

WINE BUSINESS MONTHLY

April 2021 • \$5.95

The Industry's Leading Publication for Wineries and Growers

www.winebusiness.com

TECHNICAL REVIEW

The Hilt Builds in Efficiency and Fluidity in New Space

PLUS:

Results of Facilities Survey Show Wineries Still Expanding

The Pros and Cons of Cluster Zone Leaf Removal

Measuring How Soil Affects Terroir Expression





CRU CLASSÉ COLLECTION

STAND TALL WITH THE STATURE OF
CLASSIC GRANDS CRUS!

Designed to celebrate the true essence of Grands Crus, the Cru Classé Collection presents a selection of luxury bottles with silhouettes that hail back to the values of authenticity unleashed from historical archives.

Portocork

"The cork is the final guardian of the wine we have labored hard and long to make as close to perfect as possible.

As such, it is hugely important.

I can tell you from my heart that I have never worked with better corks than the ones from Portocork. The only thing possibly better is the delightful and efficient people we get to deal with there.

We will be with them forever."

Manfred Krankl

SINE QUA NON

* 22-time recipient of Wine Advocate's perfect 100 points



NAPA, CALIFORNIA | 707 258 3930 | PORTOCORK.COM

The Beginning of the Growing Season

AS THIS ISSUE OF *WBM* heads off to subscribers, we've been hearing the loud hum and whirling sounds of large fans in the early hours, signaling budbreak in Carneros and relatively cool temperatures.

Budbreak signals a new beginning. It's that wonderful moment that occurs each spring as the vines wake up from winter dormancy, the beginning of about eight months of work in the vineyard before harvest. Most of us are ready for new beginnings in 2021.

Terroir translates to soil or land in French and has come to mean the taste of a place but is endlessly debated, with some even calling it a marketing ploy or myth. The authors of a paper published this month would beg to differ, however. They argue that multiple factors that drive terroir expression can be quantified, mapped, measured and managed.

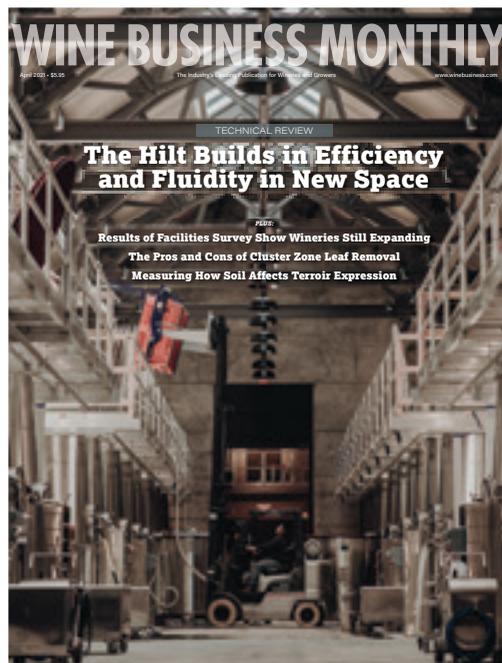
Weed control has long been one of the most challenging issues in managing a vineyard, and the tools deployed for controlling weeds in the vineyard are also often debated. This month Mark Greenspan explains why weed control has become even more challenging.

Cluster zone leaf removal is commonly used to avoid rot, but how it's employed is key. The technique can even be used stylistically but timing is important. As an article this month indicates, scientific research evaluating these techniques are pushing boundaries in looking for potential effects.

It's been exactly one year since the World Health Organization officially declared the coronavirus outbreak a pandemic. We've all been affected in one way or another, and the whole ordeal forced many of us to be creative. This month, resident detective Jake Lorenzo shares a little about how he's been spending his time.

Here's to a fruitful and successful growing season.

Cyril Penn – editor



WINE BUSINESS MONTHLY

April 2021 • Volume XXVIII No. 4

Editor Cyril Penn

Managing Editor Erin Kirschenmann

PWV Editor Don Neel

Eastern Editor Linda Jones McKee

Copy Editor Paula Whiteside

Contributors Laure de Rességuier, Denise Gardner, Mark Greenspan, Jess Lander, Michael S. Lasky, Jean-Phillippe Roby, Cornelis van Leeuwen

Design & Production Scott Summers

Director, Analytics Group Alan Talbot

Editor, Wine Analytics Report Andrew Adams

Web Developers Burke Pedersen, Peter Scarborough

President & Publisher Eric Jorgensen

Associate Publisher Tamara Leon

ADVERTISING

Sales Director Amy Olmsted

Account Executives Hooper Jones, Laura Lemos

Advertising Production Manager Julia Willmers

ADMINISTRATION

Vice President - Data Management Lynne Skinner

Circulation Liesl Stevenson

Financial Controller Katie Kohfeld

Database Content Analyst Leila Bradaran

Research Assistant Sara Jennings

Public Relations Mary Jorgensen

Chairman Hugh Tietjen

Publishing Consultant Ken Koppel

For editorial or advertising inquiries, call 707-940-3920 or email info@winebusiness.com

Copyright 2021 Wine Communications Group, Inc. Short passages can be quoted without permission but only if the information is attributed to *Wine Business Monthly*.

Wine Business Monthly is distributed through an audited circulation. Those interested in subscribing for \$39/year, or \$58 for 2 years, call 800-895-9463 or subscribe online at www.winebusiness.com. You may also fill out the card in this magazine and send it in.

Capture the Moment.

Help your customers make memories with your product and our packaging.

 #heartofpackaging

Elevate your expectations by partnering with the wine industry experts at Berlin Packaging.

We offer in-stock wine bottles, corks, closures, and more.

Plus, our custom design studio and repack operation can help grow your business.

[BerlinPackaging.com/Moments](https://berlinpackaging.com/Moments)

1.800.2.BERLIN



winemaking



the hilt

TECHNICAL REVIEW

Finding Efficiency and Fluidity in a Brand New Space14

Jess Lander

WINES&VINES BUYER'S GUIDE

Select Oak Alternative Vendors 28

grape growing



Organic Weed Control Just Became Difficult Again32

Loss of an organic herbicide sets organic growers back to where they used to be

Mark Greenspan



Cluster Zone Leaf Removal in the Vineyard38

What's the best strategy to achieve Chablis-style Chardonnay?

Denise Gardner

PW PRACTICAL Winery & Vineyard

Measuring and Managing the Soil Effect in Terroir Expression . . . 44

Cornelis van Leeuwen, Jean-Phillippe Roby, Laure de Rességuier

sales & marketing



Savvy Packaging Makes Budget-Price Wines Appear a Great Value . . .48

Michael S. Lasky

WINES&VINES BUYER'S GUIDE

Select Capsule Vendors 58

RETAIL SALES ANALYSIS

Retail Wine Sales Up 17 Percent in January62

Wines Vines Analytics

technology & business

Little Momentum for Value-Priced Wines64

Andrew Adams

SURVEY REPORT

2021 Facilities Survey: Wineries Continue to Upgrade Tasting Room and Event Space70

Nearly Half Have Solar Panels but Forty-one Percent Don't Have a Backup Power Plan, Insurance Rates Increasing

departments

MONTH IN REVIEW 4
 NEWS 10
 PEOPLE 76
 ADVERTISER INDEX 80
 JAKE LORENZO **Things to Do** 82



WINEMAKER OF THE MONTH81

David Tegtmeier
 founder, winemaker and viticulturist,
 Liquid Art Winery, Manhattan, KS



LA GARDE
INOX



WE DON'T CUT CORNERS

USA

JOHN PHILLIPS

408 500.8797 — john@lagardeinox.com

Canada

PAUL MAGDER

647 671.2417 — paul@lagardeinox.com

LAGARDEINOX.COM — 1 800 263.5170 — info@lagardeinox.com

Matt Dees

winemaker, The Hilt, "Technical Review: The Hilt," page 14

"It's hard living for a vine here; there's no question about it. Everything about this place makes it a challenge, but you need those conditions to make some of the most exciting, alive and energetic wines."

Curtis Mann

vice president of alcohol, Albertsons, "Little Momentum for Value-Priced Wines," page 64

"Seltzers are pulling volume out of the wine department, mainly in the below-\$10 category. There are some more wine-based seltzers hitting the market soon, so that may keep customers in the category although in some cases I'm not sure if customers are differentiating between malt, wine or spirits-based seltzers."

Dr. Michela Centinari

associate professor of viticulture, Pennsylvania State University, "Cluster Zone Leaf Removal in the Vineyard," page 38

"Generally, pulling leaves from both sides of the canopy is not recommended in warm/hot regions [if a grower has not previously used CZLR techniques]."

Mark Greenspan

author, "Organic Weed Control Just Became Difficult Again," page 32

"Organic growers lost a tool that seemed to be their holy grail while, in truth, it was just a grail-shaped beacon projected by the handmaiden Zoot from the Castle Anthrax."

Dr. Cain Hickey

viticulture extension educator, Pennsylvania State University, "Cluster Zone Leaf Removal in the Vineyard," page 38

"Having better control over producing clean fruit ultimately gives growers and winemakers more flexibility associated with picking decisions during harvest."

Made in California



Been here all along...

- Over 60 years of wine industry expertise paired with today's advanced technology.
- Sustainable & Reliable.
- **100% Californian.**

Partner with your local glass supplier.

Call 209-341-4527 (GLAS) to find out how.



MODESTO, CA | galloglass.com

Top Stories from **WINE BUSINESS.com** – In Case You Missed It



Steven Spurrier (1941-2021)

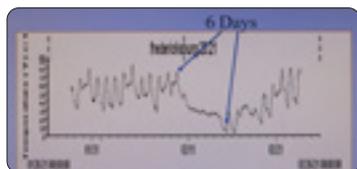
Steven Spurrier, best known for creating the tasting between top Chardonnay and Cabernet Sauvignon wines from California and France in May 1976, known as The Judgment of Paris, passed away on March 9, 2021. He will be remembered for founding the Académie du Vin, the Académie du Vin Library; and as a consulting editor for *Decanter Magazine*; chairman of the Decanter World Wine Awards; chairman of Decanter Asia Wine Awards; author of eight wine books, including *L'Académie du Vin Wine Course* and *L'Académie du Vin Guide to French Wines*. He was perhaps most proud of founding Bride Valley Vineyard in Dorset, England with his wife Bella. Spurrier will be missed, not just by family and friends, but by people throughout the wine world. His memoir, *Wine, a Way of Life*, was published in April 2018.



Cooling Off Period as U.S. and EU Agree to Suspend Airbus Tariffs for Four Months

The Office of the U.S. Trade Representative announced a four-month suspension of all tariffs imposed in the context of the Airbus-Boeing disputes, both on aircraft and non-aircraft products, for an initial period of four months—which includes the 25 percent tax on wines from France, Germany, Spain and the UK that was imposed in October 2019. The suspension is not a repeal. The four-month “cooling off period” sets a deadline for reaching a settlement in the Airbus dispute.

“We welcome this critical progress towards rebuilding the trans-Atlantic wine trade,” Wine Institute president and CEO Bobby Koch said. “The EU is the largest export market for our wineries and a stable, constructive relationship is essential to growing U.S. wine exports. For this reason, Wine Institute has always advocated against the targeting of wine in unrelated trade disputes.”



Freezing Temperatures Hit All of Texas, Vineyard Damage May Be Extensive

Cold weather that descended on Texas beginning in February was unique in that it affected the entire state over the course of about 10 days. The last time such a deep freeze had hit the state was in 1989. The damage for vineyards is potentially extensive. Texas is home to 471 wineries and more than 5,000 acres of grapes.



Hoffmann Acquires Sixth Missouri Property

Naples, Florida-based Hoffmann Family of Companies announced the purchase of Mount Pleasant Estates in Missouri, founded in 1859. The purchase of Mount Pleasant is one of several vineyard properties acquired this year by Hoffmann in the Augusta, Missouri, area, west of St. Louis. The firm has said it plans to invest \$100 million to create the largest vineyards and winery development in the Midwest. Hoffmann aims to create a national destination, including wineries, a hotel, restaurants and a 12-hole golf course.

NDtech[®]

The world's first natural cork with a non-detectable TCA performance*

GUARANTEED EXCELLENCE

THE WORLD'S BEST WINE STOPPER JUST GOT BETTER

The **NDtech** technology individually checks each wine stopper, allowing Amorim to deliver the world's first natural cork with a non-detectable TCA performance*. Winemakers rely on our dedication to supply the world's best stoppers. **NDtech** is the latest step to complement Amorim's proven preventive, curative and quality control methods, delivering the supreme guardian for wine.

For additional information on this wine packaging breakthrough, please visit amorimcork.com.

*releasable TCA content at or below the 0.5 ng/L quantification limit, analysis performed in accordance to ISO 20752.

AMORIM CORK

AMORIM CORK AMERICA | 360 Devlin Road, Napa, California 94558 | Tel: 707.224.6000 | info.acam@amorim.com | amorimcork.com

Top Stories from WINE BUSINESS.com – In Case You Missed It



French Critics Rate Organic and Biodynamic Wines Higher

A broad-based study from two economists indicates eco-certification [organic and biodynamic] has a positive effect on wine expert scores. Magali Delmas of UCLA and Olivier Gergaud of Kedge Business in France, reviewed wine scores from dozens of French wine experts. Their study, entitled “Sustainable practices and product quality: Is there value in eco-label certification? The case of wine” was published in the journal *Ecological Economics*.

The professors drew data from three major French wine publications, aggregating ratings on more than 128,000 French wines scores from more than 30 French wine experts from 1995 to 2015. Wines ranged in price from \$5 to \$450. The study included scores from three French wine publications, including Gault & Millau, Gilbert Gaillard, and Bettane Desseauve.

“With organically grown wines, we saw an increase of 6 points in their scores compared to conventional or sustainable wines.

With biodynamic, there was an increase of 11.8 points in their scores, compared to conventional or sustainable wines,” said Delmas, professor of management at the UCLA Institute of the Environment and the Anderson School of Management where she is also the director of the UCLA Center for Corporate Environmental Performance. “We are not saying that all organic or biodynamically grown wines taste better,” said Gergaud.



Constellation Expands Business with Nation's Largest Distributor

Constellation Brands awarded Southern Glazer's Wine & Spirits distribution responsibilities across approximately 70 percent of its wine and spirits brand portfolio in the United States, effective April 1, 2021. Southern previously represented roughly 40 percent of Constellation's wine portfolio.

“Achieving a consumer-focused route to market is essential to achieving our objective to out-pace, out-grow and out-execute the category in channels where consumers are choosing to engage,” said Robert Hanson, executive vice president and president - wine and spirits division, Constellation Brands.

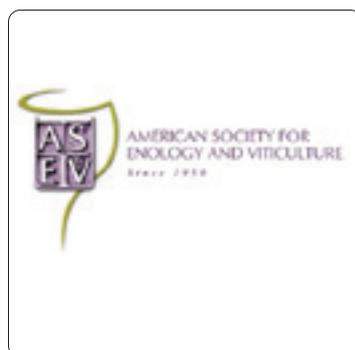
Constellation has been focused on wines priced above \$11 since choosing to sell its lower priced wine brands to E & J Gallo in a transaction that closed earlier this year.



Breakthru Unveils Fine Wine Strategy

Breakthru Beverage Group, the nation's fourth largest wine distributor, announced the launch of Aspect, a “uniform, cohesive portfolio solution for the rapidly growing fine wine space.” The company said Aspect will employ an enhanced go-to-market approach with a heightened focus on education, account segmentation, data and insights to better service Breakthru's supplier and customer partners.

The Aspect team will be required to maintain advanced accreditations and work closely with customers to engage and train staff, support events and drive engagement. “Consumers today are more educated on wine varietals and profiles and are demanding more variety and quality. Aspect will provide our customers with concierge-level service that will assist them in building wine programs to satisfy this demand,” Daren Cliff, Breakthru senior director, Aspect portfolio said.



ASEV Selects 2021 Best Enology and Viticulture Papers

The American Society for Enology and Viticulture has selected the 2021 Best Paper Award winners and they will be presented during the 2021 Virtual ASEV National Conference, June 21-24. Both papers are available on www.ajevonline.org.

The 2021 Best Viticulture Paper, “Soil Temperature Prior to Veraison Alters Grapevine Carbon Partitioning, Xylem Sap Hormones, and Fruit Set” by Stewart K. Field of Nelson Marlborough Institute of Technology in New Zealand, Jason P. Smith and Bruno P. Holzapfel of Charles Sturt University in Australia, and Erin N. Morrison and R.J. Neil Emery of Trent University in Canada, looked into gaining a better understanding of environmental effects on grapevines and the physiological regulation of acclimation. The authors assessed the effects of soil temperature (14° C or 24° C) between bloom and veraison on growth, nonstructural carbohydrates, cytokinins, abscisic acid, and leaf function of potted Shiraz grapevines. They concluded

that soil temperature significantly affects grapevine growth and that the responses are mediated largely by an influence of temperature on mobilization of reserve carbohydrates from the roots.

For the 2021 Best Enology Paper, ASEV selected “Determination of Molecular and ‘Truly’ Free Sulfur Dioxide in Wine: A Comparison of Headspace and Conventional Methods,” by Todd W. Jenkins, Patricia A. Howe, and Andrew Waterhouse of the University of California, Davis, and Gavin L. Sacks of Cornell University. The authors developed a new analytical method for “truly” free SO₂ and compared it to conventional methods of measuring SO₂. They concluded that their new GC-based method that measures the SO₂ concentration in the headspace of wine samples is less prone to overestimating the free SO₂ in red wines than are conventional methods and provides stable results at low operating costs. [WBM](#)



- CAPSULES BY RAMONDIN CAPSULAS S.A.
- SOLID METAL LABELS BY APHOLOS
- MARQUES FRENCH OAK ARTISAN BARRELS



Contact:
Bastos LLC
320 Newton Way
Angwin, CA 94508
Tel: 707-337-6666

www.bastosllc.com

Finding Efficiency and Fluidity in a Brand New Space

Jess Lander

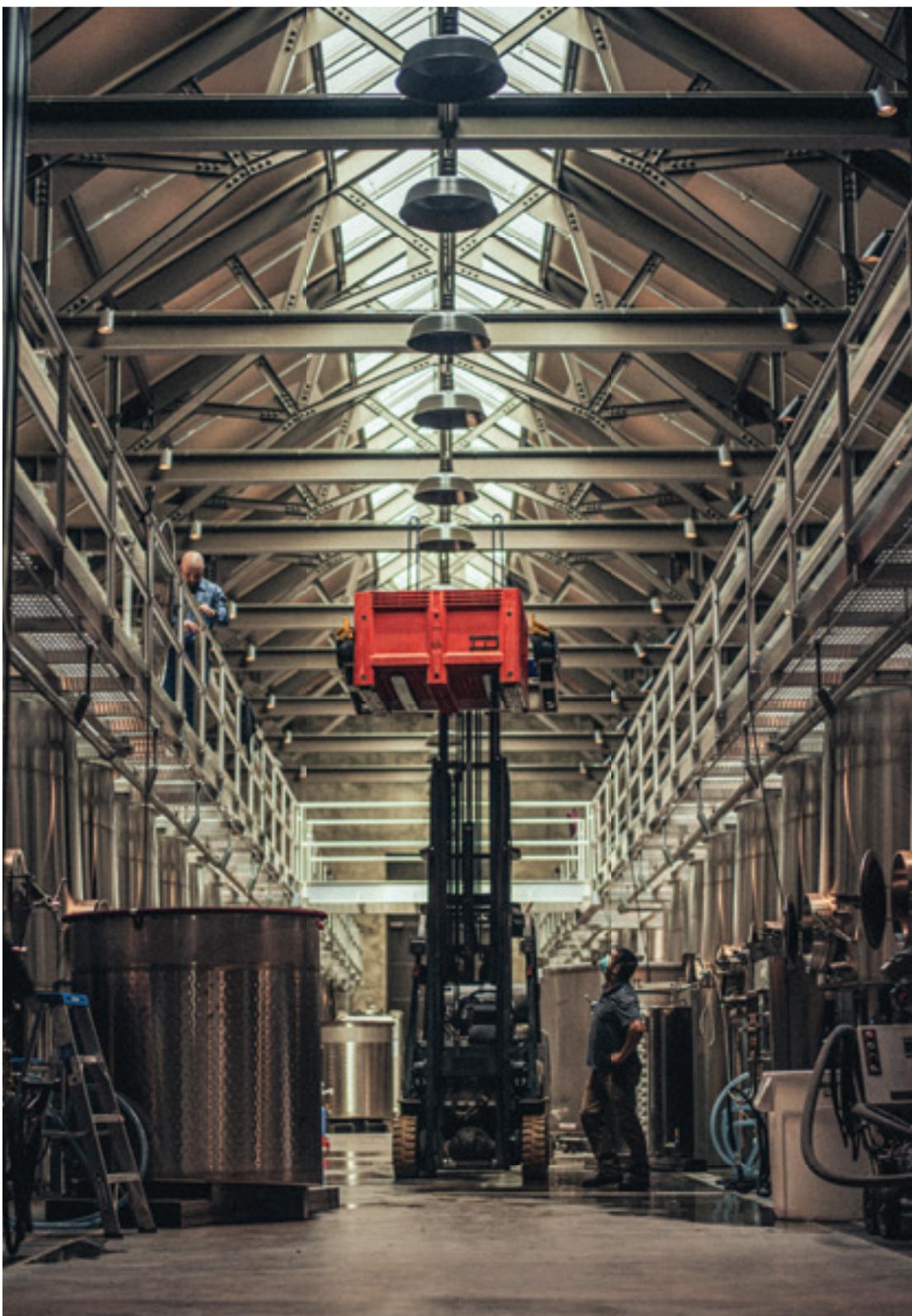
Jess Lander is a writer based in Napa Valley, California, who covers wine, beer, food and travel. Her work has appeared in *Wine Enthusiast*, *Decanter*, the *San Francisco Chronicle*, *AFAR* and other publications.

MATT DEES, WINEMAKER FOR The Hilt, definitely has an opinion about the Sta. Rita Hills AVA: “It’s arguably the greatest place to grow Pinot Noir and Chardonnay in the U.S.” The grape growing region, which became an official Santa Barbara County AVA in 2001, “comes down to freshness,” Dees explained, “that kind of liquid sunshine quality to the Chardonnay and the complexity, the subtlety and the nuance, along with undeniable California fruit in the Pinot Noir.”

Founded in 2008, The Hilt was launched as a sister label for JONATA, which produces an array of Santa Barbara wines from its 600-acre Ballard Canyon vineyard. Dees has been the winemaker of both since their inception. The Hilt has always been dedicated to crafting Pinot Noir and Chardonnay from the western coastal vineyards of Santa Barbara County but eventually narrowed its focus upon finding its true, permanent home in the southwest corner of the Sta. Rita Hills.

This region is especially unique for its close proximity to the ocean and its rare transverse mountain range, which extends east to west and funnels the cool Pacific breezes right on through the AVA instead of blocking it. “It ends up being this really wonderful opportunity to ripen fruit and maintain acid unlike anything else in the U.S. Without this oddity of geological history, we wouldn’t be making wine here,” said Dees. “It would be too warm.”

In 2014, The Hilt owners purchased the 3,600-acre Rancho Salsipuedes site, known today as The Hilt Estate. Comprising three vineyard sites, a massive state-of-the-art winery and a hospitality center, The Hilt Estate is finally nearing completion and already setting a new standard of winemaking in the buzzing Sta. Rita Hills region.



CARY WILTON/THE HILT ESTATE

Quality Equipment For Quality Production



DTX for Tartaric Stabilization
& pH Reduction

DTMA
Maceration Accelerator

OMNIA Ceramic
Membrane Lees Crossflow

Crushing • Pressing • Flotation • Filtration • Bottling • Packaging

Over 60 years of design and manufacturing experience to deliver innovative machinery for every step of the wine making process!

dellatoffola.us

Santa Rosa | (707) 544-5300

DELLA TOFFOLA
USA



The Hilt Estate | 2240 Santa Rosa Rd. Lompoc, CA 93436 | ☎ 805-564-8581 | thehiltestate.com

Owners/Principals E. Stan Kroenke

Winemaker(s) Matt Dees, winemaker;
Drew Pickering, associate winemaker

Vineyard Manager Coastal Vineyard Care
Associates, Ruben Solorzano

Founded 2001

Production 8,000

Price \$55

VINEYARD INFORMATION

Appellation Sta. Rita Hills AVA
Vineyard Acreage 200
Varieties Grown Pinot Noir, Chardonnay
Tons Used vs. Tons Sold 35% used, 65% sold
Sustainability Certification(s) SIP Certified
Soil Type Monterey Shale formation/Diatomite
Climate Cool, Region 1
Sustainability Practices Mechanical weed control
Vineyard Sources Radian, Bentrack,
Puerta del Mar
Custom Crush? No

BUILDING THE WINERY

Year Built 2020
Architect Backen & Gillam Architects
Contractor Grassi & Associates
Interior Design Backen & Gillam Architects
HVAC McCall Plumbing and Mechanical
Other Key Construction Suppliers Taft Electrical

WINEMAKING

Wines Made Chardonnay, Pinot Noir,
Syrah, Riesling
Receiving Hopper Armbruster VSTF 3000
Vibrating Sorting Table Armbruster VSTF 3000
Destemmer Rotovib 10
Crusher Armbruster mobile crusher
Tanks Santa Rosa Stainless Steel: 4-, 6-, 8-, 10-ton
conical fermentation tanks
Punch-down Devices R.S. Randall & Co.
Pump-over Devices Burgstahler
Pumps Yamada air pumps, Waukesha 10
Presses White: Sigma 5; Reds: Diemme 23hL
basket press
Forklift Unicarriers Platinum II: Model CF80LP
Bin Dumper Cascade forward bin dumper
Barrels 8% new French oak for Pinot Noir;
30% new French oak for Chardonnay;
Bruno Lorenzon, D&J, Sirugue, Stockinger
Barrel Washing System Moog, Steam: Swash 16420
(SW20)

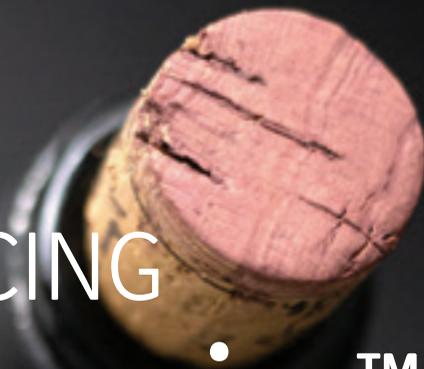
Yeast/Nutrients/Enzymes/Other Additions

RC212 for Pinot Noir, QA23 for Chardonnay
Winemaking Management System Vintrace
Winemaking Software Vintrace
Analytical Equipment Admeo Y15, Oenofoss

PACKAGING

Glass Varied
Corks Portocork
Capsules Ramondin
Label Design LMNOP
Label Printing Tapp Label (a G3 company)
Case Goods Storage Wineshipping
POS Software WineDirect
Compliance Software ShipCompliant
Website Design Internal
Lender/Financial Agency Silicon Valley Bank
PR Agency Jarvis Communications





INTRODUCING
Scott Promise™

**Dry-Steam
Technology**

Every cork, every day
at **no additional cost**
to our customers.

Learn more about **Dry-Steam Technology** and
Scott Promise™ at scottlab.com/promise

100% clean cork
across our **entire range**
of cork offerings.

The clean cork
with a **clear promise.**



SCOTT
LABORATORIES



The Hilt "Pinot Bowl"

THE HILT ESTATE

The Sweet Spot

Before settling in Santa Barbara County, Dees made wine in a number of regions, starting out in Vermont in the late 1990s. He moved to Napa in 2001 and worked for Staglin Family Vineyard, which led him to a trio of harvests in New Zealand at Craggy Range. After cutting his teeth under two prominent winemakers, Andy Erickson and Doug Wisner, Dees accepted his first head winemaking job with JONATA.

"I had seen some vintages in New Zealand that were dicey. I'd seen some in Napa that were pretty warm," he said. "While I adore wines from both regions, for me there was something in the middle I wanted: the density of fruit from Napa and the freshness and vibrancy of New Zealand."

Santa Barbara fit that bill; but if there were one hesitation Dees had, it was Chardonnay, the most widely planted grape in Santa Barbara County. "When I came down here, I think if you'd given me 100 grapes to work with the rest of my life, Chardonnay might not have broken the top 100. I just wasn't interested in it," he said, explaining that his time in the Sta. Rita Hills has changed him.

"Now, Chardonnay is my number one. It's the grape I would choose above all others to work with the rest of my life. There's just something about the electricity of the wine here. It really hums."

IDEAL SOLUTIONS FOR THE IDEAL WINERY.



- Fully automatic units from 4 to 20 modules
- User friendly PLC with automated EASY - MODERATE - DIFFICULT wine filtration settings
- Automatic self washing mode
- Stainless steel housing
- Exclusive trans membrane pressure filtration programming



CRIVELLER GROUP

EAST COAST | **WEST COAST**
 info@criveller.com | mail@criveller.com
 905.357.2930 | 707.431.2211
www.criveller.com

PROCESSING, BOTTLING, LABELING AND MORE FOR WINE, BEER & OLIVE OIL

I N N O V A T I O N Y O U C A N T R U S T



SARA

A D V A N C E D [®]

Our standard since 2018, SARA Advanced[®] enhances natural cork quality and increases neutrality up to 99.6%.

