then expecting a cracking label design to be finished by the time it's bottled, doesn't leave much time for what is an incredibly important element of your product. If you want a great creative result, engage the designers early in the process. Give them time to mull over the challenges and opportunities. A rushed project will often mean corners are cut and opportunities not fully grasped.

Failing to sync wine and design

A great wine is let down by a mediocre label, and a great label can be let down by a mediocre wine. The wine in the bottle must be as great as the label on the front of that bottle. Remember, a great label will get consumers to buy your wine once, but it's the winemaker's job to ensure they come back for a second purchase. 🍷

Rowena Curlewis is the CEO and co-founder of the of the drinks design agency Denomination, which has offices in Sydney, London and San Francisco.



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■ ANDY STARR

How some wineries are exploring another tier in the wholesale market

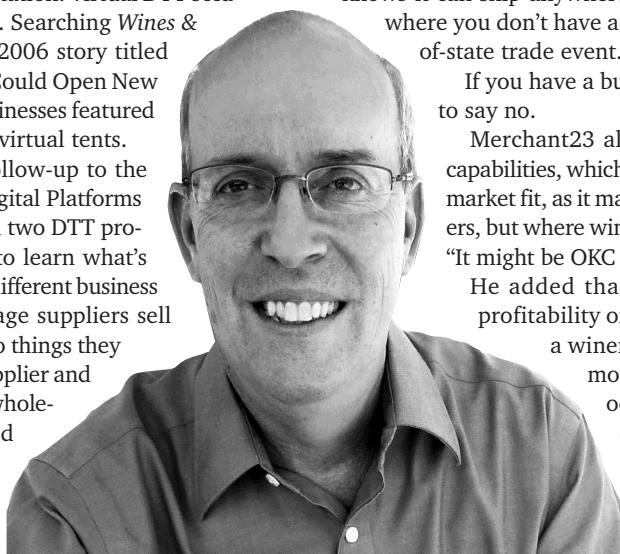
Scenario 1. You spend a long week in New York, Washington, D.C., and Boston to sell wine with your in-state distributors. You call on a number of retail accounts, of which two out of three say they will carry your wine. Later you learn that your distributors ended up selling your wines to just one location, the one owned by a friend of your college roommate. The process is expensive, inefficient, exhausting and ultimately demoralizing.

Scenario 2. You get some nice press from a reviewer in Chicago. A day later, a wine shop in Evanston, Ill., calls, asking, "How can I get your wine?" But you don't have a distributor in Illinois, so you thank the owner and politely decline the order.

The problem is well-known to any vintner with experience navigating the three-tier system. The system can work reasonably well if you have a distributor, but if you don't, then it doesn't work at all. Consolidation has reduced the number of distributors, who are focused on their largest wine suppliers. The few good small distributors that remain are booked up, and the not-so-good ones may be slow to pay their bills. On top of that, you have to do all the selling yourself anyway. You can sell direct to consumers in most states, but that still keeps you off of restaurant wine lists and retail shelves.

Just recently, online portals for direct-to-trade (DTT) became a real option for wineries to market their products in states where they do not have representation. Virtual DTT solutions have been tried in the past. Searching *Wines & Vines'* archives, I found a June 2006 story titled "Direct-To-Trade Sales Options Could Open New Doors." I understand that the businesses featured in that article have folded their virtual tents.

This column is a one-year follow-up to the September 2017 report "New Digital Platforms Connect the Tiers." I interviewed two DTT providers and four of their clients to learn what's working. The DTT providers use different business models to help alcoholic beverage suppliers sell across state lines to retailers. Two things they have in common: for both the supplier and retailer, they look like an online wholesale store, with 24/7 automated sales and restocking; and they provide additional sales and marketing services beyond what is found on their websites.



Merchant23 was launched two years ago by founder and CEO Jacob Moynihan. The company facilitates wholesale sales in every state that allows a three-tier system. Even some state agencies in control states have become clients of the company. Merchant23 carries 360 SKUs on its website and claims to sell many more privately listed wines through its system.

Merchant23 uses its network of distribution partners in every state for clearing and compliance. When a purchase order is created from a retailer on the site, Merchant23 handles all logistics, clearing and compliance. Suppliers do not sign agreements with distributors, who clear the supplier's products on an invoice-by-invoice basis. Moynihan explained that it takes just a few minutes to get set up on the Merchant23 site, where you upload your products, including images, wholesale case prices, inventories and suggested retail prices. Sellers own and warehouse their own inventory, removing the issue of wholesalers holding stock of old vintages.

I asked Moynihan about pushback from in-state wholesalers to a potentially competing system. He said he hasn't experienced opposition and added, "Distributors like to work with Merchant23. They have no inventory to carry, no marketing, sales or other expenses, while getting paid on transactions going through their state. They are happy to be part of it."

Moynihan pointed to the doors that open when a winery knows it can ship anywhere. "You can do marketing in states where you don't have a distributor. You can attend an out-of-state trade event."

If you have a buyer calling up, you no longer have to say no.

Merchant23 also has significant data-crunching capabilities, which are used to assist a supplier for best market fit, as it may be a market with your ideal retailers, but where wines like yours are underrepresented. "It might be OKC and not NYC," Moynihan said.

He added that the company can evaluate the profitability of some wines versus others to help a winery pitch a retailer that it will make more money carrying your wines. On occasion, the company has advised clients on how to upgrade their own websites.

Moynihan said the highest added value comes from Merchant23's personal sales efforts.

The company actively sells wine along with its suppliers and has hired key account managers in California, Colorado, Connecticut, Massachusetts, New Jersey and Texas, with plans to cover the entire United States. The company also has merchandisers who can assist with floor displays. "This is not a 100% digital play," he said. "Wineries won't be successful with just a software platform. There is still a human component."

Cheryl Durzy is the founder and CEO of Liberation Distribution (LibDib), which she describes as a "technology-based company that provides three-tier to any winery that wants it."

In contrast to Merchant23, LibDib is the wholesaler, with wholesale licenses in all states where it does business, currently California and New York, with four additional state licenses pending. Durzy plans to be licensed in every state in the next two years.

Since starting in June 2016, LibDib has grown to have 305 active suppliers with 1,822 alcoholic beverage SKUs in California, and 184 active suppliers plus 1,150 SKUs in New York, with more being added daily.

Durzy compares LibDib's platform to Etsy, where suppliers go in and enter all their data, sell sheets, videos and other materials in one place. Setting up distribution in a new state is as easy as entering some information online and uploading a license. And for the on-premise or off-premise retailer, Durzy said, "It's a nice, easy self-serve shopping experience."

Durzy offered the example of a small California winery that had a relationship with a New York restaurant but couldn't sell its wines. Using LibDib, the winery now ships four cases every few months. The restaurant pays LibDib as the second tier, which then pays the supplier within 45 days. Durzy claimed LibDib's margins are only 15%, as the company doesn't own and maintain delivery trucks or warehouses. Unlike with many wholesaler agreements, wine suppliers are free to leave at will, as LibDib will not enforce franchise laws.

Delivery costs are the responsibility of the supplier/maker, who then builds them into the price. LibDib also has relationships with warehouses in both markets that can assist with storage and delivery.

To be successful, Durzy also stresses the need for human interaction. She said the winery owner is always going to be the most passionate salesperson. "They are still out there selling, just like three-tier today."

To that end, LibDib will help the winery find a local rep. She sees wineries using her platform and substituting efficient virtual tastings with retailers via Skype or Facetime, instead of spending time and money to travel across the country.

Both Durzy and Moynihan demonstrated tremendous entrepreneurial energy, optimism and dedication in helping their clients suc-

ceed. I also never heard either say that they require slotting, return, marketing, spoils or other "allowances" that primarily exist to enhance a middleman's bottom line. This may be just a little different than your own distributor experiences.

Getting past the gatekeeper

Founded on election night 2016 by Meg Murray, Oregon-based Nasty Woman Wines is a brand with "lefty feminist leanings." Murray expected the brand positioning with natural-food stores would be a no-brainer to get distributors to support, but soon learned that "I couldn't even get past that gate."

She now uses LibDib to bypass conventional distributors and go direct to market.

Murray does her own sales, traveling to California as well as doing virtual retailer tastings. In fact, she was doing two virtual tastings the day of our interview, one in Santa Monica, Calif., and another in upstate New York, essentially disproving the idea that you can't be in two places at once. Murray noted that "it's a different way of selling."

Air shipping wine samples does cost money, but much less than flying. She works from home but meets people "where they are in today's world. Buyers are so busy."

She said she heard from one New York account who discovered her on LibDib and reached out asking, "I love your brand. How do we do a tasting?"

Using LibDib, Murray's sales went from zero to "several handfuls" of placements, including all 29 California and Washington locations of Total Wine & More, an account she had been working to break into for over a year. She now has a base on which to grow, making it easier to take on contract sales reps to grow the brand, and eventually storing wine in California to cut costs. By having someone else take care of compliance, paperwork and payments, Murray can focus on the relationships. "This is a sales and marketing business. You just happen to be selling wine," she said.

Making sales after giving up

Along with his father, Matt Railla is co-owner of Wine Guerrilla, a single-vineyard Zinfandel specialist producing 1,000 cases a year in Santa Rosa, Calif. Before starting with Merchant23, Railla tried everything to get the attention of distributors, with minimal success. He gave up trying (does this sound familiar?), instead focusing his time on the tasting room, which opened in 2013. His three-tier sales dropped to zero.

About a year ago, he started to work with Merchant23, and sales started with some small deals. Now he gets reorders or deals every month and sells in four states, including a San Diego retailer that orders about one-half pallet each month. His direct-to-trade sales are close to 200 to 300 cases annually. Railla is now feeling con-

fident that he can grow to 1,600 cases and sell what he makes, and he credits Merchant23. "What they did for us was take all of that effort out of my hands," he said. "Now all I have to do is say yes or no, and get my wine ready to ship."

The little guy gets into Cost Plus

Reid Kinnett is winemaker for Karah Estate Vineyards, a 2,000-case winery in Sonoma County, Calif. Like so many wineries at this size, Karah Estate doesn't have a dedicated sales manager on staff. He likens the use of Merchant23 to "letting me throw more lines in the water," as Merchant23 casts a broad net that goes well beyond what his broker network can reach. Kinnett added that "once you make a few sales in an area, then it snowballs."

Merchant23 was able to get a large order from Cost Plus World Market, something that would be highly unlikely in the conventional three-tier model. Cost Plus was direct-to-store shipped a high-quality wine that none of its competitors had, and Karah Estate moved some excess inventory without heavy discounting. And the best part: Kinnett was paid promptly.

A small importer's story

Ami Nahari is the founder and CEO of The River Wine, based in New York state. The company distributes and produces premium kosher wines and spirits from Israel, California, Italy and Finland, with annual sales of 10,000 cases.

Nahari was doing well in his home territory of New York and New Jersey but struggled in California, which should have been his second-largest market. He had some retail demand, but his distributor didn't allocate resources to the niche kosher market, even though to Nahari it was a big market. He went to California and built sales himself, eventually getting it to \$30,000 annually.

Then he started using LibDib's platform, and California sales took off, going from "500 to 1,200 cases just in the first year. Now I am getting calls from Mollie Stone's and others."

Nahari still can't cover California as well as he'd like, so LibDib helped him find a contract sales rep who should get him to 2,000 cases annually. He heaps praise on LibDib, stating, "I wouldn't dare to call LibDib a clearing house. They treat the wines as their own, and there are no hidden fees, no minimums."

These examples show that online or virtual three-tier may finally be a viable solution for the small winery and will likely only get better. And it should be a lot more efficient than those weeklong East Coast sales trips. 🍷

Andy Starr, founder of StarrGreen (starrgreen.com), is an entrepreneur, marketing manager and winemaker who provides strategy, management and business development consulting services. A resident of Napa Valley, Calif., he holds a bachelor's degree in fermentation science from the University of California, Davis, and an MBA from UCLA.

The background of the cover features a light blue silhouette of the United States map. Overlaid on this map are numerous silhouettes of wine bottles in various shades of blue and teal, creating a textured, layered effect.

DISTRIBUTOR MARKET 2018

SPECIAL ANNUAL REPORT
ABOUT THE FAST-CHANGING
WHOLESALE TIER



Top 10 U.S. Wine Distributors

A shortlist of the top 10 wine distributors and their executives,
ranked by importance to U.S. wineries

By Stacy Briscoe

This is *Wines & Vines*' second year publishing the top 10 U.S. wine distributors as ranked by the data and research group Wines Vines Analytics. The list is developed with unique criteria chosen to emphasize the interests of wineries, such as how many and which U.S. wineries a distributor represents and the percentage of population in the states they cover. While the top five distributors are consistent with last year, because of mergers and acquisitions, each has seen its business expand by increasing the number of states served and overall wineries represented. One major change, a proposed merger of No. 2 Republic National Distributor Co., and No. 3 Breakthru Beverage Group, has yet to be approved by federal regulators. The distribution of beer and spirits was not taken into account in creating this list.

1 Southern Glazer's Wine & Spirits

Headquarters: Miami, Fla.
States served: 45
Offices: 123
U.S. wineries represented: 1,141
Chairman: Harvey Chaplin
Executive vice chairman: Bennett Glazer
CEO: Wayne Chaplin
President: Sheldon Stein

Southern Glazer's Wine & Spirits (SGWS) hits the No. 1 spot for the largest wine distributor in the United States once again. It serves 45 states and 1,141 wineries, according to the Wines Vines Analytics. The firm generated revenue estimated by *Forbes* magazine at \$16.5 billion in 2017, placing it at No. 17 on the magazine's Top 25 Companies list for that year.

SGWS was formed through a January 2016 agreement to merge Southern Wine & Spirits, which became the largest U.S. distributor as of 1992, and Glazer's, which had gross revenue of about a third of Southern's. The two had acquired several other distributors since 2010 including Premier, Stoller, Odom, Olinger, Alliance, Sterling and Union. In January 2018, SGWS acquired Jarboe Sales in Oklahoma; the deal is scheduled to officially close in October 2018.

As of May 2018, Southern increased total distribution by expanding Santa Rosa, Calif., based Jackson Family Wines' distribution into Florida. With this agreement, the family-owned winery is now available in 13 U.S. markets.

According to the company, SGWS employs more than 20,000 people and distributes more than 150 million cases of wine and spirits annually across 45 U.S. states, as well as Canada and the Caribbean.

SGWS also had to recently contend with lawsuits filed by New York authorities. At the end of 2017, the wholesaler was fined \$3.5 million by New York's State Liquor Authority (SLA) for engaging in "pay to play" schemes. Additionally, Southern Glazer entered into a corporate compliance agreement with the SLA, agreeing to allow the legal entity to regularly obtain information on practice violations. The agreement also imposes a responsibility for SGWS to report questionable business interactions to the SLA for further investigation.



Wayne Chaplin

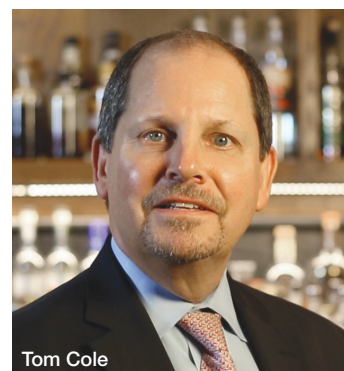
2 Republic National Distributing Co.

Headquarters: Grand Prairie, Texas
States served: 23
Offices: 46
U.S. wineries represented: 820
President and CEO: Tom Cole
EVP and COO: Robert Hendrickson
CFO: Nicholas Mehall

Republic National Distributing Co. (RNDC), is the nation's second largest wine distributor, representing 820 wineries according to Wines Vines Analytics. The RNDC was formed in May of 2007, the result of a merger between Republic Beverage and National Distributing Company. The combined firm now operates across 22 states, and Washington D.C.

In May 2018, RNDC extended its distribution partnership with Ste. Michelle Wine Estates for an additional five years across nine markets, including Louisiana, Maryland, Nebraska, North Dakota, Oklahoma, South Dakota, Texas, Virginia and Washington D.C.

In November 2017, RNDC and Breakthru Beverage Group (BBG) collectively announced their plans to merge pending regulatory approvals. The deal has yet to be approved.



Tom Cole

3 Breakthru Beverage Group

Headquarters: New York, N.Y.

States served: 16

Offices: 37

U.S. wineries represented: 629

Co-chairmen: Charles Merinoff and W. Rockwell Wirtz

President and CEO: Greg Baird

Breakthru Beverage ranks third among the top wine distributors in the United States, selling products from 629 wineries into 16 different states from 37 offices, according to Wines Vines Analytics. Breakthru, in its present form, is the result of a merger between Chermer Sunbelt and Wirtz distribution companies in early 2016, along with 15 other companies they had acquired in previous years.