707.636.2530



MASILVA **USA**

MASILVA.COM



The "Soprano," Radian

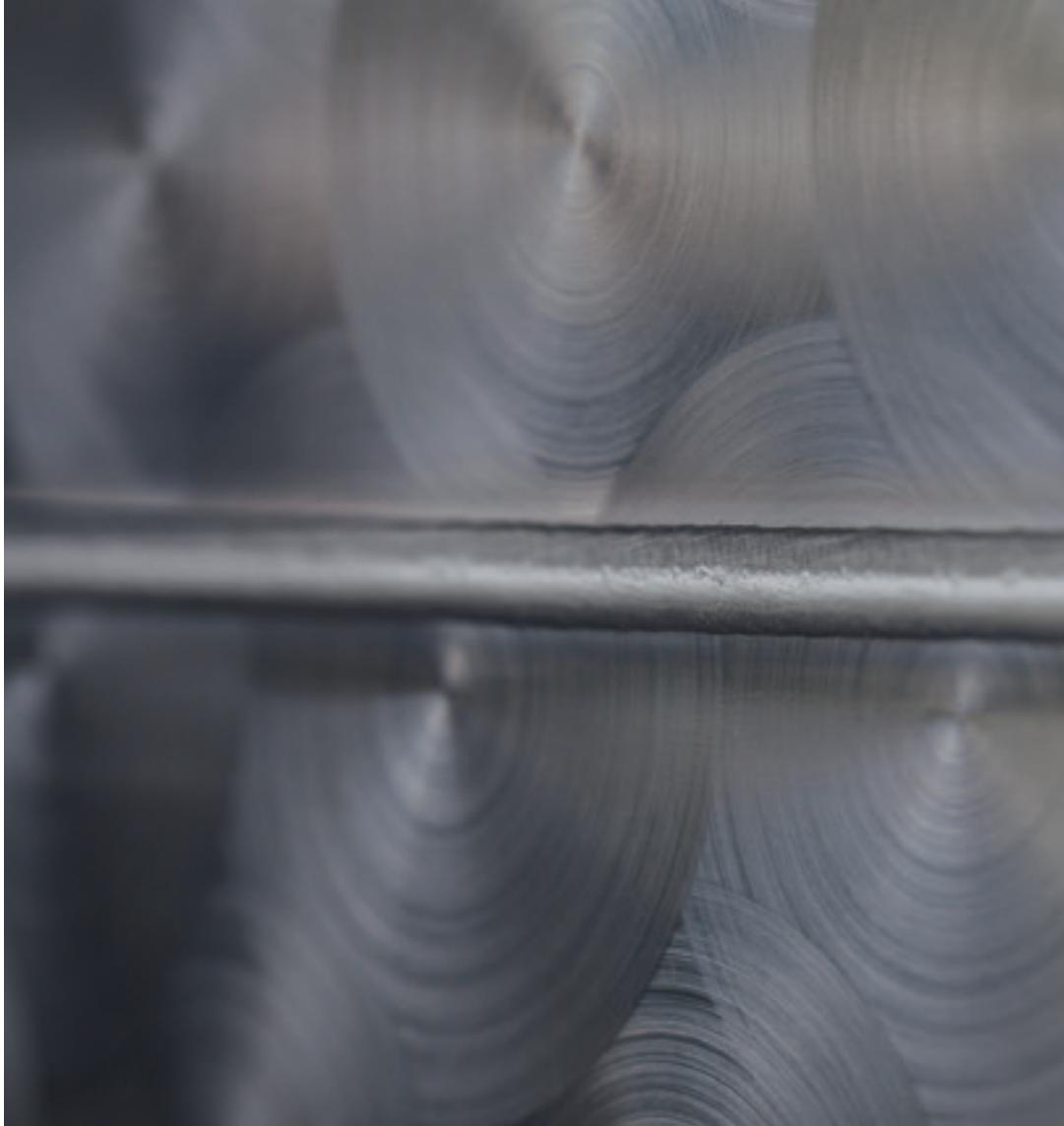
CARY WILTON/THE HILT ESTATE

A Tale of Two Vineyards

Dees describes The Hilt's two main vineyards—Radian and Bentrack—as the Soprano and the Alto, respectively. Clocking in at 96 acres each and planted mostly to Pinot Noir and Chardonnay, both were part of the Rancho Salsipuedes purchase. A third and fairly flat estate vineyard parcel, Puerta Del Mar, sits in front of the winery and is planted to 2.5 acres of Chardonnay and Pinot Noir apiece. The Hilt sells 65 percent of its fruit to other wineries.

Radian has steep, north-facing slopes and higher elevation (up to 900 ft.) compared to the long, Burgundy-like rolling hills of Bentrack, which doesn't go beyond 500 ft. If viewed as siblings, Radian would be the problem child. Planted on an exposed bed of inland sea that's hundreds of feet deep with diatomaceous earth (DE), it's cold, the vines struggle to get water and face a daily onslaught of vicious winds.

"It's the meanest vineyard I've ever met," said Dees.



Easiest Tanks to Clean!

The flawless surfaces and perfectly welded seams make the tank very easy to clean without chemicals. The ultra-smooth 2R rated interior surface will effectively resist the build-up of tartarate residues. The high-quality robot-arm laser welds leave no chance for residual product to harbor spoilage organisms.

www.speidel-stainless-steel-tanks.com



ORIGINAL

Sustainable solution 

Dare to be different

SHAPEART, give a textured look to your aluminium closure.

Amcor, the largest range of capsules and closures for Wine, Sparkling Wine and Spirits.

Contact your **SHAPEART** expert at **707-257-6481**
info.capsules@amcor.com - www.amcor.com



STELVIN® is a trademark of the AMCOR Group



SOFTGARD
Tin



CAPGARD
Aluminium



ROLLTOP
Poly laminate



STELVIN®
The original wine aluminium closure



HOODS
Tin Poly laminate

Bentrock is a little more easy-going. It's more protected from the harsh winds, it's warmer, and the soils are deeper and more complex, allowing for a different level of ripeness. Dees described it as a friendlier site where the wines can be a little more generous.

For both Radian and Bentrock, he's found that Dijon clones, viewed by some as the red-headed stepchild of boutique wine production, are often the best choice for these sites due to the demanding climate and difficult set conditions. "There can sometimes be a stigma that Dijon clones are in some way inferior, but we've been farming it now for six years, and Dijon clones are

really the only things that work out there and would give us the opportunity to produce such high-quality Pinot and Chardonnay," he said.

"Our site is a really interesting argument for Dijon clones in their proper environment. If you plant them in really deep river soil, you'd get a lot of vigor, the clusters would be giant, but that's not where you'd want to plant them. Plant them where they struggle. In a really marginal site, you can still get 2 to 3 tons an acre. They are very paltry yields, but they're yields, and we can reach vine balance. The climate here would make some of those Heritage clones non-viable options."

Growing in the Margins

According to Dees, farming at Radian can be considered "growing in the margins."

"These vines hate living. They find joy in the small things," he joked. "It's hard living for a vine here; there's no question about it. Everything about this place makes it a challenge, but you need those conditions to make some of the most exciting, alive and energetic wines."

Located in the southwest corner of the AVA—the coldest, windiest spot, according to Dees—Radian is a direct shot to the ocean, just 10 miles away. It's planted to just shy of 80 acres of Pinot Noir, 15 acres of Chardonnay and two 1-acre blocks of Syrah and Riesling located at the highest elevation point. The slopes get as steep as 35 degrees.

But what truly makes Radian both unique and difficult is its soils, which have a rare and high content of DE. "It's not that rare in the Sta. Rita Hills, but the form we've grown it in—amorphous exposed parent material—is rare," said Dees, explaining that while it does retain heat and drain well, it's hydrophobic and doesn't hold onto water, forcing the roots to go very deep in search of it.

"We've found it can work. It makes these tiny, scrawny berries with very thick skins, and it makes for a wine unlike I've ever seen. When Pinot Noir ripens on deeply rich DE soils, there's a very high acid it maintains, and with thick skins, it produces wines that kind of act like chameleons. It's dark and brooding on the nose, fresh and light on the palate with fine and massive tannins."



setting the standard for oak alternatives



eVOAK
Forward Thinking Oak Products

SENSORY SCIENCE . CREATIVE TECHNOLOGY . UNPARALLELED SELECTIONS . EXPERT ADVICE

eVOAK IS DISTRIBUTED BY OAK SOLUTIONS GROUP

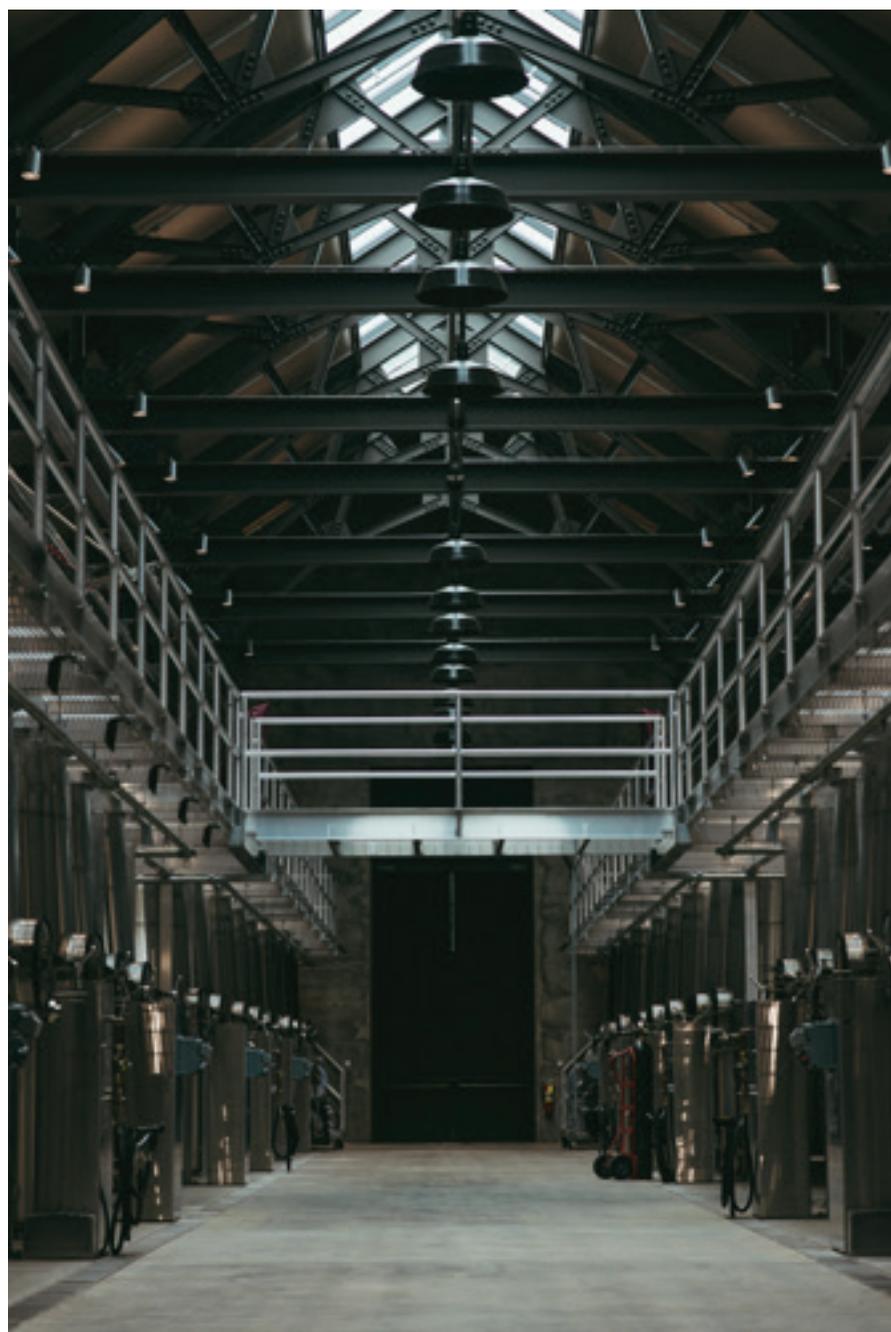
At the very top of Radian, where The Hilt is experimenting with Syrah and Riesling, there's so much DE that it's like walking on the moon. The soil is pure dust and weightless, and the winery has a chicken coop at the top in an attempt to get more organic matter to stick to it. Dees said they've found many fossils up there, including giant bones and preserved seahorse-like pipefish.

"That's the extreme," he said. "If you want to see the feeling and passion of The Hilt Estate distilled into one block, it's that block."

Production: More Space and Dialed-in Efficiency

For over a decade, The Hilt made wine in a small, 10,000-square-foot warehouse—a little "hole in the wall," as described by Dees—in Buellton. But for the 2019 harvest, Dees and his team were finally able to move into their new home, and it's a major upgrade at 50,000 square feet with all the bells and whistles a winemaker could dream of.

"I think it was really a blessing to make wine in a space that was less than ideal for the embryonic days of our project," said Dees. "It gave us the opportunity to see what we really needed, what we really wanted and what would work. Our other space was not designed to be a winery. There were no drains. None of the joys of wineries."



CARY WILTON/THE HILT ESTATE

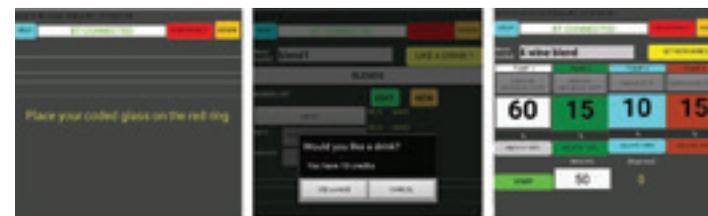
TASTING ROOM

Automated Wine Dispenser



Pour up to 4 wines

Wines are pumped from storage bags based on SmartBarrel® technology, no oxidation, and long-term storage of partial volumes. Serve any wine or make a blend using the tablet. Makes blending fun, encouraging more sales, and reduces tasting room staff. Serving size can be set (2oz or 5oz).



Read RFID code

Use the credit

Pour the wine

Scan QR code to watch video



\$3500
Introductory Price

www.GOfermentor.com

877 377 5359 sales@GOfermentor.com

Gusmer Offers a Complete Line of Oak Adjuncts!

Gusmer Oak Products

GRANULAR OAK 

- American Oak Avantage®
- French Oak Avantage®
- Premium Oak-Mor®
- Toasted Oak-Mor®

OAK CHIPS 

- American Oak Avantage®
- French Oak Avantage®



Arôbois Oak Products

FRENCH OAK CHIPS 

- **Sweet** - caramel, vanilla, sweetness
- **Balance** - gingerbread, licorice, silky tannins
- **Fresh** - spice, enhancing length
- **Intense** - almond, cocoa, creating roundness



FRENCH OAK BLOCKS 

- **Balance** - gingerbread, licorice, silky tannins
- **Intense** - almond, cocoa, creating roundness



www.gusmerwine.com
sales@gusmerenterprises.com

West Coast: 81 M Street Fresno, CA 93721 Tel: 559.485.2692	The Wine Lab™: 640-D Airport Road Napa, CA 94558 Tel: 707.224.7903	Gusmer Sonoma Store: 9025 Old Redwood Hwy, Ste E Windsor, CA 95492 Tel: 707.836.1056	East Coast: 1165 Globe Avenue Mountainside, NJ 07092 Tel: 908.301.1811	Midwest: 1401 Ware Street Waupaca, WI 54981 Tel: 715.258.5525
--	--	--	--	---

Gusmer Videos - www.gusmerwine.com/videos     

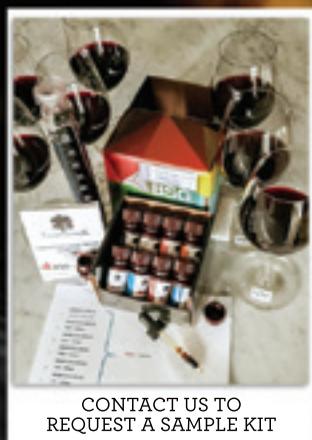


Winemaker, Matt Dees

CARY WILTON/THE HILT ESTATE

**UNIQUE WINE RECIPES
DESERVE
QUALITY OAK TANNINS**

Liquid Oak Tannins & Powdered Tannins



CONTACT US TO
REQUEST A SAMPLE KIT



bsgwine.com | 800.585.5562
474 Technology Way, Napa CA 94558

The Hilt produces four series of wines. The Estate wines of Pinot Noir, Chardonnay and Sparkling are all blends of the Radian and Bentrack vineyard that represent this pocket of the Sta. Rita Hills as a whole. The single-vineyard series features individual expressions of Pinot Noir and Chardonnay for Radian, Bentrack and Puerta del Mar vineyards. The Guards, split into Old Guard and Vanguard, are vineyard blends designed to showcase two different interpretations or styles of winemaking. Lastly, there's a set of small lot special bottlings that encompass Syrah, Rosé of Pinot Noir, Pétillant Naturel, Botrytis, Chardonnay Musqué and a Vermouth.

In addition to The Hilt's portfolio (8,000 cases), wines for JONATA and The Paring (a secondary label that utilizes fruit from both estate programs) are made at The Hilt Estate, totaling roughly 25,000 to 30,000 cases of annual production.

Designed by notable wine country architect Howard J. Backen of Backen & Gilliam Architects, the new winery looks from the outside like a modern-day barn with wood siding. It has two floors and is so large that Dees, who likens the space to a train station, said he was walking roughly 10 miles a day this past harvest.

"Everything we do here is based on efficiency and fluidity, to be able to move without being stuck in tiny spaces and cornered somewhere," he said. "If you don't have space to work, you don't have space to think. We wanted a place that allowed us to work without fearing we were too crowded to get anything done efficiently."



CARY WILTON/THE HILT ESTATE

WINEMAKING

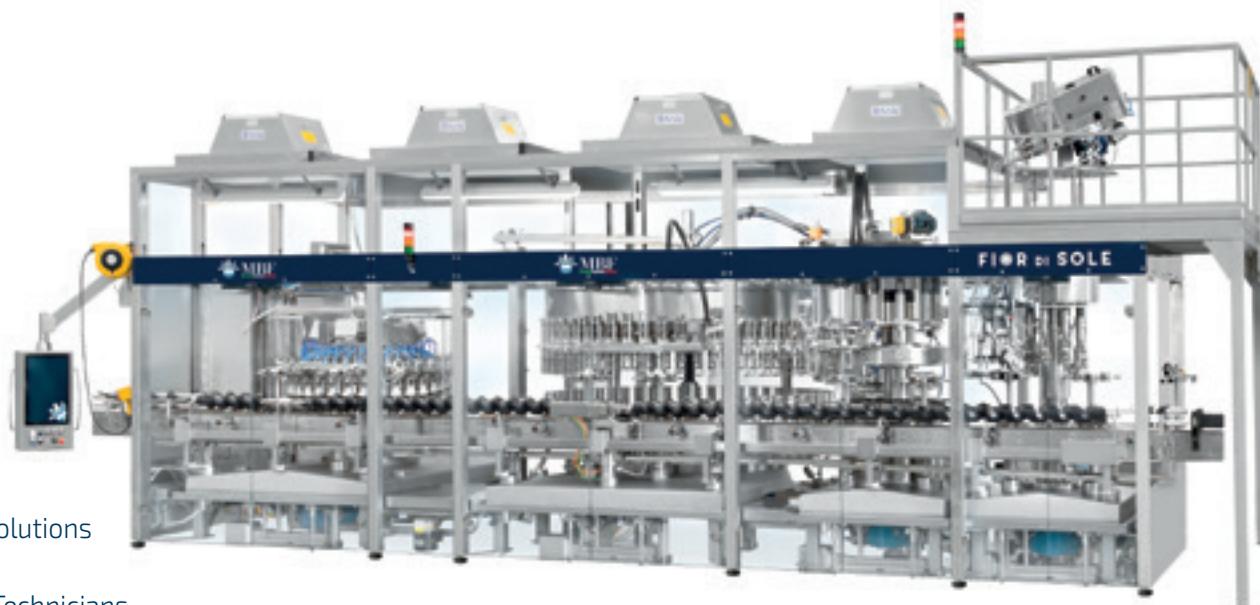
Another key in the winery design for Dees was separating the processing of fruit from fermentation. At the new winery, all the processing is done outdoors underneath an awning. “I like keeping all that mess outdoors. Bring it into tanks and once you’re inside this facility, you’re in a winemaking facility, a fermentation management facility,” he said. “You can pull wine from a tank, think about it and taste it without the chaos of forklifts or the incessant noise of a destemmer.”

Incoming grapes in half-ton bins are dumped on a vibrating sorting table on the outdoor crush pad where a small team sorts through the clusters

(heavy sorting is done in the vineyard), which then move to an incline table that takes them to the top of the Rotovib 10 destemmer. Dees called this a “revolutionary” piece of equipment.

They don’t do much crushing—Pinot Noir is 100 percent whole berry—and they destem into 1-ton, custom-made stainless steel bins with an actuated 16-inch butterfly valve. The winery has an entire wall of roll-up doors; and once they’re up, a forklift lifts the bins and hooks them into slides that roll right to the top of the tanks.

For Pinot Noir, Dees does up to 35 to 40 percent whole cluster fermentation, depending on the vintage and vineyard source. “We’re really sensitive to



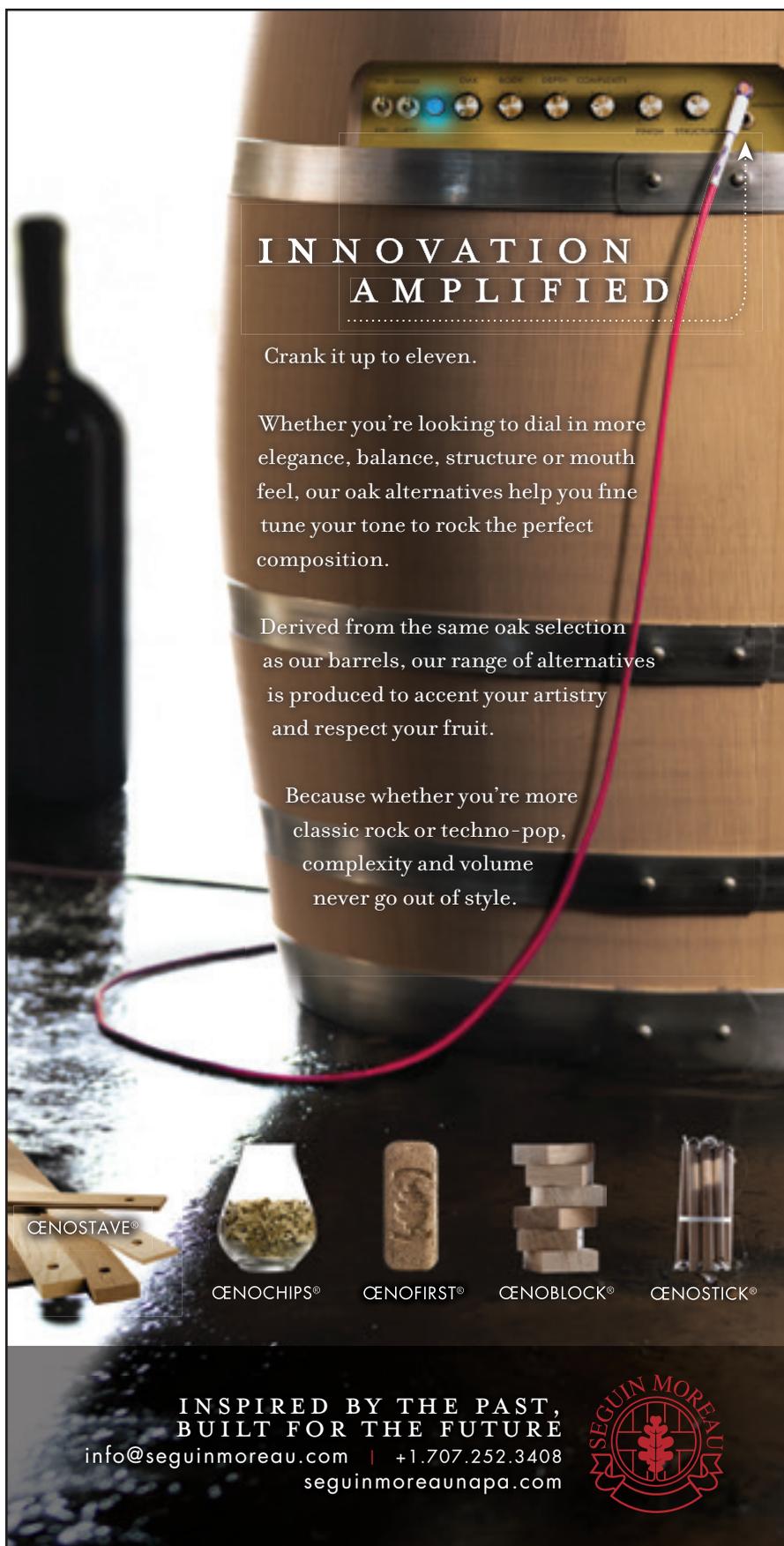
MBF FillBlock - 200 bpm

- | Complete Bottling Line Solutions
- | On-Site Parts
- | Factory-Trained Service Technicians
- | Preventive Maintenance
- | Upgrades
- | Remote assistance
- | Off-site Repairs

MBF North America Inc.

429 First Street - Suite 120/220 - Petaluma, CA 94952 - 2129 Commercial Drive - Suite A - Frankfort, KY 40601
 e-mail: sales@mbf-na.com - service@mbf-na.com - phone: (844) 711-8182

www.mbfnorthamerica.com



**INNOVATION
AMPLIFIED**

Crank it up to eleven.

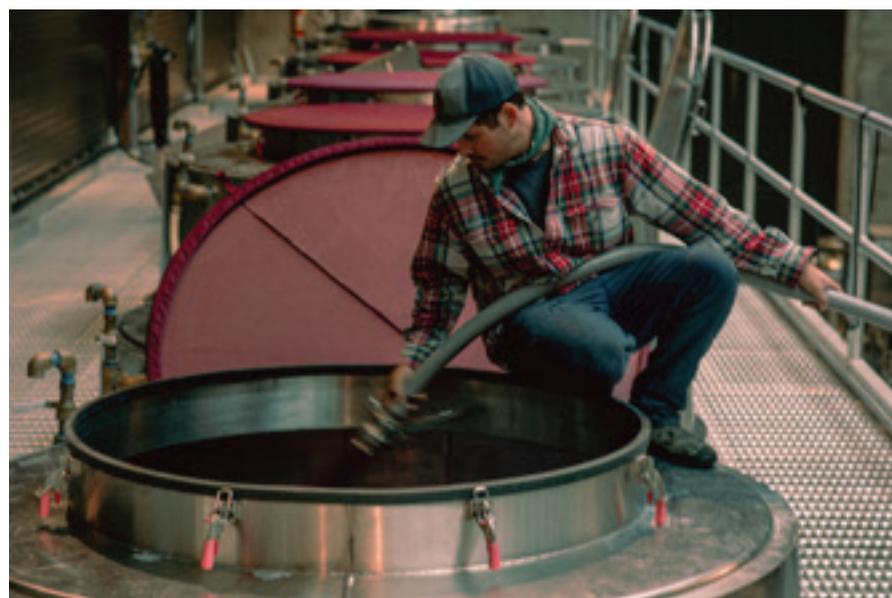
Whether you're looking to dial in more elegance, balance, structure or mouth feel, our oak alternatives help you fine tune your tone to rock the perfect composition.

Derived from the same oak selection as our barrels, our range of alternatives is produced to accent your artistry and respect your fruit.

Because whether you're more classic rock or techno-pop, complexity and volume never go out of style.

CENOSTAVE® CENOCHIPS® CENOFIRST® CENOBLOCK® CENOSTICK®

INSPIRED BY THE PAST,
BUILT FOR THE FUTURE
info@seguinmoreau.com | +1.707.252.3408
seguinmoreaunapa.com

CARY WILTON/THE HILT ESTATE

stems. We're not sure they're always a godsend. They can often be a curse," he said. "As our vines mature, we're using more. But our younger vines planted in 2007 are just starting to get in the window where stems are acceptable."

The Hilt's small lot tanks range from 4 to 10 tons each. While Dees said that red wine fermentations vary, his go-to method is cold soaking for 10 to 12 days with very gentle pump-overs but not until there's a solid cap. He generally does no more than two to three punch-downs—which are run on rails throughout the winery—per tank for the entire vintage. The tanks are then drained and pressed in a Diemme 23hL basket press. All free-run is kept separate, though in the case of whole cluster inclusion, they play with reintroducing press fractions back into the free-run.

For Chardonnay, Dees works with both a basket press and bladder press. For the basket press, he uses a layering technique—which he likens to "making a club sandwich"—of stems and a half-ton of grapes in the basket press, which results in better yields, though still smaller than via bladder press. "The marriage of the regular bladder press and basket press together are a match made in heaven," he said.

The Chardonnay then goes to barrel in the white wine cellar. Dees said that his team "tries" to get them through malolactic fermentation (MLF), but the PH is so low from their vineyard sites that it's "difficult for the bacteria to survive or get a foothold." Of the 40 percent he inoculates, roughly 25 percent make it through malolactic.

After 12 months of barrel aging (plus six months of stainless steel for single-vineyard wines), the Chardonnay is bottled. The Hilt utilizes 35 percent new oak with barrels coming from François Frères, Stockinger, Lorenzon and Sirugue.

THE UNDERGROUND

When you head down the steps from the first floor to the cellar, passing artwork done by Dee's children in the stairwell, you really understand his train station analogy: it's a long, narrow and seemingly unending concrete structure divided by pillars.

It's here that the second half of the red winemaking process occurs as the press is drained to barrels via gravity. It's also where Dees' goal of efficiency is most visible. There are no forklifts, and everything is moved with a large pallet jack. Moreover, all 1,800 barrels of varying sizes, including some cigar barrels, are on OXOline racking systems.

"We love the opportunity to do bâtonnage without any occupation. We can simply roll the barrels. You pull in place, you move, clean, steam, rinse and fill in place," said Dees. "In the old spot, if you wanted one barrel, you had to



Protect Your Nectar

To order new bungs,
call (415) 457-3955
staff@boswellcompany.com

www.boswellcompany.com



come in and move like 600 barrels. We almost had our crew crying, it was so efficient. It was such a funny thing to see that, all of a sudden, it doesn't take 12 hours of community forklifting a day: you just fill a barrel."

The Hilt uses roughly 8 percent new French oak for Pinot Noir, which is aged in barrel for 12 months. Dees uses Dargaud & Jaeglé barrels, Francois Frères MT, Marcel Cadet medium toast and Bruno Lorenzon. "We might be the only company using [Lorenzon] in the state, but it's been incredible with our Pinot Noir," said Dees. "It's difficult to find a marriage that works with Pinot, that's symbiotic with our fruit. These have been really effective at 8 to 10 percent."

Most of the "underground train station" is taken up by barrels, but there are a number of tanks as well. This includes 1,200-gallon rectangular tanks used to drain the tanks upstairs and then relocate the wine to barrel, in addition to six 4,400-gallon blending tanks, which are later pumped back up to the bottling truck outside. Primary blending trials are held in late spring following harvest, and there is no racking done prior to moving the blends to stainless tanks. For smaller lots, The Hilt does have its own bottling line.

The new winery has enabled Dees to fine-tune the winemaking process, not necessarily to reflect his style of winemaking but to truly let the vineyards do the talking. "As a winemaker, you can sandpaper or chisel. We take the sandpaper route," he said. "We've always seen ourselves as great listeners and great observers of our vineyards. I would never minimize the role of winemaking; we do make it very diligently. We're focused and precise. But as far as the style we make, we came into it saying, 'Let's see what kind of wine this vineyard makes.' It has a voice, a very loud voice, and we don't try to change that."



THE HILT ESTATE

The Final Piece

In May of 2021, The Hilt plans to open the hospitality side of The Hilt Estate, which is consistent with the facade of the winery and was also built by Backen. The interior is being designed by Amber Interiors, based in Los Angeles. Guests will have the option to choose from several tasting flights that showcase wines from both The Hilt and JONATA portfolios, and there will be an array of different spaces to accommodate a range of interests.

"Our vision is to create a place where wine lovers can take their time to discover our estates and the region as a whole," said The Hilt Estate Director Armand de Maigret. "We want to be a gateway to Sta. Rita Hills, the go-to place to visit in Santa Barbara County. We hope to make greater Los Angeles discover the wine country in their backyard and fall in love with it." **WBM**

BTB Beverage Company

- Full-service production, packaging, and canning for ready-to-drink wine cocktails, hard seltzers, ciders, spritzers, beer and spirits.
- Separate facility dedicated to alternative beverage production including all equipment; tanks, pumps, mixers, filters, hoses, etc.
- An experienced team of fermentation, blending, carbonating, and compliance professionals ready to deliver your next beverage project.

**Wine Bottling
Services
Available**



Call us to discuss your new projects
Contact Matthew Glynn
at 707-492-5270
matthew@bintobottle.com

WINES & VINES
BUYER'S GUIDE

Select
Oak Alternative Vendors

This list of select vendors is generated using the Wines & Vines Buyer's Guide.
To see a full list of vendors please visit: winesvinesanalytics.com/buyersguide

AFTEK Inc.
Rochester, NY ☎ 585-458-7550
www.aftefilters.com

Agrovin USA
Windsor, CA ☎ 707-782-6371
www.agrovin.com/en.html

Amalé Oak Importers, LLC
Lafayette, CA ☎ 707-455-1095
www.amaleoak.com

ATP Group
Windsor, CA ☎ 707-836-6840
www.atpgroup.com

Ausvat
Willunga, SA ☎ 6-188-557-1022
www.ausvat.com

Barrel Blasting, Inc.
Napa, CA ☎ 707-312-9084
www.barrelblasting.com

Barrel Builders Inc.
Calistoga, CA ☎ 707-963-9963
www.barrelbuilders.com

Bayard Fox Selections
Napa, CA ☎ 707-812-4554
www.bayardfoxselections.com

Bernard Tonnellerie
Cloverdale, CA ☎ 707-633-4254
www.tonnellerie-bernard.com

Berthomieu Tonnellerie
Cloverdale, CA ☎ 707-224-2377
www.berthomieu.com

Black Swan Cooperage, LLC
Park Rapids, MN ☎ 218-237-2020
www.blackswanbarrels.com

Bouchard Cooperages

Napa, CA ☎ 707-257-3582
www.bouchardcooperages.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Cubes, Oak Segments, Oak Staves

TYPES OF OAK: French Oak

Brewmaster
Pittsburg, CA ☎ 800-288-8922
www.brewmasterwholesale.com

BSG Handcraft
Shakopee, MN ☎ 800-999-2440
www.bsghandcraft.com

BSG Wine

Shakopee, MN ☎ 800-585-5562
www.bsgwine.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Cubes, Oak Powder, Oak Tank Staves, Spirals

TYPES OF OAK: American Oak, French Oak

Canton Cooperage
Santa Rosa, CA ☎ 707-843-4407
www.cantoncooperage.com

Cellar-Tek
Kelowna, BC ☎ 250-868-3186
www.cellartek.com

CFP Winemakers
Pittsburg, PA ☎ 412-232-4507
www.cfpwinemakers.com

Charlois Cooperage USA
Cloverdale, CA ☎ 707-944-1371
www.charloiscooperageusa.com

Classic Oak Products
Belrose, NSW ☎ (02) 9479 4700
www.classicoakproducts.com

Cooperages 1912 Napa
Napa, CA ☎ 707-255-5900
www.cooperages1912.com

Core Enology Group
McMinnville, OR ☎ 971-237-5071
www.enologygroup.com

Creative Oak
Benicia, CA ☎ 707-752-6350
www.creativeoak.com

Davison Winery Supplies
McMinnville, OR ☎ 503-472-1711
www.dwinesupplies.com

Demptos Napa Cooperage
Napa, CA ☎ 707-257-2628
www.demptosusa.com

Enartis
Windsor, CA ☎ 707-838-6312
www.enartis.com

Erbslöh Geisenheim GmbH
Geisenheim, Germany ☎ 496-722-7080
www.erbsloeh.com/en

Ermitage Tonnellerie
Cloverdale, CA ☎ 707-224-2377
www.tonnellerie-ermitage.com

Fine Northern Oak

Napa, CA ☎ 707-307-6222
www.finenorthernoak.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Crosscut Staves, Crosscut Chains, Oak Staves, Oak Inserts

TYPES OF OAK: French Oak, American Oak

Flextank USA
Vancouver, WA ☎ 877-407-3348
www.flextankusa.com

France Chêne
Artiguelouve, France ☎ 33559-983-1954
www.france-chene.com/en/

G3 Enterprises

Modesto, CA
☎ 800-321-8747
www.g3enterprises.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Chips Blend, Oak Staves, Oak Barrel Inserts

TYPES OF OAK: French Oak, American Oak

Gino Pinto, Inc.
Hammonton, NJ ☎ 609-561-8199
www.ginopinto.com

Gusmer Enterprises

Fresno, CA ☎ 559-485-2692
www.gusmerwine.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Powder, Oak Blocks

TYPES OF OAK: French Oak, American Oak

GW Kent, Inc.
Ypsilanti, MI ☎ 734-572-1300
www.gwkent.com

Heinrich Cooperage
Tanunda, Australia ☎ 707-935-3452
www.heinrich.com.au

Innerstave, LLC
Sonoma, CA ☎ 707-996-8781
www.innerstave.com

J Rettenmaier USA
Shoolcraft, MI ☎ 269-679-2340
www.jrsusa.com

Laffort USA
Petaluma, CA ☎ 707-775-4530
www.laffortusa.com

LaGlasse Company
Varize, France ☎ 33038-764-2778
www.laglasse.net

Le Grand USA
Walla Walla, WA ☎ 707-738-7465
www.legrandusa.com

Leroi Tonnellerie
Cloverdale, CA ☎ 707-944-1371
www.tonnellerie-leroi.com

Les Tonnelleries De Bourgogne
Meursault, France ☎ 33038-025-9255
www.tonnelleries-bourgogne.com

Lodi Winery Laboratory
Lodi, CA ☎ 209-339-1990
www.lodiwinelabs.com

Magreñán Tonelería
Cloverdale, CA ☎ 707-633-4254
www.magrenan.es

MoreWine! Pro
Pittsburg, CA ☎ 800-600-0033
www.morewinepro.com

Nadalié USA
Calistoga, CA ☎ 707-942-9301
www.nadalie.com / www.oakaddins.com

Napa Barrel Repair Shop
Napa, CA ☎ 707-253-1182
www.napabarrelrepair.com

Napa Fermentation Supplies

Napa, CA ☎ 707-255-6372
www.napafermentation.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Cubes, Oak Powder, Oak Segments or Inserts, Oak Tank Staves, WineSticks

TYPES OF OAK: French Oak, American Oak

New World Winery Equipment
Springfield, MO ☎ 607-426-0434
www.enotools.com

Nuance Winery Supplies
St. Catharines, ON ☎ 289-929-1671
www.nuancetrade.com

Oak Infusion Spiral by The Barrel Mill
Avon, MN ☎ 800-201-7125
www.infusionspiral.com



Oak Bean. StaVin produced the first oak bean, a sawn cube of oak which extracts much faster than staves but in a much slower and more controlled manner than any type of oak chips. The Bean provided winemakers with a quicker method to introduce oak flavors and aromas, without the harsh characteristics often associated with oak chips.

Fire-Toasting. Invented first system to consistently fire-toast and perfect barrel alternative oak staves to truly replicate barrel flavors and aromas—without the barrel. A winemaking first.

Express Oak. Progressively refined and perfected the pure and concentrated essence of a three-year seasoned & fire-toasted French oak barrel into a liquid form. Express Oak's unique method of extraction allows it to instantly and elegantly integrate with wine or spirits. Typically used as a finishing tool, it can elevate a great wine to an exceptional one.

Barrel Fingerprinting. By way of qualitative and quantitative research & development, StaVin created a unique system to mimic and deliver the subtle aromatics and nuanced flavor profiles of whichever particular barrel a winemaker chooses.

Trial Packs. StaVin designed and introduced an easy to use trial pack which enables winemakers to optimize their particular barrel alternative needs for any wine, in one week.

Macro-Aeration. StaVin championed the use of macro-aeration during the fermentation and production of red wines. The natural presence of pyrazine-based compounds and small chain alcohols and aldehydes can give new wines distinctly green characteristics. These "green" compounds have extremely low aroma thresholds, and macro-aeration during fermentation reduces these characteristics by encouraging the dissolution of CO₂ dissolved in the must.

3-Year Seasoning. StaVin is the only company that seasons all of its oak in open air for a full 3 years. Through numerous trials we've found 3 years to be the optimal seasoning time for all staves before toasting. This minimizes harshness while maximizing flavors.

Fan Packs. By listening to feedback from winemakers and cellar hands StaVin conceived and developed the first oak stave Fan Pack, and easy to employ tank system. By way of C-rings welded to the walls of tanks the Fan Packs attach either directly or along a sanitary stainless chain, depending on tank size. Choice of type and amount of Fan Packs offer great convenience and control when loading staves in tanks.

Oak Calculator. Created an easy to use oak calculator, to assist winemakers with decision making. Using the StaVin Trial Pack, a winemaker can determine exactly the type of oak and percentage of new barrel impact desired for their vintage. The Oak Calculator can then be used to ascertain the amount of desired product needed for the volume of wine they need to treat.

Barrel Head. A wine industry first; StaVin innovated the combining of specially heated French oak with fire-toasted oak to effectively mimic high end French barrels without toasted heads. Barrel Head adds texture and mouthfeel to most wines, giving winemakers yet another tool to enhance their wines.

Optimal Stave Thickness. Working with the advice of Dr. Vernon Singleton, StaVin determined the optimal thickness of oak staves should be 10 millimeters (3/8") in order to best maximize extraction of flavors over a 2-year period. This recognized the fact that the average penetration of wine diffusing into a barrel stave was a depth of 4 to 6 millimeters.

Tank Systems. Developed two easy-to-use stave systems for use in small and larger tanks. The Modular system for small tanks and Matrix system for larger tanks. Both systems were developed to allow winemakers the expansion of wine programs without purchase of additional barrels.

Infusion Tube. Developed, fabricated and patented the Infusion Tube, a perforated stainless steel through-the-bung device. Quick and easy to reload, it delivers toasted flavors and aromas without the need to remove heads on old neutral barrels.

Metallized Bags. StaVin introduced the use of food grade metallized polyethylene bags. These hermetically-sealed bags lock in delicate flavors and aromas, while locking *out* oxygen and any undesirable external odors, such as TCA.

Snake System. Developed an automated system that can efficiently stir and mix yeast lees in most any tank. The StaVin Snake System is often employed in mixing tanks to improve white wine mouthfeel.

Barrel Replica. Another highly unique through-the-bung product, the Barrel Replica was created to impart flavors and aromas over longer-term maturation periods in old neutral barrels. The Replica offers the winemaker formidable flexibility. Depending on the amount of stave sections used (up to 10), and which type of oak(s) and toast level(s) are loaded, a 10% to 100% barrel impact and wide variety of flavor profiles can be achieved.

Micro-Oxygenation. StaVin created the OxBox Micro-Oxygenation System to enable airtight stainless steel tanks to breathe, exactly like oak barrels. When paired with toasted and untoasted French oak, this system fine-tuned winemakers' control over flavors, aromas and maturation while mimicking the particular barrel of their choice.

Savour Oak. Developed Savour Oak oven toast Barrel Alternatives. Initially for use in fermentation of red wines, this special toast promoted maximum development of aldehyde compounds, which would then infuse into the fermenting must. In turn saving acetaldehyde, produced by yeast, and directly reacting with anthocyanins to initiate stabilization of color. Further reactions with tannins may also help build mouthfeel.

In-Tank Bags. StaVin's versatile C-ring chain system enabled winemakers to attach food grade nylon mesh bags filled with oak Stave Segments and oak Beans to large tanks for wines which needed faster oak extraction than what oak staves could provide.

Barrel Insert. StaVin developed a simple yet effective system to insert and retain staves in barrels. This unique, easy to load system provided winemakers the flexibility of which and how much oak to employ to any lot of wine.

Winemakers worldwide trust VINEA
The global leader in French oak alternatives



Center of France origin • Air dried 36 months



The Boswell Company
(415)457-3955
staff@boswellcompany.com

WINES & VINES
BUYER'S GUIDE

Select
Oak Alternative Vendors

Oak Solutions Group

Napa, CA ☎ 707-259-4988
www.oaksolutionsgroup.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Cubes, Oak Powder, Oak Segments or Inserts, Oak Tank Staves, Tannin

TYPES OF OAK: French Oak, American Oak

Oak Tradition

Walla Walla, WA ☎ 509-200-9157
www.oaktradition.com

Oak Wise

Lodi, CA ☎ 209-224-5353
www.oak-wise.com

OCI

Waverly, OH ☎ 740-947-4159
www.oakchipsinc.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Cubes, Oak Segments, Oak Shavings, Nu-Oak, Oak Barrel Insert Sticks, Tank Staves

TYPES OF OAK: French Oak, American Oak

Oenofrance USA, LLC

Petaluma, CA ☎ 707-252-8270
www.oenofrance.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Powder, Oak Segments or Inserts, Oak Tank Staves

TYPES OF OAK: French Oak, American Oak

Oenowood International

Cognac, France ☎ 3351-722-4002
www.oenowood.com

Pickering Winery Supply

San Francisco, CA ☎ 415-474-1588
www.winerystuff.com

Presque Isle Wine Cellars
North East, PA ☎ 814-725-1314
www.piwine.com

Quality Wine Barrels Cooperage
Santa Maria, CA ☎ 805-481-4737
www.qualitybarrels.com

Quercus Concepts

San Francisco, CA ☎ 707-775-7065
www.oakalternatives.com

Santé Beverage Supply

Raleigh, NC ☎ 919-522-5937
www.santebeverage.com

Saury Tonnerrie

Cloverdale, CA ☎ 707-633-4254
www.saury.com

Scott Laboratories, Inc.

Petaluma, CA ☎ 707-765-6666
www.scottlab.com



TYPES OF BARREL ALTERNATIVES: Thermic Bung Inserts, Thermic Cubes, Thermic Fan

TYPES OF OAK: American Oak

Seguin Moreau Napa Cooperage



Napa, CA
☎ 707-252-3408
www.seguinmoreaunapa.com

TYPES OF BARREL ALTERNATIVES: OenoStaves, Oak Staves, Oak Blocks, Oak Chips, Oak Sticks, OenoFinisher

TYPES OF OAK: French Oak, American Oak, European Oak

StaVin, Inc.

Sausalito, CA
☎ 415-331-7849
www.stavin.com



TYPES OF BARREL ALTERNATIVES: Fans, Segments, Beans & Long Beans, Chips, Inserts

Suber Lefort Group Pty Ltd

Nuriootpa, SA ☎ 6188-562-3420
www.suberoak.com

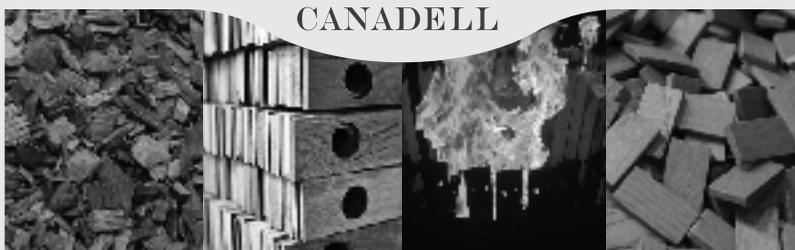


BOUCHARD COOPERAGES

A commitment to quality and customer service.



CANADELL



Premium French Oak fire & convection toasted Fans, Barrel Inserts, Dominos & Chips

*Aqueous

CHÊNE-oelogie
FRENCH OAK TANNIN



Excellence Tannin
TOASTED
French Oak Tannin

Structure Tannin
UNTOASTED
French Oak Tannin

Also available from Bouchard Cooperages



WWW.BOUCARDCOOPERAGES.COM
sales@bouchardcooperages.com • (707)257-3582

bouchardcooperages Bouchard Cooperages

weOAK.
BY VICARD



THE PRECISION ALTERNATIVE

WWW.GROUPE-VICARD.COM



CONTACT • 3462 Willis Drive Napa CA 94558 • TEL: (+1) 707-699-1103 • EMAIL: office@vicard-usa.com

The Boswell Co.

San Rafael, CA
☎ 415-457-3955
www.boswellcompany.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Segments or Inserts, Oak Tank Staves

TYPES OF OAK: French Oak

TN Coopers

Sonoma, CA ☎ 707-996-5600
www.tncoopers.com

Toasted Oak Co.

Placerville, CA ☎ 530-344-1121
www.toastedoakinc.com

Tonnellerie de Jarnac

Napa, CA ☎ 707-332-4524
www.tonnelleriedejarnac.com

Tonnellerie Du Monde

Beychac-et-Caillau, France
☎ 055-672-8200
www.tonnelleriedumonde.fr

Tonnellerie Quintessence

Beychac et Caillau, France
☎ 707-935-3452
www.tonnelleriequintessence.fr

Tonnellerie Radoux USA

Santa Rosa, CA ☎ 707-284-2888
www.radouxcooperage.com

Trust Cooperage

Napa, CA ☎ 561-540-4043
www.trustcooperage.com

Vadai Barrels / Vadai Wine LLC

Drain, OR ☎ 626-289-8250
www.vadaiwinebarrels.com

Vicard USA

Napa, CA ☎ 707-699-1103
www.groupe-vicard.com



TYPES OF BARREL ALTERNATIVES: Oak Chips, Oak Blocks, Oak Cubes, Mini Staves, Oak Staves

TYPES OF OAK: French Oak

Vines to Vintages, Inc.

Jordan, ON ☎ 905-562-0142
www.vinestovintages.ca

Vivelys USA - Oenodev, Inc.

Santa Rosa, CA ☎ 707-546-2213
www.vivelys.com

Wine and Beer Supply, LLC

Ashland, VA ☎ 844-482-9463
www.wineandbeersupply.com

Winemaker Products LLC

Milford, CT ☎ 203-506-9500
www.winemakerproducts.com

WineStix

Waterloo, NY ☎ 315-246-8266
www.winestix.com

XtraChêne

Santa Rosa, CA ☎ 707-843-4407
www.xtrachene.fr

FINE NORTHERN OAK

★ THE BEST OF AMERICAN OAK

www.finenorthernoak.com • 707-307-6222 • info@finenorthernoak.com

EXCELLENCE IN WOOD FOR YOUR *Wine*

OCI
FINE APPALACHIAN OAKS

WAVERLY, OHIO | 800.STAVE10 | WWW.OAKCHIPSINC.COM

OENOFRANCE USA

CHEERS TO ANOTHER HARVEST!

EXPRESS THE FULL POTENTIAL OF YOUR GRAPE WITH OUR OENOQUERCUS OAK RANGE OF PRODUCTS.

Soaking chips takes too long?

Inquire about setting a trial with our Dynamic Infuser to cut the extraction of oak chips and domains down to 2 weeks with better and longer lasting integration.

Please contact your representative for details.
Carmen Giuffrè: cgjuffre@oenofranceusa.com
Fabien Machard de Gramont: fmag@oenofranceusa.com
Ph: +1 (707) 971-8270 - Fax: +1 (707) 971-8260
www.oenofrance.co/us

Organic Weed Control Just Became Difficult Again

Loss of an organic herbicide sets organic growers back to where they used to be

Mark Greenspan

WHETHER AN ORGANIC GROWER or not, weed control using herbicides has been quickly falling out of fashion. In the earliest part of this century, foul-smelling pre-emergence herbicides were being eschewed for their potential destruction of soil-borne life and potential danger to higher animals despite their long-lasting ability to control unwanted vegetation. Growers were proudly proclaiming “Roundup-only” weed control, with the belief that the softer chemical glyphosate would be an acceptable way to control weeds without long-term degradation to the soil and to humans and higher animals. And frankly, glyphosate was a wonder drug for weed control, as it translocates throughout the plant and not only kills the foliage, but also the roots, providing long-term control for weeds, theoretically without danger to animals, humans or the environment.

But since the Roundup-only movement started, glyphosate has been given a couple of dark, bloody and swollen black eyes, whether deserved or not. The public simply does not want growers to use glyphosate, feeling it to be unsafe and potentially carcinogenic to humans. While glyphosate’s true hazard to humans remains in question, the general public has taken a firm stand against it and numerous wineries are steadfast in their stance against growers using any of that herbicide. While glyphosate may or may not be as dangerous as the general public seems to be convinced of, there is reason to be concerned about its impact on soil health. Glyphosate blocks the shikimic acid biochemical pathway in plants. That’s convenient since humans and higher animals do not have such a process and, hence, the chemical can kill plants without harming humans. But bacteria do have a shikimic acid pathway and soil bacteria, including the countless beneficial ones, can potentially be damaged by glyphosate.

So, if pre-emergent herbicides and glyphosate were off the table, the only alternatives for conventional growers were and are contact herbicides, which kill the foliage they come in contact with, but do not translocate within the plant. This means that, if the root system were strong enough, the weed could re-grow and require either re-application of herbicide or mechanical removal.



Dr. **Mark Greenspan** has more than 30 years of scientific viticulture research and viticultural field experience. He specializes in irrigation and nutrition management, yield and canopy management, vineyard climate and microclimate, vineyard design and vineyard technologies. He is the founder of Advanced Viticulture, Inc. based in Windsor, California (www.advancedvit.com), providing consulting, technology and automation, vineyard management and vineyard development for wineries, winemakers and wine growers devoted to producing premium wines. Please direct queries to mark@advancedvit.com or 707-838-3805.

The Holy Grail?

It seemed like we finally got what we needed for with a product called Weed Slayer. Introduced late in 2017 its active ingredients were eugenol (clove oil) and molasses. It was packaged with a companion product called Agro Gold® WS, which was an activator-like product required to be applied in the same tank as the herbicide. After its introduction, it was pulled from the market for a brief period of time because the Agro Gold product was proprietary and its contents needed to be disclosed before it could be listed as organic. The secret ingredient was reportedly *Bacillus thuringensis*, a bacteria commonly used as an organic insecticide. The activator differentiated Weed Slayer from other eugenol products in that it allowed for entry into the plant by the herbicidal ingredient.

Duarte Nursery

35"
UberVine™

Clean Plants

Tons and tons of reasons

- Ultra clean rootstocks
- 100% containerized
- Certified virus free clones
- 2010 protocol selections

24"
MagnumVine™

12"
Standard

Clonal Field Days Harvest 2021 - For more details visit DuarteNursery.com

Stefan Daniels
North Coast
Central Coast
415-309-3930

John Arellano
San Joaquin Valley
559-804-6949

Tia Russell
North Coast
Southern Oregon
209-815-2399

Joel Myers
Oregon
503-435-8932

sales@duartenursery.com



Clean, Clonal, Containerized
1-800-GRAFTED

duartenursery.com | Hughson, CA



Clean Plants
For Your Future™



TOURS • TRADE SHOW • LUNCH

24TH ANNUAL Friends Day

RSVPmarketing@duartenursery.com

FRIDAY, MAY 7TH, 2021 | 9 AM - 2 PM

CA CARLSEN & ASSOCIATES

WINERY EQUIPMENT · FITTINGS · SERVICE



For all of your winery equipment needs



707-431-2000 WWW.CARLSENASSOCIATES.COM

Organic Weed Control Just Became Difficult Again

No, Just a Beacon

It was what we all had been desperately seeking: an organic herbicide that not only worked but worked well. Visually, it behaved very similarly to glyphosate. That is, it took a couple of weeks before any symptoms of kill occurred. After that, weeds would turn chlorotic and die. It wasn't perfect and it was finicky as to selection of spray adjuvants. We used it in our farming company and found that it worked very well. Excited by those results, I heartily recommended the product to our clients who farm organically, and it seemed like most of my colleagues in the industry were also on the bandwagon.

But, if something seems too good to be true, it often is just that. In early December, the California Department of Food and Agriculture (CDFA) issued a stop use order on the Agro Gold WS product, indicating that the non-organic herbicides glyphosate and diquat had been found in samples. Whether those ingredients were intentionally introduced by the manufacturer or not, the fact is that the product was not organic, despite the label indicating that it was.

Damn.

So, now we're back to where we were a few years ago. Non-organic growers have many other herbicide tools in their pockets, but those are not without their pitfalls, as I indicated previously. But organic growers lost a tool that seemed to be their holy grail while, in truth, it was just a grail-shaped beacon projected by the handmaiden Zoot from the Castle Anthrax (if you need to ask what that means, don't worry about it).

Are there alternative organic herbicides on the market? We've seen many come and go—other Eugenol-based products, acetic acid products and even corn gluten. None of them really seemed to impress. Supress® is an herbicide that uses Caprylic and Capric acids as active ingredients (per the product label). It is essentially a burn-down, contact herbicide. It seems to be effective but is finicky about the spray surfactant and solution pH (so was Weed Slayer for that matter). It is mainly effective on seedlings and early growth stages of weeds. More established weeds will burn a bit but will often not be destroyed. That said, it's really the only other feasible material to use as an organic herbicide at this point.

Other Methods of Weed Control

Besides chemicals, we do have other ways to manage weeds. This isn't news to anyone, but since we lost Weed Slayer, we're having to go back to methods we used to rely on but had maybe let rest for a while.

Mechanical tillage is an alternative for many growers. Weed knives, that slice just below the soil surface and remove weeds without much soil disturbance, are a popular method. They work fine in soils that don't have a lot of rocks on their surface. And for weeds that don't have thick stalks, which may re-grow after their heads have been sliced off. We've also seen many soil moisture probes decapitated by weed knives, so they aren't perfect.

Alternatives or adjuncts to weeds knives include rotary cultivators, which can be used with or without the weed knives. They do a better job at moving the soil and loosening weeds that the weed knife may miss. They can also be used on rockier soil surfaces, since their rotation can jar smaller rocks loose. However, they're not perfect and require a slow-moving tractor for their operation. Run that tractor too fast and you may take out a vine or two as the unit begins to retract out of its way.



Industry-funded research through the
AMERICAN VINEYARD FOUNDATION
leads to more economical grapegrowing,
and your support makes it happen.

Conservative estimates place mealybug management costs to growers in the range of \$200 - \$500 per acre. Effective control strategies have been developed through research by Kent Daane, Jocelyn Millar, Rodrigo Almeida and Monica Cooper, providing growers with:

*Doctors Kent Daane
and Monica Cooper*

- guidance to pesticide efficacy and application timing
- discovery of the value of ant control for mealybug suppression
- synthesization of a commercialized mealybug mating pheromone, and more...

Our better understanding of mealybug virus transmission, along with the methods developed for tracking and treatment, have now given our growers effective control practices.

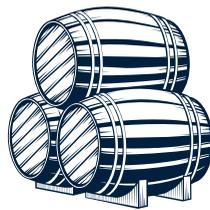
AVF-funded research drives our industry into the future while saving our farmers money *now*.

For a wealth of useful viticulture and enology research and information, visit AVF.org, ngr.ucdavis.edu, asev.org, or graperesearch.org

AMERICAN VINEYARD FOUNDATION

P.O. Box 5779, Napa, CA, 94581 • tel (707) 252-6911 Visit our Web site at www.avf.org for information on funding and current research projects

PRIVATE



BARREL AUCTION

AUCTION OF WASHINGTON WINES

PRESENTED BY
WINEBOW FINE WINE & SPIRITS

APRIL 19 & 20, 2021

ONLINE | LIVESTREAM

EXTRAORDINARY WINES MADE ONE TIME ONLY

Thirty of Washington state's most notable winemakers have created 5-case lots with exclusive ownership rights. Each wine showcases the very best that Washington state has to offer.

This is an event for licensed retail, on-premise buyers and qualified collectors.