In July 2018, the company announced a signed agreement to merge its New Jersey wholesale market with Allied Beverage Group. "We have found a great partner in Breakthru and look forward to combining their strong practices with our own. ...Our aim is to bring even greater value to our customers and supplier partners," said Allied Beverage Group president and CEO, Jeffrey Altschuler, in a statement.

The integrated company will operate under the name Allied Beverage Group and together will continue to be the state's leading distributor with annual revenues exceeding \$1 billion, according to the joint announcement.



Greg Baird

4 Young's Market Co.

Headquarters: Tustin, Calif.

States served: 11

Offices: 56

U.S. wineries represented: 693

Chairman: Vern Underwood

CEO: Chris Underwood

The fourth largest wine distributor, Young's Market Co., is currently serving 693 wineries in 11 states from its headquarters in Orange County, Calif. Young's has absorbed six other distribution companies since 2010, including Columbia in Oregon and Washington.

In May 2018 Wilson Daniels (WD), which is a New York-based subsidiary of Young's Holdings, announced the acquisition of Oregon-based Galaxy Wine Com-

pany from founders Matt Elsen and Bob Liner. Once the merger is complete, Galaxy will operate under the wholesale division of importer Wilson Daniels LLC. Galaxy will continue to be led by Elsen and Liner under the direction of Wilson Daniels president Rocco Lombardo.

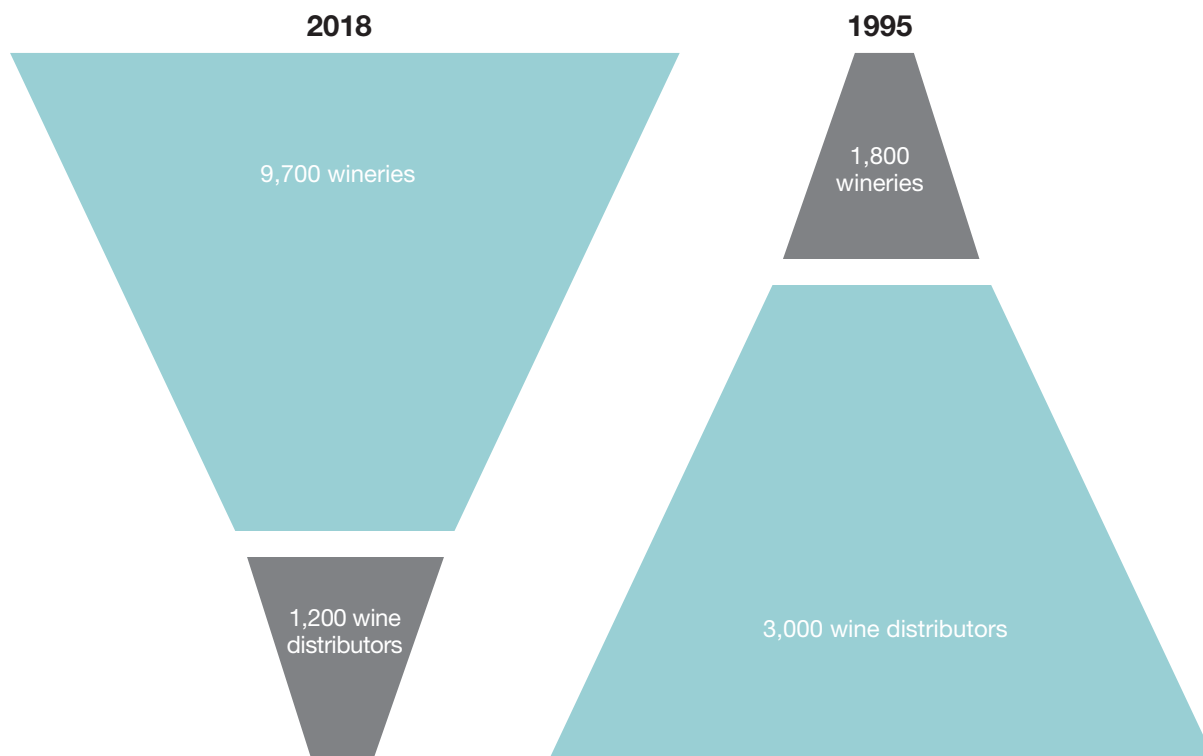
Galaxy's portfolio numbers more than 400 producers, including wines from A to Z, Vineyard Brands, Dalla Terra, Elk Cove, Maisons Marques & Domaines, Kermit Lynch and Domaine Serene.

Young's, already present in the Oregon distribution market, projects 2018 gross revenues of \$200 million in the state. Total revenues across the company's 11-state footprint is expected to reach \$3 billion in 2018, according to the company.



Chris Underwood

CONSOLIDATION OF U.S. WHOLESALERS



Source: Distributor sources and Wines Vines Analytics.

5 Johnson Brothers Liquor Company



Headquarters: St. Paul, Minn.
States served: 22
Offices: 36
U.S. wineries represented: 401
CEO: Michael Johnson

Johnson Brothers Liquor Co. is a family-owned wine, spirits and beer distributor, based in St. Paul, Minn. In 2017, the company expanded its market reach to New York and West Virginia and is currently shipping in 22 states.

In March 2018, the company announced it had signed an agreement to acquire Mutual Distributing of North Carolina, which, according to the announcement, has 700 employees and seven branches throughout the state. The acquisition will include accounts with Constellation, Trinchero, Banfi, Zonin, Foley Family Wines, Terlato and Heineken as well as local breweries.

In addition to distribution, Johnson Brothers provides sales consulting services that include shelf configuration, wine list consulting, staff training, tasting events and helping clients with their product mix. The company is also celebrating its 65th year in business in 2018.

6 Winebow Group



Headquarters: Glen Allen, Va.
States served: 22
Offices: 21
U.S. wineries represented: 598
President and CEO: Dean Ferrell

Making a big jump from last year's No. 10 position to No. 6 this year is the Winebow Group. In June of 2017, Winebow expanded its distribution network into Rhode Island. Then, in January 2018, the national importer and distributor announced its expansion into Oregon, increasing its total footprint to 22 states. With the addition of Oregon, Winebow now covers the entire West Coast, with Noble Wines in Washington and The Henry Group in California. Winebow is operating a new Portland, Ore., warehouse managed by Toni Ketrenos. Kathy Byrd is the company's vice president and general manager of Noble Wines and Erle Martin is now executive vice president of wholesale west.

Also in January 2018, The Henry Wine Group, partnered with Hahn Family Wines, producer of luxury and super-premium wines from California's Santa Lucia Highlands, Monterey County and Central Coast. As of February 2018, Henry Wine Group has exclusive distribution rights for Hahn, Hahn SLH, Lucienne, Smith & Hook and Boneshaker labels.

7 Empire Distributors



Headquarters: Atlanta, Ga.
States Served: 4
Offices: 13
U.S. wineries represented: 586
President and CEO: David Kahn

New to the Top 10 Distributor's list is Empire Distributors, headquartered in Atlanta, Ga. The company represents 586 wineries across four states and also distributes spirits, beer and non-alcoholic beverages.

According to Wines Vines Analytics, in June 2018, Empire Distributors acquired Noble Selection (formerly Volio Vino) in Colorado. With that acquisition, the company increased its footprint from three to four states. Empire representatives would not verify or comment on any acquisitions or provide any additional information on the company's background or business practices.

According to Emire's website, the company employs more than 1,500 employees across four states: Georgia, North Carolina, Tennessee and Colorado.

MAJOR U.S. WINE DISTRIBUTORS

	States Served	Offices	Headquarters
Southern Glazer's Wine and Spirits	45	123	Miami, Fla.
Republic National Distributing Co. (RNDC)	23	46	Grand, Prairie, Texas
Breakthru Beverage Group	16	37	New York, N.Y.
Young's Market Co.	11	56	Tustin, Calif.
Johnson Brothers Liquor Company	22	36	St. Paul, Minn.
Winebow Group	22	21	Glen Allen, Va.

Source: Wines Vines Analytics.

8 Heidelberg Distributing Co.



Vail Miller Jr.

Headquarters: Dayton, Ohio
States served: 2
Offices: 9
U.S. wineries represented: 85
Co-chairmen: Al Vontz III and Vail Miller Sr.
CEO: Vail Miller Jr.

Down from last year's No. 6 spot to No. 8 this year is Heidelberg Distributing out of Dayton, Ohio. The family-owned company distributes beer, spirits and non-alcoholic beverages in addition to wine.

The company began with German-born immigrant Albert W. Vontz who, in 1907 at age 22, came to the Ohio as a trained brewer and eventually invested in two local taverns. Post-Prohibition, he helped open Cincinnati's Vienna Brewery and later drove a truck for Heidelberg Brewery in Covington, Ky., delivering beer to grocery stores and restaurants in Dayton. Though the brewery closed in 1946, Vontz kept the Heidelberg name and offered his delivery and distribution services to other breweries.

In the 1950s, wine represented a large part of the operation's sales, but it also acquired the Anheuser-Busch franchise in Cincinnati and later the Budweiser distributorship.

Today, Heidelberg, employs 1,600 associates, represents 740 suppliers, including 85 wineries, and serves 26,000 retailers in Ohio and Kentucky.

9 Opici Family Distributing



Linda Opici

Headquarters: Glen Rock, N.J.
States served: 8
Offices: 9
U.S. wineries represented: 250
CEO: Linda Opici

Another new name to the Top 10 Distributor's list is Opici Family Distributing, headquartered in Glen Rock, New Jersey. The fourth-generation, family-owned wine and spirits wholesaler traces its roots back to 1913 when husband and wife Joseph and Esther Opici, Italian immigrants, began importing wines from Italy and distributing them within their home state of New Jersey. In 1934 the couple established the American Beverage Distribution Company of New Jersey — and from that, a family business was born.

During the 1990s, the Opicis expanded their distribution business, purchasing wholesale operations in Connecticut and Florida; by 2013, they had markets in Washington D.C., Maryland and Delaware.

Today Opici Family Distributing serves 250 wineries across seven eastern U.S. states, and Washington D.C.

10 Wine Warehouse



Jim Myerson

Headquarters: Los Angeles, Calif.
States served: 1
Offices: 2
U.S. wineries represented: 76
Chairman and CEO: Jim Myerson
Senior vice president: Linda Myerson Dean
President and COO: Greg Akins

Down from its 2017 No. 7 spot, Wine Warehouse, headquartered in Los Angeles, Calif., takes the No. 10 position this year. The company operates only in California, distributing products from 76 wineries within the state, according to Wines Vines Analytics.

The company was founded in 1973, when brothers Bob and Jim Meyerson, avid wine collectors, saw an opportunity to bring fine wines from abroad to the then new and fast-growing U.S. market. By 1978, Wine Warehouse was an established wholesaler of premium wine from around the world, but also represented almost half of the bonded wineries in Napa Valley.

Today, second-generation, owners Jim Myerson and Linda Myerson Dean, son and daughter of Bob Myerson, take the company's leadership positions as CEO and senior vice president, respectively. Wine Warehouse's portfolio includes domestic wines ranging from top-volume producers like E. & J. Gallo Winery to boutique brands like Eberle Winery, Far Niente Winery and Nickel & Nickel.

U.S. WINE DISTRIBUTOR COUNTS

State	Unique Distributors	State	Unique Distributors	State	Unique Distributors
California	154	Texas	43	North Carolina	35
New York	105	Washington	40	Maryland	33
Illinois	65	Massachusetts	39	Michigan	33
Florida	53	Oregon	38	Ohio	33
Virginia	48	Colorado	36	All others	458
Total US Distributors				1,213	

Source: Wines Vines Analytics.

Building a Powerhouse Brand Regionally

How Bread & Butter's founders used Northeast distribution as a proving ground

Jim Gordon

It has become axiomatic in the wine business that gaining national distribution for a brand is difficult if not impossible. Most everyone knows the chart of two funnels pointing in different directions that illustrates the challenge. Today, 9,700 U.S. wineries need to push their wines through just 1,200 distributor or wholesaler companies. That situation used to be reversed. In 1995, there were just 1,800 wineries fanning out into a wide funnel of 3,000 distributors.

"When I started my career, there was a lot more attention from wholesalers," said Gregory Ahn, CEO of Folktale Wine Group, based in Carmel, Calif. "It used to be that distributors would come out to California and knock on your door to look for new wines. Nowadays they don't even have time to taste all the wines that come to their offices."

It's a well-known challenge posed by distributor consolidation. Faced with that challenge, some brand owners like Ahn have found a solution in regional distribution. Focusing distribution and sales efforts on one region of the U.S. enabled Ahn and his team at Alcohol by Volume, the previous business name, to create a brand, prove its appeal in one region, and later sell it to a bigger wine company that could take it national.

Bread & Butter is that brand. Conceived in 2012 and launched in 2013 as a partnership between Alcohol by Volume and Fior di Sole custom-crush winery, the \$15 retail Chardonnay and Pinot Noir brand grew to 200,000 cases in four years and was sold to Novato, Calif.-based WX Brands in April 2017 for an undisclosed sum. The advisor who assisted in the sale, Mario Zepponi of Zepponi & Co., said that Bread & Butter's focused, regional-sales approach was a key factor in attracting the buyer.

"I look at it as a pathway to success," Zepponi told *Wines & Vines*, "especially for brands that are more positioned for sale at some point. But no matter what, it's a strategy that will lead to a successful brand."

Zepponi used the Bread & Butter example in his presentation at the Unified Wine & Grape Symposium in January of this year. He told the

audience that strategic distribution is becoming more and more important. "Independent wineries are going to have to think like craft beer and spirits makers. I would encourage them to look at this example."

Ahn confirmed Zepponi's characterization of the Bread & Butter distribution strategy, but admitted that it wasn't as intentional as it may have appeared. "Unfortunately, I am not smart enough to say that I sat in my evil lair and decided this is what we're going to do for distribution."

But he and his team's relationships with the trade in the Northeast, and outside the major urban centers, led them in that direction. Zepponi said the company built two-thirds of its distribution in case depletions in the Northeast and did it with 65% independent, off-premise accounts and middle-tier wholesalers.

"It was definitely distributor and wholesaler relationships that were key," Ahn said. Opici, based in New Jersey, distributed Bread & Butter in Connecticut and upstate New York. Bay State was the company's partner in Massachusetts, Rhode Island and New Hampshire.

Ahn said that when starting a new brand or new winery, trying to get distributors to add it to their books is the biggest challenge. "Wholesale channels have created such a bottleneck that it's difficult to even get distribution at all without relationships. But we had to get our own people to pound the pavement to help them."

He and two other salespeople did the pounding at first, building to five people total before the sale.

Origin story

A quirky shop in Salem, Mass., that sold both wine and kitchenware provided the aha moment in 2012 that led to the creation of Bread & Butter. Ahn, who had worked for Seagram, Diageo, Allied Domecq and Constellation Brands before founding Alcohol by Volume, said he had been hearing from various clients that consumers were turning away from unoaked Chardonnay and looking for a more classic style of California Chardonnay that was "more malolactic-driven, oak-driven and fruit-forward."

Ahn had begun to believe that the trend toward unoaked wines had peaked with the Naked brand and that the trade and the public were ready for more offerings in the mid-price points that were openly rich and oaky. He observed that many people in the wholesale tier especially remained affectionate about Rombauer Chardonnay, which continued to be a big seller because of, and not in spite of, its very fruity and oaky flavors and quite soft and luxurious texture.

The store stocked a number of what Ahn calls the pastry brands such as Layer Cake, Cupcake, and JaM along with cheeky labels like Twisted Sister and Bitch. It also sold cookbooks, and as he flipped through a dictionary of food terms he came upon an entry for bread-and-butter pickles. A description of the sweet pickles as a simple, uncomplicated staple got him thinking that the name would work especially well for a Chardonnay, except the pickle part.

He said Alcohol by Volume had already worked with the Fior di Sole winery in Napa, Calif., as a custom production partner, and he asked the winery to start making Bread & Butter Chardonnay. Fior di Sole's owners are Dario de Conti, Valentina Guolo-Migotto and Stefano Migotto, who are also the owners of Ca' Momi brand wines and a Napa, Calif., restaurant of the same name.

By 2014, Alcohol by Volume was listed as one of Inc.com's 500 fastest-growing companies, producing Bread & Butter and other brands including Alias Wines, Aviary Napa Valley, Des Amis, Le Mistral, Manifesto and State of Art. At the time of the sale in 2017, Zepponi stated in a news release that the brand had consistently ranked as one of the fastest-growing in the industry, based on retail scan data, with a sales value increase of 139% for the 52 weeks ended Feb. 25, 2017, based on the Nielsen food and liquor outlet data. "Minimalist packaging design and a clean style have helped Bread & Butter stand out within the increasingly competitive super-premium price category," Zepponi wrote, "despite the brand's minimal distribution in retail chains and limited sales outside of the East Coast."