PARTICIPATING WINERIES

Aquilini	DeLille Cellars	Leonetti Cellar	Treveri Cellars
Baer Winery	Dunham Cellars	Novelty Hill	Two Vintners
Barrage Cellars	Doubleback	Owen Roe	van Löben Sels Cellars
Betz Family Winery	Dusted Valley	REININGER Winery	Walla Walla Vintners
Brian Carter Cellars	J. Bookwalter	Seven Hills Winery	Woodward Canyon
Col Solare	Januik Winery	Sleight of Hand Cellars	
Columbia Crest	Lauren Ashton Cellars	Sparkman Cellars	
Côte Bonneville	L'Ecole No 41	Syncline Winery	



REGISTER ONLINE

Scan this code to access the auction site, or go to our Upcoming Events page to learn more about the Private Barrel Auction: <https://auctionofwawines.org/events/private-barrel-auction>

2021 SPONSORS

Winebow | Northwest Farm Credit Services | Washington Wine Commission | Trysk Print Solutions | Tonnellerie Quintessence | TW Boswell
G3 Enterprises | DIAM | everyvine | Pollen Systems | Wine Business Monthly | Bloom | Doubleknot Creative

Organic Weed Control Just Became Difficult Again

For those hydraulically powered units, in-row vine spacing is a very important factor in their effectiveness. Modern vine spacings down to 3 feet or a meter are often too small for the powered devices to penetrate into the vine row and retract quickly enough to avoid vine damage. So, they often require settings that reduce their penetration under the vine. We usually find that in-row vine spacings of 4 feet or greater are amenable to those mechanical forms of tillage.

Another type of device that seems to have its place is the “finger roller” type of cultivator. Rather than its rotation being powered by hydraulics, it is more of a passive roller device with fingers that reach into the soil and turn it up as it rotates along the ground and near and under the vines. These implements have promise but are usually not sufficient to operate on their own. They can’t penetrate hard ground or rocks, so a pass with a weed knife or similar tool is often needed to pre-loosen the soil before using a finger roller. On the other hand, sandy soils are much more amenable to the passive finger roller type of device.

Other mechanical devices include under-row mowers, which do not kill weeds, but keep them in check by mowing. There may be advantages to mowing under the rows rather than cultivating, as mowing doesn’t disturb soil structure or impair fungal mycelial formations like cultivations tools can do. Berm sweepers are not really meant to remove weeds but can take out some small weeds. Some of the heftier sweepers have rather stiff nylon bristles that may indeed perform some weed removal. As long as weeds aren’t too large or thick, the rolling brush types of implements may actually be an important tool for weed control. And they can sometimes be rotated to perform trunk suckering as well.

This begs the question about sustainability (which I’ve asked before). Which is more sustainable? Applying a non-organic herbicide to the soil to control weeds or running multiple tractor passes through a vineyard to control weeds, all the while burning fossil fuels and potentially compacting the soil by the tractor wheels (or tracks).

Hot air may be used to control weeds without, or in conjunction with, tillage or herbicides. This can be in the form of a flame or a blower producing very hot air. The idea is to rupture weed plant cells from the brief blast of intense heat—not to burn them up. These devices can work but require a lot of fuel and must only be used during the winter when conditions are not dry and wind is not blowing.

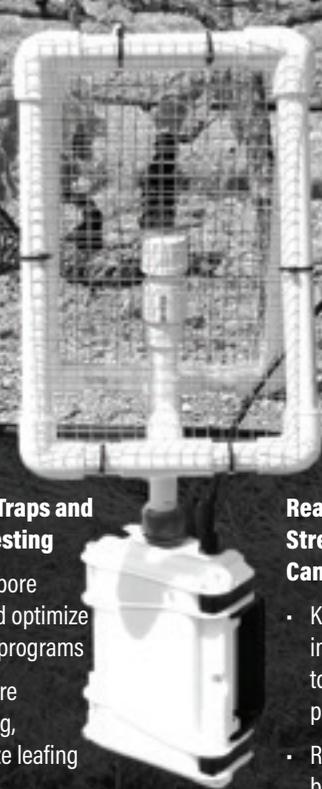
Sheep may be used for weed control as well. These living mowers will do a very effective job at trimming vegetation under vines and in the row middles. They don’t care where the vegetation is as long as they can reach it. And since most breeds of sheep can reach the vine canopy, it is only possible to use sheep before budbreak, as they have no problem making a meal out of grape tissue. There are ways around this, such as training sheep not to eat grape tissue (really, it has been done), but they don’t retain this training and it needs to be repeated frequently (usually by spraying something on the foliage that makes them ill). There are also miniature breeds of sheep that can’t reach the fruit zone, but they are smart and use vine trunks to boost them into the tasty grape zone.

Weed control is one of the most challenging aspects of grape growing. While we are largely growing more accepting of vineyard floors that are not perfectly weed-free, we nonetheless need to reduce the competition from weeds for the vines. Both organic and conventional growers are trying to limit their inputs and go softer on the soil (not to mention softer on their expenses). Herbicides are an easy way to control weeds but have potential impact on the soil that is difficult to overlook. We thought we had the solution but didn’t. Weed control sucks. **WBM**



CVC

Reduce Powdery Mildew Spray Costs
Lower Your Irrigation Budget



Powdery Mildew Spore Traps and Fungicide Resistance Testing

- Weekly field testing of spore presence to forecast and optimize fungicide management programs
- Timely results direct more effective fungicide timing, chemistries and prioritize leafing schedules

Real Time Vineyard Water Stress Monitoring using Canopy Temperatures

- Know when water stress begins in real time and how much water to apply to maintain the desired plant water status.
- Real time soil moisture probes can be included in the CVC system.

Contact CVC for details
 Bryan Rahn, Michael Princevalle office: 707.965.3700 info@coastalvit.com
www.coastalvit.com

NEW... stopGEL Anti-Frost Candles

Responsible Frost Protection for vineyards & orchards





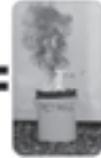
STOPGEL GREEN
100% NATURAL

+



PARAFFIN CANDLES
PETROLEUM ORIGIN

=



STOPGEL GREEN
100% NATURAL

+



PARAFFIN CANDLES
PETROLEUM ORIGIN

+



PARAFFIN CANDLES
PETROLEUM ORIGIN

VERY LOW SMOKE EMISSION

- The first anti-frost candle of 100% natural origin
 - Zero petroleum, zero paraffin
 - Renewable and environmentally friendly
- Generates 50% more energy, requiring fewer candles
 - Fast ignition – extinction at will
 - French quality and manufacturing
- Available in 6L buckets (std.) and 80L drums

For information & pricing call 800.237.4594
For online catalogs visit spectrellising.com

SpecTrellising

PREMIUM WINE SOLUTIONS

Cluster Zone Leaf Removal in the Vineyard

What's the best strategy to achieve Chablis-style Chardonnay?

Denise Gardner

Denise Gardner is a winemaking consultant focused on improvement of wine production efficiency, quality and marketability by making sound scientific decisions and enhancing winemaker education. Find out more about Denise and her consulting services at www.dgwinemaking.com or by following her @dgwinemaking on Instagram and Facebook.

RECENTLY, A WINEMAKER POSED a viticulture question to me about cluster zone leaf removal, a vineyard management strategy in which leaves surrounding the fruit zone are removed from the vine at some point during the growing season. The question was: what cluster zone leaf removal (CZLR) strategy would I recommend for Chardonnay vines grown in the Eastern United States to achieve a Chablis-style Chardonnay?

I was stumped.

My expertise is in wine production and enology, and my recommendations for vineyard management are focused on picking decisions during harvest. But when I thought about it, I wondered if the question might have been based on conversations among winemakers who weren't getting the whole picture around the purpose and execution of CZLR in the vineyard.

To find some answers, I turned to the experts. I knew three professionals who were researching or recommending CZLR techniques to grape growers, and I wanted to get to the bottom of what they were actually recommending for Eastern and Southern grape growers. This article is a summary of my interviews with Dr. Michela Centinari, associate professor of viticulture at Pennsylvania State University; Dr. Cain Hickey, viticulture extension educator at Pennsylvania State University; and Fritz Westover, vineyard advisor and founder of Westover Vineyard Advising and the Virtual Viticulture Academy.

The Purpose of Cluster Zone Leaf Removal

All three experts agreed: the primary purpose of cluster zone leaf removal is for grapevine disease control. In regions that experience higher concentrations of humidity or a high likelihood of regular rainfall through the growing season, opening up the canopy by stripping out leaves around the grape clusters improves air flow to better dry clusters and enhance spray penetration (**FIGURES 1-4**). CZLR allows the grower a better chance at producing fruit the winemaker will want, even if the weather doesn't cooperate.

As Hickey explained, "Having better control over producing clean fruit ultimately gives growers and winemakers more flexibility associated with picking decisions during harvest."

This can be especially useful for those vineyards that contain rot-prone varieties. The extra air flow helps mitigate disease presence during seasons that may instigate more rot production.

Westover added that there may be additional benefits associated with the practice, including earlier initiation of methoxypyrazine reduction during the growing season. This can be beneficial for red grape growers who want to reduce the incidence of green bell pepper flavors in their wines, an aromatic component not typically desired by winemakers. There's also evidence that CZLR techniques could increase anthocyanins and phenolics in fruit, which are components winemakers look for in red grape varieties.

Furthermore, Westover indicated that cluster zone leaf removal can be used as an insect control technique for those vineyards that experience high spotted winged drosophila (SWD) or grape berry moth (GBM) pressure. "Getting sprays fully applied to the fruit clusters is essential in these cases," Westover explained.

Implementing CZLR for the Vineyard

All three of these professionals agreed that the use and degree of CZLR techniques needed evaluation on a site-by-site basis. In some incidences, recommendations on the number of leaves removed may also vary based on vineyard blocks within the site. Furthermore, there are considerations for grape variety or cultivar. For those growing both *Vitis vinifera* and hybrid grape varieties, there tends to be a general benefit in using CZLR on *vinifera* varieties over hybrids as many hybrid varieties generally have better disease resistance (**FIGURES 5-6**). Also, there's little scientific evidence to point to chemistry or sensory advantages from CZLR in many hybrid varieties.

For grape growers who want to use CZLR techniques in their vineyard, when should they remove leaves? The experts recommended starting with early budding varieties and then moving onto later budding varieties to give the grower more time to remove leaves at the right moment. The timing, extent and magnitude of leaf removal appear to matter when it comes to cluster zone leaf removal.



ALL PHOTOS CAIN HICKEY

FIGURE 1: Chardonnay vine before leaf removal



FIGURE 2: Chardonnay vine with two leaves per shoot removed



FIGURE 3: Chardonnay vine with four leaves per shoot removed



FIGURE 4: Chardonnay vine with six leaves per shoot removed

Wonderful nurseries™

SEASON AFTER SEASON, NORTH AMERICA'S LEADING GRAPEVINE NURSERY

Quality grapevines don't grow overnight. In fact, the knowledge and skills behind the process take years to cultivate. That's why smart growers place real value in the experience and leadership of Wonderful Nurseries. Year after year, season after season, we have been innovators in growing technology and in delivering the industry's most tested vines.

We believe in the philosophy of "Growers First", and that has enabled us to remain first choice for many of the nation's most respected growers. As North America's largest grapevine nursery, we are proud to be recognized as a driving force of loyalty and stability for our grower partners.

WONDERFUL NURSERIES, SETTING THE STANDARD FOR OVER 30 YEARS



SERVING YOUR VINE, ALMOND AND PISTACHIO TREE NEEDS



[WonderfulNurseries.com](https://www.WonderfulNurseries.com) 661.758.4777
27920 McCombs Road, Wasco, California 93280

© 2021 Wonderful Nurseries LLC. All rights reserved.
WONDERFUL, WONDERFUL NURSERIES and the accompanying logos are
trademarks of Wonderful Nurseries LLC or its affiliates.



We can handle your projects from SS tank Design and Fabrication to turnkey installation. Call: 559-233-7116



Cluster Zone Leaf Removal in the Vineyard



FIGURE 5

FIGURE 5: Well-exposed clusters of Cabernet Franc ready for harvest

All of the experts cautioned commercial growers to be careful when following techniques outlined in published research papers. As they pointed out, scientific research designs that evaluate these techniques are pushing boundaries to look for potential effects. If a grower has not previously used CZLR techniques, Centinari noted, “Generally, pulling leaves from both sides of the canopy is not recommended in warm/hot regions. Furthermore, maybe only start out exposing 50 to 60 percent of the fruit instead of 100 percent fruit exposure if you’re unsure how this technique will affect your fruit.”

The timing for pulling leaves is an essential part of the treatment’s success, and berry size on the clusters is often used as an indicator for when to pick leaves. It is important to expose fruit to sunlight early in the season, typically by the time the berry reaches the size of a pea, in order to reduce the risk of sunburn in warm/hot climates. Hickey commented that he tries to get leaves removed when the berries are peppercorn-sized. If the leaves are removed later, when berries are larger than peas, the berries become more susceptible to sun and heat damage as they haven’t had enough time to accumulate the necessary compounds for defense.

NAPA FERMENTATION SUPPLIES

YOUR ONE-STOP SHOP SINCE 1983!



CONTACT US TODAY!

575 Third St. Bldg. A Napa CA 94559
 707-255-6372 | napafermentation@aol.com
www.napafermentation.com



FIGURE 6

FIGURE 6: Vidal Blanc with “commercial leaf removal” (two leaves per shoot). In humid regions, hybrid grapes need some exposure but not as much as vinifera varieties.

Risks Associated with CZLR

With all the insect and disease management and potential chemistry and sensory benefits associated with CZLR, it’s hard to imagine the downside to using this technique in the vineyard. Nonetheless, there are risks. Most of the risks surround the timing of when leaves are removed from the vine. “If leaves are removed before bloom, the grower risks crop yield reduction because he/she is reducing the carbon availability that the plant needs as a resource for fruit set,” Hickey explained.

However, there can be physical damage to grape berries if the leaves are removed too late. Westover has seen physical damage associated with workers being too rough when pulling the leaves from the vine, which leads to scarring on the berries. Furthermore, if berry clusters are overly exposed, he has seen 60 mile per hour winds and sandstorms injure those berries in multiple ways.

Westover also warned about the use of CZLR in hotter, drier, sunnier regions, “On some sites I work with in Texas and Arizona, I have seen some negative effects affiliated with cluster zone leaf removal, especially on the west side of the canopy. Specifically, this can lead to berry sunburn, grape berry shrivel and the fruit temperatures can increase by 15° F, which can lead to cooked flavors.”

EUROPEAN CRAFTSMANSHIP STAINLESS STEEL WINERY TANKS

IN STOCK, READY TO SHIP

NOW



Harvest is on the horizon. You need tanks and you need them now, but compromising on quality to get them fast is not how great wines are made.

We’re ready. Our Letina stainless tanks – jacketed, single wall, variable, you name it – are built in Europe and in stock in our Pacific Northwest warehouse, ready to ship.

Want more info? Call us today, or visit: agertank.com

(503) 780-4681

AGER TANK &
EQUIPMENT CO.

AGERTANK.COM



JUNE 21–24, 2021

Merit Award Presentation

Dr. Hildegard Heymann
University of California,
Davis

**Extension Distinction
Award Presentation**

Dr. Anita Oberholster
University of California,
Davis

Honorary Research Lecturer

Dr. Hans Schultz
Hochschule Geisenheim University,
Germany

Keynote Presentation

Dr. Gavin Sacks
Cornell University,
New York



AMERICAN SOCIETY FOR
ENOLOGY AND VITICULTURE

For more details
visit asev.org

VIRTUAL

Zenport Vineyard Tools
 Spraying | Pruning | Tying | Harvest

Agriculture Drones!

Tying Tools!

Harvest Shears!

Cordless ePruners!

www.zenportindustries.com | 503-524-7289

MicroVantage
 Ultra Premium Filter Series

LET'S BE CLEAR
 THE ANSWER IS MICROVANTAGE

When high purity & absolute retention are prerequisites for your filtration process, **MicroVantage cartridges deliver.**

- > Membrane Cartridges
- > Melt-Blown Depth Cartridges
- > Pleated Filter Cartridges
- > Custom options available
- > Made in USA

SHELCO.COM
 100 Bradley Street, Middletown, CT • info@shelco.com • 1.800.543.5843
 ISO 9001:2015

The Wine Industry's Leading Online Job Site

winejobs.com

More wineries use winejobs.com than any other online job site.

Created & Managed by **WINE BUSINESS MONTHLY**

Cluster Zone Leaf Removal in the Vineyard

Centinari agreed. Research from Washington state and Italy has shown that fruit temperatures that reach 35° C (95° F) may lead to inhibition of anthocyanins and aromatic changes that can potentially cause negative effects on fruit and wine quality. She explained, “Almost everyone agrees on removing leaves from the east side of the canopy as this is the side of the canopy that gets hit by morning sun and can help dry out the clusters and canopy quickly due to the increased exposure. Debate surrounds west side leaf removal from the canopy, and how many leaves should be removed for a given site or region.”

Do the Risks Outweigh the Rewards?

Despite these risks, all three experts emphasized evaluating the site, block and variety as there is not one blanket solution when it comes to applying CZLR techniques. Furthermore, all experts agreed that in regions that experience heavy humidity or growing season rainfall, the rewards generally outweigh the risks associated with CZLR.

Hickey added, “We have to remember, as growers, to ask winemakers what they want. Are they willing to risk sunburn? Is it possible to adjust picking times to avoid over-ripened fruit? Generally, winemakers don't want rot



FIGURE 7

FIGURES 7 AND 8: While the advantages of cluster zone leaf removal for winegrape varieties with tight clusters are well-documented, sun exposure on the clusters can pose potential risks.

under any circumstances, and this technique is a way to minimize the influence of rot.”

Centinari also mentioned, “Due to the fact that cluster leaf zone removal is used in regions with inherent seasonal variation, by the time growers have to pull leaves, no one knows how the remainder of the growing season will turn out. It’s fair to say there is risk in the unknown.”

However, for varieties with tight clusters and sensitivity to rot, the advantages of cluster zone leaf removal are well-documented and will likely be worth the management investment for winegrape growers (FIGURES 7-8). “I always remind growers facing rot-prone varieties or with those that face annual pressure from spotted wing drosophila or grape berry moth that the benefits of cluster zone leaf removal far outweigh the risks,” Westover said.

As a winemaker, I have to agree with these viticulture experts; I would rather deal with clean fruit than rotted fruit, so I would feel comfortable working with growers that use practices to routinely reduce rot incidence. If a good vintage year follows or ripening is accelerated, I’d recommend adjusting the picking time for that winegrape variety. This may be difficult for the winery logistically but being flexible with picking schedules is a part of the seasonal variation associated with these grape growing regions. **WBM**



FIGURE 8

These images show Chardonnay clusters from the sun-exposed (FIGURE 7) and shaded (FIGURE 8) side of vines that have undergone cluster zone leaf removal.

MALA Closure Systems

Give your wine the final touch: the closure that your wine needs.

sales@mala-usa.com • (707) 765-6252

Tonnellerie Sirugue

Nuits Saint Georges, France

Natural Air-drying
French Oak

Exclusive U.S. agent:
Françoise Gouges
3435 Ocean Park Blvd, #107-511
Santa Monica CA 90405
Cell: 310-403-8398 • Email: francoise@sirugueusa.com • www.sirugueusa.com

Measuring and Managing the Soil Effect in Terroir Expression

Cornelis van Leeuwen, Jean-Phillippe Roby, Laure de Rességuier

Cornelis van Leeuwen is professor of viticulture, **Jean-Philippe Roby** associate professor and **Laure de Rességuier** lecturer-researcher at EGFV, Univ. Bordeaux, Bordeaux Sciences Agro, INRAE, ISVV, F-33882, Villenave d'Ornon, France.

TERROIR RELATES THE TASTE of wine to the place where it was produced. It involves the influence of climate, soil, cultivar and viticultural practices on wine. A lot of progress has been made over the years in understanding how soil can shape the quality and style of a wine.

To observe and explain the soil effect, it needs to be broken into measurable factors. Once these are quantified by appropriate approaches, a terroir can be mapped and managed. By fine-tuning the choice of plant material (rootstock and grape variety) and viticultural techniques according to local soil conditions, it is possible to optimize terroir expression.

Soil Effect in Terroir Expression

It is surprising how different vineyard soils can be. Great wines can be produced on acidic soils with a high gravel content or on calcareous or heavy clay soils. It is not possible to define a potential high-quality soil by its composition. It would be tempting to conclude from this diversity that soil does not matter.

However, a study conducted on 500 vineyard blocks located in famous winegrowing estates in the Bordeaux area has shown that soil type does, in fact, impact wine quality. The soil type significantly influenced the probability that the grapes would be selected for the first quality wine on these estates.⁵ Although this study proves that soil type has an impact on wine quality, it does not explain the mechanisms involved.

Rocks are studied by geologists and soils by soil scientists; these scholars give names to rocks and soil types and produce maps. These maps provide useful information on how rocks and soils are distributed over a given area, but they cannot explain the process by which they might impact wine quality. To do so, the effect of the soil needs to be decoupled from climate and broken down into measurable units.

If soil influences wine quality, this effect is necessarily mediated through the vine. Soil modifies vine phenology and development, as well as ripening traits and grape composition.⁹ As a result, wines produced on different soils

vary in sensory attributes because the composition of the grapes changes according to the soil type on which they were produced.⁷ To obtain an insight into how soils influence wine quality, we need to understand how the soil influences vine phenology, growth and grape composition at ripeness.

Back to Basic Agronomy

Like any plant, vines respond to their environment. Agronomists know that light, temperature, minerals and water resources are needed to make plants grow and for fruit to ripen. In any given place, these environmental resources are available in different proportions: more or less light, higher or lower temperatures, more or less water, and differing availability of specific minerals. Among minerals, nitrogen matters more than any other.

Vine development, phenology, vigor, yield and grape composition at ripeness vary according to available resources. As a result, different soils can either directly (e.g., through modifying berry ripening dynamics) or indirectly (e.g., by impacting the choice of the harvest date) produce grapes with different composition in primary (sugar, organic acids) and secondary (polyphenols, aroma compounds) metabolites and are likely to produce wines with a different taste.

In terms of soil-related factors, soil temperature, water availability and nitrogen availability can have a major impact on vine physiology and grape composition. Soil temperature influences vine phenology, and grapes will ripen earlier in warm soils.

Water influences shoot and berry growth and ripening traits. It has been shown that water deficit (but not severe stress) is required for optimal quality and terroir expression, particularly in red wine production.⁶ When vines experience water deficit, shoot growth stops early in the season, and berries remain small and contain more polyphenols.⁶ Water deficit needs to remain mild to attain optimum white wine quality. Low nitrogen increases berry skin phenolics,^{1,3} which are usually positive for red winemaking but can be detrimental for some white wine aromas.² Hence, optimum vine nitrogen status is lower in red wine production compared to white wine production.

Backing you from coast to coast.

Bottles 100% made & supported in the USA.

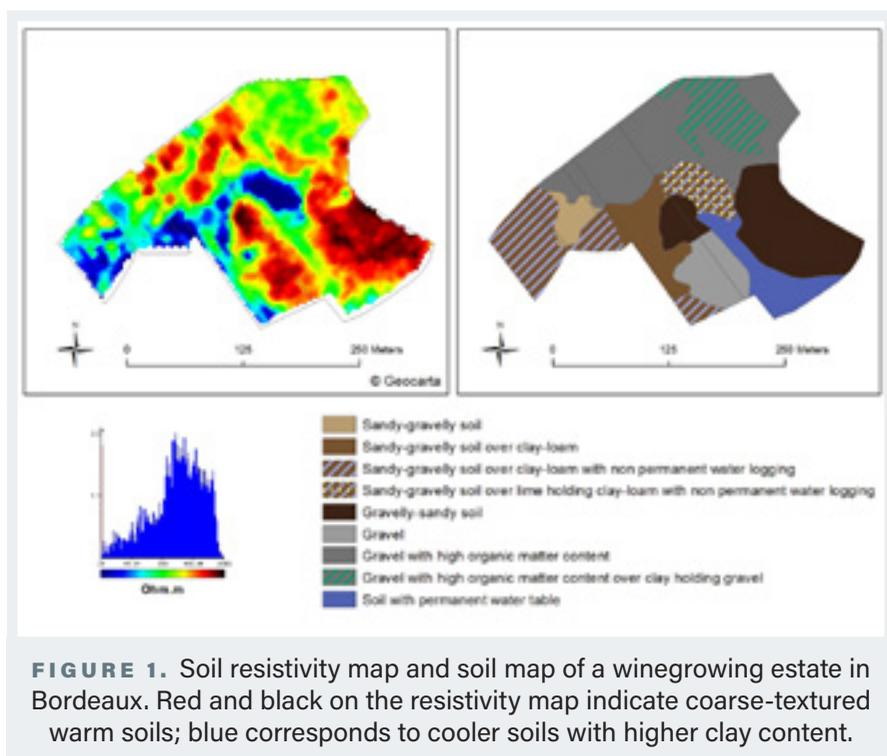
As the largest producer of glass wine bottles made 100% in the USA, Ardagh Group has the resources to meet your unique needs with flexibility, responsiveness and ease.

Our experienced sales teams and manufacturing facilities are ready to serve you – right from the heart of the major North American wine regions. Call us today to learn more about our extensive bottle portfolio and the exceptional quality and service you can expect from your local glass manufacturer.



★★★★
MADE
IN THE
USA

West: 707-200-9350
Central/East: 317-558-1585
ardaghgroup.com/wine2021

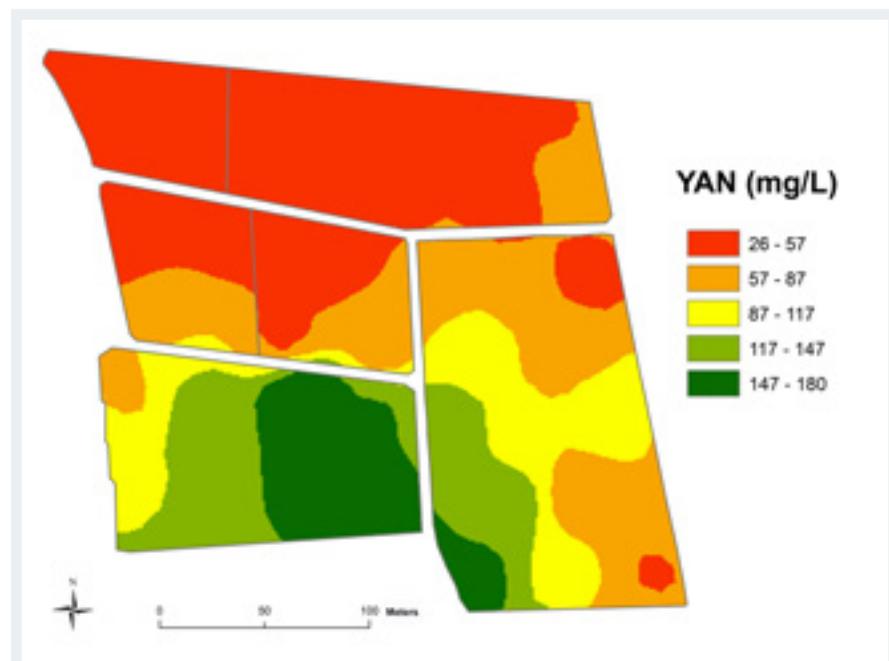
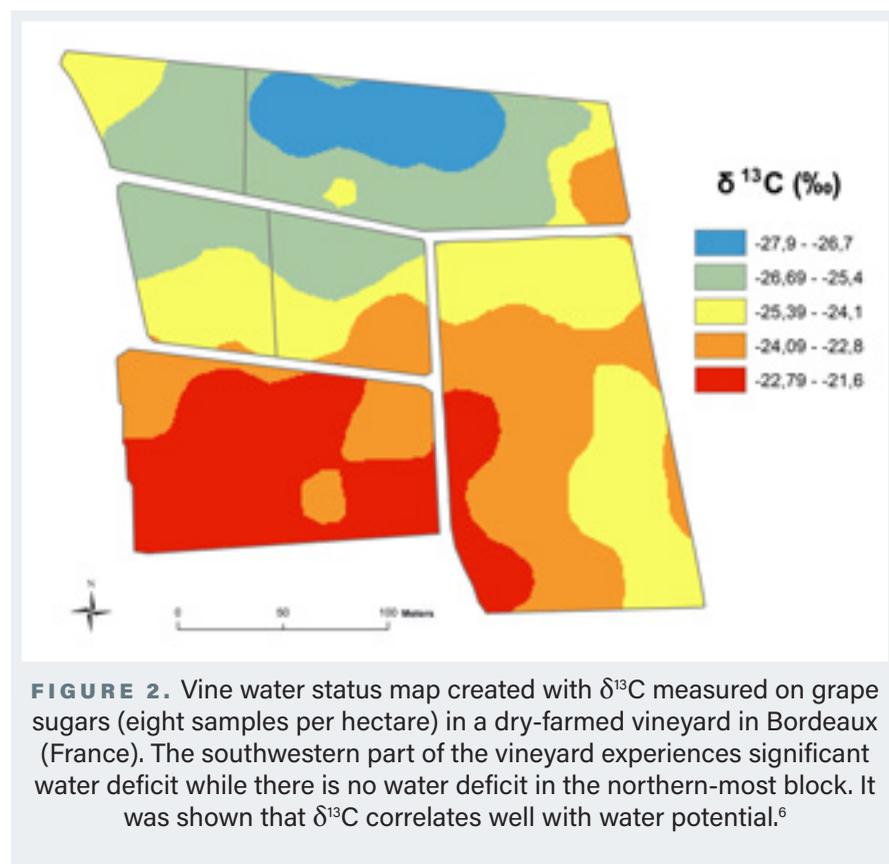


Assessment of Soil Temperature, Nitrogen and Water Availability

Soil temperature can be measured with specific probes, but it is not easy to integrate results vertically (across different soil layers), spatially (over the field) and temporally (over the growing season). The measurement of soil resistivity can be considered as a proxy for soil temperature: soils with high resistivity are generally coarse-textured and warm, and soils with low resistivity contain more clay and are cooler (see **FIGURE 1**) although there may be a few exceptions to this general rule.

Vine water status can be measured by $\delta^{13}\text{C}$ on grape sugars (see van Leeuwen et al., 2009 for methodology⁶). By measuring $\delta^{13}\text{C}$ on samples taken from a regular grid of 8 to 10 points per hectare, vine water status can be mapped (**FIGURE 2**). Vine nitrogen status can be assessed by measuring yeast available nitrogen (YAN) in grapes. These measurements can be carried out on the same samples as those collected for $\delta^{13}\text{C}$ analyses, and results can subsequently be mapped (see **FIGURE 3**). By combining soil resistivity, water status and nitrogen status maps, a very precise assessment can be made of the major factors that drive soil-related terroir expression.

NOTE: $\delta^{13}\text{C}$ is an integrative method to assess vine water status by one single measurement carried out on grape juice at harvest.⁶ The principle is the following: When grapevines produce sugars by photosynthesis, this sugar is enriched in ^{13}C (relative to ^{12}C) when the stomata are closed, i.e., when vines meet water deficit stress. The sugar produced by grapevines roughly from two weeks prior to mid-veraison to three weeks after mid-veraison ends up in the grape berries. If you measure the ratio of $^{13}\text{C}/^{12}\text{C}$ (expressed as $\delta^{13}\text{C}$) on grape juice at harvest (or one or two weeks prior to harvest), you have an average measurement of vine water status over that specific period. You need very specific equipment to perform that measurement (stable isotope mass spectrometer), but most universities have this equipment. Growers have to collect grape juice and send it to a lab. In California, Fresno State University offers this analysis for a reasonable cost: contact Luca Brillante (lucabril-lante@csufresno.edu).



Management of Terroir

Growers can optimize terroir expression by choosing plant material and viticultural techniques according to the set of locally available resources. Rootstocks need to be adapted to soil type. High vigor rootstocks perform better in poor and shallow soils, and low vigor rootstocks in rich and fertile soils.

In cool soils, berries risk not attaining full ripeness; hence early ripening grape varieties will perform better. In warm soils, grapes may be too high in sugar, too low in organic acids and show undesirable cooked fruit aromas; these pitfalls can be avoided with late ripening varieties.

In dry-farmed vineyards, white varieties perform better in soils with medium to high water and nitrogen availability while red varieties will produce more concentrated wines in soils where vines undergo water deficit and low nitrogen.

The training system should be chosen as a function of available water. High-density plantations will adapt to soils with high water-holding capacity while the detrimental effect of excessive water stress can be mitigated with low-density plantations or goblet-trained bush vines.⁸ In irrigated vineyards, water deficits should be greater on red varieties compared to white varieties.

Vineyard floor management and fertilization practices can fine-tune the amount of soil-available nitrogen. Cover cropping can create a competition with the vines for nitrogen and lower vine nitrogen status while nitrogen deficit can easily be compensated by cover cropping with nitrogen-binding species, like legumes, organic or mineral fertilization.

No Myth

Terroir expression is considered by some authors as a myth.⁴ We disagree. The terroir effect can be observed and explained when the multiple factors that drive terroir expression are hierarchized and broken down into measurable units. Because terroir is highly variable in space, the tools used for measuring these units should ideally be able to produce maps. Once key factors are quantified and mapped, they can be used by growers to fine-tune the choice of plant material and viticultural techniques to optimize terroir expression. **WBM**

This text was edited from the original publication by IVES Technical Review, October 2020, with permission of the publisher.

References

1. Chone, X., C. Van Leeuwen, Ph. Chery and P. Ribereau-Gayon. 2001 Terroir influence on water status and nitrogen status of non-irrigated Cabernet Sauvignon (*Vitis vinifera*): vegetative development, must and wine composition. *S. Afr. J. Enol. Vitic.*, 22, n°1, 8-15.
2. Chone, X., V. Lavigne-Cruege, T. Tominaga, C. Van Leeuwen, C. Castagnede, C. Saucier and D. Dubourdieu. 2006 Effect of vine nitrogen status on grape aromatic potential: flavor precursors (S-cysteine conjugates), glutathione and phenolic content in *Vitis vinifera* L. cv. Sauvignon blanc grape juice. *J. Int. Sci. Vigne Vin*, 40, n°1, 1-6.
3. Hilbert, G., J.-P. Soyer, C. Molot, J. Giraudon, S. Milin and J.-P. Gaudillere. 2003 Effects of nitrogen supply on must quality and anthocyanin accumulation in berries of cv. Merlot. *Vitis*, 42, n°2, 69-72.
4. Matthews, M. 2016 *Terroir and other myths of winegrowing*.
5. Renouf, V., O. Tregoat, J.-P. Roby and C. Van Leeuwen. 2010 Soils, rootstocks and grapevine varieties in prestigious Bordeaux vineyards and their impact on yield and quality. *J. Int. Sci. Vigne Vin*, 44, n°3, 127-134.
6. Van Leeuwen, C., O. Tregoat, X. Chone, B. Bois, D. Pernet and J.-P. Gaudillere. 2009 Vine water status is a key factor in grape ripening and vintage quality for red Bordeaux wine. How can it be assessed for vineyard management purposes? *J. Int. Sci. Vigne Vin*, 43, n°3, 121-134.
7. Van Leeuwen, C., J.-P. Roby and L. de Resseguier. 2018 Soil related terroir factors, a review. *OENO One*, 52, 173-188.
8. Van Leeuwen, C., P. Pieri, M. Gowdy, N. Ollat and J.-P. Roby. 2019. Reduced density is an environmental friendly and cost effective solution to increase resilience to drought in vineyards in a context of climate change. *OENO One*, 53, n°2, 129-146.
9. Van Leeuwen, C., Ph. Friant, X. Choné, O. Trégoat, S. Koundouras and D. Dubourdieu. 2004 Influence of climate, soil and cultivar on terroir. *Am. J. Enol. Vitic.*, 55, n°3, 207-217.

Join us for “Terroir and Vineyard Management”

7-11, March 2022

5 days in Bordeaux focused on the specificities of terroir.

A unique experience learning the state-of-the-art in vineyard management, including field trips, soil pit studies, and numerous wine tastings.



➔ If you are interested, please contact us to be placed on our mailing list (without engagement) so that we can notify you in November for possible registration.
formco@agro-bordeaux.fr and more info on study.agro-bordeaux.fr/course/terroir-and-vineyard-management/



Savvy Packaging Makes Budget-Price Wines Appear a Great Value

Michael S. Lasky

EACH YEAR SAVVY WINE shoppers scoop up millions of bottles of “value” category wines, which sell for about \$10 or less. While the relative price of value wines is often a siren call to consumers, it’s their package design—be it bottle, box or can—that will ultimately be the main sales closer. However, by the very nature of their retail price, value wines often have proportionally smaller packaging material budgets compared to the possible extravagance afforded to higher-priced wines.

To pinpoint the various package design elements that move consumers to purchase, Wine Business Monthly sought out answers from prominent package designers/brand consultants, as well as research firms that have studied the correlations of value wine with packaging.

Packaging Elements That Communicate Quality Despite the Price

“Gold foil is a traditional device treatment used to convey quality,” said Ed Rice, managing director at design and branding firm, Affinity Creative. Rice offered a caveat that it’s very easy to use too much or too little. The key, he added, is to get it just right.

“The value consumer actually appreciates some of these extra design cues,” he said, such as gold coloring, a crest or even a cartouche. “It gives them a sense of reassurance that even though the bottle may be inexpensive, it still contains good wine. They’re seeing those reinforcements and those reminders that say there’s quality within,” Rice explained.

Stella Rosa is a prime example of the use of package design cues to communicate a higher level of quality than the bottle price might convey. Rice pointed out that Stella Rosa bottles are armed with gold foil on the label borders and pictured crown, and the glass mold is enhanced with an embedded 3D crown cartouche. (As a side point, custom glass cartouche molds can be expensive and only amortize their cost at larger order numbers—50,000 plus—which most value wines require.)

Châteaux, winery buildings or even wooden barrels are other popular design features. According to Rice, these types of

cues help consumers feel comfortable that their selection is a good product or that there is something/someone standing behind the product.

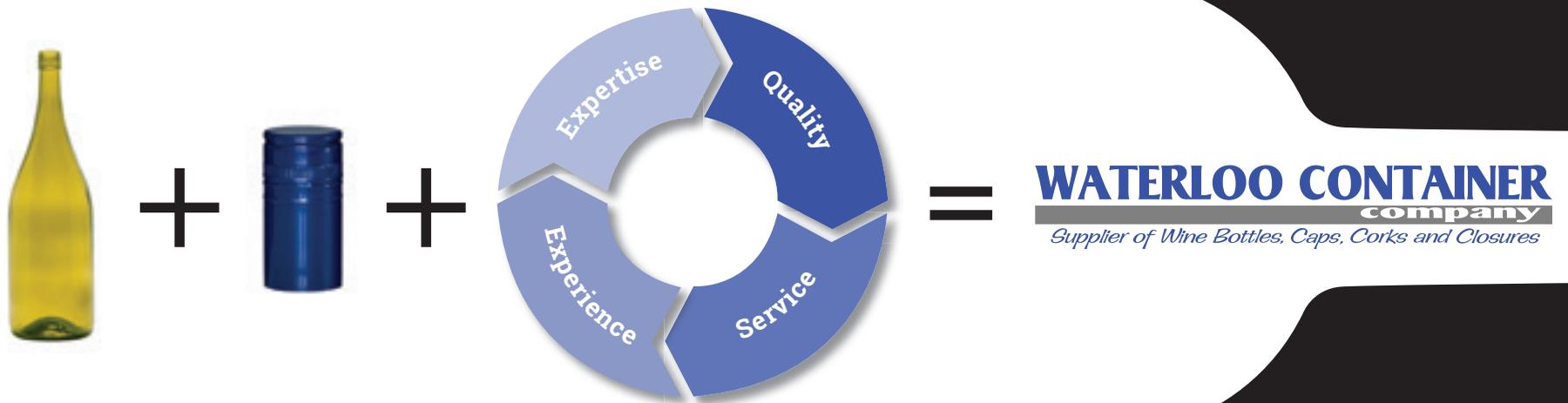
This distinctiveness and appeal of the product, when placed on a shelf, are something retailers refer to as “shelf impact,” which makes a huge difference in product sales. For example, when CF Napa redesigned the beige label of Kendall-Jackson’s popular Vintner Reserve Chardonnay, certain elements needed to pop out while maintaining the brand’s refinement.

David Scheumann, CF Napa’s owner and creative principal, explained that by increasing the varietal’s font size, as well as the consumer-recognizable “Vintner’s Reserve” logo, both would pop on the new, pure white background. This strategy increased consumer recognition of the bottle on the shelf, and sales popped.

“Putting a lot of reinforcing cues onto their label, like gold foil, communicates quality and lends to a more traditional look and feel—nothing crazy, just very reassuring,” he said. The same design principles apply to boxed wines as well.



SIMPLE MATH



For a Great Looking Package...

...we are the solution.

WATERLOO CONTAINER
company

Supplier of Wine Bottles, Caps, Corks and Closures

888-539-3922 • waterloocontainer.com

Like us on Facebook! 



Smarter solutions in glass



DobleAlto™ applies innovative thinking and advanced techniques to achieve a distinctive double base and taller, sophisticated form factor for a unique presentation. Both exclusive and economical, there is no increase in the amount of glass required in the production of DobleAlto™, bringing value to your brand.



CALIFORNIA, NORTHWEST & EAST COAST
info@globalpackage.net | 707 224-5670

globalpackage.net

Savvy Packaging Makes Budget Price Wines Appear a Great Value

Successful Box Wine Packaging Designs are Anything but Boxed in

“One of the advantages of box wine, of course, is that there’s just a bigger palette to work with. You’ll see a lot of boxes where there’s wine pouring into a glass. Or you’ll have a scene of someone sitting in a chair relaxing. You have an opportunity of space to tell a little bit more of a story,” explained Scheumann.



With six sides to a box, there’s a lot of real estate. “The winery can tell a lot more. You can even tell a short story, or you can provide recipes. There’s all sorts of information you can place on boxes that you really can’t do effectively with a bottle of wine,” he observed, adding that the same could be said for canned wines. In addition to the 360-degree design, many come in a four-pack box, offering another opportunity for story-telling.

A lot of the communication on the box comes down to how much wine is inside. One key graphic that needs to be included: The bottle equivalent. “That way the value-centric consumer can figure out what the per-bottle price is,” Scheumann pointed out.

Just like with bottles, boxed wine has various price points or “personalities,” as Rice noted. The design must reflect that to build a brand connection with the consumer. “You may have a brand like Bota Box, which has a very natural positioning. There is more of an approachable feeling for Bota, and that resonates with that particular target market,” Rice said. “Then you have a brand like Black Box, which takes a more upscale approach. The use of black always conveys a little bit more of a sense of elegance, a sense of class, and sells well for the brand.”

So, what is it about the designs of these boxes that speaks to their consumers? “Black Box has a formal feel to it, whereas Bota is a little more sporty, a little more of an environmentally-conscious product. Bota has that ribbon river that flows vertically down the center of the package. It provides strong branding. In fact, the branding echoes the name. The Black Box brand has a containment shape that looks like a box, but it’s underscored. It’s a great mnemonic device and a strong visual device,” Rice explained.

Naturally Created,
Technically Perfected.



vinc

Individually guaranteed TCA taint-free technical corks*



www.corksupply.com

*Please see website or Technical Product Specification sheets for details.

The Costs of Packaging in the Category

While boxed wines offer a larger canvas for the designer, the actual box material comes with some challenges, Rice noted. Color limitations are set by the type of material used in the packaging. Bota Box, he said, uses a flexographic printing process and is made with a craft substrate, which the inks tend to sink into. On the other hand, Black Box uses a paperboard liner that, according to Rice, helps the ink show better and allows many more color options. Designers will need to take this into account.

“Recognize that you’re not only trying to design for a particular demographic and psychographic target market appeal, you have to also consider the constraints of the production process and packaging materials,” Rice said.

These challenges are offset, Schuemann noted, because value brands are cost-neutral. Many wineries are looking to find different and inventive ways to do more with less expense, often by using lighter glass, smaller labels and fewer embellishments. “Reduced costs can also be found where the bottles are manufactured and warehoused: domestic sources, Asian or European.”

As for labels at the value wine price point, most are coated stock. Uncoated stock generally has more of a matte feel and finish to it, which translates to a perception of higher quality. Uncoated stock can take an embossing or de-bossing effect on the press, which is another quality cue. Most producers recognize that even at a lower price point, you need to make a certain investment in your label materials. The label is the wine’s main billboard.

Secondary packaging, such as the cardboard carton wines are shipped in, should also be considered a valuable sales asset. Even in the on-premise market, the decorated carton is a moving billboard and can influence all sorts of observers as it wends its way through the distribution channel.

The Evolution of Wine Packaging Formats and Consumer Choice

British research firm Wine Intelligence conducted a study on wine packaging formats and in Sept. 2020 reported that while the COVID-19 pandemic fueled radical changes in many sectors of the U.S. economy, the wine business managed to weather the storm in overall volume in terms of wine consumption and place of purchase.

Although consumer preference for the 750ml bottle still remains dominant, smaller formats, particularly aluminum cans, have gained in popularity. Smaller formats, the report said, are appreciated by those aged 21 to 39 (Millennials and Gen-Z), whose preferences will shape the market over the next few decades.

“A typical Millennial is no more likely to have come across wine in a can than anyone else, but they are over 50 percent more likely to buy this format once they know about it; for Gen-Z members who have reached legal drinking age, they are twice as likely (compared with drinkers generally) to buy canned wine once they know it exists.

ATTITUDES TOWARDS PACKAGING FORMATS IN US

Significant growth in the proportion of US regular wine drinkers purchasing and considering smaller formats of wine, including half bottles and cans, though still from a small base



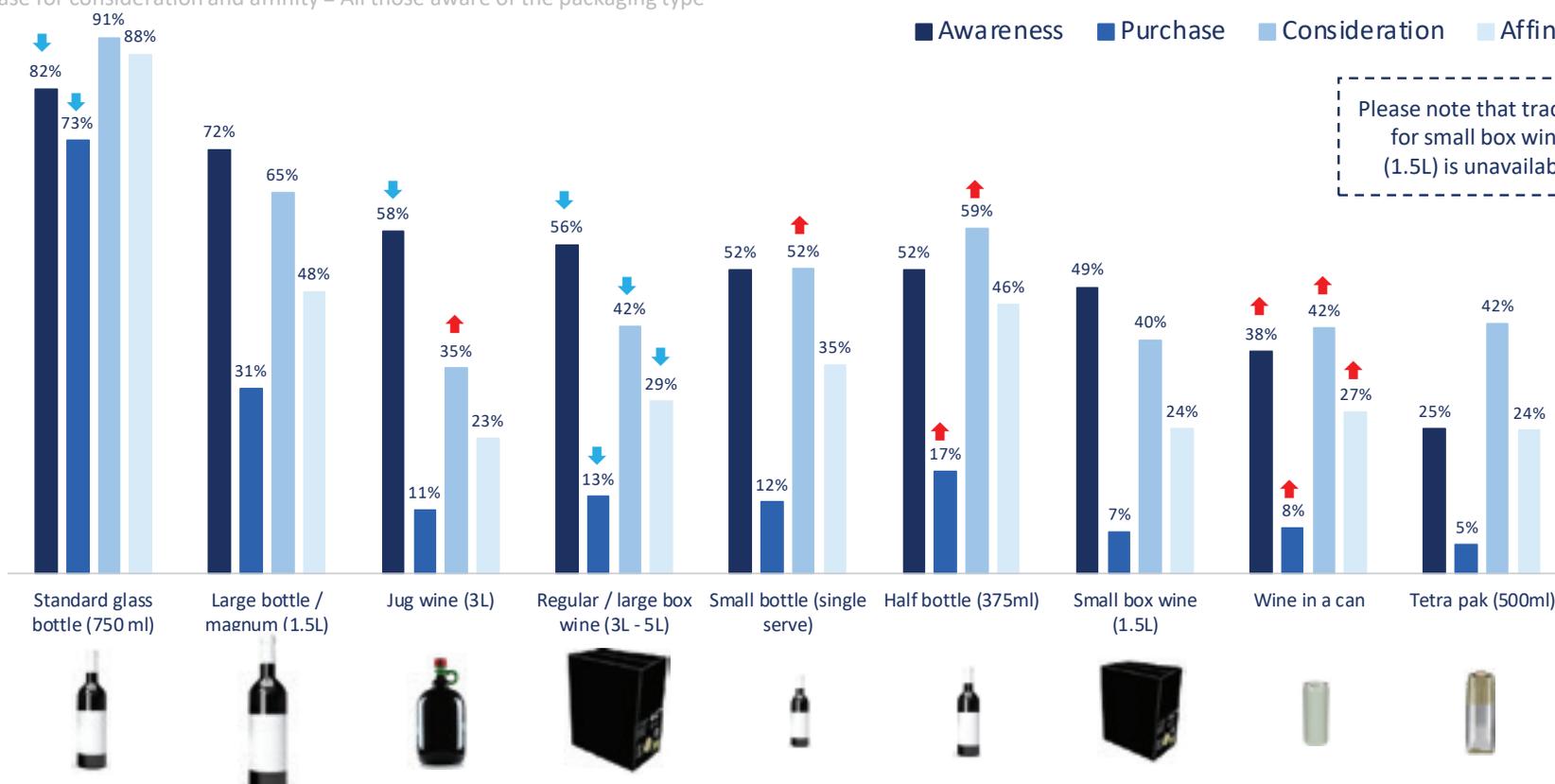
Packaging attitudes summary

% who are aware of the following packaging types
 Base for awareness and purchase = All US regular wine drinkers (n≥2,000)
 Base for consideration and affinity = All those aware of the packaging type

WHAT DO MARKET EXPERTS SAY?

“The can and smaller formats have done well this year, particularly in the summer months”
Wine Retailer, US

■ Awareness ■ Purchase ■ Consideration ■ Affinity



Please note that tracking for small box wine (1.5L) is unavailable

Wine Intelligence trade interview programme 2020
 ↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
 Source: Wine Intelligence, Vinitrac® US, Oct '17 and Jul '20, n ≥2,000 US regular wine drinkers



ramondin

3 centuries of excellence, turning 40 in the USA next year

The last decade of the XIX century was a breakthrough, the Lumiere Brothers filmed the very first movie and Nicolas Tesla patented his electric coil. At the same time in Northern Spain, a Company was formed to produce capsules for the wine industry. Another successful industry which encompasses the very best of the industry and innovation.

Technical modernization to ensure maximum quality and aging potential as the foundation of a whole universe of flavors, pleasure and enjoyment: the Wine World.

Ramondin was founded in 1890 and our customers came from both sides of the border; the wineries in Rioja and Sherry in the Spanish side, as well as the oldest and most prestigious Chateaux around the Garonne.

Now well into our 3rd century of history, we are proud to keep leading the way as **the world's largest Tin capsule manufacturer. More than 50% of the world's wines currently use Tin from Ramondin as their preferred supplier.**

When you want your wine to be perceived as the highest quality the decision is crystal clear: Tin.

This fact is even more acute in the US market where Ramondin has been present since 1982. **As we near our 40th anniversary in the heart of the US wine industry, Napa Valley, we would like to take this opportunity to thank all our customers for their business and continuous support.** Leading the Tin capsule supply for almost 40 years is a paramount achievement that we are keen to renew for decades to come.

As we enter the next era of technology, here at Ramondin we are focusing on environmental concerns that are shaping our world. Our consumer expectations are well met by the **Tin capsule, with a 100% metal fully recyclable and sustainable material which is painted with bespoke water based paints colors.** A 'Green' luxury to match the distinctive moment that opening a good bottle of wine will provide.

Ramondin Group was the first Company back in 1992 to understand that the ban imposed by the Coneg regulations in the US, and that we needed a quality alternative, thus launching the very first Tin capsule.

The excellent market reception in the market was another landmark in our Ramondin history. The subsequent prohibition in Europe which had been trail blazed by the USA, gave us a leading experienced advantage.

The updating and overhauling our equipment as required by the new regulations was no problem for a company that had been **manufacturing all of their proprietary machines, in house since the beginning.** Both the deep-drawn presses and the decorating machines were updated quickly and efficiently.

This has been an ongoing process and proudly **now have more than 40 decorating machines for Tin capsules; many of them with 3 or more registered colors and artificial vision embedded.** Our long term investment commitment on the industrial and quality side of the business is second to none.

Water based paints were also a breakthrough development at Ramondin. **In 2003 we pioneered the way Tin would be sprayed one capsule at a time with a color depth that provides a unique sensorial experience.** Equally we have the same outstanding feeling provided by the silkscreen decoration on the capsule skirt and superb embossing that will be a feast for the senses.

Today in 2021 we carry on the outstanding legacy in the US, with a strong industrial presence and a fifty-strong staff that will ensure your satisfaction and value across all chain.

Please be our guest and visit our website ramondin.com for more information or arrange a visit to our Napa facility.

Cheers.

ramondin

GREEN LUX

Pure care. Pure trust.

ramondin.com



Savvy Packaging Makes Budget Price Wines Appear a Great Value

“While convenience is a key driver of can purchase, it is also seen as a low-risk, low-cost way of trialing new products or wine styles. In the end, the can could be as much about helping consumers on the discovery path in wine as it doubtless will be as a lightweight and portion-controlled alternative to a standard bottle,” Wine Intelligence wrote.

The majority of cans are priced in the value wines segment because of the very nature of their size (187ml to 350ml).

Included in the Wine Intelligence study was a breakdown by percentages of which type of wine package surveyed consumers purchased in the prior six months, as well as which package format consumers would consider purchasing. The same participants were also asked about their package affinity.



Purchase ~ Consideration ~ Affinity

Packaging Purchase

% who have purchased each packaging type in the past 6 months
Base = All US regular wine drinkers (n = 2,000)

Standard glass bottle (750 ml)	73%
Large bottle / magnum (1.5L)	31%
Half bottle (375ml)	17%
Regular / large box wine (3L - 5L)	13%
Small bottle (single serve)	12%
Jug wine (3L)	11%
Wine in a can	8%
Small box wine (1.5L)	7%
Tetra pak (500ml)	5%
None of these	2%

Packaging Consideration

% who would consider buying wine in the following types of packaging formats
Base = Those who are aware of the following packaging formats for wine

Standard glass bottle (750 ml)	91%
Large bottle / magnum (1.5L)	65%
Half bottle (375ml)	59%
Small bottle (single serve)	52%
Tetra pak (500ml)	42%
Regular / large box wine (3L - 5L)	42%
Wine in a can	42%
Small box wine (1.5L)	40%
Jug wine (3L)	35%
None of these	1%

Packaging Affinity

% who feel that the following packaging types are right for people like them
Base = Those who are aware of the following packaging formats for wine

Standard glass bottle (750 ml)	88%
Large bottle / magnum (1.5L)	48%
Half bottle (375ml)	46%
Small bottle (single serve)	35%
Regular / large box wine (3L - 5L)	29%
Wine in a can	27%
Small box wine (1.5L)	24%
Tetra pak (500ml)	24%
Jug wine (3L)	23%
None of these	1%

NOW ONLINE OIV Wine Marketing July 19-23

Uncork the Knowledge for Wine Marketing Success

Discover how to successfully create a brand, market and sell wine. Gain practical insight and confidence to launch a new brand or revive an existing one.

- Learn from industry experts with a record of success
- Expand your network
- Gain tools and insights for small and large wineries, direct-to-consumer or three-tier distribution

Enroll today

cpe.ucdavis.edu/winemarketing

UC DAVIS

Continuing and Professional Education

NĚSTGATE™

CONNECTED CLOSURES

Get closer to your consumers



NĚSTGATE: it's all in the name. A comprehensive range of connected caps with the power to open doors to new and exciting digital relationships between brands and consumers.

Discover our range of connected closures for wine, spirits and olive oil on www.nestgate-gualaclosures.com or contact us at Email info@gualaclosuresNA.com | Tel +1 707 425 2277



**WORLDSTAR
WINNER 2020**

 *Guala Closures North America*

“Recognize that you’re not only trying to design for a particular demographic and psychographic target market appeal, you have to also consider the constraints of the production process and packaging materials.”

Ed Rice, managing director, Affinity Creative

Seventy-three percent of consumers in the study confirmed their purchase of standard 750ml bottles. Purchases of other formats dropped considerably after that: 31 percent purchased a 1.5L magnum, 17 percent bought a 375ml half-bottle and 8 percent purchased a wine can.

This all changed when consumers were asked if they would consider buying various package formats: 91 percent confirmed they would consider buying a 750ml glass bottle, 65 percent said yes to 1.5L magnums, 59 percent were open to half-bottles, and 42 percent would buy canned wine.

Accordingly, package design, no matter what the container size, becomes a winery’s most effective ammunition in the increasingly competitive value wine sales war. The package that captures the consumer’s eyes in the millisecond retail shelf scan gets the purchase. Of course, it’s the quality of what’s in the package that gets the repeat sales.

Maintaining wine sales, after the pandemic, will depend not only on eye-catching package designs but the marketing smarts that maintain consumer attention. **WBM**

COVID-FUELED: VALUE WINE SALES THRIVE AND BECOME MORE COMPETITIVE

As noted in Silicon Valley Bank’s State of Wine Industry 2021 Report, the pandemic affected lower wage earners much more than higher income folks. That has led to surprising strength in the grocery channel for high-priced wines, as well as for growth in low-priced wines for shoppers seeking value. As NielsenIQ’s sales data indicated, the \$10 price point is the sweet spot for the most sales volume of any price range.

PROSPERO
Since 1972

Get packing!

(From six feet away)

#SocialDistance

prosperoequipment.com

1-800-953-3736 info@prosperoequipment.com [f](#) [in](#) [@](#) [▶](#)

BOHEMIAN CRYSTAL TOP

VINOSEAL

Born of sand and flame, glass has always been a natural material. Did you know that glass, traditional material used for manufacturing bottles and uniquely used for the Vinoseal closure, is completely recyclable without any loss in quality? Even the sealing ring is recyclable in the same way as low density polyethylene. The result is 100% recyclable closure. We are committed to a sustainable future of packaging. For more information visit vinoseal.us

For the love of nature

100%
*recyclable
closure*



BUYER'S GUIDE

Select Capsule Vendors

This list of select capsule vendors was generated using the *Wines & Vines Buyer's Guide*. The listings identify the types of capsules the vendors offer. The information was provided by the capsule vendors. Below is a brief definition of the types of capsules.