Low-hanging fruit

Ahn said it was not his company's intention from the start to build the brand that fast and then sell it, based on success in a region. The regional distribution strategy came into focus as his team began to sell Bread & Butter. It was a strategy of necessity, he said, because of the small size of the company in 2013, which led him to aim at medium-size wholesalers who were familiar with handling fine wine. The wholesalers were not focused on supermarkets and chains, but on independent retailers.

"There was a feeling of 'let's go where there's less competition,'" he recalled. Having gone on ride-alongs with distributor reps in Boston and New York City in previous jobs, he found the practice was less common in smaller markets and with independent retailers. Ahn said the brand's success was based on relationships in the Northeast, and the team basically avoided trying to build much business in California.

"Northern California especially was so competitive," he said. "The West Coast in general is more difficult for brand development."

If you're a small or medium-sized winery in California, "you can get in your pickup and deliver wine around you, but so much of the business is based on chains that it's hard to penetrate."

He said that in his career he had taken part in acquisition discussions when his former employers bought brands, and he knew some of the attributes they valued. "So there was some conscious thinking about how you build value into a brand. One part of that is how do you grow so that there is more fruit left on the tree for a buyer. I had learned that you don't extend the brand to too many varietals, for one thing. That's for the bigger company who buys the brand to take that fruit."

"The geographic fruit is also low-hanging. If you can prove out the brand's appeal in one region, and someone looks at it and says, 'Wow, they haven't even touched this other part of

the country,' then that's something they can use to get their return on investment if they buy it," Ahn said.

He added that since Bread & Butter did not have chain grocery distribution, that was another branch loaded with low-hanging fruit for a buyer that did have chain connections. "We were doing over 200,000 cases without national chain distribution. So a buyer could imagine how quickly they might scale up the volume if they got into it."

Funding the rapid growth of Bread & Butter was the most difficult hurdle the company faced, Ahn said. The brand got to the point that it needed bigger distributors, bigger partners, he said. "We could either change our partners or give it to someone who had that expertise already. WX was such a strong private label company, but they didn't have national brands. I think they saw it as an anchor brand."

WX takes over

Wine Business Monthly listed WX Brands as the 19th largest U.S. wine producer in its February 2018 issue, and that was before the announcement of the Bread & Butter acquisition and the simultaneous acquisition of the Jamieson Ranch Vineyards portfolio.

WX CEO Peter Byck stated in a news release in April that "these acquisitions reflect the continued evolution of our company. We built this company by providing exclusive, consistently great quality wines, beers and spirits to our retail customers, and that remains the core of our business. Now we are adding a collection of wine brands that uniquely appeal to consumers and will drive category growth for our retail and wholesale customers."

Oren Lewin was the senior vice president of marketing of WX at the time Bread & Butter changed hands, but has since moved on to Peju Winery in Rutherford, Calif., where he is general manager. He confirmed to *Wines & Vines*, "We carefully analyzed the success they had

building the brand regionally, which gave us confidence we could scale the brand when we would expand it nationally.

"Unless you are one of the major wine companies, with a large sales force and significant influence with distributors and chain retailers, I believe wineries are better off building brands regionally. By concentrating your resources in a limited geography, you can demonstrate a success story that can be replicated in other markets.

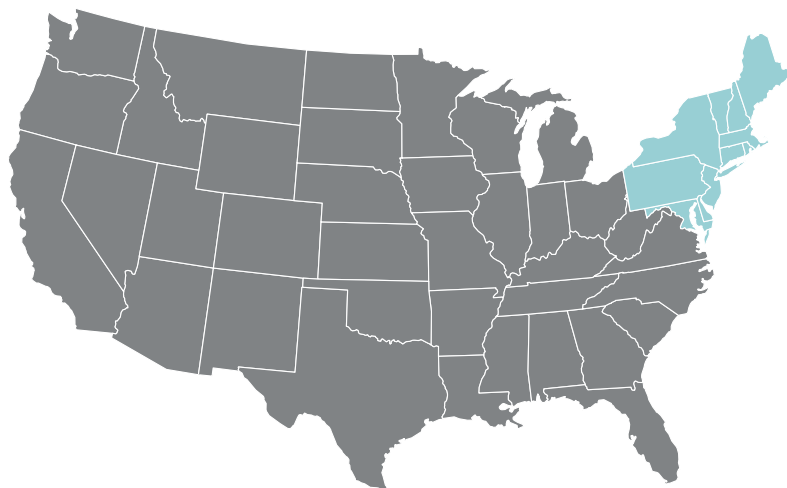
"It also gives key stakeholders confidence that your brand will be successful; winery ownership confidence they should invest resources; distributors confidence they should take on the brand; and retailers confidence they should authorize distribution.

"I generally prefer to build brands in independent markets, where you can gain distribution store by store. In chain markets, you have to convince chain buyers to give you a chance, and they generally wait for brands with proven track records. So I often launch brands in independent markets like Massachusetts, New York, Minnesota or Colorado."

Lewin said the regional approach has affected his thinking about how to expand Peju's business nationally. "At Peju, we are focusing all of our wholesale efforts on our top 12 markets, which represent 90% of our business. As we demonstrate success in these markets, we will add resources so we can expand to additional markets."

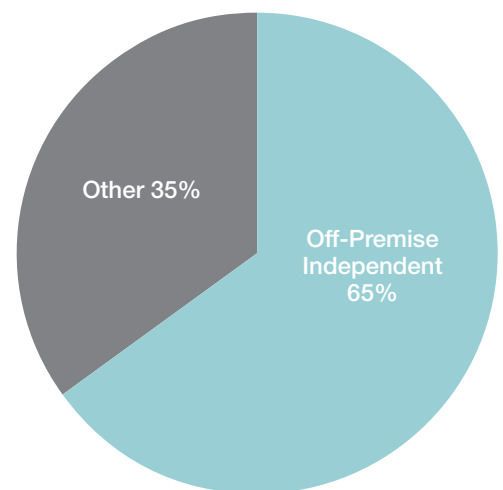
As for the other brands left in Gregory Ahn's company after he and his partners deposited their presumably large checks for Bread & Butter, he said, "Across our portfolio there are other brands with the potential to grow like that. Our focus is controlled growth, however. We don't want to get the tiger by the tail again. Our goal is not necessarily to build something to sell, but there's an active M&A market out there, and people should be prepared to have that conversation." 🍷

STRATEGIC REGIONAL DISTRIBUTION



SOURCE: ZEPPONI & CO.

Independent, off-premise retailers accounted for two thirds of Bread & Butter's sales.



Double Canyon, Single Focus

New facility provides focus and room to grow for Washington winery

By Peter Mitham



Double Canyon's expansive crush pad sits on an 11-acre property with municipal services.

Despite the long gestation and lofty ambitions for the Double Canyon winery in the new Red Mountain Center industrial park in West Richland, Wash., the focus of the facility is incredibly tight. It's Cabernet Sauvignon.

And not just Cabernet Sauvignon, winemaker Kate Michaud says as she shows off the equipment in the 47,000-square-foot facility that opened last September, but small lots of Washington's most-planted grape. "One of the things that really spoke to me when I took this job was the scale of all of this," said Michaud, who, among other previous experience, had a hand in the launch of the boutique Chardonnay brand CheckMate by Von Mandl Family Estates in British Columbia.

"This scale is not common. Usually you're doing 2,000, 18,000 tons, or you're doing a couple hundred tons, maybe, so your tanks are scaled accordingly," Michaud said. "You either have all 12,000-, 16,000-, 18,000-, 24,000-gallon tanks or you have a bunch of tanks that are 500 gallons to 1,500 gallons and a bunch of barrels."

Double Canyon fits in between, with a bias toward small. Its largest tanks are just 7,200 gallons, and the equipment parallels blocks in the winery's estate vineyard overlooking the Columbia River. "Those blocks kind of equate to 7 tons, 14 tons, 12 tons," Michaud explained, just right for its 2,500-, 4,500- and 3,500-gallon tanks, respectively. "It also allows us to keep all our blocks separate. Because we don't have 19,000-gallon tanks, we're not forced into making picking decisions that put two, three blocks together to be able to (fully) utilize the tanks."

She said she believes the connections inevitably translate into quality defined by phenolics rather than sugars. "In my

interview with (Crimson chief wine grower) Craig Williams, I was telling him I was after this holy grail of how to make an ageworthy wine," Michaud recalled of the process that led to her being hired in early 2017. "He told me the holy grail is bound anthocyanins and left me with that."

The quest for bound anthocyanins — a combination of the tannins and anthocyanins in grape skins — framed the construction of the production facility and now drives how Michaud works within it.

Crimson began planning for Double Canyon in 2005, seeking, in the words of general manager Will Beightol, "the next great place to make world-class Cabernet."

The financial crisis of 2008 put realization of the vision on hold, but not the preparations. Planting of its estate vineyard, now at 107 acres, began in 2007 on 185 acres in the Horse Heaven Hills near Alderdale, Wash. The first grapes were harvested in 2010 and went into tanks at Artifex Wine Co. in Walla Walla, Wash. Plans for a dedicated production facility began to take shape in 2013.

"We were at a couple of custom-crush facilities for a number of years and decided to invest into our own facility, mainly to have a little more control," said Sheldon Parker, senior director of operations with Crimson Wine Group.

The design team included Parker, Beightol, Craig Williams and winemakers Michael Beaulac of Pine Ridge Vineyards in Napa Valley and Casey McClellan of Seven Hills Winery in Walla Walla, which Crimson acquired in 2016.

The result was a simple, tilt-up facility geared toward production rather than visitors, though a 1,000-square-foot tasting room opened on-site this summer. (Crimson also pours wines from its portfolio at The Estates tasting room near Seattle's historic Pioneer Square.) Construction cost

KEY POINTS

Vineyard blocks and winery equipment parallel one another for efficiency.

Automation saves labor and facilitates more integrated wines.

Large 11-acre site leaves room for expansion.

about \$2 million, public filings indicate (the exact amount was not disclosed). “We made sure we got all the right equipment. From a construction perspective, we were probably very fortunate that there wasn’t Napa pricing,” Parker said. “I think you get a little bit more for your money up here.”

The savings allowed some cutting-edge equipment, including a Diemme Kappa 50 destemmer-crusher that adjusts to the quality of incoming grapes. It’s the first known installation in the U.S.

“You can toggle the crusher to a position that allows you to crush without destemming or crush with destemming. You can also choose to destem only, without crushing, or use a chute that bypasses everything,” Michaud said. It’s “fairly unusual to have the ability to adjust on the fly with the fruit.”

A Pellenc Optimum harvester equipped with Pellenc’s Selectiv technology that eliminates 99% of material other than grapes (MOG), including rachis and leaves, is used to harvest the grapes. This saves time, something Michaud has come to appreciate. “Getting the fruit here as quickly as possible to the winery does move my needle now,” she said.

White grapes go immediately to a Diemme Velvet 115 press that can handle up to 25 tons of destemmed fruit or 40 tons of must, though it typically handled 18 tons of white grapes and 25 tons of red must during its first season.

Michaud said she likes to press off juice from the must a little early to avoid over-extraction.

White juice for Seven Hills Winery goes into tall and skinny 5,000-gallon fermenters that are fully jacketed. Red grapes go into squat and square LaGarde tanks for seven to 21 days. The red tanks are also fully jacketed, including on the bottom. This ensures temperature control prior to fermentation, and a rapid transition to fermentation that limits degradation of the must. It “means we’re going to cold soak for four to seven days at 50 degrees, then when we want to turn on and start fermenting, we can just get the temp (up) quickly, then cool it should we need to,” Michaud said. It “feels like a game-changer for me, just because it feels so customized.”

When fermentation begins, the square tanks ensure even contact between the cap and must. “It’s even,” Michaud explained. “You want that one-to-one ratio because you want the cap to be thinner so that there’s more skins and color and contact with the juice.”



Double Canyon’s tilt-up walls are insulated to protect it against the temperature extremes of the Washington desert.



Several configurations of the Diemme Kappa 50 destemmer-crusher give Double Canyon maximum flexibility over incoming fruit.



Double Canyon

8060 Keene Rd., West Richland, Wash. • (509) 832-4191 • doublecanyon.com

OWNER
Crimson Wine Group

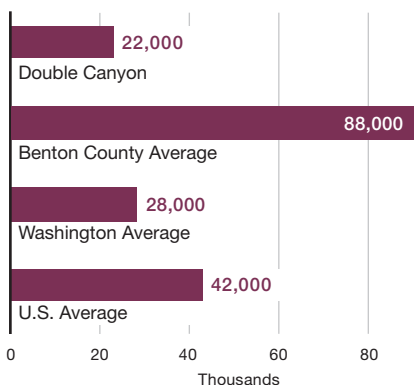
WINEMAKER
Kate Michaud

YEAR FOUNDED
2008

DIRECT-TO-CONSUMER SALES:
30%

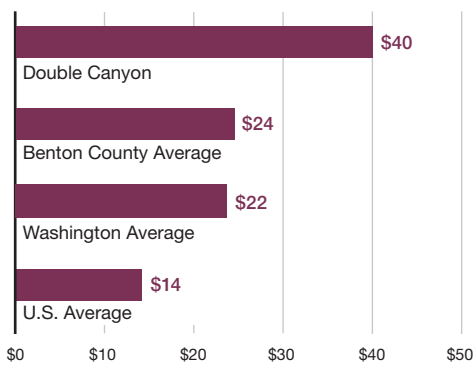
VINEYARD ACREAGE
107

WINERY CASE PRODUCTION



Source: Wines Vines Analytics

WINERY AVERAGE BOTTLE PRICE



Source: Wines Vines Analytics

The Technical Spotlight is a regular feature highlighting wineries in North America that have recently opened or undergone major renovations and improvements. *Wines & Vines* seeks to report how facility design and winemaking equipment is used to achieve a particular winemaking style while also exploring new trends and techniques being used in the industry. If you think your winery would be a good candidate for the feature, contact us at edit@winesandvines.com.

BUILDING THE WINERY

Architect	Mountain States Construction, mtstates.com UpWard Architecture, upwardarchitecture.com
Contractor	Mountain States Construction Co. , mtstates.com
Engineering	Ted Pooler, HLA Engineering , hlacivil.com
Steel and concrete	Mountain States Construction Co.
HVAC/refrigeration	Bruce Mechanical Inc. , bruceinc.com PRO Refrigeration Inc. , prochiller.com
Electrical	Brashear Electric , Richland, Wash. 509-783-1001
Plumbing	Gary's Plumbing , Yakima, Wash. 509-966-1330
Catwalks	Tri-State Machinery , tristatemachineryinc.com
Flooring and wall coating	PaintSmith , paintsmith.com
Landscaping	Heritage Professional Landscaping , heritagelandscaping.com
Metal fabrication	SMK Tri-Cities , smktricity.com

PACKAGING

Mobile Bottling	Signature Mobile Bottlers , signaturebottlers.com
Corks	DIAM Closures USA G3 Enterprises , g3enterprises.com
Capsules	Ramondin USA , ramondin.com G3 Enterprises , g3enterprises.com
Label design	CF Napa Brand Design , cfnapa.com
Label printing	Multi-Color Corp. , mcclabel.com/wine-spirit.html

MAKING THE WINE

Grape harvester	Vine Tech Equipment , vinetechequipment.com
Receiving equipment	P&L Specialties , pnlspecialties.com
Destemmer	ColloPack Solutions , collopack.com
Tanks	Santa Rosa Stainless Steel , srss.com La Garde , lagardeinox.com
Pump over and cellar pumps	Carlsen & Associates , carlsenassociates.com
Barrels	Tonnellerie Taransaud , taransaud.com Dargaud & Jaegle, Premier Wine Cask , premierwinecask.com Demptos Napa Cooperage , demptosusa.com Tonnellerie Saint Martin North America , tonnelleriesaintmartin.com Tonnellerie Sylvain , tonnellerie-sylvain.fr Seguin Moreau Napa Cooperage , seguinmoreaunapa.com Nadalié USA , nadalie.com
Barrel racks	Rack & Maintenance Source , rackandmaintenance.com
Barrel washing	Tom Beard Co. , tombeard.com
Vineyard monitoring	Ranch Systems , ranchsystems.com CropTrak by Cogent3D , icroptrak.com
Winemaking software	Vintrace , vinx2.com TankNet, Acrolon Technologies, Inc. , acrolon.com
Winery management	AMS – Advanced Management Systems , amssoftware.com

All transfer lines are chased or pushed with nitrogen gas rather than water, to avoid diluting juice or wine and to conserve water.