<p>Tin Often used on high-end wines, typically those over \$20 per bottle.</p>	<p>Pressed Aluminum 100% aluminum capsules are made using same process as tin capsules.</p>	<p>Premium Polylam This capsule comes in weight 30-70-30 (this refers to microns of aluminum, polyethylene and aluminum, respectively) and in other thicknesses as well. This is a slightly heavier, or thicker, capsule. Some vendors use the name "Almost Tin" to refer to this, and others call it "Premium Polylam."</p>	<p>Polylam Polylam capsules come in weight 20-70-20 (this refers to microns of aluminum, polyethylene and aluminum, respectively). This is the standard thickness.</p>	<p>PVC This is the material that is applied by heat and they are sometimes referred to as "heat-shrink" capsules.</p>	<p>Sparkling Wine (Coiffes) These capsules are almost always made of polylam.</p>
---	--	---	---	--	--

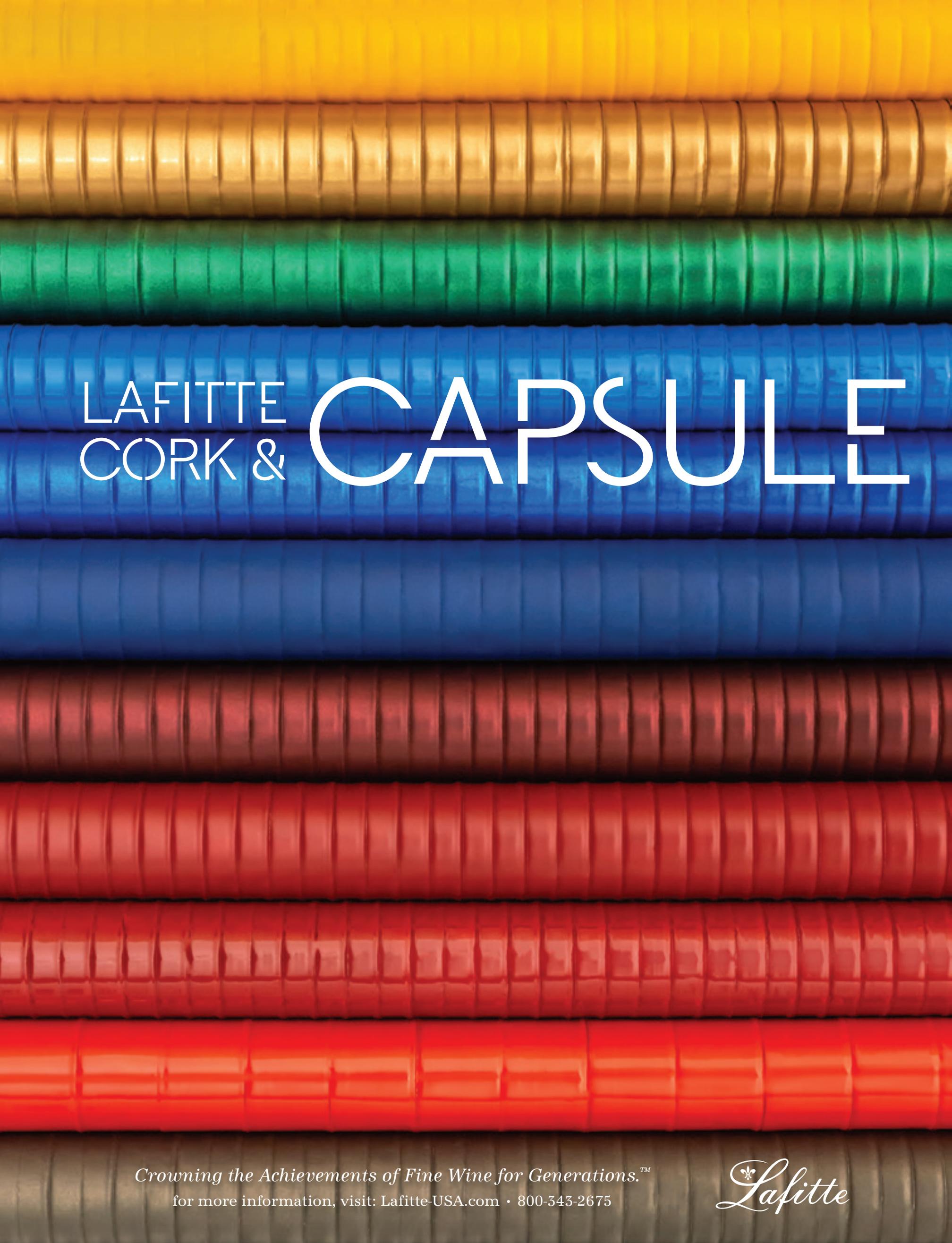
Some capsule vendors offer polylam capsules that are plastic-free.

Wine Business Monthly considers screwcaps to be closures. We do NOT include screwcaps in capsule directories.

To see a comprehensive list of capsule vendors please visit: winesvinesanalytics.com/buyersguide

Select Capsule Vendors

			Capsules					Sparkling Wine (Coiffes)
			Tin	Pressed Aluminum	Premium Polylam	Polylam	PVC	
ACIC Cork and Closures	American Canyon, CA	www.acicclosures.com	●			●		
All American Containers, a Veritiv Company	Santa Rosa, CA	allamericancontainers.com	●	●	●	●	●	●
Amcor, LLC Amcor is a global leader in the manufacture and marketing of Stelvin aluminum screwcaps for the wine industry. Stelvin®, the original wine screwcap developed more than 50 years ago, is the market reference. The Stelvin® screwcap uses specific liners that respect the aging process and deliver uncompromised flavors and aromas. Amcor recently launched EASYPEEL, an innovative aluminium overcap that makes opening premium wines easy and safe. Amcor also now introduces SHAPEART, a proprietary system for developing bespoke, dimensional and unique closures that elevates wine and spirits brands.	American Canyon, CA	www.amcor.com	●	●	●	●		●
								
A0 Wilson, Ltd.	Erin, ON Canada	www.aowilson.ca	●	●	●	●	●	●
Bastos, LLC Over 20 years of winery packaging experience and a focus on premium and ultra-premium packaging. Free deliveries for stock tin capsules (no grape cluster on head) within Napa and Sonoma Counties. Gorgeous French oak barrels at amazing prices since 2003.	Angwin, CA	www.bastosllc.com	●	●	●	●		●
								
Berlin Packaging Berlin Packaging is a leading supplier of bottles and packaging to the wine market. Beyond an extensive supply of in-stock standard and premium bottles (including our Bruni Glass line), we also offer an array of services to be the true one-stop shop for packaging needs, including branding and bottle design, financing, consulting, warehousing and logistics services. With locations across North America, Europe and South Africa, the company has the right products, expertise, and geographic proximity to help customers increase their net income through packaging products and services.	Fairfield, CA	www.berlinpackaging.com					●	
								
Brick Packaging, A Saxco Division	Traverse City, MI	www.brickpackaging.com				●	●	
BT-Watzke America, Inc.	Sherwood, OR	www.bt-watzke.com	●	●	●	●	●	●
CFP Winemakers	Pittsburgh, PA	www.cfpwinemakers.com					●	



LAFITTE
CORK & CAPSULE

Crowning the Achievements of Fine Wine for Generations.™

for more information, visit: Lafitte-USA.com • 800-543-2675

Lafitte

Select Capsule Vendors

	Capsules					Sparkling Wine (Coiffes)
	Tin	Pressed Aluminum	Premium Polyam	Polyam	PVC	
<p>Cork Supply USA</p> <p>Benicia, CA www.corksupsy.com</p> <p>Since 1981 Cork Supply has been redefining quality through innovation, superior service and expertise. Our products include natural corks, VINC technical corks, Nomacorc® synthetic corks, Rivercap tin and Rivercap AGL poly laminate capsules, Sparflex wirehoods and foils and Guala screwcaps. Our innovative DS100 and DS100+ processes for natural corks and VINC line of technical corks feature individual TCA guarantees. Introducing the Innocork® Circuit, a new two-phase TCA extraction process ensuring all natural corks are free of TCA and other off aromas at no additional cost to our customers.</p> 	●	●	●	●	●	●
<p>Cortica Benicia (CB USA)</p> <p>Fairfield, CA www.cb cork.com</p>	●			●	●	●
<p>Crush2Cellar</p> <p>Newberg, OR www.crush2cellar.com</p>	●					●
<p>Enocapsule, Inc.</p> <p>Vaudreuil, QC Canada www.enocapsule.com</p>				●	●	●
<p>Enoplastic USA</p> <p>Fairfield, CA www.enoplastic.com</p>				●	●	●
<p>Enotools</p> <p>Springfield, MO www.enotools.com</p>	●	●		●	●	●
<p>G3 Enterprises</p> <p>Modesto, CA www.g3enterprises.com</p> <p>G3 Enterprises is an industry-leading packaging manufacturer, winemaking supplies and equipment, bottling services and logistics provider for the beverage and ag industries with locations throughout the U.S. G3 offers custom solutions and stock programs to meet the needs of wineries and growers from boutique to large. We offer a wide-range of high quality capsules such as poly laminate and tin wine and champagne capsules.</p> 	●	●	●	●	●	●
<p>Gino Pinto, Inc.</p> <p>Hammonton, NJ www.ginopinto.com</p>					●	
<p>Hauser Packaging, Inc.</p> <p>Portland, ME www.hauserpack.com</p>				●	●	
<p>Intercap Closures</p> <p>New York, NY Italy www.intercapclosures.com</p>			●	●		●
<p>Janson Capsules USA</p> <p>Napa, CA www.jansoncapsulesusa.com</p> <p>Janson Capsules is a global leader in designing, manufacturing and marketing capsules and screwcaps for the Wine, Spirits and Gourmet food industry. With over 30 years of experience in printing and packaging, Janson Capsules provides a creative packaging solution with high quality products, strong customer support and technical expertise. In October 2019, the company joined RMD Group (Ramondin) to lead the capsule and screwcap markets and to offer a complete portfolio: Janson by Ramondin for Polyam, PVC and PET capsules. Ramondin for tin capsules, coiffes and muselets. Inspiral for screwcaps. Finally, our E-CAP is the result of our commitment to innovation, sustainability and an eco-friendly environment: a 100% plastic free polyam capsule patented by Ramondin.</p> 	●	●	●	●	●	●
<p>Lafitte Cork & Capsule, Inc.</p> <p>Napa, CA www.lafitte-usa.com</p> <p>Lafitte aims to be a progressive community leader in sustainable production. We are committed to continuously improving the quality and integrity of our products and services, with an active focus on environmental responsibility. We are proud to offer the best service platform in the wine packaging industry. Lafitte currently offers the following closure solutions: natural cork, agglomerated, aggro 1+1, sparkling wine corks, colmated, molded micro agglomerate and bar-top closures. Lafitte also offers PVC, polyam, aluminum and tin capsules.</p> 	●	●	●	●	●	●
<p>Maverick Enterprises, Inc.</p> <p>Ukiah, CA www.maverickcaps.com</p>	●		●	●	●	●



			Capsules					Sparkling Wine (Coiffes)
			Tin	Pressed Aluminum	Premium Polylam	Polylam	PVC	
Select Capsule Vendors								
Napa Fermentation Supplies	Napa, CA	www.napafermentation.com	●	●		●	●	
At Napa Fermentation Supplies, we have everything for the wine industry including a wide array of closures. So whether you're looking for capsules, corks, closures or wax we've got you covered. We are your source for fermentation equipment and supplies, for 38 years!			NAPA FERMENTATION SUPPLIES					
Phoenix Packaging International Corp.	Lasalle, QC Canada	www.phoenixpackaging.com	●	●	●	●	●	●
Pickering Winery Supply	San Francisco, CA	www.winerystuff.com	●	●		●		
Ramondin USA, Inc.	Napa, CA	www.ramondin.com	●	●	●	●		●
Our company has been producing capsules for the wine industry for over 125 years. Our main office and factory is located in Laguardia, Spain. We also have factories in Argentina, Chile and France. Production and sales of tin, aluminum, polylam capsules and screwcaps. Local inventory of stock tin, polylam capsules and screwcaps in many colors. Custom color polylam capsules. Printed and formed our factory in Napa.			ramondin					
Rich Xiberta USA	Cotati, CA	www.xiberta.com	●			●	●	
Rivercap USA	Benicia, CA	www.rivercap.com	●	●	●	●	●	●
Saxco International	Concord, CA	www.saxco.com			●	●	●	●
Scott Laboratories, Inc.	Petaluma, CA	www.scottlab.com	●					
Scott Labs is the leading supplier of cork & closures, fermentation and filtration products, equipment, parts and service for the North American wine community. Our Cork & Packaging department specializes in custom and stock closures for still and sparkling winemakers. Our portfolio ranges from proprietary products such as ScottPlus™ Dry-Steam Natural Cork and Scott Micro-Agglomerated cork, to products from industry leaders such as Amcor Tin Capsules, STELVIN screwcaps, ICAS wirehoods and Relvas sparkling wine corks. Our vision is to provide the best customer experience to the wine and specialty beverage community.								
SealLux	Santa Rosa, CA	www.seallux.com			●	●	●	●
Sparflex	Dizy, France	www.sparflex.com	●	●	●	●	●	●
Spirited Packaging	Stockton, CA	www.spiritedpackaging.com	●		●	●		
TricorBraun WinePak	Fairfield, CA	www.tricorbraunwinepak.com	●	●	●	●		●
Waterloo Container Co.	Waterloo, NY	www.waterloocontainer.com				●	●	●
Waterloo Container is a family-owned business started in 1980 to support the burgeoning wine industry in the Finger Lakes of New York and on the East Coast. Your complete packaging provider for glass wine, beer and liquor bottles. Import and domestic. Corks, caps and closures. Custom UV glass printing. Shrink sleeve application. Custom packages and closures. Re-packing, warehouse and inventory services.			WATERLOO CONTAINER <small>company</small> <i>Supplier of Wine Bottles, Caps, Corks and Closures</i>					
Wine and Beer Supply LLC	Ashland, VA	www.wineandbeersupply.com	●	●	●	●	●	●
Wine Country Closures	Fairfield, CA	www.battistellacapsule.com	●	●	●	●	●	●



RETAIL SALES ANALYSIS

Retail Wine Sales Up 17 Percent in January

Wines Vines Analytics

Produced by Wines Vines Analytics, the *Wine Analytics Report* is the industry's leading source of market insights, objective analysis and data.

SALES VALUE UP 17 PERCENT IN JANUARY

Off-premise table wine sales rose 17 percent versus a year ago in the four weeks ending Jan. 23, NielsenIQ scan data showed, approaching \$1.3 billion. The strong growth indicated that pandemic growth trends continued to be felt, even in the typically slower sales month of January. Sales during the latest 52 weeks rose 16 percent versus the previous year to exceed \$17.2 billion.

SALES VOLUME ROSE 9 PERCENT IN JANUARY

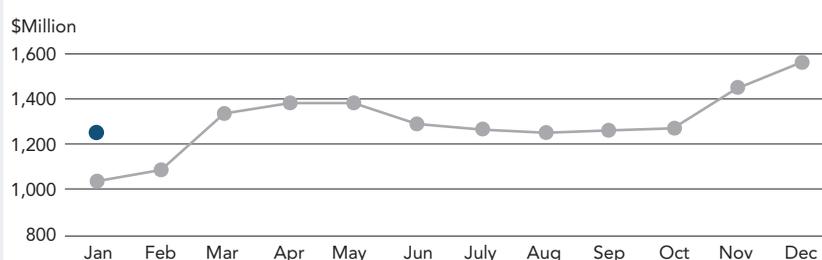
Off-premise table wine volumes increased 9 percent versus a year ago in the four weeks ending Jan. 23, totaling 12.8 million 9L cases. The latest 52 weeks saw case volumes rise 11 percent to total 179.9 million 9L cases.

PINOT NOIR MAINTAINS STRONG GROWTH, PRICING

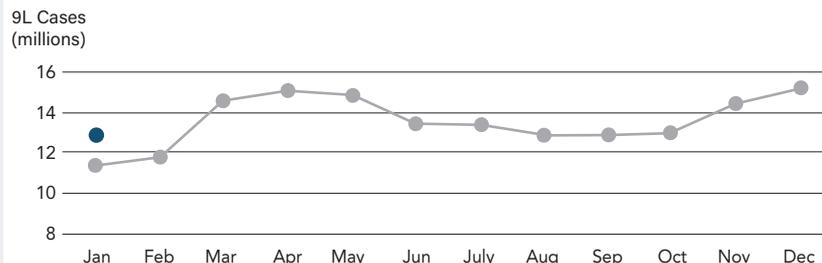
Pinot Noir is the most expensive of the top five wine types sold through NielsenIQ off-premise channels, with an average bottle price of \$11.50 in the 52 weeks ending Jan. 23. With the price increasing 3 percent in each of the past two years, Pinot Noir has managed to maintain and increase its edge over lower-priced varietals. The premium pricing has also failed to dampen consumer enthusiasm for the varietal, which saw sales in the latest 52 weeks increase more than 20 percent, second only among the top five wine types to red blends. Total sales in the period totaled nearly \$1.4 billion.

A closer look at the data shows that sales growth is strengthening, with Pinot Noir sales up nearly 25 percent in the latest four weeks. Average bottle price has followed suit, peaking during the latest 13 weeks—encompassing the premium holiday period—at \$12.04 a bottle. During the latest four weeks, pricing averaged \$11.87 a bottle, up 6 percent versus a year earlier. The accelerating price growth indicates consumers' continued willingness to spend on more expensive bottles, a reflection of the ongoing shift in spending from on-premise channels to off-premise for at-home occasions and the enduring appeal of Pinot Noir for such occasions. **WBM**

Trended Off-Premise Value

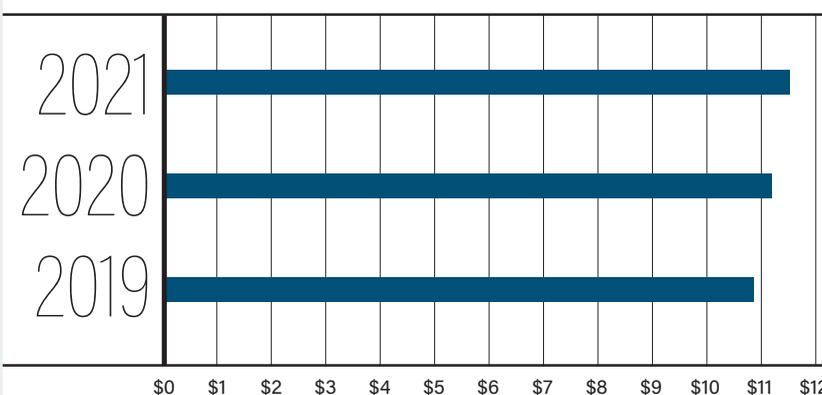


Trended Off-Premise Volume



SOURCE: NielsenIQ Latest 4 Wks - W/E 01/23/21

Pinot Noir Average Bottle Price



SOURCE: NielsenIQ Latest 52 Wks - W/E 01/23/21

Methodology

Sourced from NielsenIQ, these figures represent off-premise retailer wine sales to the consumer aggregated across a variety of channels nationwide, including grocery, drug, mass merchandisers, convenience, dollar, military, as well as a selection of warehouse clubs, and liquor channel geographies and liquor channel retail chains. NielsenIQ figures are updated and released every four weeks.

NielsenIQ Table Wine Category Segments MARKET: Total US xAOC+Conv+Military+Liquor Plus PERIOD: Week Ending January 23, 2021

NielsenIQ		Dollar Value				9L Equivalent Volume				Avg Equivalent Price Per 750ML	
		Dollar Value % Chg YA		9L Equivalent Volume % Chg YA		Avg Equivalent Price Per 750ML					
		Latest 52 Wks - W/E 01/23/21	Latest 4 Wks - W/E 01/23/21	Latest 52 Wks - W/E 01/23/21	Latest 4 Wks - W/E 01/23/21	Latest 52 Wks - W/E 01/23/21	Latest 4 Wks - W/E 01/23/21	Latest 52 Wks - W/E 01/23/21	Latest 4 Wks - W/E 01/23/21	Latest 52 Wks - W/E 01/23/21	Latest 4 Wks - W/E 01/23/21
TOTAL TABLE WINE		17,226,779,705	1,254,706,026	15.9	16.7	179,874,475	12,834,241	10.9	9.2	7.98	8.15
PRICE TIERS BY CONTAINERS	BOX	1,757,037,296	125,126,226	19.9	12.4	40,157,235	2,863,687	15.3	9.9	3.65	3.64
	\$0-\$3.99	648,843,826	46,623,605	8.9	4.4	21,767,649	1,566,816	6.3	3.4	2.48	2.48
	\$4+	1,107,670,846	78,450,683	27.4	17.7	18,376,200	1,295,730	28.0	18.8	5.02	5.05
	Total Table Wine Glass	15,134,364,960	1,105,161,301	15.6	17.3	135,932,229	9,695,752	9.9	9.0	9.28	9.50
	Value Glass \$0-\$3.99	613,746,140	42,723,234	-1.3	-6.6	15,221,588	1,048,867	-1.4	-7.4	3.36	3.39
	Popular Glass \$4-\$7.99	3,358,123,874	235,769,084	5.3	2.2	50,090,587	3,509,537	4.3	1.0	5.59	5.60
	Premium Glass \$8-\$10.99	3,612,259,812	255,981,280	11.0	9.8	31,423,849	2,217,472	9.7	8.6	9.58	9.62
	Super Premium Glass \$11-\$14.99	3,767,075,983	275,982,536	23.1	25.9	24,799,334	1,817,652	22.6	26.6	12.65	12.65
	Ultra Premium Glass \$15-\$19.99	1,847,604,520	139,530,950	24.5	31.1	9,018,880	676,620	24.5	31.3	17.07	17.18
	Luxury Glass \$20-\$24.99	764,087,681	57,830,835	33.1	45.0	2,907,716	220,305	32.0	45.2	21.89	21.87
Super Luxury Glass \$25+	1,161,479,704	95,749,261	27.9	43.4	2,413,866	196,831	26.3	40.9	40.08	40.52	
IMPORTED	IMPORTED	4,707,927,953	329,107,362	18.6	17.5	46,348,713	3,231,040	13.9	10.5	8.46	8.49
	ITALY	1,562,591,345	116,326,238	25.8	25.8	12,882,844	938,319	21.5	20.1	10.11	10.33
	AUSTRALIA	797,003,815	57,440,469	8.1	3.4	12,764,687	915,676	6.8	1.2	5.20	5.23
	FRANCE	638,344,825	38,580,240	21.0	28.3	3,645,988	213,291	15.5	18.9	14.59	15.07
	CHILE	305,603,265	21,289,795	12.9	7.4	4,649,491	325,008	13.7	7.9	5.48	5.46
	SPAIN	195,030,606	14,151,933	14.7	12.0	2,347,262	169,934	12.3	7.7	6.92	6.94
	GERMANY	90,167,176	6,133,872	17.7	15.5	791,272	53,334	10.0	8.1	9.49	9.58
	NEW ZEALAND	643,637,324	41,756,708	25.2	23.2	4,499,806	288,624	22.5	20.4	11.92	12.05
	ARGENTINA	360,658,752	25,918,310	8.6	7.7	3,787,299	264,568	6.0	2.1	7.93	8.16
	SOUTH AFRICA	28,558,025	1,950,953	14.9	21.4	235,972	16,242	13.5	21.5	10.08	10.01
	PORTUGAL	53,657,299	3,248,058	28.8	31.3	535,239	31,859	27.3	31.1	8.35	8.49
DOMESTIC	DOMESTIC	12,518,851,752	925,598,664	14.9	16.5	133,525,763	9,603,202	9.9	8.8	7.81	8.03
	CALIFORNIA	11,242,842,515	832,247,312	15.0	16.2	123,617,804	8,886,066	9.9	8.4	7.58	7.80
	WASHINGTON	690,246,713	49,636,148	9.3	12.4	5,555,396	393,800	7.3	9.4	10.35	10.50
	OREGON	304,801,760	23,222,825	23.7	32.2	1,531,276	114,179	22.3	30.0	16.58	16.94
	TEXAS	36,040,416	2,752,068	4.5	6.2	402,551	30,731	0.2	4.3	7.46	7.46
	NEW YORK	46,578,275	2,414,441	22.4	6.9	528,453	32,246	10.5	1.8	7.34	6.24
	NORTH CAROLINA	46,640,032	3,861,878	13.7	30.3	480,163	39,793	12.0	29.1	8.09	8.08
	INDIANA	27,693,954	2,225,207	19.3	32.1	297,831	23,896	17.1	30.8	7.75	7.76
	MICHIGAN	29,241,377	2,085,400	19.0	27.2	299,938	21,177	16.8	26.1	8.12	8.20
TYPES	RED	8,958,910,753	693,615,638	17.0	19.4	82,986,908	6,203,191	11.9	11.0	8.99	9.32
	WHITE	6,905,295,429	477,595,750	14.4	13.1	78,728,988	5,425,190	10.3	7.4	7.31	7.34
	PINK	1,357,327,772	83,215,074	15.9	16.9	18,118,946	1,203,212	9.0	8.6	6.24	5.76
VARIETALS	TOTAL CHARDONNAY	2,867,398,795	200,259,329	10.4	9.5	32,143,537	2,234,928	6.8	4.2	7.43	7.47
	TOTAL CABERNET SAUVIGNON	3,291,664,808	255,487,055	18.2	20.6	28,636,896	2,139,163	13.4	11.4	9.58	9.95
	TOTAL PINOT GRIGIO/PINOT GRIS	1,555,266,871	105,862,647	12.9	9.7	19,729,097	1,341,230	10.9	6.4	6.57	6.58
	TOTAL PINOT NOIR	1,376,095,127	107,243,748	20.4	24.8	9,965,656	753,035	16.7	17.8	11.50	11.87
	TOTAL MERLOT	737,572,783	54,562,661	3.2	4.4	9,752,276	698,435	0.5	-1.9	6.30	6.51
	TOTAL SAUV BLANC/FUME	1,290,385,965	86,322,022	25.8	24.0	11,038,606	737,151	23.8	20.9	9.74	9.76
	TOTAL MUSCAT/MOSCATO	747,366,037	56,312,614	15.7	14.8	10,793,383	792,049	11.9	9.5	5.77	5.92
	TOTAL WHITE ZINFANDEL	279,455,454	19,946,557	1.3	1.8	5,510,954	389,721	0.6	0.5	4.23	4.27
	TOTAL MALBEC	282,925,844	20,594,236	10.8	10.0	2,583,293	183,113	9.9	7.2	9.12	9.37
	TOTAL RIESLING	270,615,211	19,029,111	14.9	16.0	2,785,108	192,508	10.1	10.7	8.10	8.24
	TOTAL ZINFANDEL	246,743,580	18,676,285	10.6	12.9	1,680,027	124,210	8.1	8.4	12.24	12.53
	TOTAL SHIRAZ/SYRAH	152,160,267	10,987,665	3.0	-4.8	1,614,825	114,183	-0.2	-10.8	7.85	8.02
	WHITE BLENDS (ex. 4/5L)	275,358,655	19,338,597	16.0	20.9	3,098,606	216,523	9.7	10.2	7.40	7.44
	RED BLENDS (ex. 4/5L + CHIANTI)	2,353,825,877	186,942,721	20.9	23.3	20,374,883	1,573,198	17.4	17.4	9.63	9.90
	ROSE BLEND	750,612,357	38,909,754	24.4	30.6	6,086,099	333,204	20.1	21.7	10.28	9.73
GLASS SIZES	750ML	12,600,098,601	927,235,099	17.1	20.1	93,343,880	6,709,518	11.8	12.7	11.24	11.51
	1.5L	2,234,158,244	156,487,047	9.0	4.4	37,161,900	2,606,680	6.6	2.0	5.01	5.00
	3L	59,932,949	4,139,600	0.1	-8.2	1,459,627	99,694	-2.7	-10.2	3.42	3.46
	4L	80,255,395	5,660,833	4.9	4.0	2,481,478	175,254	2.4	2.3	2.70	2.69
	187ML	104,063,722	7,096,176	-1.1	-4.3	1,199,111	82,220	-5.0	-6.0	7.23	7.19
	375ML	37,944,479	3,480,400	65.9	92.5	143,564	13,699	65.3	97.3	22.04	21.19
BOX SIZES	ex. 4/5L	1,217,304,601	86,209,319	25.2	15.7	21,279,238	1,501,950	23.9	15.2	4.77	4.78
	1L	35,712,299	2,590,600	1.0	-1.8	508,530	36,840	-1.6	-3.1	5.85	5.86
	1.5L	25,671,270	1,806,462	-10.7	-14.9	500,649	35,793	-9.6	-13.8	4.27	4.21
	3L	933,779,972	65,225,421	34.5	23.7	17,496,397	1,226,266	31.0	21.3	4.45	4.43
	5L	539,728,655	38,916,671	9.4	5.7	18,877,898	1,361,731	6.9	4.5	2.38	2.38
	TETRA	251,879,600	18,622,658	1.0	-4.2	3,222,589	234,440	-1.3	-6.0	6.52	6.62

Source: NielsenIQ

Little Momentum for Value-Priced Wines

Andrew Adams



Andrew Adams is the editor of the *Wine Analytics Report* and was a writer and editor at *Wines & Vines* magazine from 2011 to 2018. Adams grew up in the city of Sonoma, Calif., and graduated from the University of Oregon with a degree in journalism. In addition to working at daily newspapers for more than a decade, Adams worked for more than two years (three harvests) in the cellar and lab at a winery in Napa Valley.

- **Despite pandemic off-premise surge, sales of value wines remain lackluster.**
- **Consumers appear to be choosing seltzers or box wines rather than value bottles.**
- **Gallo may revitalize sector following deal with Constellation.**
- **Increases in DTC and e-commerce haven't lifted value wines to same degree as all wine.**

FOR MUCH OF THE past decade, the value side of the wine market had been stagnant, and growth came from the premiumization trend. The pandemic disrupted those long-term trends in 2020; but as a new year begins and a tentative recovery gains momentum, it appears some of the trends of the past decade may usher in the new one.

E-commerce shoppers don't appear to be the same as value-minded grocery store consumers, and retailers are increasingly shifting shelf space away from lower-priced wines in favor of seltzers and ready-to-drink (RTD) beverages that are eating away at total market share.

The major deal between E. & J. Gallo Winery and Constellation Brands that closed Jan. 5, 2021 saw the latter divest its value-priced wine business, which has seen modest growth, in favor of premium wines and direct-to-consumer brands that deliver the stronger sales and better margins shareholders of the publicly traded company want to see.

As the world's largest wine company, Gallo has the resources to support innovation and creative marketing for the lower tiers of the market. Stephanie Gallo, the company's chief marketing officer, said in a recent interview with *Wine Business Monthly* that the brands acquired through the deal may help bring new consumers to wine. "As we continue to invest in our premium and luxury businesses, we see a tremendous opportunity with this acquisition to bring new consumers into the wine category," she said. "This allows us to provide our customers and consumers with quality products at every price point."

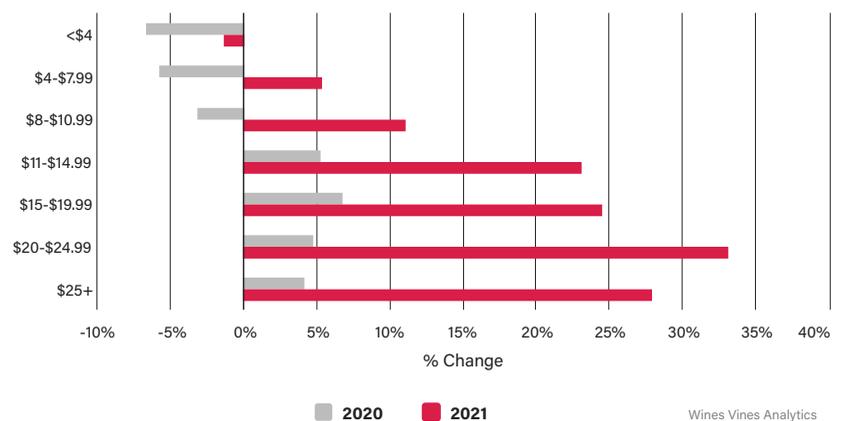
What Gallo will, or can do, in this part of the market remains to be seen. What has happened in retail since the early days of the pandemic, however, is that sales of wines priced less than \$11 per 750ml have slowed while wines priced above that have continued to do well.

\$11 Remains the Dividing Line

According to NielsenIQ data from the 52 weeks ended Dec. 26, 2020, sales of wines priced less than \$3.99 were down more than 1 percent compared to a year earlier. Wines priced between \$4 and \$7.99 and \$8 to \$10.99 grew 5 percent and 10 percent over the previous year, respectively. Wines priced between \$11 and \$14.99, however, were up 22 percent while those priced between \$15 and \$19.99 rose by 23 percent over the previous year.

Off-Premise Sales Value % Change by Price

Source: NielsenIQ; off-premise sales of table wines in glass packaging, 52 weeks ended Jan. 23 and comparable period ended 2020.



The most expensive price segments saw the fastest growth through NielsenIQ off-premise channels in the 52 weeks ended Jan. 23, with double-digit gains contrasting sharply with performance a year ago.

SEE WHAT'S **INSIDE** THIS BARREL!

Just open the camera on your phone and point it at the label.



WINE PRODUCTION SOFTWARE

We get it. We are you.

With over 100 harvests under our belt, we know winemaking.

We understand your greatest challenges managing production, and we've catered our software specifically to address them. From budbreak to bottle, InnoVint manages your entire winemaking process. Save time, gain confidence, and improve the quality of your wine with software tailored to you.

Learn more by scanning the barrel label with your smartphone's camera.





WINES VINES ANALYTICS

The Leading Source for Wine Industry Data

Wine Analytics Report:

A monthly interactive digital publication. The latest wine industry metrics, market analysis and trends shaping the wine industry. Ensure your company's success by making informed business decisions based on market conditions and emerging new trends.

Wine Analytics Database: **NEW!**

The Wine Analytics Database features a data cube structure allowing users to easily access and interpret data from multiple sources measuring different dimensions of the North American wine business. Time series data from 2010 to 2020 for multiple data sets. Visualization with charts, graphs and data tables.

Winery Database:

Online system, enabling 24/7 access to our proprietary database that includes winery profile and contact information on over 11,000 North American wineries, and over 30,000 contacts.

Distributor Market Service:

Enables wineries to identify, contact and monitor U.S. Distributors by state. Monitor your competitor's distribution and know the wineries represented in Distributor's portfolios. For Distributors and Importers, this searchable database allows you to identify current distributor relationships among U.S. Wineries.

Contact Alan Talbot at:
alan@winesvinesanalytics.com

winesvinesanalytics.com • 707.940.4744

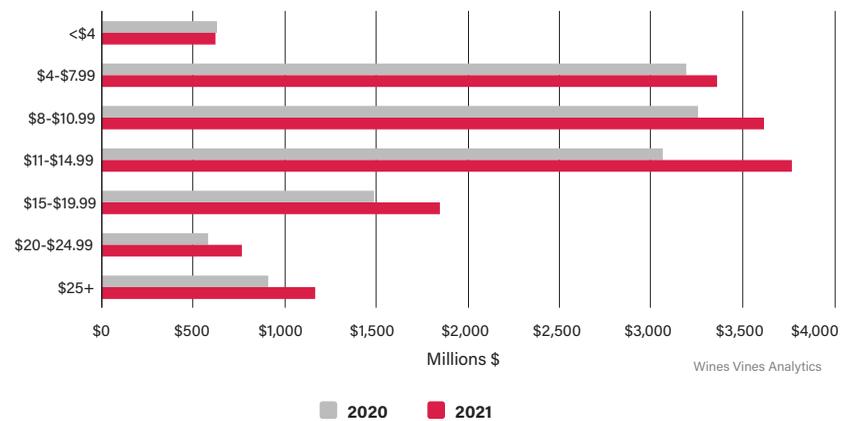


WINES VINES ANALYTICS

Little Momentum for Value-Priced Wines

Off-Premise Sales Value by Price

Source: NielsenIQ; off-premise sales of table wines in glass packaging, 52 weeks ended Jan. 23 and comparable period ended 2020.



Domestic table wines in the \$11-\$14.99 price category accounted for the single largest tranche of off-premise sales through outlets tracked by NielsenIQ in the 52 weeks ended Jan. 23.

In 2019, the growth for wines at those higher prices was much more modest—only 5 percent for wines priced between \$11 and \$14.99—but the sales for lower priced wines had declined at a much more significant pace. Wines priced between \$8 and \$10.99 fell 3 percent compared to the previous year, and sales for wines priced between \$4 and \$7.99 fell by 6 percent to more than \$3.2 billion.

While the early days of the pandemic saw consumers buying wine at all price points, that rising tide ultimately did not lift all boats. Compared to the double-digit growth for wines at higher price points, the modest gains at lower prices are even less impressive.

Aside from wines in larger packaging, particularly box wines, the value side of the market is slipping back into the doldrums while higher-priced wines stay strong as consumers have shifted their buying from the on-premise sector to retail. As the on-premise market is expected to recover later this year, the sales growth of higher-priced wines will likely slow and ultimately decline compared to 2020. Yet those who track the retail space expect premiumization to continue at the expense of lower-priced wines.

Curtis Mann MW is the vice president of alcohol for the Albertsons chain of grocery stores and said aside from the major brands, such as Barefoot (owned by Gallo), Franzia and a few others, value-priced wines have not performed as well as wine in general. "Initially, when the pandemic hit, customers traded down to value wines, probably as a concern over possible economic fallout from the coronavirus," he said in an email. "However, as customers became comfortable that the economy was stabilizing, they returned to the premiumization trend, and items over \$10 started to steal share again."

Value Via Box Packaging Still Popular

He noted that the number of SKUs for wines priced less than \$10 in Albertsons' stores has steadily declined as most new products entering retail are priced above the \$10 mark. "The one exception is sweet wines as new customers continue to enter the wine category through sweet, and they tend to be under \$10."

Mann said box wine sales also continue to see a dramatic increase led by brands such as Bota Box. This packaging format has remained popular throughout the pandemic as consumers have gravitated to lower prices, higher volume and a package designed to sit in the fridge or on a countertop

for an extended period. While Bota has a “premium” purchase price of around \$16.99, that works out to a little more than \$4 per 750ml.

The bottom shelves of retail wine aisles are shifting to include fewer bottles in favor of more boxes and more alternative packaging, such as wine-in-can brands that continue to do better than wine overall.

The other major headwind to value-priced wines is the ongoing and extraordinary performance of seltzers. NielsenIQ found the number of seltzer buyers doubled in 2019 and doubled again in 2020.

“Seltzers are pulling volume out of the wine department, mainly in the below-\$10 category,” Mann observed. “There are some more wine-based seltzers hitting the market soon, so that may keep customers in the category although in some cases I’m not sure if customers are differentiating between malt, wine or spirits-based seltzers.”

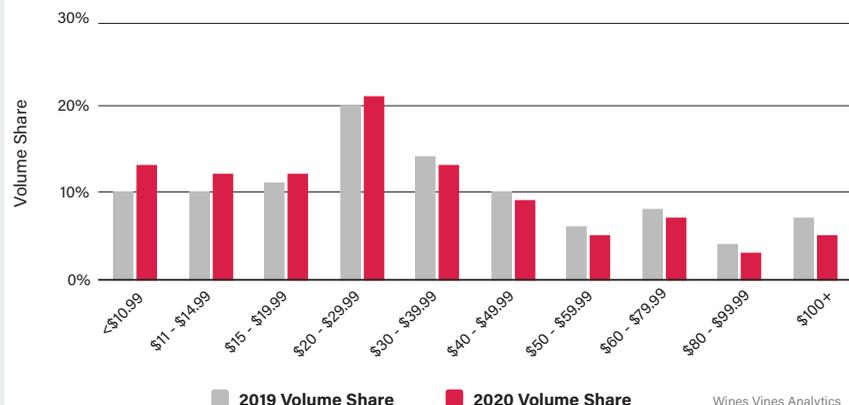
If it has carbonation, the word “seltzer” on it and comes in a can, American consumers can’t seem to get enough of it.

The “ready-to-drink” (RTD) market tracked by NielsenIQ has grown from \$3.7 billion in 2018 to \$8.5 billion in 2020. In the 52 weeks ended Jan. 1, 2021, seltzer sales grew 157 percent, spirits-based RTDs were up 157 percent, and spirits-based seltzers grew by an astounding 466 percent.

Danny Brager, who was previously NielsenIQ’s senior vice president for beverage alcohol and now helps manage a joint off-premise market report as well as a private consultancy, said many of the trends in play prior to the pandemic are re-emerging as the market returns to something closer to normal.

DtC Shipment Volume by Price

Source: Wines Vines Analytics/Sovos ShipCompliant, 12-months ended December 2020, 2019; volume share includes <2% unspecified price



By volume, DTC shipments are more balanced across all prices although the past year saw most gains for wines priced less than \$30. As the share of wines priced more than \$100 fell by two points to 5% in 2020, the average bottle price for all wines shipped declined by 9.5%.

He said seltzer drinkers, like other consumers, have been buying more beverage alcohol in general, but the share of those purchases by seltzer and spirits has grown at the expense of wine and beer. Brager was less certain if the consumers who are choosing spirits over wine are behind the lackluster performance of value-priced wines. “To me, the whole scene is blurrier than it was before with all these new categories and products,” he stated.

NOMACORC TRENDSETTERS

“WE WANTED TO MAKE THE PERFECT WINE FOR FRIED CHICKEN. THE RECIPE CALLED FOR SUGARCANE.”

For Hardy Wallace of Dirty & Rowdy, Green Line closures are the perfect finishing touch because they’re sustainably made from sugarcane and engineered to outperform other corks in every way.

by **VINVENTIONS**
us.vinventions.com/trendsetters

CENTRAL COAST *Insights*

The economic and financial conference for the Central Coast wine industry

Thank you!
to the participants, sponsors and partners.

PRESENTED BY

WINE BUSINESS MONTHLY & *WBMevents*

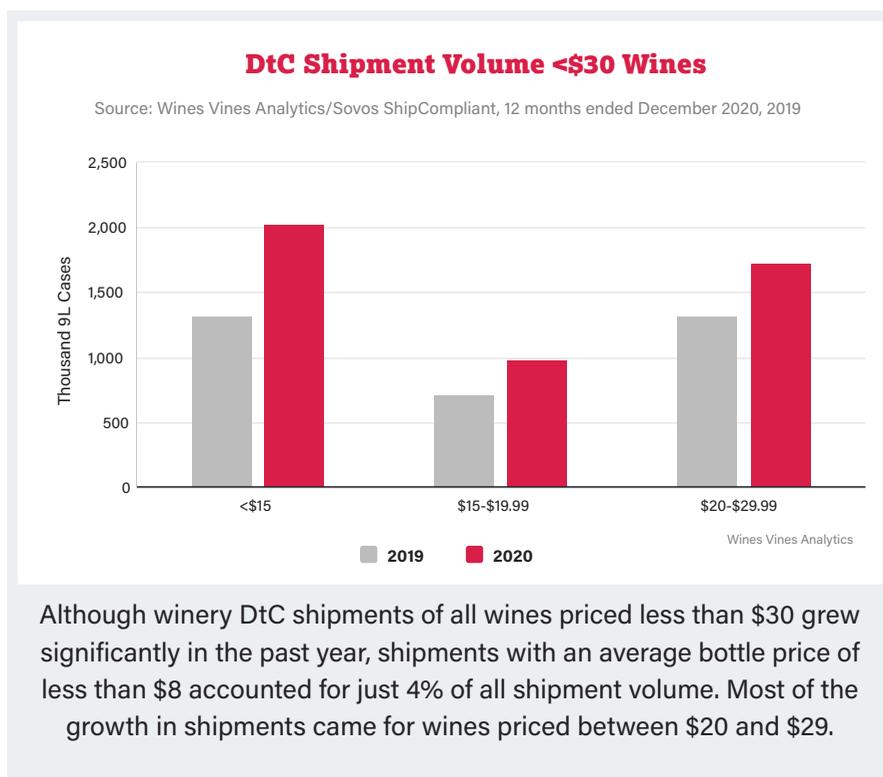
For more information call 707-940-3920 or visit wbmevents.com

THANK YOU TO THE 2021 SPONSORS!

BANK OF AMERICA 



Little Momentum for Value-Priced Wines



What is abundantly clear in the NielsenIQ data is that wine in glass bottles priced less than \$11 is not performing well.

Brager said he couldn't recall a deal similar to the one between Gallo and Constellation, so he wouldn't hazard a guess as to what it could mean for the market and lower-priced wines in particular. "The one thing I know with Gallo is that they're really good with execution," he said. "They have the muscle and power to do what they are going to do and put their emphasis behind it."

Through its partnership with Rakuten Intelligence, NielsenIQ also determined that the number of beverage alcohol e-commerce buyers grew by 167 percent in 2020.

E-commerce Surge Powered by Premium Prices

The number of e-commerce alcohol shoppers surged past 3 million in April and May but began to moderate with the onset of summer. The total number of e-commerce shoppers fell to its lowest level of roughly 2.5 million in September before beginning to climb (in step with the number of new COVID-19 cases) before surging to a new high of around 3.5 million in December.

While much of this Internet shopping can be attributed to the pandemic, online shopping is widely considered a new normal as consumers have discovered just how easy it is to buy wine, beer and spirits online.

Wine.com reported revenues of \$329 million in 2020, which were 119 percent more than in 2019. Much of the website's new business appears to be for the long haul as its subscription service saw a 149 percent increase in revenue to \$189 million. The company's personalized wine club service accounted for more than 25,000 wines selected for shoppers by Wine.com's team of sommeliers. The online retailer also claims to be bringing in younger consumers, with 44 percent of its new customers part of the millennial generation or younger. Mobile devices also accounted for \$110 million in revenue, an increase of 111 percent over last year.

All this new business, however, is for higher-priced wines.

As founder Michael J. Osborn explained in an email, the average selling price for Wine.com consumers is around \$30 per bottle. "Equally important to know is that our assortment starts at \$8 or \$9, but even then, we don't carry a comprehensive assortment of value-priced wines as competitive pricing on the segment is difficult and freight, where the bottle weight is the factor, consumes the product gross margin," he stated. "That may be the biggest factor standing in the way of value-priced wines and direct shipping—the delivery costs and adult signature tag requirement."

Part of the e-commerce boom has also involved winery direct-to-consumer shipments. That channel grew to more than \$3.7 billion in total value from a 27 percent increase in total volume to more than 8 million cases.

Much of that growth was from new shoppers entering the channel, wineries allocating more inventory to their DTC programs and consumers buying a greater variety of wines, often at lower price points. These new contributors to DTC growth, in turn, drove the average bottle price of shipments down 9.5 percent to \$36.83.

Shipments of lower-priced wines did see substantial growth: wines priced less than \$15 grew to account for roughly 25 percent of all shipment volume in 2020, wines priced between \$3.50 and \$4.99 grew 96 percent in volume, and the \$5 to \$7.99 price tier saw an 85 percent increase in shipment volume. These two price bands, however, accounted for just 342,543 cases or slightly more than 4 percent of the entire channel's volume. Wines priced between \$20 and \$29.99, meanwhile, saw a 31 percent increase in volume to more than 1.7 million cases, and this price band accounted for 21 percent of the total channel volume.

So while the DTC channel did see a significant increase in shipments at prices that would still be considered "value" in the retail market, this increase is still very small compared to the entire DTC channel that, despite a record year in 2020, still accounts for about 10 percent of the entire off-premise market.

It remains to be seen what Gallo may do with its lion's share of the value market in retail, but the most recent trends portend a reduced set of traditional wine SKUs at lower prices with a greater number of box wines and an ever-growing number of seltzers and RTD beverages taking shelf space and market share for wine. **WBM**

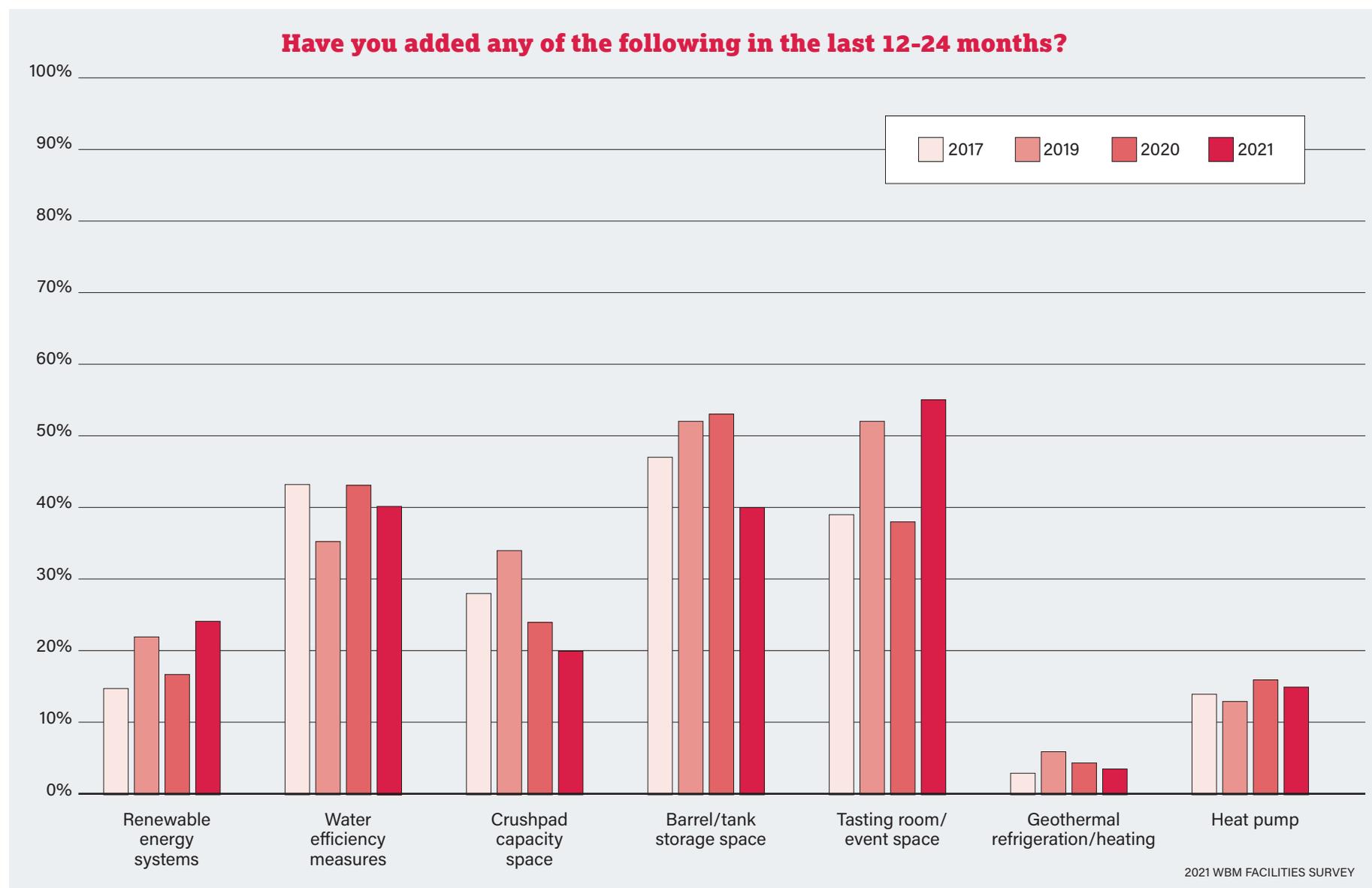
2021 Facilities Survey: Wineries Continue to Upgrade Tasting Room and Event Space

Nearly Half Have Solar Panels but Forty-one Percent Don't Have a Backup Power Plan,
Insurance Rates Increasing

WHILE THE ECONOMIC UNCERTAINTY and drop in tourism wineries experienced in the past year led many to postpone making capital investments and projects were put on hold, results of the latest *WBM Facilities Survey* show that upgrading the visitor experience continues to be a priority. Sixty percent of wineries responding to the survey plan to add tasting room or event space over the next 12 to 24 months.

Survey results indicate this emphasis on upgrading visitor experiences was in the works prior to the Covid-19 crisis—55 percent of wineries said they had added tasting room/event space in the past 12 to 24 months—but the number of respondents planning to add tasting room or event space rose twelve percent from year-to-year. That may be driven by the crisis in some cases actually accelerating projects with wineries making improvements to accommodate social distancing, outdoor activities, virtual tastings, and the like.

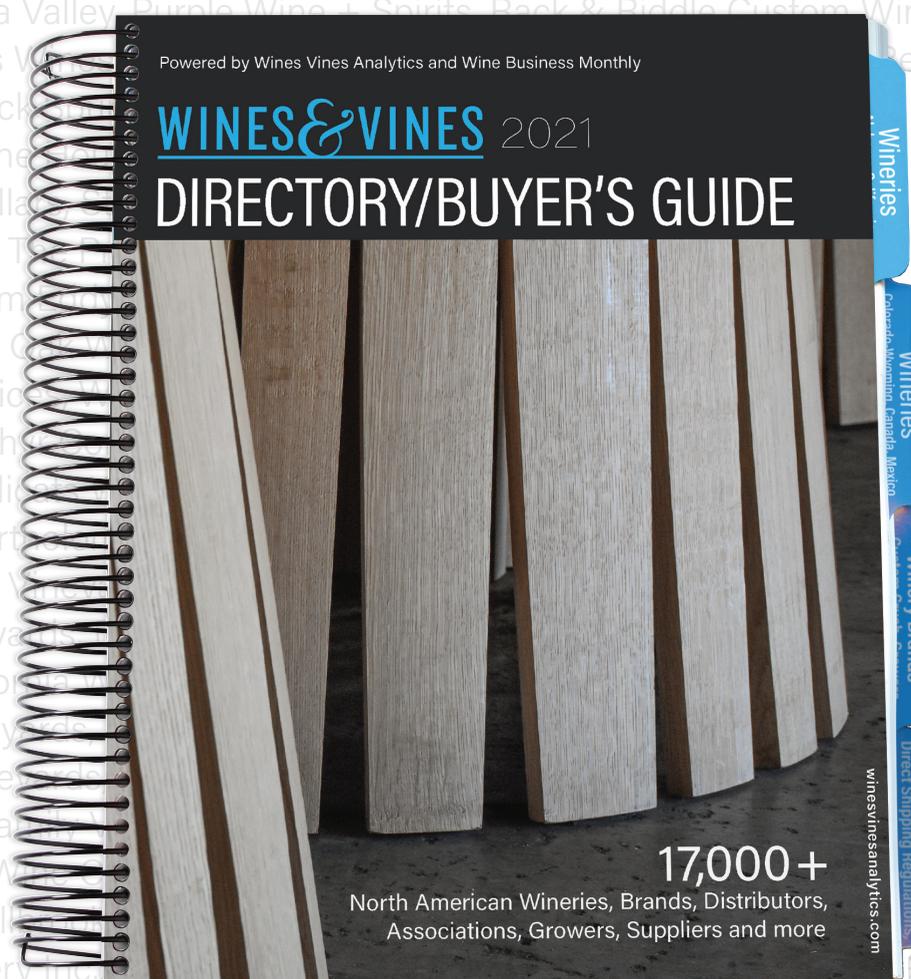
Seventy-two wineries participated in this year's survey.



The Resource Wineries Use to Research Purchase Decisions

WINES&VINES

BUYER'S GUIDE

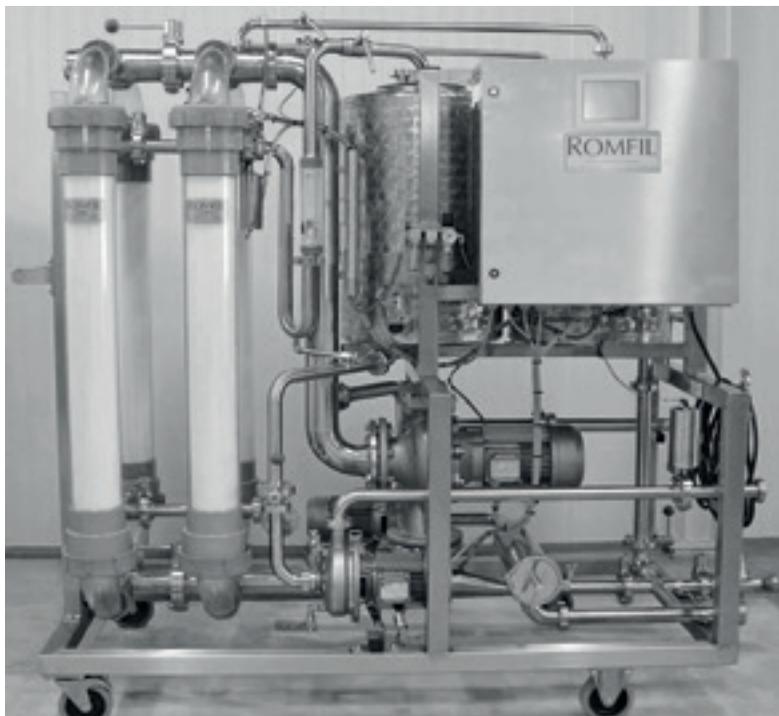
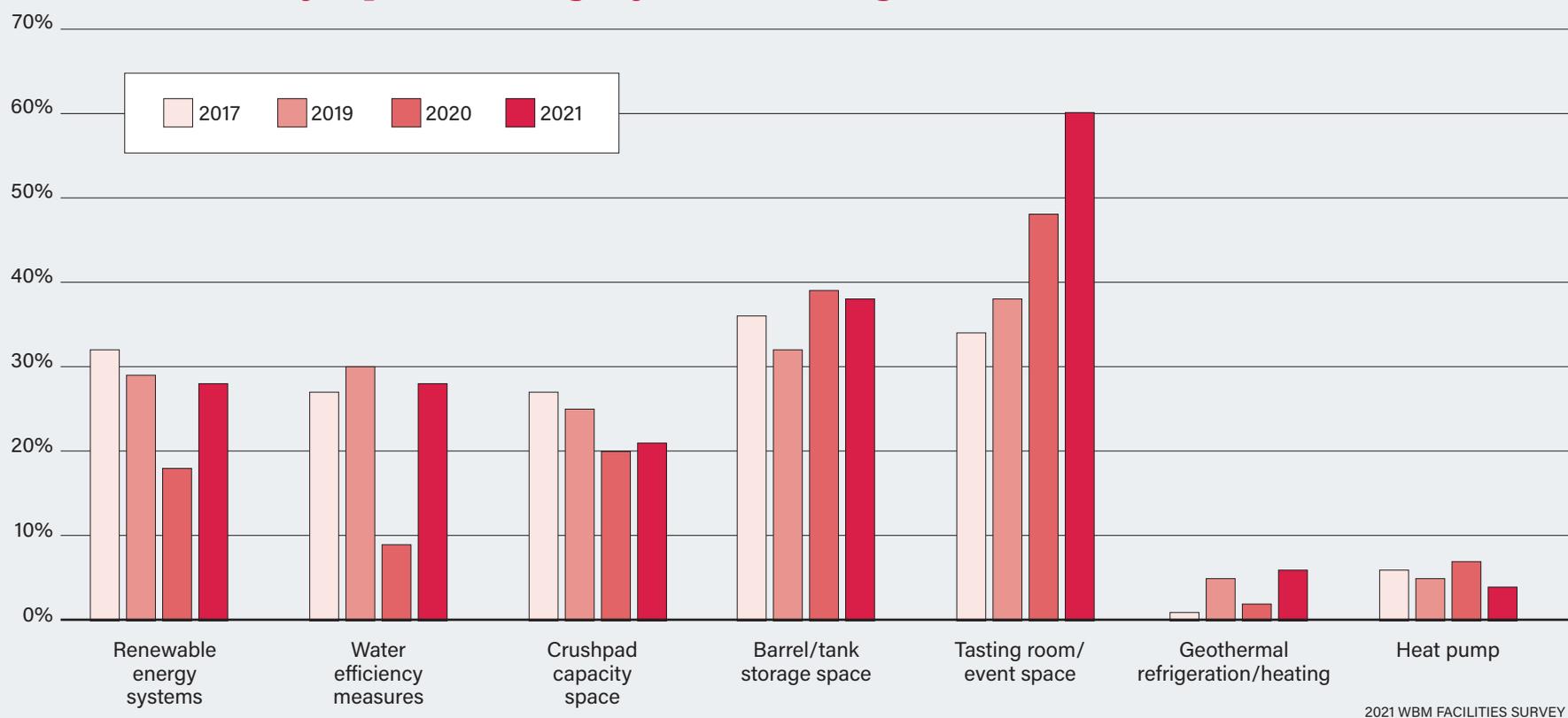


Get Your Copy Today

wbbuyersguide.com/buynow

Connecting buyers and sellers.