The tanks are sized to handle the grapes by the vineyard block or in larger lots as necessary, but what stands out about the facility is the degree of automation. All the controls can be locked in, and data on ferments is stored in the cloud via TankNet. The in-house lab uses Vintrace, which tracks data during tastings for detailed analysis down the road. The result is a facility operating with a regular staff of just three people in addition to Beightol and Michaud. During harvest, winery staffing doubles, while an additional 15 people work in the vineyard.

The effects come together most clearly during fermentation, which TankNet allows Michaud to manage remotely from her mobile device. The winery's four 2,500-gallon open-top fermenters each have a centrifugal pump bolted onto them that can be triggered from her phone. "I can see

my tank pump-throughs, I can see my tank temperatures, I can see my cap temperature and my juice temperature, and I can see that the delta is too high and my cap is too high, and I say 'spin that tank,' and this all starts," she said.

Pumpovers can also be scheduled for certain set points, reducing labor demands and allowing shorter pumpovers at regular intervals to create more integrated wines.

"I think our strategy is going to be more pumpovers for short amounts of time because we're not using manpower to do it," she said. "It's (a) more customized extraction based on organoleptic tasting and seeing where we are, paired with numbers that we're seeing in the lab."

When fermentation completes, the wine is put into barrels split 67% to French and the rest to American oak. Taransaud is the benchmark, and this year Michaud is trialing Seguin Moreau low-aroma Icône barrels. Her larger lots go into American oak



Double Canyon winemaker Kate Michaud is focused on achieving bound anthocyanins as the foundation of age-worthy Cabernet Sauvignon.

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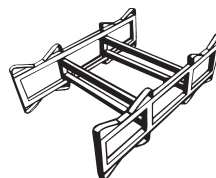
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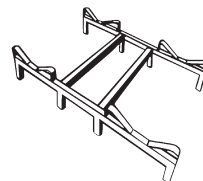
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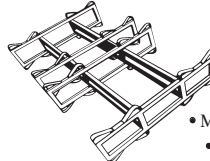
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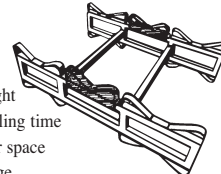
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barrels from Nadalie, Demptos and Canton. “I am more comfortable with French oak and more comfortable with the coopers that I have been working with, but in saying that you still kind of need a sub-\$1,000 barrel to be your workhorse barrel,” she said.

The barrel room, which is as sophisticated as the rest of the operation, has 22-foot ceilings. It is where Michaud’s quest for bound anthocyanins comes into play.

“I had to figure out how to get to bound anthocyanins. And the way you do is being

able to heat to kind of bind up the pre-anthocyanins. So all these barrel rooms have the ability to be held at 80 degrees should I want to, and I probably will,” she said.

While the room will normally be at 55° F, ancillary heaters hanging in the corners allow Michaud to raise the temperature as needed.

The barrel room also features four Aerocide units, originally developed by NASA to ensure a supply of fresh air for astronauts. Twice a day, ultraviolet light will process the air in the barrel room and get rid of airborne yeasts,

bacteria and other microbes. Primarily designed to prevent problems from starting, the system also aims to allow higher humidity levels in the barrel room without encouraging microbial development.

It “feels like a pretty nice insurance piece that we have there,” Michaud said. “It also means we can turn our humidity up more and have less evaporation, less topping losses, because we’re not worried about a higher humidity, which would mean, normally, more mold.”

Supporting the controls on heat and humidity are high-performing concrete sandwich-panel walls that have an R value of 25 to withstand the harsh winter conditions of the eastern Washington desert. The sandwich is formed by embedding a layer of insulating foam between two concrete wythes to form a single panel 14 inches thick and indistinguishable from any other tilt-up assembly.

Rounding out microbial control is a Tom Beard unit that washes, steams and treats barrels with ozone in a single pass. Rinse water recirculates to become wash water for the next set of barrels.

Casey McClellan, who became involved with the design process following Seven Hills’ acquisition in 2016, is impressed. McClellan continues to oversee the making of Seven Hills’ small-lot wines at its home winery in Walla

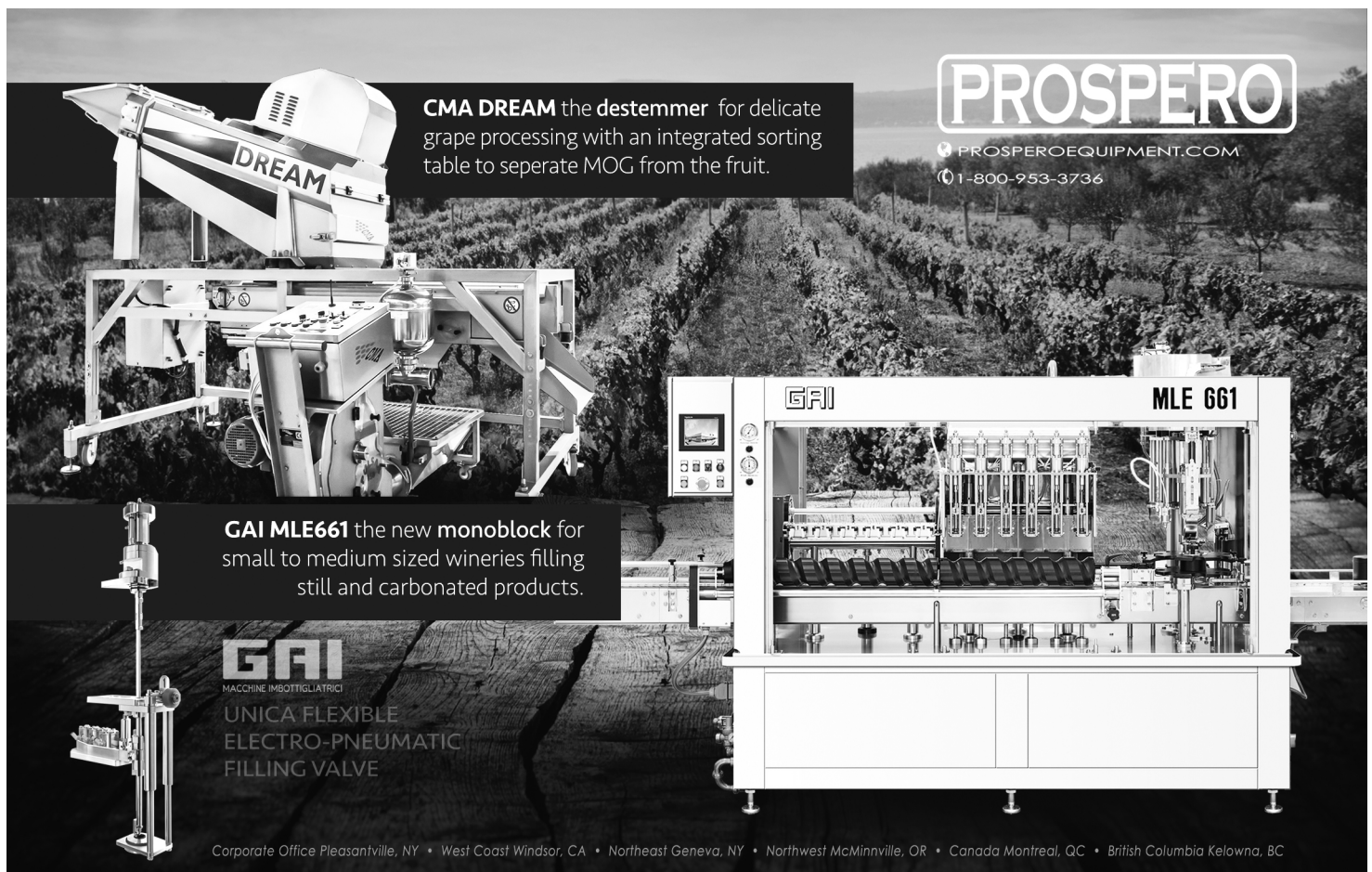
WASTEWATER MANAGEMENT

The state of Washington’s development of a general permit for winery wastewater discharge has vintners giving wastewater systems greater consideration. Double Canyon has made a point of being savvy about water use, using nitrogen to push must through pumps and recirculating water elsewhere.

Its location at Red Mountain Center was clinched by a municipal wastewater system that addresses new state requirements. Since wastewater enters the municipal system, wineries don’t require a permit.

Roscoe Slade, public works director for West Richland, said the system monitors for biochemical oxygen demand (BOD), soluble materials and pH, taking these issues off industry’s plate. “What seems to be coming in here first are wineries,” Slade said.

Besides Double Canyon, Pacific Rim Winemakers, Sugar Horse Cellars and Black Heron Distillery have all taken space in the 320-acre industrial park.



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Walla, but automation means he can continue to keep tabs on the larger lots produced in West Richland. "They've got a lot of great tools and equipment, and a lot of control," McClellan said.

With one vintage behind him, there's nothing in particular he would change.

Parker is also satisfied with the results and how the facility has performed since coming online in September 2017. He doesn't anticipate any problems with its second vintage coming up; instead, expansion is on his mind.

He describes the current facility as Phase 1 and includes space — currently used to host events — to produce up to 50,000 cases (current production is about 21,800 cases). Crimson can also "Lego on" another barrel room to the end of the existing facility. The site is 11 acres and can accommodate expansion to 80,000 square feet or even 120,000 square feet. "Theoretically, we could go up to 200,000 cases," Parker said.

The mechanical room was built to exactly this scale, with double the capacity needed. The boiler, for example, is a massive engine with a 4 million BTU capacity. "The boiler to the air tanks to the recirc tanks for hot water to the air compressor, everything is built already sized to expand to whatever we get to," Parker said. "If we have the sales that support it, we will expand." 🍷



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Wind Turbine Electricity Generation

Scheid Family Wines expands sustainability efforts with renewable resource

By Cynthia Bournellis

Wind is not just something that you can feel against your skin, hear when it howls, or see the effects of its devastation. Wind also is one of the fastest-growing sources of electricity in the world. In the United States, wind energy ranks fourth in electricity production, behind natural gas, coal and nuclear energy, according to the California Energy Commission (CEC).

In California, wind plays a crucial role in the state's electricity portfolio and Renewable Portfolio Standard (RPS). According to the CEC, electric utilities are required to source 50% of retail sales from renewable sources by 2030. Further data from the CEC shows that commercial-scale wind projects generated a net 13,500 gigawatt-hours of electricity in 2016, about 6.81% of the state's gross system power; and wind energy accounted for 39% of California's renewable energy production for the RPS.

While hundreds of homes and farms are using small turbines to produce electricity, others are going big time. Most impressive is a wind-turbine installation in California's Salinas Valley in Monterey County. In August 2017, a huge turbine was erected at Scheid Family Wines in Greenfield to improve overall efficiency by supplementing the electricity delivered through the Pacific Gas & Electric (PG&E) grid with an on-site, emission-free renewable energy source.

Scheid has been farming wine grapes in Monterey County since 1972 and today has 4,000 acres of sustainably certified vineyards and a large state-of-the-art winery in Salinas Valley.

The new wind turbine is a major element in Scheid's sustainability-practices program.

Salinas Valley whirlybirds

The Scheid wind turbine may very well be the first large-scale project in the U.S. to be installed on a winery property and was put in by Foundation Windpower LLC, a developer, owner and operator of utility-scale wind projects. This is the third Foundation installation in Salinas Valley, including a turbine at Taylor Farms, a food-processing plant in Gonzales, and another at the city of Soledad's wastewater-treatment plant. Foundation Windpower has 20 sites throughout California, with the oldest installed in 2010 in the city of Tracy, at the base of the Altamont Pass.

Wind turbines require sites that 1) have a good wind regime to generate significant energy and 2) are in a non-residential area, according to Bob Lewis, founder of Foundation Windpower. "There has to be enough wind to run the turbines, which are state-of-the-art and are the same size as those used on wind farms."

The Scheid turbine is a utility-scale 1.85-megawatt generator designed for high-wind environments. These massive structures are built to last 25 years but potentially can run 30 years or more.

Winds in the Salinas Valley blow, on average, 13.5 miles per hour, making conditions favorable to wind-energy generation, particularly during the summer afternoon hours of noon-6 p.m. (Monday through Friday). These hours are defined by PG&E as "peak electrical demand" hours and result

KEY POINTS

California is serious about wind energy as part of the state's electricity portfolio and requires that electrical utilities source 50% of retail sales from renewable sources by 2030. As of 2016, wind energy accounted for 39% of California's renewable energy production.

Due to efficient winds and lack of residential area, California's Salinas Valley is an ideal region for select wind-farm projects.

Scheid Family Wines has erected a large wind turbine in Salinas Valley and expects electricity savings from the turbine to exceed \$50,000 per year.

in higher electricity costs and an increase in greenhouse gases. "The turbine offsets this expense and impact," Lewis says.

Turbines begin spinning and generating electricity when the wind blows at 7-9 mph, Lewis notes, produce full power at 34 mph, and generally shut off and enter a survival mode when the wind exceeds 56 mph.

The wind above my vines

Scheid ripped out 6 acres of Pinot Noir vines (to be replanted later) to clear, grade and excavate the site for the turbine. The first phase

of construction involved excavating at a depth of up to 35 feet from the surface to construct a foundation 15 feet in diameter. The subsurface soil was prepared for both the foundation and pad, and any remaining soil was returned to the center of the foundation pursuant to the foundation design. Construction lasted two weeks, followed by 30 days of inactivity to allow the foundation's concrete to cure.

The second phase, which took four weeks, involved the delivery and assembly of the tower, rotor, transformer and nacelle (a cover housing that houses all of the generating components in a wind turbine). Each piece was shipped and then assembled on-site using cranes. The finished turbine sits on less than one-half acre; the additional area is required for delivery and construction of the structure. Next, electrical work was performed to connect the wind-turbine generator to two transformers and an underground transmission line. The distance from the wind turbine to the circuit box is 1,000 feet.

Assembly and installation by Foundation Windpower using General Electric equipment included two transformers. One transformer, located at the base of the turbine, increases the generator's 690 volts (V) to 12.47 kilovolts (kV) for delivery of electrical energy through underground conductors to the step-down transformer. The step-down transformer delivers 12.47 kV-

480 V and is located near Foundation's protection switchgear adjacent to Scheid Family Wines' main switchgear. Foundation's switchgear provides a 52G turbine breaker operated by relays and a DC battery system. The switchgear also includes PG&E's manual disconnect switch.

The wind turbine can be seen, not heard, for miles. The center line of the turbine hub is 264 feet above ground. Three propeller blades are each 132 feet long, and the top arch of the propeller blades is 396 feet above ground level. The props turn at approximately 19.5 rpm. The turbine operates on an automatic basis whenever sufficient wind is present, 24 hours per day, seven days per week. Sound at the base of the turbine is approximately 70 decibels and less than 50 decibels at 1,000 feet.

Netting it out

The contract between Scheid Family Wines and Foundation Windpower is called a Power Purchase Agreement in which Foundation Windpower owns, operates and maintains the turbine, in addition to providing power to the winery operations. Scheid pays a fee that includes a discount below what PG&E would charge.

The turbine is connected to the energy meter at the winery and provides power for main winery operations. The turbine operates in parallel with PG&E. This means that when the wind is

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not blowing, Scheid is drawing energy from PG&E. When the turbine is operating, the energy that is not used from PG&E remains in the utility grid and Scheid receives credits from Foundation Windpower at the same rate that PG&E would have billed Scheid during that time period.

Maintenance is included in the Power Purchase Agreement, and costs range from 3% to 5% of the total installation cost of \$4 million to \$5 million. "Foundation Windpower is monitoring the turbine generation remotely 24/7," Lewis says. If there is an issue, we have a team of technicians available to access and repair any problem. Preventive maintenance is also performed throughout the life of the turbine."

Windfall in savings

The turbine went online Sept. 15, 2017. Based on a wind-energy savings analysis from Scheid for the period from September 2017 through January 2018, Scheid has realized \$28,854 in energy savings via the wind turbine. A full year, however, is required to determine the reduction in PG&E demand charges.

"After evaluating our electrical cost savings from the wind turbine project and due to the growth in our business, comparing year-over-year costs is not reflective of the savings from wind-power utilization," says Tony Stephen, Scheid Family Wines chief planning officer.

"Based on current performance, we estimate electricity savings from the turbine to exceed \$50,000 per year."

In keeping with its sustainability practices, the cost to replant the 6 acres of Pinot Noir vines that were ripped out for the turbine installation was \$3,500 per acre, including materials—because Scheid reused the original trellis and end posts.

Industrialization and wildlife coexisting

Before construction, Foundation Windpower conducted an analysis that included potential impact of the turbine on birds and other wildlife, plants and aesthetics (scenic vistas, intact landscapes and scenic routes), using data from Ventana Wildlife Society, California Department of Fish and Wildlife, California Natural Diversity Database, the U.S. Fish and Wildlife Service and the California Native Plant Society's Electronic Inventory of Rare and Endangered Vascular Plants.

At a time when the Migratory Bird Treaty Act of 1918 is turning 100, the industrialization of landscapes is top of mind. Turbines—as well as oil spills and power lines—can pose a threat, especially to birds. In the Salinas Valley, the king of birds is the federally endangered California condor. There are roughly 90 birds in Central

California, according to Mike Stake, senior wildlife biologist for Ventana Wildlife Society in Monterey County. Ventana is credited with the successful recovery of the breeding population of bald eagles in Central California and currently is doing the same for the condors.

"I visited the [Scheid] site several years ago, and based on my opinion about the condors' potential to collide with these structures, I recommended that Foundation Windpower do a study," Stake recalls. While Stake says that collision is a problem for golden eagles at some wind facilities, concerns over condors have intensified because of their large size. The California condor is North America's largest land bird, with a wingspan of 9.5 feet. Adults weigh approximately 22 pounds. Their size—coupled with the valley's propensity toward high winds and fog—could compromise their ability to navigate these turbine structures.

The California condor range in Central California includes the Carmel Highlands on the north, San Simeon on the south, and extends east across the Salinas Valley to Pinnacles National Park in the Gabilan Range of San Benito and Fresno counties. This rugged terrain gives them the uplift they need to sustain flight. Although the Salinas Valley is not considered ideal condor habitat, they regularly fly across the valley to the ranges on either side,



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*Doctors Kent Daane
and Monica Cooper*

making their crossing as high as 5,000 feet or more above the ground.

The condors seek out a direct path to get from one side of the valley to the other. Condor

“Based on current performance, we estimate electricity savings from the turbine to exceed \$50,000 per year.”

– Tony Stephen, chief planning officer
Scheid Family Wine

flights tend to be lower and more frequent in the southern Salinas Valley. For example, condors typically fly several thousand feet above the valley floor in Gonzales and Soledad, but flights are often below 1,000 feet near King City.

Per a contract with Foundation Windpower, Stake began conducting data analysis of condor locations to study their movement patterns at the Scheid site in 2015. The goal was to determine whether the condors fly low enough at the site to be at risk for collision. Stake fo-

cused primarily on the east side of Salinas Valley, close to the foothills, where condor traffic is higher than in other areas.

Ventana has been tracking condor movement since 1997, first with VHF radio transmitters attached to the birds' wings. In 2003, they began using satellite tags. Roughly one-quarter of the condor population in this area has been tagged. The tags are run by solar power to collect location fixes (GPS coordinates) and position the birds within several meters of where they are. The GPS is coordinated to the bird, and each bird is given a specific number as an identifier. The GPS communicates with a satellite and collects the birds' locations, which are stored inside the tag. Once a condor flies near a cell tower, the data is uploaded to a server at Ventana's office.

The GPS takes into account the condors' horizontal positions relative to the satellite and their vertical positions relative to the ground. “Their vertical position is key to all of this because it lets us see how high above ground the birds are flying,” Stake says. Average altitude is also measured to determine potential collisions. The condors' locations are then plotted onto a Google Earth map to determine how many birds are flying close to the wind-development site.

Findings from the condor study

The 2015 study occurred over one month.

It included 1.5 million data points on condor movement already collected in 2003 up through the end of the one-month study. The results showed that California condors, on average, are flying 1,000 feet or more over the Scheid property in Greenfield, where they tend to fly higher than they do in the southern part of the valley. “Based on our study, we did not find any birds [condors] flying within rotor tip height (maximum height that the turbine blade swings upward) at Scheid,” Stake reports.

Ventana's study of condors over time shows that even though today's condor populations are much bigger and more birds are flying over the Salinas Valley, they are still flying quite high, are continuing on a straight path, and do not seem to be approaching the three turbines in Salinas Valley. When the condors fly near King City and closer to the ground, biologists have become more concerned about wind-energy developments. 📍

Cynthia Bournellis is a certified California Wine Appellation Specialist with honors, journalist, and wine industry professional. You can read more about her journeys through wine on her blog, frombehindthetastingbar.com.

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PRODUCT FOCUS

Forklifts

How wineries make do with older machines, and the latest models unveiled by vendors

By Stacy Briscoe

Cary Roulet, vice president of material handling for Holt of California, a company that provides forklifts for some of the largest wineries in the industry, says that regular maintenance and pre-season inspections are so important that Holt mechanics will run checks on machines regardless of where they were purchased. “Nothing takes the air out of a small startup winery than a machine that doesn’t work,” he said, adding that his crew will also pre-inspect any used machine a winery is considering purchasing.

When asked about the latest forklift innovations, Roulet spoke highly about the expanding capability and efficiency of electric machines: The newest electric forklifts run on lithium-ion batteries, which are easily charged and require less input energy; they’re easier to operate; they can perform both inside and outside jobs; and they don’t pollute or let off excess heat or fumes.

“What we’ve discovered about the business is that the evolution of winemaking and storage is in a huge transition,” Roulet said. Without naming names, Roulet mentioned one client who was struggling with storage space inside the winery. The Holt team was able to reconfigure the space by stacking materials higher and narrowing the aisles and provide a forklift that could reach higher and maneuver more tightly. “It saved them from having to invest in another storage facility,” he said.

Though Roulet said electric models are both more efficient and more versatile, he understands that some winemakers still use propane machines — and Holt has an emissions expert on staff to assist those clients. For those who own, or are thinking of buying, a used propane machine, Roulet cautioned that those machines need to meet the California Air Resources Board’s emission requirements based on where the grower or winery operates.

Roulet’s advice to the wine industry is to lease forklifts instead of buy. “Leases on lift trucks are so inexpensive,” he said, “and the technology is changing all the time.”

Yet many winemakers seem to inherit their lift trucks, holding on to older, used models way past their prime.

Small-scale electric lift

“We have a Yale forklift that is pretty old, and it’s been at the winery longer than I have,” said Tim Telli, winemaker and proprietor of Betwixt Wines in San Francisco. The 1979 Yale forklift is battery-operated, which Telli said is perfect for his small indoor workspace, as it “doesn’t have any stinky exhaust fumes.”

Because Telli sources his grapes from vineyards throughout California, including Sonoma and Santa Cruz counties and Lodi, his forklift gets the most use during harvest season, as grapes are transferred from trucks and dumped from bins into their respective fermentation receptacles. Knowing that he uses the machine for only a small window of time every year, Telli said he conducts his own pre-harvest inspection, ensuring that the battery is fully charged and all controls fully functional.

So he doesn’t know what happened during harvest 2017 when his forklift shut down on the wrong side of the warehouse’s roll-up door. After trying in earnest to recharge the machine, Telli ultimately called Cromer Material Handling in Oakland, Calif., for a rental. “It’s always hard to find a rental forklift with a rotator,” Telli said. “Most businesses don’t need it.”

Jason White, the corporate used and rental manager for Cromer, agreed and said he doesn’t see a lot of requests

Experts say leasing forklifts can be an affordable way for a winery to stay up to date with improved lift truck technology.

for rotators on the rental side of his business — even within the wine industry. Instead, typical seasonal requests are for lifts with side shifts with forks or bin dumpers attached.

When the replacement machine arrived and didn't include the rotating function that Telli needed to dump his grape bins, he and the Cromer repairman swapped out the rotating forks from the old Yale machine onto the loaner. "If we had a bin-dumper attachment, then we wouldn't need a rotator. But that is another expense, and quite a large footprint when not in use," Telli said, again referring to his small workspace.

Telli's machine took about a week to repair and seems to be ready for the harvest ahead.

However, Betwixt is expanding to include an additional warehouse space across the street from its current location, so Telli is currently looking into another forklift — one for each location.

When asked what kind of machine he's looking to buy and where he'll get it, Telli's answer was simple: Buy one from a winemaker down the street who's leaving his warehouse space. "It's also pretty old. But a new one is a substantial piece of equipment to buy," Telli said. "Besides, they do last forever — if you maintain them."

Propane proves multifunctional

Crux Winery in Sonoma, Calif., also uses a Yale forklift — what co-owner and winemaker Brian Callahan describes as "an old beater that was new in 1982." Like Betwixt, Crux Winery is in a confined space, a 2,700-square-foot warehouse off Lytton Springs Road.

Yet Crux uses a propane forklift. According to Callahan, 60% of the warehouse is the barrel room, so he and his co-owner and fellow winemaker, Steven Gower, rarely take the machine inside their winery, as it gives off a lot of fumes. Instead, Callahan and Gower bring things out of the barrel room when they need to use the forklift.

Inside the barrel room, the two winemakers use what Callahan calls "a poor man's forklift": a walk-behind electric straddle stacker. "It doesn't have the lifting capacity of a forklift but can handle a lot of jobs and is easier to maneuver in our small space," he said.

Callahan and Gower use their forklift the most during harvest season to unload arriving grapes, dump grapes onto the sorting table or into the press, and to load bins of stems and skins that they send back to the source vineyards to compost.



Yale

BYD

Exclusively sold through Cromer Material Handling, the new line of BYD FE electric lift trucks features a lithium-ion battery that charges within one hour and lasts for eight to 10 hours. Unlike with traditional lead-acid batteries, there's no need for regular maintenance, thus reducing the risk of chemical exposure to both wines and winery workers. Various BYD models are available in different sizes with lift capacities ranging from 3,000 to 10,000 pounds. All models come with pneumatic tires, to accommodate indoor and outdoor jobs. Cromer is offering free demos and an on-site survey to match the appropriate model to a winery's needs.

cromer.com



BYD

YALE

The Yale GP050MX can be used on indoor or outdoor jobs and features a PSI engine available in LPG or dual fuel. The forklift can lift approximately 5,000 pounds and comes with Yale Flex Performance Technology that is designed to maximize fuel use for longer run times. An optional side-shifting fork positioner enables the operator to quickly change fork position.

yale.com

TOYOTA

The propane-powered Toyota 8FG35U is designed specifically for outdoor use and is one of Toyota's recommended harvest rentals. Because it's fitted with a rotator attachment, users can lift, rotate and dump bins or pressed pomace. The 5,000-pound capacity forklifts are equipped with solid, pneumatic tires that are bigger with more ground clearance and can handle loose gravel and uneven surfaces. Geared for indoor use, the electric, four-wheel Toyota 7FBCU35 features cushion tires and can lift up to four-barrel racks, or eight barrels at a time. The forklift has a 6,000 to 8,000-pound capacity and a 12-foot clearance radius. Toyota also manufactures three-wheel forklifts with 3,000 to 4,000 pound capacity. These provide a smaller footprint and are able to turn inside their own radius, needing only about 10-foot clearance.

tmhnc.com

“During racking and bottling, it becomes our little gravity machine,” Callahan said. “We lift barrels and tanks and let gravity move the wine to its new location, whether it's a new barrel or the bottling machine.”

Callahan said this “forklift method” is generally gentler than using a pump to move wine from one place to another. By using the lift to raise up barrels and tanks and attaching a racking cane and hose to start a siphon using nitrogen, the wine is pushed out of the raised receptacle to the grounded receptacle. “It takes a little longer, uses less energy, and is less upsetting to the juice,” Callahan said.

The machine is owned by the warehouse landlord and is included as part of the winery's lease as long as Callahan and Gower maintain it. And they do — by themselves. Callahan said much of the maintenance — which mainly revolves around the machine's hydraulic system (repairing the lines, topping the fluids) as well as brake adjustments and battery recharge — is similar to that of the tractor used on their home vineyard.

“We do have access to people in our complex who run a heavy-equipment rental company, and they seem to be able to fix anything that moves,” Callahan said. “Trading for wine is usually an easy proposition.”

Multiple lifts for multiple jobs

Wine Foundry, a 30,000-square-foot custom crush facility in Napa, Calif., produces an average of 35,000 cases of wine annually, so the forklift story is an eclectic mix. According to general manager Steve Ryan, the facility is home to three forklifts: one propane and one electric, purchased through Holt of

California in Pleasant Grove, Calif., for \$12,000 and \$9,000, respectively, and an additional electric machine that is a part of the building lease.

Ryan said the propane forklift, a four-wheel Caterpillar that can lift about 3 tons, is the winery's main workhorse during harvest season. Though it gives up a little on maneuverability, Ryan said, it makes up for it by how much it can haul and by moving around tanks or large stacks of case goods. And because they do have a bin-dumper attachment, the Foundry team can use the forklift for loading grapes into the hopper during crush. “This is our most versatile lift because of that and the higher weight load to move large equipment when needed,” Ryan said.

The two electrics, a Clark and a Toyota, are both three-wheel lifts, so they are able to move around in tight spaces and stay inside the barrel room. “With a tighter turn radius, it's less of a bull in a china shop,” Ryan said. Each electric machine can load up to 2 tons, and they are most commonly used to move barrels, small cases and supplies and for loading and unloading half-ton bins of grapes.

All three of the forklifts were procured used. “As long as the batteries on the electric lifts are in good shape, it's a big savings as opposed to purchasing new,” Ryan said. The most common maintenance problems he and his team have encountered are the battery cells going down on the electric forklifts or the hydraulic lines clogging on the propane machine. “It's easily managed with preventative maintenance, though,” he said. The Foundry's forklifts are all regularly serviced by Holt mechanics. 🍷



Jungheinrich

JUNGHEINRICH

The ETR 340 by Jungheinrich is a single-reach lift truck that uses a hydraulic system that can reach a lifting speed of up to 160 feet per minute. The battery-powered forklift has a loading capacity of 4,000 to 4,500 pounds, and the supplier claims the machine can run for up to two consecutive shifts on one charge. The machine was designed to operate in tight spaces such as narrow aisles requiring high lift heights.

holtlift.com

CROWN

The recently redesigned FC Series of forklifts by Crown feature a near-zero turning radius and allow for a larger battery, providing longer run time with up to 40% more loads per battery charge and up to 10% more loads per shift. The hydraulic system has been optimized to provide greater lift and tilt and lower speeds, resulting in increased productivity and savings of time, energy and effort. Models in this series can load from 4,000 to 5,500 pounds.

crown.com

CAT

A three-wheel electric forklift with 2,500- to 4,000-pound load capacity, the 2ET4000 by Caterpillar uses an energy-efficient AC electrical system that the manufacturer claims requires only one charge to last two full work shifts. The machine also features curve control that automatically reduces the speed of the forklift when it's taking corners. The mast, overhead guard and counterweight are designed in such a way to provide operators with optimum visibility in all directions, and a display panel provides information on service icons, directional indicators and performance modes. With AC power steering, operators can control the forklift with standard fingertip controls that include a travel directional switch and horn.

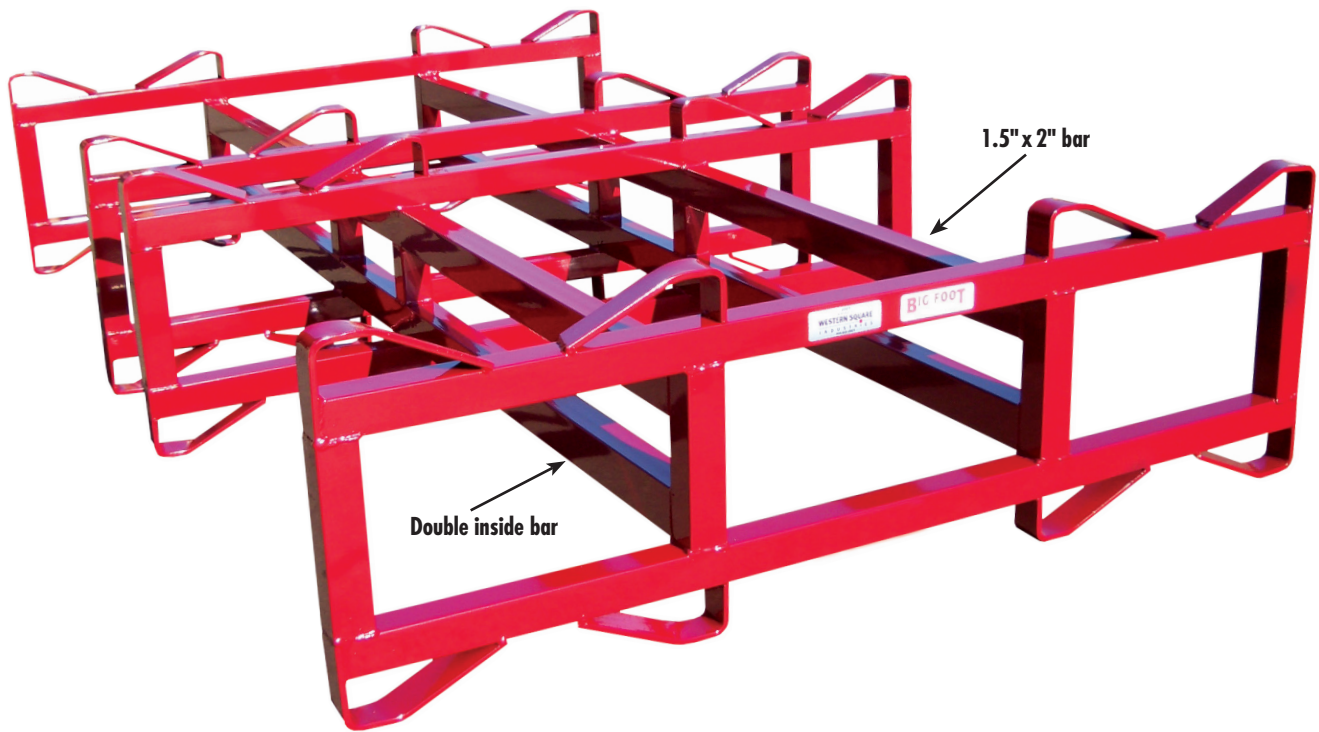
holtlift.com



Cat

The Wines & Vines Product Focus feature is not intended to provide a definitive listing of all available products in a particular segment or provide any comparative analysis, but rather serve as an overview of what's new or available and also of potential interest to readers as determined by the magazine's editorial staff.

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Join our String-Bean-of-the-Month Club

Name a product and there is now a club for it: razors, socks, meal kits and on and on. Just about anything can be delivered regularly via a club or subscription plan. As a result, winery staff may have become a bit jaded about selling wine club memberships. There can be push back from tasting room hosts who complain that no one is joining wine clubs anymore, or that everyone is pitching at every winery, and guests are tired of hearing about it.

WISE's current mystery-shopping reports reveal wine clubs are being presented less than 40% of the time. That means that 60% of the time visitors aren't being effectively presented the wine club and invited to join, likely because tasting room staff members convince themselves that people don't want to join another wine club. But one must remember the Platinum Rule — to treat customers the way *they* want to be treated. It's all about your guests and their preferences.

Pacing, not pouncing

If done correctly, selling wine clubs should not be a hustle. The people who are most successful at selling wine clubs have mastered the art of hanging with the sale. They focus on showing the customer what's in it for them by explaining features and benefits throughout the guests' experience. It's all about pacing instead of pouncing: Invite your customer to join after explaining what's in it for them and weave those benefits into the conversation and not just at the end of the experience.

What's in it for the customer?

Bring up one club benefit, exclusivity — receive wines not available anywhere else — then let it go. Serve others or ask open-ended questions to learn the customers' preferences.

Then describe another club benefit — it might be the next club event or invitations to other private, special events — then let it go.

Later, bring up another club benefit — sav-

ings — then let it go.

How about free tasting? For a party of four, if one of you becomes a wine club member, your first savings will be \$XX (the cost of a tasting for four).

What's in it for the staff?

When they sell a club membership, there's typically a bonus, right? And it's an emotional high to help the customer treat him or herself to great wine on a recurring basis. Also, club members tend to buy much more than non-club buyers, and some love nothing better than to help sell memberships to others.

So, let's get out of our own heads (and wallets) and remember that we have something our customers want — our wine clubs! 🍷

WISE Academy (Wine Industry Sales Education) offers a comprehensive curriculum designed specifically for wine industry professionals, and is celebrating its 10th year in 2018. Learn more at wineindustry-saleseducation.com.

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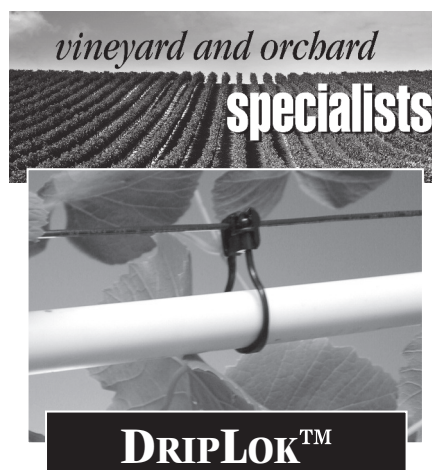
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Elevated Wine Tasting at Burgess Cellars

Napa Valley winery enhances hospitality to keep pace with consumer expectations

By Stacy Briscoe

In May, Burgess Cellars launched its new tasting experience, “Mountainside Tasting.” A seated experience that is literally elevated: The new Mountainside Tasting Room is perched 1,000 feet on the winery’s Howell Mountain estate in Napa Valley.

Elizabeth Miller, director of hospitality for Burgess Cellars, said the original “hospitality team,” when the winery first began to offer tastings after opening in 1972, was founder Tom Burgess. Guests would squeeze into one of the winery’s barrel rooms, where Burgess himself would pour a selection of current releases. “As Napa Valley wine tourism and Burgess Cellars grew, a few others joined Tom on the hospitality front through the years, but our tasting experience charmingly remained in that active barrel room,” Miller said.

It’s just within the last two years that the winery began focusing on creating better guest experiences. The “barrel room” transformed into the cellar tasting room (though still, indeed, an active barrel room used by the wine-making team), offering intimate by-appointment tastings that last about an hour.

“Recently, it became clear to us that Napa Valley and its visitors have evolved,” Miller said. “Gone are the days of 10 belly-up-to-the-bar tastings in a day ... Experiential and immersive-based wine tourism is the name of the game now — here in Napa and globally.”

The “Mountainside Tasting” now joins the “Tasting in the Cellar” as an appointment-based hospitality offering. The new 90-minute experi-

ence puts guests in full view of the Burgess estate vineyards. The extended time, Miller said, allows hospitality staff to have a real conversation with guests, immerse them in the winery’s story and “indulge the most curious of guests and the most wine-geeky questions.”

According to the Wines Vines Analytics winery database, Burgess Cellars produces around 12,000 cases per year of Syrah, Petite Sirah, Malbec and Petit Verdot. Miller added that, in the future, Burgess will be expanding to include Cabernet Franc and Zinfandel as well. The winery owns 60 acres of vines, and the average bottle price is \$50.

Wholesale supports DtC innovation

Miller said direct-to-consumer (DtC) sales make up less than 50% of Burgess’s sales, and the new tasting experiences are intended to boost those sales. She said that the successes that the winery has seen through distribution has served as a stable financial anchor, allowing for investment in the more innovative DtC approach.

Burgess staffs a small team, and Miller said she takes hiring and managing this team quite seriously. “As our experiences are intimate, and often nearly private, the wine educator is a crucial part of visiting Burgess Cellars,” she said.

Winemaker and general manager, Kelly Woods, often conducts what Miller refers to as “out of the box” staff training, taking team members on vineyard walks, barrel tastings and educating them about the estate’s Howell

Mountain fruit. “Kelly gives of herself constantly to the team, and this has allowed our team to really live what we do up here, and best share that with our guests,” said Miller.

What sets Burgess Cellars apart from other wineries in the area, Miller said, is the effort the hospitality team puts into communicating with their wine club members. “We are communicative with our members every step of the way,” she said, “from always informing them in advance of important dates, calling them throughout the year to check in and always being a very friendly and helpful voice on the other side of the phone.”

Tools of the trade

The Burgess hospitality team uses WineDirect to manage its POS/CRM, email and wine club. The glassware is Andrea Robinson’s “The One,” which Miller calls the perfect stemware that caters to the wide range of grape varieties Burgess produces, from Chardonnay to Petit Verdot to Cabernet blends. To keep that stemware clean, the tasting room team uses the Jackson Avenger glasswasher.

When asked about any standout design features in the new venue, Miller called out three educational artwork pieces located inside the tasting room. “Each piece highlights the defining aspects of our *terroir* and viticulture,” said Miller. “We use these eye-catching pieces as visuals with guests, so they can clearly see what’s happening on our mountainside grapevines from root to berry.”



The new Lytle Barnett brand features a label paper developed just for sparkling wine.

What's Popping in Sparkling Wine Packaging

As more wineries add a sparkler to their portfolios, they also aim to have that bottling stand out

By L.M. Archer

According to a 2017 Nielsen study, 71% of consumers don't know what they want when they walk into a store looking to buy some wine.

Nielsen concluded packaging is of vital importance to persuade consumers to buy a particular brand. And as sparkling wine continues to grow in popularity in the United States, those same consumers are now more likely to be looking for a bottle of bubbles. Innovative and attractive packaging could help convince them to pick your brand off the shelf.

For Maria Stuart of R. Stuart & Co. in McMinnville, Ore., the ultimate goal of any wine label is to create a personal connection between the customer and the wine. "When a wine speaks to a person, you've got a customer for life," Stuart said. Stuart worked with designer Andrea La Rue at Nectar Graphics in McMinnville to create the Bubbly and Rosé d'Or sparkling wine labels.

La Rue isn't the only designer delighting sparkling wine makers. Carrie Higgins of CRUSH Creative Packaging, the wine label division of Taylor Made Labels in Lake Oswego, Ore., is a 25-year wine industry packaging veteran. Higgins' tagline is, "There's drama in a package," and she said most clients venturing into sparkling wine ask the same questions: "How do I take my existing brand and create something lovely that's different? How do I make it stand out from my still wines?"

Higgins consults with clients on a whole host of technical aspects specific to sparkling wine, such as paper stock, embellishments and what she calls the "sparkle factor" — which makes a wine stand out on the shelves.

"A couple of years ago, when sparkling wines were just sort of peeking out in Oregon," Higgins said, "people were pretty conservative. 'It was hard almost to tell it was a sparkling wine. It was almost like they were afraid of it, because we didn't really do sparkling wine in Oregon, right? To me, it's super fun and exciting to see people taking chances. ... This is your time to take a little risk, get a little funky, be creative, have some fun.'"

Recently, Higgins collaborated on the packaging for a new Jackson Family Wines sparkling project called Lytle-Barnett. Higgins printed the labels in Lake Oswego, package design originated with Andrea La Rue of Nectar Graphics, and Radiant Sparkling in McMinnville handled the bottling.

"This is a stand-alone sparkling wine project," Higgins said. "It's three different sparkling wines being released all at one time, and they're using a paper that was specifically developed for sparkling wine — called Sparkling Asti by Fasson. The paper manufacturers are now actually making papers geared towards this fun sparkling-wine-specific market."

Higgins also sees more "ice bucket" tested papers, die cuts and adhesives for sparkling

wines. "Paper, adhesive, varnishes — you have to make sure you're marrying a wet strength paper and a wet stick adhesive," she said. "Those two components must sync up, and they're very different. That's on the end line. But oftentimes there are conditions on the bottling line end of it as well."

Condensation and overflow can occur during bottling, so some wineries prefer to label afterward. Higgins advised doing some research on the bottling provider, its equipment, the bottling environment, the machinery, who will be applying the labels and when. "Those are critical questions to ask because if you don't, you could really risk failure, and could be looking at a reprint — more expense — if you don't have those discussions up front."

Heather Chartrand, chief operating officer of Watermark Labels in Lodi, Calif., concurs. "We are seeing a trend with traditional wineries adding a sparkling varietal to their product offering," she said. "Our customers have taken a strong

KEY POINTS

Unique labels and other elements help convey what's unique about a sparkling wine.

Traditional Champagne corks and crown caps are popular.

Canning sparkling wine is a cost-effective and trendy way to market.

interest in the metallic silver material because it adds a design element that sets their sparkling label apart from the other wine labels.”

Watermark won the 2018 Avery Dennison Wine by Design contest at the Unified Wine & Grape Symposium in Sacramento, Calif., for design innovation utilizing Avery Dennison materials. Watermark garnered the award for its design for a sparkling rosé produced by Van Ruiten Family Winery in Lodi. The packaging included Fasson 56# MaxFlex Bright Silver paper.

“For the Van Ruiten project, we used a textured and elegant bright white felt material combined with embossing and foil to communicate the Van Ruiten brand message of classic design and quality wine,” Chartrand said. “A silver capsule added continuity to the silver foil embellishments on the label and complemented the blush color of the wine.”

Other ways to make a statement

Sometimes what’s left out makes a statement. J.K. Carriere of Newberg, Ore., employs an unusual

cutout label in periwinkle blue for its sparkling wine. “All of our labels have been a collaborative effort between my brother Jim, myself, and our brother-in-law Greg Maffei, who owns Grey Matter Design,” said general manager Linda Crabtree. “The inspiration for this label came from a set of classic childhood fairy tales that we had as kids. The front cover of each book sported a picture plate that was seemingly a combination of a View-Master 3D image and a hologram.”

Crabtree said her brother wanted to re-create a “looking into the bottle” experience via the cutout frame on the front label. The winery’s signature wasp is visible from the other side of the bottle and scaled to take into account the distortion from the liquid in the bottle.

“There is a general rule that blue is not a desirable color to use in food packaging, but we threw that one out the window because we liked how the periwinkle blue played against the salmon-pink wine,” Crabtree said. “The rest of the other decoration on the bottle is fancier than our other labels,

in keeping with sparkling packaging tradition.”

Custom labels are also proving popular in retelling a winery’s narrative. Three years ago, Artesa Winery president Susan Sueiro launched project Galatea, so named for the Pygmalion statue brought to life in Greek legend. Working with designers Mucho of Barcelona and San Francisco, the team focused on visually communicating the “soul” of Artesa through its labels. As part of the Codorníu family, Artesa uses its labels to celebrate the owners’ more than 450 years of Spanish heritage, artistry (Artesa means “handcrafted” in Catalan), each wine’s distinctive personality and sense of place, and the estate’s sleek, California-meets-Barcelona modern style.

“Our goal was to bring our beautiful estate and winery to life,” Sueiro said. “Our sparkling wines have always been made under the Codorníu Napa name; Artesa is the name of our still wine portfolio.”

In designing the revamped Artesa packaging, Sueiro said the company wanted to update the Codorníu packaging and add the



Watermark Labels won an innovation award for this packaging design.

vintage and estate vineyard designation while ensuring the new strategy was consistent with the other top vineyard-designate wines in the Codorníu portfolio. “The label’s ‘badge’ shape is reminiscent of the metal number plates historically used in the extensive Codorníu cellars to identify rows of aging bottles,” she said.

Augmented reality and laser cutting

Paragon Labels in Petaluma, Calif., offers a whole new dimension in labels with augmented-reality features that are activated with a smartphone app available for free for either Apple or Android devices. Paragon owner Jason Grossman said the labels can play a short video or animation and then provide users the option to purchase, read tasting notes or sign up for a newsletter. The app also allows users to capture an image of the video and share it on social media, email and text with their friends. “Since Treasury did such a good job with their 19 Crimes label, app people get the value of this now,” Grossman said. “It’s a selling tool, not a gimmick. Because how many wineries don’t want to get a direct connection with a consumer? They all want that. Let’s face it. And this allows them to do it.”

St. Helena, Calif.-based Boisset Collection is using Out the Bottle

SPARKLING WINE PACKAGING VENDORS

Company	Phone	Website	Bottles	Wire-hoods	Seals / Foils / Bands	Sparkling Wine Closures
ACIC Cork and Closures	(707) 630-1380	acicclosures.com		✓		✓
All American Containers - East Coast	(315) 585-6045	aacwine.com	✓		✓	
All American Containers - Pacific Coast	(707) 838-8864	aacwine.com	✓		✓	
Amcor Flexibles American Canyon	(877) 783-5846	stelvin.com			✓	
Amcor Rigid Plastics	(707) 637-4205	amcor.com/productsearch?s=wine	✓			
Amorim Cork America	(707) 224-6000	amorimca.com				✓
APCOR - Portuguese Cork Association	+351227474040	realcork.org				✓
APHOLOS Metal Labels & Closures	+541145013201	metal-labels.com				✓
Ardagh Group, Glass - North America	(800) 428-8642	ardaghgroup.com	✓			
Bastos, LLC	(707) 968-5008	bastosllc.com	✓	✓		✓
Battistella USA	(707) 863-7755	battistellacapsule.com		✓	✓	
Bergin Screen Printing and Etching	(707) 224-0111	berginglass.com	✓			
Berlin Packaging	(707) 389-7600	berlinpackaging.com	✓		✓	
Brick Packaging, A Saxco Co	(866) 770-7600	brickpackaging.com	✓	✓	✓	✓
Bruni Glass, A Berlin Packaging Company	(707) 389-7605	bruniglass.com	✓			✓
BSG HandCraft	(800) 999-2440	bsghandcraft.com	✓	✓		✓
Carolina Wine Supply	(336) 677-6831	carolinawinesupply.com	✓			
Ceramic Decorating Co	(323) 268-5135	ceramicdecoratingco.com	✓			
CFP Winemakers	(412) 232-4507	cfpwinemakers.com	✓			
ColloPack Solutions	(707) 258-3940	collopack.com				✓
Cork Supply USA	(707) 746-0353	corksupply.com		✓	✓	✓
Cortica Benicia (CB USA)	(800) 532-2207	cbcork.com		✓	✓	✓

SPARKLING WINE PACKAGING VENDORS

Company	Phone	Website	Bottles	Wire-hoods	Seals / Foils / Bands	Sparkling Wine Closures
Diam Closures USA	(800) 321-8747	g3enterprises.com				✓
Enoplastic USA	(707) 207-7904	enoplastic.com			✓	✓
Etched Images, Inc.	(707) 252-5450	etchedimages.com	✓			
Exal USA	(330) 744-2267	exal.com	✓			
Fortera	(415) 890-2073	fortera.co	✓		✓	
G3 Enterprises	(800) 321-8747	g3enterprises.com	✓		✓	✓
Gallo Glass Co.	(209) 341-3583	galloglass.com	✓			
Ganau America, Inc.	(707) 939-1774	ganauamerica.com				✓
Gino Pinto, Inc.	(609) 561-8199	ginopinto.com	✓			
Global Package, LLC	(707) 224-5670	globalpackage.net	✓			
Glopak Wine and Spirits	(844) 445-6725	glopakwineandspirits.com	✓			
Guala Closures North America	(707) 425-2277	gualaclosures.com				✓
HanmerRoss Cork & Closure	(860) 851-9417	hanmerross.com				✓
Hauser Packaging, Inc.	(888) 600-2671	hauserpack.com	✓	✓		
Heinrich Gültig Korkwarenfabrikation GmbH	(707) 863-8404	gueltig.com				✓
Herti	(916) 562-0515	hertius.com				✓
Infinity Foils, Inc.	(913) 888-7340	infinityfoils.com			✓	
Innovative Sourcing, Inc.	(509) 452-4800	innovativesourcing.com	✓		✓	
Janson Capsules, Inc.	(707) 256-3957	jansoncapsules.com			✓	
Krones, Inc.	(414) 409-4000	kronesusa.com		✓		
Lafitte Cork & Capsule, Inc.	(707) 258-2675	lafitte-usa.com			✓	✓
Lakewood Cork	(607) 535-9252	lakewoodcork.com				✓
M A Silva USA	(707) 636-2530	masilva.com	✓			✓
MALA Closures Systems, Inc.	(415) 302-3123	mala-usa.com				✓
Maverick Enterprises	(707) 463-5591	maverickcaps.com			✓	✓
O-I Packaging Solutions	(469) 443-1000	o-ipackagingsolutions.com	✓			
Phoenix Packaging International Corp.	(514) 487-6660	phoenixpackaging.com	✓	✓	✓	✓
Pickering Winery Supply	(415) 474-1588	winerystuff.com			✓	✓
Portocork America	(707) 258-3930	portocork.com				✓
Prooftag	(335) 632-11050	prooftag.net			✓	
Quest	(908) 851-9070	byquest.com	✓		✓	
Ramondin USA, Inc.	(707) 944-2277	ramondin.com		✓	✓	✓
Rivercap USA	(707) 752-8600	rivercap.com		✓	✓	
Santé Beverage Supply	(919) 522-5937	santebeverage.com		✓	✓	✓
Saverglass, Inc.	(707) 259-2930	saverglass.com	✓			
Saxco International	(800) 328-6035	saxco.com	✓		✓	
Scott Laboratories, Inc.	(707) 765-6666	scottlab.com		✓		✓
Sierra Packaging Solutions	(559) 897-0711	spssales.us	✓			
TricorBraun	(314) 569-3633	tricorbraun.com	✓			
TricorBraun WinePak	(707) 399-5800	tricorbraunwinepak.com	✓		✓	
Unionpack	(707) 557-2277	unionpack.com		✓	✓	✓
United Bottles & Packaging	(450) 622-1600	unitedbottles.com	✓			
Universal Packaging	(866) 549-1323	thinkuniversal.com	✓			
Valentin-Thierion Corp.	(707) 320-3877	valenthierion.com		✓		✓
Verallia	(707) 419-7200	sgp-packaging.com	✓			
The Vintner Vault	(805) 226-8100	thevintnervault.com	✓			
Vinventions USA	(919) 460-2200	vinventions.com				✓
Waterloo Container Co.	(888) 539-3922	waterloocontainer.com	✓	✓	✓	✓
West Coast Bottles, LLC	(800) 282-2028	westcoastbottles.com	✓			
World Wine Bottles & Packaging Solutions	(707) 339-2102	worldwinebottles.com	✓			

For more information about the suppliers listed above, visit winesandvines.com/buyersguide or see *Wines & Vines*' 2018 Buyer's Guide.

labels for its Buena Vista wines, including the 2015 The Count red blend. While not a sparkling wine, the Boisset blend is one of a just a few U.S. brands that will be packaged with an augmented-reality label, which will feature a textured black crocodile pattern for the black label, gold foil writing and a photo of the famed Count Agoston Haraszthy on the front. When activated, the photo of Haraszthy will begin talking about the winery and wine. "This interactive label technology is another way that we are continuing to champion the historic past of Buena Vista — but now with a very futuristic technology that we think has the potential to transform (the sales end of) the wine industry, just as Haraszthy did by being a pioneer of California wine," said Boisset Collection communications manager Megan Long.

Paragon also boasts what it claims is the world's only Laser-web laser printer, capable of creating intricate, multidimensional labels, which has attracted interest from many sparkling wine producers. "We're getting a lot of interest (from sparkling wine producers), because if you have laser-cut labels, you're one of the few on the shelves," Grossman said.

Everyday exotics

But labels are only part of sparkling wine packaging. Barry Jackson of Equinox in Santa Cruz, Calif., produces sparkling wine for his own label, as well as for 17 other wineries. "A few (clients) currently use a crown cap as the final closure. One of those is changing to a cork and wire finish because he has grown weary of people asking to try his 'pet nat,'" he said. "The big dif-



An effective brand design creates a personal connection with the consumer.

ference in handling is applying two closures versus one. We can do about 15% to 20% more bottles with crowns in the same amount of time.”

Jackson estimates the cost for crowns averages 5 to 10 cents each, cork and wire about 65 to 85 cents combined, and non-agglomerated Champagne corks approximately \$3 each. He and his clients prefer unbranded capsules; the most popular capsule colors requested include black (55%), gold (40%) and silver (5%). Jackson does apply a neck label at the base of the capsule on his bottles, though his other winery clients do not. “One of the wineries we apply crowns for has used neck bands and strip labels over the crown, shoulder flashes, even purple ribbon over the crown,” Jackson said. “This particular winery is known for eccentric packaging and labels.”

Bottle innovations

Jackson also said the use of atypical bottle shapes is getting more popular with some of his more unorthodox clients. “One winery we work with uses a bowling pin-shaped bottle,” he said. “Everybody loves it, thinks it’s beautiful! Except me. We have to hand-ridle this bottle, because it does not work in our gyropalette.”

Jackson and his clients use Saverglass, O-I Packaging Solutions and TricorBraun Winepak for more traditional sparkling wine bottles. He said he and his clients have been working with a lightweight bottle type from a European supplier and appreciate the reduced weight but noted, “With our less-than-innovative machin-



SPARKLING IN A SMALLER FORMAT

Domaine Chandon unveiled a new 187 milliliter aluminum bottle with a screwcap for its California Sweet Star cuvee. The new packaging was designed for on-premise accounts where glass bottles could not be sold. Initially launching in New Orleans and Chicago, the smaller bottles will begin rolling out nationally this year and are available for sale at the winery’s website in a 24 pack. “It took several tastings and trials to ensure that the wine quality remained superior in the new packaging,” said head winemaker Pauline Lhote. She said she conducted four different trials starting in June 2017 to evaluate the new packaging in terms of wine chemistry, including pressure testing, and sensory analysis over the course of a year. “We made some changes on our bottling line equipment to be able to run this aluminum bottle which was mostly change parts to accommodate new bottle height and inspection equipment to guarantee the quality and consistency.”

ery, it’s more prone to breakage, which is bad. It’s a learning curve.”

Saverglass sales manager Jennifer Smith said she has noticed extra-premium clients opting for more artful bottle designs with sylph-like necks, curvaceous shoulders and pronounced punts such as Champenoise Vintage, Champenoise Anassa, and Cuvée des Sacres. For more economical, environmentally friendly clients, Saverglass offers the Eco Design bottle, a standard-shaped, 835-gram bottle.

Portable potables, sparkling in a can

According to market research firm IRI, canned sparkling wine sales rose 43% in the 52 weeks through July, far outpacing the growth of wine packaging in glass, although cans are starting from a smaller base.

In this age of social media, canned wines prove highly Instagram-ogenic. Cans also prove to be an affordable, portable, non-

breakable and portion-controlled option for concerts, sporting events and any other venues where bottles just don’t work.

One winemaker jumping on the canned sparkling wine wagon is Chris Berg with Roots Wine Company in Yamhill, Ore. Berg, who has been making traditional sparkling wine since 2009, recently launched his canned wine project, with an anticipated initial production of 4,000 small (125-milliliter) cans to markets in California, Oregon, Washington, Wisconsin, Virginia and New York. “For sparkling it makes sense in smaller cans. The bubbles last a shorter period than traditional *méthode champenoise*,” Berg said.

The pragmatic producer uses a base rosé of Pinot Noir, and outlines the canning process as follows: “Fermentation, filter, can. Pretty simple. We will do the labeling and packaging at our winery.”

Roots ships the finished wine to Motherlode in Portland, Ore., for canning, and TAPP in Napa, Calif.,

prints the labels. Berg opts for scuff-proof plastic labels with plastic backing and market-tested glue adhesive. After labeling, he affixes four-ring plastic holders to the cans, and places them into 24-pack cases.

“Pricing is fairly similar at the end of the day,” Berg said. “The cans cost \$2.40 each versus \$6.50 per bottle. With traditional (sparkling wine), by the time you add in the bottles, labor and packaging, it (costs) about the same.”

Aside from cost, Berg points out the other benefits and challenges he’s encountered canning sparkling wine. “Benefits are that it is quick compared to *méthode champenoise*. Challenges are that the wine has to be ice cold before injecting bubbles and force carbonation. If not, the losses will be significant and harder to keep in suspension.”

Clearly, these sparkling wine packaging innovations prove as scintillating as the wines inside, helping engage and sustain consumer interest long after the corks — and cans — pop. 🍾

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An artistic label for a 'troublemaker' of a brand

2012 El Rey Cabernet Sauvignon Travieso

Campbell, Calif., traviesowinery.com

Founded: 2003

Annual case production: 700

Average bottle price: \$33

Tucked away in the backstreets of Campbell, Calif., is the city's only winery, Travieso. The winery takes its name from the Spanish word for "troublemaker" or "bad boy." The Spanish theme, which owner and winemaker Ray Stiler says pays homage to the culture of California, is a thread woven throughout each of their wine's labels — both in name and art.

"El Rey" translates to "the king," and is a nod to the noble Cabernet grape, but also a famous mariachi song by the same name. The lyrics are about a wandering migrant cowboy and his burrow who, although they have no money and no queen, declare themselves the king of the trail.

Travieso works exclusively with artist Jody Brookens for all of their label designs. "When we decided on an art label theme, we didn't have to search for an artist, his style was out of control just like us," Stiler said.

— Stacy Briscoe

CORK: **Laffite Cork and Capsule**, www.lafitte-usa.com

GLASS: **Ancienne Reserva Vetri**, saverglass.com

LABEL ARTIST: **Jody Brookens**, jodybrookens.com

LABEL GRAPHIC DESIGNER: **Chris Blumb Design**, chrisblum.com

BOTTLING: Mobile bottling line by **Ultima Mobile Bottling, Inc.** (ultimamobilebottling.com) featuring **Orbit** bottle cleaner/rinser (mcbradyengineering.com), vacuum gravity fillers, **Robino-Galandrino** foil applicators (robinoegalandrino.it/en), **Bertoloso** corker and foil spinner (bertoloso.com), and **Impresstik 3000** labelers (impresstik.com)



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Vineyard Pest Spreading in Eastern U.S.

Potential damage from spotted lanternfly could total \$18 billion, wine grapes at risk

The New Jersey Department of Agriculture announced July 18 that the spotted lanternfly (*Lycorma delicatula*) had been found in Warren County, N.J. That county is separated from Pennsylvania by the Delaware River and is only about 50 miles from Berks County, Pa., where the spotted lanternfly (SLF) was first identified in 2014.

In spite of quarantine measures instituted by the Pennsylvania Department of Agriculture (PDA) in November 2014, the insect has spread in southeastern Pennsylvania. The quarantine zone now covers a total of 13 counties east of the Susquehanna River and south of the Pocono Mountains. It has been found in small numbers in New York, Delaware and Virginia.

Because the SLF has increased in both numbers and geographic location, concern about the threat this insect species poses to agriculture and other industries such as hardwoods has also increased among the wine industry, university experts and government agencies. For the first time, researchers from Pennsylvania State University, Temple University, Rutgers University, Cornell University and Virginia Polytechnic Institute and State University met at Albright College in Reading, Pa., for a “working group” meeting on the SLF on July 16 and 17.

They were joined by extension personnel, representatives from the PDA and the U.S. Department of Agriculture Animal and Plant Health Inspection Service, members of groups such as the Hardwoods Development Council, and individuals from industries including wineries, orchards and landscaping firms that have been impacted by the presence of this new pest. According to Heather Leach, an extension associate in entomology at Penn State and one of the organizers of the meeting, 85 people attended from eight states.

The conference focused primarily on updating the current research on the SLF by

different universities and the USDA-APHIS. Julie Urban, senior research associate in entomology at Penn State, was one of several researchers who spoke about the projects they are conducting in different locations. She along with Erica Smyers, a doctoral candidate in entomology, Michela Centenari, assistant professor of viticulture, and Michael Saunders, professor *emeritus* of entomology, have set up a research site in Berks County at Manatawny Creek Winery in Douglassville, Pa.

This spring the researchers planted 80 three-year-old Chardonnay vines, each one in a netted cage, and after the vines are established, plan to introduce different densities of adult SLF. The goals are to determine the feeding damage to the vine, long-term damage, amount of yield reduction and the impact of sooty mold (which can occur on the honeydew secreted by the insects as they feed) on the vines.

A second project is taking place at the Berks campus of Penn State in Reading. Urban planted 250 one-year-old grapevines and then introduced ten SLF nymphs into the sleeve surrounding each vine. She is testing the efficacy of 20 different insecticides, and will check each vine every two, seven and 14 days to count how many SLF are alive or dead.

Doug Pfeiffer, professor of entomology at Virginia Tech, suggested that work needs to be done on the behavior and phenology of the SLF and noted that the first egg hatch on May 9 and the first adults on July 12 are occurring earlier in this country than what has been suggested by information from Chinese researchers on the SLF.

A panel representing industries affected by the SLF included Jenny Metz, vineyard manager at Maple Springs Vineyard in Bechtelsville, Pa. She said that initially they kept the nymphs under control with sprays, but by September she couldn't spray fre-



The spotted lanternfly has been found in Pennsylvania, New York, Delaware and Virginia.

quently enough. She was concerned about the quality of the fruit, the decrease in yields, and the potential longevity of the vines, especially after finding no fruit on the edges of the vineyard.

Other members of the panel—Brian Walsh, owner of Salix Springs Landscaping in Montgomery County, Pa., Ed Weaver, owner of Weaver's Orchard in southern Berks County, and Wayne Bender from the Hardwoods Development Council—expressed their concerns about the best management practices for tree fruits, berry crops, and hardwoods, since the SLF is a voracious eater of those crops and more than 70 other plant species.

After the presentations and discussions, the group brainstormed on potential research priorities and made suggestions for extension projects and for possible regulations.

In February, the USDA allocated \$17.5 million to help stop the SLF and the Pennsylvania state budget for 2018-2019 included \$3 million for the PDA to work to understand, detect and control this invasive pest. It is estimated that the SLF could devastate \$18 billion worth of agricultural products in Pennsylvania alone.

—Linda Jones McKee



Pinot Gris in the Finger Lakes

Careful vineyard management and rigorous spray programs
lead to high-quality yields in New York

By Ray Pompilio

Pinot Gris is a mysterious cultivar with many faces. A mutation of Pinot Noir, its grapes can exhibit skin color ranging from a light grayish blue to a brownish pink along with almost black or pale green, with the variations even evident on the same canes.

In the last 30 years, it has become more prevalent in the United States. It was first planted by David Lett of Eyrie Vineyards in Oregon in 1965. The early 1990s saw a concerted effort to popularize the wine, when Ed King planted some 100 acres of the vines at his newly formed King Estate Winery in Eugene, Ore. Currently, the winery has more than 300 acres of this cultivar planted, all of it organically grown, and it is the nation's largest producer of Pinot Gris wine.

Today, the variety is grown throughout California, Oregon, Washington, Idaho, Michigan and New York, and several other states have smaller acreages. This article will provide insight into the viticultural details at two Pinot Gris producers in New York's Finger Lakes region. A second article will highlight the techniques two winemakers use to produce similar and different styles of this wine. Anthony Road Wine Co. of Penn Yan, N.Y., and Damiani Wine Cellars of Burdett, N.Y., each produce about 800 cases of Pinot Gris annually from fruit grown along Seneca Lake.

Growing Pinot Gris at Anthony Road Wine Company

John and Ann Martini planted their first grapes in 1973,

but Anthony Road Wine Co.'s first vintage wasn't until 1989. Today, the winery has about 85 acres in production, and the vineyards have been managed by their oldest son, Peter Martini, since 1999.

Their planting of almost 11 acres of Pinot Gris is currently the largest planting of the variety in the Finger Lakes. Ten of the acres were planted on 100 acres of land originally purchased by California's Robert Young family in 2001 (at the time, a significant recognition of the potential future of the Finger Lakes). Anthony Road bought the land from the Young family in 2014 and has since sold it, while continuing to manage the current planting of 55 acres. "We've got good dirt and gentle slopes," Peter Martini said. He identified the soil as a Cayuga and Honeoye silt loam that is generally well-drained, except in isolated spots where the shale layer is very high, leaving only 16 inches of topsoil.

The vines were sourced from Vintage Nurseries, in Wasco, Calif., which last year changed its name to Wonderful Nurseries. The vines include two clones, 146 and a lesser amount of a clone name that Martini cannot find in his records. The majority of the rootstock is 3306, with some 101-14 also used. Laser planted in two phases by Benchmark Custom Planting of Ovid, N.Y., in 2002 and

Verrill's double-lyre training system is basically two vertical shoot positioned canopies that open at about three feet above the ground and with left and right wires set an angle.

KEY POINTS

Pinot Gris can be a difficult grape to grow in the Finger Lakes region of New York because of the risks of winter damage and downy and powdery mildew.

Three growers in the Finger Lakes have found success with the variety through careful canopy management and regular spray programs.

Hilling up vines before the start of winter has proved particularly successful for one grower.

2003, the vines are spaced 8 by 5 (8 feet between rows and 5 feet between plants) and trellised with vertical shoot positioning (VSP), allowing four 2½-foot-long fruiting canes per vine, and usually 10 buds per cane.

Martini likes to prune in mid-March, but labor supply and demand usually means that pruning begins in late February. Bud break averages late April to early May, and Martini begins applying a protectant spray when the shoots are about 2 inches in length. Spraying is done with a Gregoire G-8 that has harvester and sprayer heads from Lakeview Vineyard Equipment in Niagara-on-the-Lake, Canada. The machine permits efficient spraying: It can cover 50 acres in six hours. That speed allows Martini to schedule his spray timing. "Timing



Pinot Gris grapes often have different colors, sometimes from the same vine.

in sprays is more critical because of the disease pressure we have here," he said, and then explained that there is a limited lifespan for protectant sprays that has to be closely watched. These sprays, consisting of elemental sulfur, work to limit diseases such as powdery and downy mildew, Phomopsis and black rot that can affect the vineyard throughout the growing season.

Martini hopes to limit spraying to eight applications but said the average is 10 sprays, and in 2017 he needed 12 sprays. This does not include spraying for botrytis, which can be a problem with Pinot Gris. However, if the conditions warrant it, this cultivar can produce a botrytized dessert wine, which Anthony Road has made in the past.

Regarding the trellising, Martini is adamant about "exact shoot positioning" of Pinot Gris,

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since it is not an upright-growing cultivar. He employs two sets of moving wires and has considered adding another set of wires because of the variability of shoot lengths and the vine's propensity to produce double buds. Positioning is usually a four- to five-week process, which averages from the second week in June to the second or third week in July. It entails lowering the bottom wire to the ground, repositioning those shoots, and then raising the wire to the proper level before repeating the process with the top wire.

Although this method of shoot positioning is more labor intensive, Martini said, "I sure like the way they look while growing, with the fruit all hanging in an open area, as well."

Leaf removal is done shortly after fruit set, usually the beginning of July, with a Collard Raptor leaf remover that uses the company's Pulsed Air System of compressed air out of two rotating nozzles to tear the leaves into tiny bits. That equipment was also sourced from Lakeview.

A permanent sod of natural vegetation is mowed between the rows, but under drought conditions the vines can suffer. In 2012, many of the fruiting canes had to be removed to help the vines survive a serious drought. The vines did survive and produced a good harvest in 2013. However, Martini believes that the drought stress was a factor in the vine loss following the extreme winter of 2014. He ended up replacing about 1,500 vines from that damage.

He said he gets nervous when temperatures reach -5° F, even though he believes Pinot Gris can withstand slightly colder temperatures. To help counter the winter temperatures and early frost considerations, Anthony Road installed six used wind machines in the vineyards.

Veraison is usually the second week of August, and the grapes ripen by late September. On average, Martini likes to see the grapes get to 20° Brix to 21° Brix, with a 0.6-0.75 TA and a pH of 3.5.

Martini said Pinot Gris is the only grape he grows that can have different-colored clusters on the same vine when ripe. He noted that he always looks to harvest before weather trouble can set in, since he sells more than half the Pinot Gris to other wineries. Because a number of other local growers have ripped out this cultivar because of growing difficulties, he is able to get around \$1,750 per ton for his grapes. The vines provide about 5 tons per acre, which, in turn, can produce 190-200 gallons of juice per ton. Along with Martini, winemaker Peter Becraft and his crew make the final decision on harvest time, and once ready, the grapes are mechanically harvested very early in the morning into 1-ton bins with the Gregoire G-8 machine.

Following harvest, Martini uses a German hill-up plow to cover the graft union with 8-10 inches of soil. Once the hilling is completed, Martini said with a chuckle, "then it's time for me to put my head in the sand for a bit."

Pinot Gris for Damiani Wine Cellars

Although Damiani Wine Cellars is primarily known for its red wines, the winery is also one of the largest producers of Pinot Gris in the Finger Lakes. Lou Damiani, one of the founders, has about 1 acre of Pinot Gris in his original vineyard, and has more — consisting of 2 newly productive acres — in Damiani's newest vineyard on the east side of Seneca Lake. To this point, the majority of the fruit has been purchased from vineyards along Seneca Lake. Although the winery has purchased some Pinot Gris from Anthony Road

and Hazlitt's 1852 Vineyards, its main supplier has been grape grower Chris Verrill at Harvest Ridge Vineyards in Lodi, N.Y.

Verrill said he started planting his all-vinifera, 45-acre vineyard in 1999, and his 6 acres of Pinot Gris were planted in 2002. In recent years, most of his grapes have been purchased by Ravines Wine Cellars in Geneva, N.Y., and in 2017 Ravines purchased 145 tons out of a total crop of 165 tons. In December, Morton Hallgren, co-owner and winemaker for Ravines, will complete the purchase of the vineyard, with Verrill staying on as manager. Ironically, to this point, Ravines did not buy the Pinot Gris grapes, so Verrill sold the fruit elsewhere, including to Damiani.

I asked Verrill why he didn't choose to open his own winery, and he quickly responded, "We learned a long time ago that we grow really good grapes and we make really bad wine — you have to know your strengths and weaknesses, and we quickly learned ours."

The fact that he grows really good grapes might surprise some, given his lack of farming experience. Growing up in Maine, he did work for a small dairy farm in the summers but chose to become a pharmacist instead. He worked several years as a pharmacy district manager for Walmart, but quickly tired of the traveling and long hours inside. He decided he'd rather be outdoors, working for himself, so he found land on the east shore of Seneca Lake, and Harvest Ridge was born.

Verrill did extensive research on the viability of numerous cultivars and hired Finger Lakes grape grower Tom Mitchell to do soil testing. Several acres of hedgerows were removed, and a basic herringbone tile drainage system was laid in to improve drainage in some wet spots. The soil ranges from a Darien silt loam to Honeoye and Cazenovia



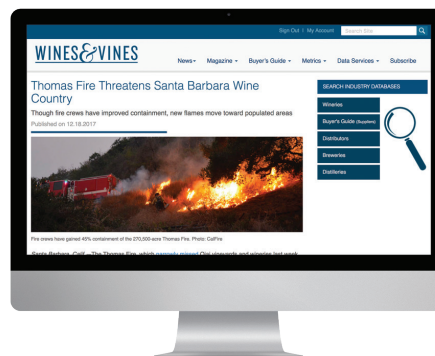
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Peter Martini, vineyard manager at his family's Anthony Road Wine Company on the west side of Seneca Lake, uses two moveable wires to shoot position the Pinot Gris vines on the VSP trellis.

soils, with average depths of 2 to 4 feet over a shale stone bed.

The Pinot Gris vineyard is composed of 3 acres each of two clones. One is an unnamed clone attributed to Dr. Konstantin Frank, and the other is a University of California, Davis Foundation Plant Services clone considered to be derived from clone 53, in Colmar, France. Verrill's vineyards are planted in a north-south direction to allow for greater sunlight absorption from the east-west path of the sun. The Pinot Gris is planted with 11.5 feet between rows and 4.5 feet between plants. The goal is "to maximize photosynthesis," and Verrill said he believes he can increase the process by up to 40% by his version of double-lyre trellising.

His system splits the canopy, allowing for maximum sunlight exposure and much improved drying of moisture from the vines, which helps limit disease pressure.

The system is basically two VSP canopies with left and right wires set at an angle, to open the tops at about 3 feet above the ground. The vines average about 12 buds per cane, resulting in 36-48 buds per vine. The opened canopy thus limits leaf overlap and shading of the fruit. The idea for this system came from an article Verrill found from Australia, and with the Pinot Gris he began sourcing pre-notched steel posts from Quiedan Co., a major producer of steel trellises headquartered in Salinas, Calif. The company worked with him to provide pre-drilled posts to his specifications, set with a center bracket to hold the posts together. Eventually, Verrill changed the center bracket to a pivoting bracket, which allows him to straighten the angle of the trellis for mechanical harvesting if poor weather at harvest is imminent. Otherwise, all his grapes are contracted to be hand-picked, including those purchased by Damiani.

Poor weather can also be in the form of winter cold. In January 2004, severe cold affected Finger Lakes vineyards and resulted in major *vinifera* vine damage. Verrill had wisely hilled up his vineyards, and Pinot Gris damage was limited to the loss of the crop that year. The vines were not permanently damaged, however, and the following year provided a full harvest. Cold hardiness can be a factor when planting Pinot Gris. The average low winter temperature at Harvest Ridge is 0° F, with more severe temperatures experienced in 2004, 2014 and 2015. These anomalies, however, have not affected the overall production and quality at his vineyards.

The vines are pruned by a 29-person crew, contracted by Verrill and four other vineyards. The crew rotates among the five vineyards, this year beginning at the end of February, and his vineyards were fully pruned by the third week in March. As insurance, an extra cane is left on the Pinot Gris vines until budding is complete, which usually happens at 125- to 135-degree days. This year, bud break occurred May 10 to 11.

In late May, the crew returns and performs suckering, the removal of extra, non-fruiting shoots. The workers also hand-hoe around the graft union and, post-bloom, move the catch wires every two to three weeks once the shoots reach a length of 16-18 inches. At this time, the crew also removes the third cluster of Pinot Gris (and Pinot Noir). One other post-bloom task is leaf removal, when up to 50% of the leaves are removed to facilitate exposure of the canopies.

Verrill begins spraying for powdery mildew once the shoots are 2 to 4 inches long, in early June. He uses JMS Stylet Oil, which kills the fungus upon contact. "I look at my spray program a little differently than some growers. As a pharmacist, I understand the chemistry and microbiology of the sprays," he said.

On the second pass for powdery mildew, he adds Mancozeb, a fungicide for downy mildew control. He continues these sprays weekly until pre-bloom, when he uses Quintec, a systemic control for powdery mildew. Bloom averages between June 20 and July 1 and, once complete, Verrill uses systemic sprays for both mildews, as well as botrytis.

The catch wires continue to be moved as the canes increase in length, and with that growth there is also an increase in leaf density. This requires more leaf-pulling, a task performed two or three times throughout the

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Chris Verrill grows Pinot Gris vines at his Harvest Ridge Vineyards with 4.5 feet between vines and 11.5 feet between rows to accommodate a modified double-lyre trellis.

growing season. Verrill believes that his rotation of spray chemistries and canopy management allow him to avoid any spray at *veraison*, which for his Pinot Gris averages from Aug. 10 to 12.

Following *veraison*, the final major task before harvest is the addition of bird netting. The entire vineyard is netted, tenting the vine down below the irrigation lines, where twist ties hold the netting in place. The netting was purchased about 10 years ago from Midwest Vineyard Supply of Decatur, Ill. At this point all necessary field work is completed. Within about three weeks, the Pinot Gris will be ready for harvest.

When to harvest is determined both by Verrill and the wineries purchasing his grapes. "I've always thought of it as a partnership with the winemakers and myself," he said.

He invites them to come to the vineyard throughout the season, not just at harvest. Although winemakers may have certain sugar and acid numbers in mind, Verrill makes the final decision, based upon taste. Variables that influence harvest include weather, disease, the availability of the pickers and trucking options to best fit the wineries. The Pinot Gris harvest averages about 24 tons, which is divided among Damiani and three other wineries. Damiani's purchases have averaged 6 to 9 tons annually, but in the recent past has been as much as 13 tons.

Is Pinot Gris one of the more difficult grapes he is growing? "Yes," Verrill answered with little hesitation. "It's almost as challeng-

ing as Pinot Noir, with probably slightly less botrytis susceptibility."

One advantage Pinot Gris has over Pinot Noir is its ability to be cropped at 4 tons and have good quality ripeness. Both Pinots have small, compact clusters, which can easily lead to botrytis without proper spray control and leaf-pulling management. Verrill stressed that early control of powdery mildew and botrytis is most important, because if they are allowed to develop, sour rot is inevitable, which can ruin the fruit quality. "Nothing works well when the fruit has sour rot," he said.

These caveats aside, Verrill has managed to produce high-quality Pinot Gris for Damiani Wine Cellars and others for almost two decades. Although some other growers in the Finger Lakes have removed their Pinot Gris because of the challenges, there is a developing market in the Finger Lakes and elsewhere for the wine as an alternative to Chardonnay, and even to Riesling, as Pinot Gris can also be made in different styles of wine. If managed well in the right site, domestic Pinot Gris appears to be on a path to increased interest. 🍷

Ray Pompilio is a wine writer based in Ithaca, N.Y., and a regular contributor to the Wine East section of *Wines & Vines*.

RAY POMPILIO

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Rutherford Dust Society, Day in the Dust 2018

In July, the Rutherford Dust Society hosted its 18th annual “Day in the Dust,” a tasting event focused on the unique *terroir* of the Rutherford AVA in Napa Valley. The walk-around tasting event featured 30 wineries from the area, showcasing what their plot of Rutherford *terroir* produces.



Mitch Rice, winemaker, Mersenne Wines, Santa Rosa, Calif.



Lisanne Leask, assistant winemaker, Rutherford Hill Winery, Rutherford, Calif.



Left to right: Emma Swain, CEO, St. Supéry Estate Vineyards & Winery; Lauren Leeds Pesch, partner, Leeds & Pesch Vineyard Consulting; Karen MacNeil, author, *The Wine Bible*; Sara Fowler, winemaker, Peju Province Winery; Regina Weinstein, director of marketing, Honig Vineyard & Winery.



Paul Steinauer, winemaker, Flora Springs Winery & Vineyards, St. Helena, Calif.



Westin Laurence (left), owner, Heitz Cellar and Rachelle Mudaliar (right), director of hospitality, Heitz Wine Cellars, St. Helena, Calif.



Kristy Melton (right), winemaker and Jose Rodriguez, associate brand manager, Freemark Abbey Winery, St. Helena, Calif.

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