Do you plan on adding any of the following in the next 12-24 months?



ROMFIL CROSSFLOW FILTRATION

One of the pioneers in engineering crossflow filtration, Romfil Crossflow systems have been filtering wine since 1998. Romfil crossflow stands for quality and precision in manufacturing and processing.

Our filters are simple, gentle, modular and thoughtfully engineered. With capacity ranges from 200 gallons an hour to over 5000 gallons an hour – we have a system to simplify your life.

FOR THE LOVE OF WINE


Euro-Machines
 Vineyard and Winery Equipment

West: 707-864-5800
 East: 540-825-5700
 info@euromachinesusa.com – www.euromachinesusa.com

How Wineries are Conserving Energy

As the chart below indicates, wineries have taken a wide range of measures to save energy. Low energy lighting is low hanging fruit, one of the least expensive energy saving measures providing an immediate return, so it's not surprising that 76 percent of respondents said they've already done it. Only a very small percentage of wineries admitted to not taking any steps to reduce energy use.



“I’m looking for a commercial banker who wants to understand my business.”

TALK TO US

Get in touch with our wine industry specialists by visiting www.bankofmarin.com/wine



Bank of Marin

SERVING THE BAY AREA



Member FDIC

COMPLETE CONTROL

Easy, Affordable, Accessible



Temperature Control



Brix/Temp Tracking



Secure Cloud Access



Alarm Notifications



Scheduled Pump-Overs

www.acrolon.com

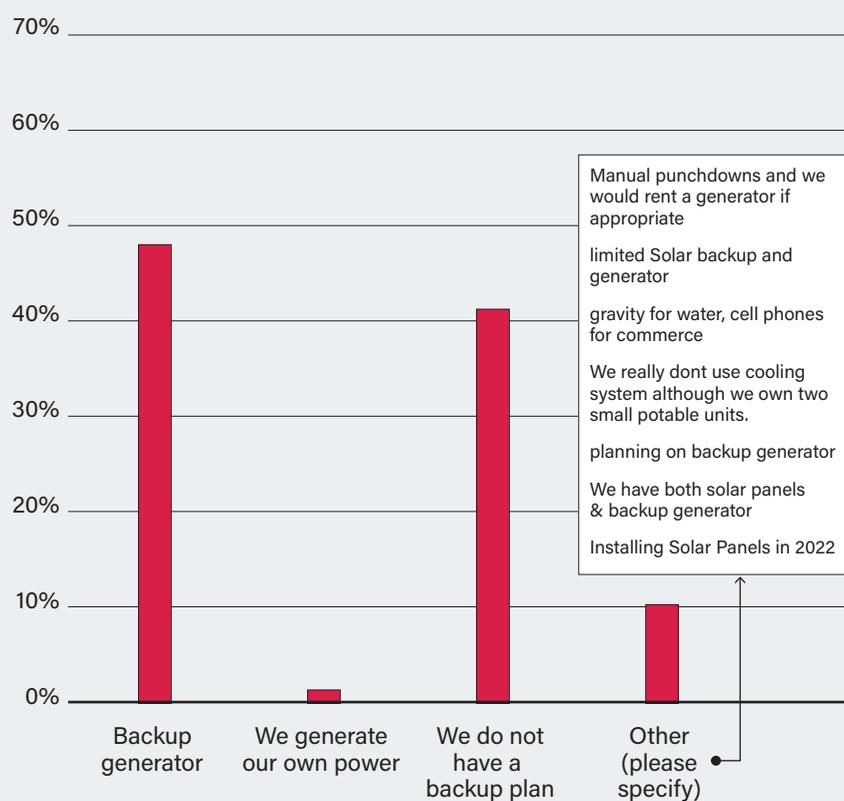
More Solar Panels Deployed

As we've observed before, the rate of adoption of solar panels by wineries continues to accelerate as the costs of installing them drop. That trend is reflected in survey results indicating that an impressive 43 percent of wineries now have solar panels, up from 30 percent in this survey two years ago. The increase is higher among smaller wineries, which may indicate that a larger proportion of mid- to large-sized wineries already have them.

Power Outages? What's the Plan?

The wildfires and public safety power outages that occurred in Northern California during the 2019 and 2020 harvests brought an increased awareness that power reliability is an issue for a considerable number of wineries. Forty-eight percent of wineries surveyed this year plan to deploy backup generators in the event of an outage. Forty-one percent acknowledged they don't have a backup plan but that is an improvement over 2020, when 58 percent of wineries confessed to not having a backup power plan. As one might guess, mid- and larger-sized wineries tended to be more likely to have backup power plans.

In the event of a power outage, what is your backup power plan?



2021 WBM FACILITIES SURVEY

SUSTAINABLE ALTERNATIVE WINE PACKAGING



THE LEADER IN QUALITY WINE PACKAGING SOLUTIONS

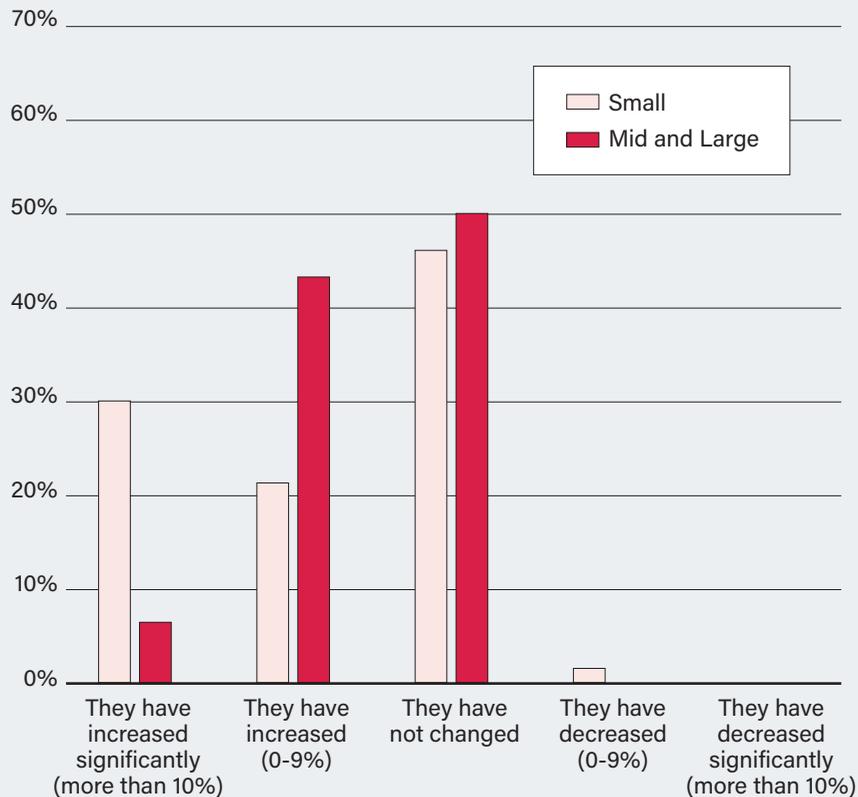
KEG LEASING, FILLING & LOGISTICS SERVICES

100% REUSABLE STAINLESS STEEL KEGS

COMPLETE WINE CANNING SERVICES

INFO@FREEFLOWWINES.COM | FREEFLOWWINES.COM | 415.626.1215

Have your insurance rates changed in recent years because of wildfire or other natural disasters?



2021 WBM FACILITIES SURVEY

Insurance Costs and Availability

It's been widely reported that the wildfires of 2019 and 2020 led insurance companies to increase rates. That trend is also reflected in the survey. Twenty six percent of wineries said their rates increased more than 10 percent in recent years as a result of wildfires or other natural disasters; another 26 percent indicated they've increased; and less than half said they haven't changed. An additional 20 percent of those surveyed—14 wineries—said they had policies dropped because of the risks of natural disasters. More often than not, however, these wineries—63 percent of them—were able to find new policies. **WBM**

LET'S DO MORE, TOGETHER



World Cooperage

You know your fruit – we know our oak.
Together, let's craft a beautiful wine to achieve your cellar goals.



worldcooperage.com

Wineries & Winemaking

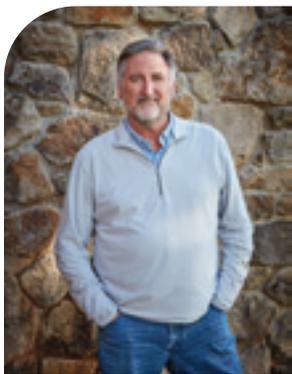


Alicia Sylvester

Banshee Wines appointed Alicia Sylvester as the winery's new winemaker. Sylvester joins Banshee following her winemaking role at Merus in Napa. Sylvester works in concert with CEO and co-founder Baron Ziegler to continue crafting site-specific wines that are true to style and character, on which Banshee has built its reputation. She attended California Polytechnic State University, San Luis Obispo where she

began to explore the wine business through her studies and summers full of viticulture and enology internships. She graduated in 2011 with a Bachelor of Science in agriculture business with a marketing concentration, minoring in wine and viticulture. In 2015, Sylvester joined the winemaking team at Lancaster Estate as an enologist and was quickly promoted to assistant winemaker a year later while earning her winemaking certificate from University of California, Davis.

Phantom Creek Estates in the Okanagan Valley announced winemaker Francis Hutt left the winery and returned to his native New Zealand for personal reasons. During his two years of impactful contributions, Hutt executed the 2019 vintage at the new winery facility and obtained organic certification for the winery and its vineyards in 2020. "As a family-owned business, we respect the importance of being close to family members, especially given the current times," said Santiago Cilley, CEO of Phantom Creek Estates. "We appreciate Francis' many contributions, and he will be missed by all of us here. Due to his departure, we will begin the immediate search for his replacement."



Michael Beaulac

Chalk Hill Estate Vineyards & Winery announced Michael Beaulac as senior winemaker. Beaulac brings more than 20 years of experience working with premiere luxury Northern California wineries. Beaulac's most recent tenure was serving as general manager and winemaker at Napa's Pine Ridge Vineyards from 2009 to 2020, where he oversaw the estate's 160 acres. Prior to this time, Beaulac was vice president of St. Supéry Vineyards in Rutherford from 2001 to 2009. There he worked closely with Michel Roland and Denis Dubourdieu. Beaulac's wine career began after a

chance encounter with Tim Murphy of Murphy-Goode who offered him a job as a harvest intern in 1989. He spent an interim period at Laurier Winery in Sonoma's Carneros region working as a cellar master with Merry Edwards from 1989 through 1991.

Crista Johnson joined the La Prenda Vineyards team as its marketing manager. After six years managing the marketing department at Schug Winery, Johnson spent the last few years consulting in the wine industry and travelling with her family. She started working at wine importer Negociants USA in 2007. In 2011 Johnson accepted a position managing the marketing department at Schug Carneros Estate Winery. Elected to the Board of Directors of the non-profit Carneros Wine Alliance in 2015 she served as board chair, vice chair and secretary. Johnson has since worked with several wine industry clients such as Vinfolio, Chai Consulting as well as the Sonoma Valley Education Foundation. She was a founding contributor to the Wine Country Moms Blog and continues to write in her free time.



Carolyn Wentte

Wente Family Estates announced a new alignment for the company's senior leadership. Eric Wentte will transition to chairman emeritus as the next step in his 43 years of service supporting the five-generation family business where he has held roles including winemaker and head of production, to leadership roles as president, chief executive officer, and chairman of Wente Family Estates. Succeeding Eric as chair will be Carolyn Wentte. Carolyn joined the company in 1980 working side by side with her two brothers, Eric and Philip (vice chairman). Carolyn started in sales and marketing where she developed and led

Wente Vineyards' lifestyle businesses as well as grew the Wente Family Estates portfolio of brands over the past 40 years. She became president in 1995 and the family's first female CEO in 2008. In Carolyn's 13 years as acting CEO, she provided a steady vision for the business, with a focus on wholesale success, customer experience, continuous improvement of systems and operational flow, and a culture of innovation.



Tyson Overton

Tyson Overton will assume the role of chief executive officer. Overton joined Wente Family Estates in 2014 to lead its sales organization and most recently has been serving as the chief sales and marketing officer, leading the charge on scaling Wente Family Estates' share of the market. Following consecutive years of growth in revenue, volume and share in the company's wholesale business, he supported the team through a challenging, unprecedented year in 2020 and led them to over-deliver on company profit targets, driving success for the total organization. As CEO, Tyson will be part of the senior leadership team comprised of family and key executives in HR, sales, operations, finance, marketing, and IT.

Consulting winemaker Jean Hoefliger joined the Texas Wine Collective, beginning with the 2021 growing season. He will immediately begin work with the existing winemaking teams at Brennan Vineyards and Lost Oak Winery to enhance estate farming practices and wine quality. In 2005, Hoefliger started Oakville-based Alpha Omega Winery in Napa as the winemaker and general manager. After 12 successful years, he shifted his career to become a full-time consulting winemaker. Since that transition, Hoefliger has worked with a multitude of iconic producers all around the world, including: Monteverro in Tuscany, Pact(e) in Burgundy, Perinet in Priorat, Tolosa Winery in Edna Valley, V. Vineyards in Sonoma County, as well as MR Michel Rolland, Newton Vineyard, and Hill Family Estate in Napa Valley. Hoefliger will begin his work in the vineyards this spring with the Brennan Vineyards and Lost Oak Winery teams as they prepare for bud break. From there, he will assist with farming strategies for the remainder of the growing season and will be on site for harvest and vinification in the fall.

Dan Foster, president and managing partner of 7Cellars, has been appointed to director of wholesale for acclaimed, philanthropy driven wine company, ONEHOPE Wine. Foster will maintain his role at 7Cellars while expanding the wholesale division of ONEHOPE Wine. This emphasis and expansion of aligned interest highlights the strong partnership between the two rapidly expanding brands.



Susan Lin

Susan Lin, Head of Wine Expertise for Belmont Wine Exchange, has been named Master of Wine (MW) by the Institute of Masters of Wine. Lin joins a prestigious group of 418 Masters of Wine around the world and is one of 56 Masters of Wine in the United States. Lin earned the title by passing the three stages of examination consisting of a series of theory papers and blind tasting exams, and the passing of an academic research paper. Lin's research paper, Influences of classical music on the perception of a Brut non-vintage Champagne, can be accessed via the Institute of Masters of Wine. Lin joined

Belmont Wine Exchange in 2014 from a career in high-tech, where she worked as a program manager for Search and Maps Quality at Google. She is a classical pianist and holds a Master of Fine Arts in music, bringing a unique perspective to wine pairings and events.



Omar Percich

Don Sebastiani & Sons chief operating officer, Omar Percich, was promoted to chief executive officer. In this expanded role, Percich will continue to work closely with Don Sebastiani & Sons president, Donny Sebastiani, to increase overall profitability and portfolio growth across the company. Percich joined the company in 2017 as chief financial officer and was subsequently elevated to chief operating officer, taking over for the retiring Tom Hawkins. Over the course of his five-year career, Percich has

been instrumental in growing the company's efficiencies and profitability focusing on; reducing costs, increasing accountability while implementing the wine industry pricing management software, Tradeparency and shaping an effective and bright executive team who are well positioned for the future success of the company. Percich previously worked as controller and CFO for Foley Family Wines in Napa, Calif.



Anthony Marzella

Scheid Family Wines based in Monterey County, Calif., is growing its family from coast to coast with two additions to the national sales team; Anthony Marzella, Northeast regional sales manager; and Nancy Chira-Garcia, sales representative for Monterey. With decades of experience between them, these team members each bring a wealth of experience and talents to Scheid Family Wines. Marzella comes to Scheid Family Wines with over 30 years of industry experience. In his most recent position, Marzella worked as the Northeast division manager for Quintessential Wines, with an emphasis in serving the New York/New Jersey corridor. Prior to that, he spent 16 years with The Winebow Group successfully navigating his way from brand manager to general sales manager to vice president/general manager of wholesale sales. Chira-Garcia has been a steadfast force on



Nancy Chira-Garcia

the Scheid Family Wines team for the past seven years, starting out in the Scheid Vineyards tasting room in Carmel, then moving to the hospitality team in 2014. In this capacity, she worked with local hotels and businesses as well as charitable and non-profit organizations, introducing them to the Scheid portfolio and creating mutually beneficial partnerships.



Victor de la Luz

Victor de la Luz' first winemaking job was working for winemaker Aryn Morell at Matthews Winery in 2007 at its original Woodinville winery. De la Luz' latest job is working with Morell as the production manager at M&L Production in Walla Walla where the Matthews wines are produced in addition to the other Otis Family ultra-premium brands (Tenor, Jaine, Blackboard). De la Luz was hired in February to lead the cellar team at the 50,000+ case a year facility that also crafts Alleromb, Gard Vintners,

Morell-Peña, Mullan Road Cellars and The Royal Bull. M&L produces over 100 unique wines annually with nearly two dozen varietals. In between stints teaming with Morell to craft ultra-premium wines, De la Luz has risen to winemaker at Gordon Estate Winery in Pasco, where he consults. Previously, he was the winemaker at Walla Faces in Walla Walla and Cellar Master at Distefano Winery in Woodinville. He has also crafted wines for Barons, Arlington Road (now Elevation Cellars), Page Cellars, William Church and Chateau Rollat. De la Luz will also continue to produce his own wines under the De La Luz Wines brand, focusing on single vineyard wines expressive of unique sites such as Two Blondes in the Yakima Valley, Lawrence Vineyard in the Royal Slope, Golden Ridge in the Walla Walla Valley and Kamiak in the Columbia Valley.



Neil Doerr

Gravitas Wine Marketing hired wine industry chain sales executive, Neil Doerr. Gravitas Wine Marketing currently has 12 sales representatives located throughout California, covering all of the major markets. However, with the unprecedented retail growth, especially in the chains, Campbell knew he had to find an industry pro to cover the national and regional grocery chains in CA. Prior to joining Gravitas Wine Marketing, Neil Doerr was one of the founding members at Epic Wines where he spent 17 years running the retail chain division.

He led a team of 20 overseeing multiple producers from around the world. Neil Doerr will report directly to Aaron Campbell and manage chain sales for Gravitas Wine Marketing.

Blake Yarger was promoted to winemaker at Big Basin Vineyards, officially assuming the job title for a role that he has been sharing with Bradley Brown for the past year. Yarger has responsibility for the full portfolio of the highly acclaimed Big Basin Vineyard wines and will continue his heavy involvement in vineyard management. Brown will remain involved in blending sessions and portfolio decisions but will be focusing more time on Sales and Fire Recovery efforts. Yarger came to Big Basin Vineyards in 2017 as assistant winemaker after 10 years at McEvoy Ranch Winery in Petaluma, Calif. where he quickly worked his way up from cellar master to winemaker, producing a wide variety of high-quality, minimal intervention wines. Yarger studied agroecology under Miguel Altieri at UC Berkeley and completed additional training in sustainable farming, winemaking and viticulture at UC Santa Cruz and UC Davis.

Fetzer Vineyards, the nation's 12th-largest wine marketer and a leading purveyor of wines and spirits from three origins, announced the appointment of Chris McFerran to senior vice president, sales. McFerran joins the California vintner and importer with an impressive track record spanning two decades in the wine and beverage alcohol space, including the successful stewardship of strategic national accounts for some of the nation's largest portfolio wine companies, and most recently wine and spirits sales leadership of the Beyond Beer Business Unit at Anheuser-Busch InBev. At Fetzer Vineyards, McFerran will hold responsibility for strategic national sales for the business's multi-origin portfolio of wines from California, Chile and Argentina, and the craft whiskies of Kentucky Peerless Distilling Co, reporting to CEO Giancarlo Bianchetti.

Merus Estate, a premier Napa Valley winery known for its allocation-based Cabernet Sauvignon production welcomed Eric Baugher, who joins as head winemaker, following a tenure at Ridge Vineyards in Cupertino, Calif. Bringing decades of wine experience and expertise in cabernet production, Baugher will be charged with fine tuning the winemaking style at Merus and expanding sourcing partnerships throughout the Napa Valley. Baugher studied biochemistry and molecular biology at the University of California Santa Cruz, and joined Ridge Vineyards in 1994, starting off as a chemist and worked his way up to assistant winemaker. In 2004, he became appointed winemaker at Monte Bello Winery and then chief operating officer in 2016. During Baugher's long term post, he achieved two 100-point scores for the winery's cabernet and Bordeaux blends in 2013 and 2017, along with two wines earning a place on Wine Spectator's Top 100 Wines list.

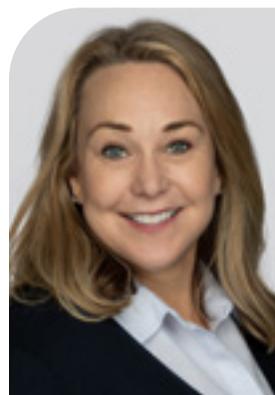
Sebastiani Vineyards & Winery named Mark Beaman as the new head winemaker, continuing his 20-year wine career, following posts at Valley of the Moon Winery in Glen Ellen, MauiWine, Mendocino Wine Company, and Columbia Crest Winery in Walla Walla. Beaman has worked in most major growing regions along the West Coast, as well as in Hawaii at MauiWine. Here he made six different estate grown varietal wines, several method champenoise sparkling wines, along with pineapple-based wines. Since returning to Sonoma, Beaman has focused on diversifying styles across the many AVA's of Sonoma County for a multitude of wines; ranging from the old vine Zinfandel in Sonoma Valley, to select blocks of Cabernet from Alexander Valley and Pinot Noir and Chardonnay of the Russian River and Carneros regions.

Distributors, Importers & Retailers

After helping launch the 2009 vintage Yao Ming Wines in the U.S. market 10 years ago, Tom Hinde has decided to step away as founding winemaker, to devote his full time and energy into other projects, such as Calina, Kintera Wines, Cru 9, Napa Bench, House of Cards, Taub Family Vineyards, Au Contraire, and Mon Frere. Working with the Taub family, Hinde is chief winemaker for Taub Family Vineyards, Napa, representing some of the best sites in St. Helena, Rutherford, Oakville, Yountville, Mount Veeder, and Howell Mountain. He also leads winemaking for the family's Au Contraire wines from Sonoma, and Mon Frere range from California. With more than 30 years in the wine industry, Hinde led all aspects of winemaking for the Yao Ming brand, which sourced grapes for its California Cabernet Sauvignons, such as the Napa Valley Cabernet Sauvignon and the Family Reserve Cabernet Sauvignon, from prestigious Napa Valley vineyards with a reputation for excellence. Hinde previously spent 16 years, from 1989 to 2005 as vice president/general manager for Kendall-Jackson Wine Estates.

Beck Family Estates, the exclusive importer and sales agency for South Africa-based Graham Beck and Steenberg Vineyards, and Oregon-based Angela Vineyards and Abbott Claim, announced their newly appointed e-commerce manager, Justin Rapolas. In his new role, Rapolas will be focusing on digital sales for the portfolio's brands. Based in Paso Robles, Rapolas gained considerable experience working as member and private client liaison for DAOU Family Estates and similar work for Eberle Winery. In those roles he focused on e-commerce campaigns, customer retention and increasing customer acquisition. He also holds a Wine Business Management Certificate from the Wine Business Institute of Sonoma State University, focusing on sales and management best practices.

Industry Services & Suppliers



Alicia McBride

Alicia McBride joined Canton Cooperage as vice president of business development and brand manager for XtraChene North America. Bringing decades of leadership and experience in oak products, McBride will be in charge of developing enological oak sales of the XtraChene brand for North America. McBride served in her previous tenure as president and general manager of Innerstave, LLC. Before that, she was international sales manager at the same company, and was mentored by Innerstave's founder Bob Rogers as regional sales manager.

ATPGroup appointed John Plato as cleaning and sanitation sales specialist. In this newly created role Plato will focus on the growth of ATPGroup's Cleaning & Sanitation Program, first in the wine industry and then expanding into breweries and beyond. ATPGroup's Cleaning & Sanitation Program was formally launched in 2019 in response to the FDA's Food Safety Modernization Act (FSMA), which shifted the nation's food safety system from responding to foodborne illness to preventing it with proper cleaning and sanitation protocols. The launch proved prescient when the COVID-19 pandemic hit, driving rapid growth in the program. Plato joins ATPGroup from Ecolab, where he drove sales of their cleaning and sanitation products and advised customers on health and safety protocols, so is the perfect person to help grow the program at ATPGroup.



HALL & BARTLEY
ARCHITECTURE AND PLANNING

55 E STREET, SANTA ROSA, CA 95404 707-544-1642

www.hallandbartley.com

Offering a full
range of
professional
design services
including Master
Planning



Theo Harris

Creative Energy, a marketing and advertising agency based in Johnson City, TN, recently announced the hire of Theo Harris as a senior copywriter. Harris has worked with small and large agencies on the West Coast and in the Midwest developing compelling messaging for clients in a wide range of industries—from food to outdoor products. A graduate of Brigham Young University with a degree in advertising communications, he has always enjoyed the process of crafting strong storytelling for his clients. Over the last six years, Harris has had the opportunity to

work with a variety of notable clients including Arby's, Sam Adams, Kohler, SureFire, Descente, Moon Cheese, and the Utah Jazz. He was approached about a possible position with Creative Energy in late 2020 and met with key members of the creative team. Harris will work closely within the Creative Energy agency to develop new messaging and strategies for their many clients.



Ginevra Altomara

Distinguished Vineyards & Wine Partners (DVWP) appointed Ginevra Altomara to the newly created position of trade marketing director. In this role, Altomara will report to DVWP vice president of marketing Kate McManus to oversee trade, retail and digital marketing for DVWP's acclaimed portfolio of wineries. The DVWP portfolio includes Argyle Winery in Oregon, MacRostie Winery and Vineyards in Sonoma County, Markham Vineyards and TEXTBOOK in Napa Valley, and DVWP's new philanthropic wine partnership with the James Beard Foundation,

Dough Wines. Altomara began her career in the New York City restaurant industry, where she was the wine and beverage director for such high-profile restaurants as 27 Standard, Artisanal and Django, before moving to the distributor side of the business in 2005. In the years since, Altomara has served as the trade marketing director for Marnier-Lapostolle, which became the first Chilean winery to earn Wine Spectator's "Wine of the Year" honor during her tenure.

Wineshipping welcomed Chet Gandhi as CIO. Gandhi stepped into the role at the beginning of the year, and will lead Wineshipping's IT strategy at their Napa, CA headquarters and across the company's 15 national warehouse sites. Gandhi has a proven track record of delivering mission-critical projects and best-in-class technology based transformations enabling scalable growth. Most recently, he ran IT globally at Intapp, a high growth software company in the SF Bay Area. Previously, he has served as the CIO for Magento, an e-commerce software company, and Applied Micro, a semiconductor company. His background also includes running his own software consultancy and leading teams in several business functions, including supply chain, inventory management and manufacturing operations.

The Wine Industry's Leading Online Job Site

winejobs.com

More wineries use winejobs.com than any other online job site.

Associations & Education

The Texas International Wine Competition appointed its new executive director, Natasha Remchuk. She is a sommelier and wine judge and has a very well-rounded background as hospitality professional specializing in marketing and events for the food, wine and spirits industry, offers custom global culinary and wine tours and is the founder of Women Stars of Food & Wine. In her role as executive director, Remchuk will oversee marketing, public relations, strategic planning on fostering positive community relations and growing the power and influence of the Texas International Wine Competition.

The Board of Directors of the Sonoma Valley Vintners & Growers Alliance announced Friday that Executive Director Maureen Cottingham will be stepping down from her position after nearly seventeen years of leadership for the Valley's wine marketing organization. Cottingham will step into a new leadership role managing her family's multi-generation farming operation and continue her commitment to California agriculture. She leaves behind an organization that has made a significant and positive impact on the Sonoma Valley region and plans to work closely with the Board of Directors on the transition and search for her replacement before departing April 2021. Under Cottingham's leadership, the Sonoma Valley Vintners & Growers Alliance has had many achievements which include raising over \$25 million for children's literacy programs and non-profits in Sonoma Valley and across Sonoma County through Sonoma Wine Country Weekend and the Sonoma Harvest Wine Auction. **WBM**



Legal Counsel to the Beverage Industry

- Applications for ABC and TTB licenses
- Distribution agreements & direct shipping advice for all states
- ABC and TTB Business Practice Counseling
- Accusation, Defense and Protest Hearing Representation
- Regulatory clearance of promotions, point-of-sale material, labels and advertising

ATTORNEYS:

John Hinman
Beth Aboulafia
Rebecca Stamey-White
Erin Kelleher
Sara Mann
Adie Sherwood
Gillian Garrett
Barbara Snider

260 California Street, Suite 700
San Francisco CA 94111
Telephone 415.362.1215
Facsimile 415.362.1494
beveragelaw.com

Thank you to all of our advertisers!

Company	web address	page
Acrolon Technologies, Inc.	www.acrolon.com	74
Ager Tank & Equipment Co.	www.agertank.com	41
Amtcor, LLC	www.amcor.com	21
American Society for Enology and Viticulture	asev.org	41
American Vineyard Foundation	www.avf.org	35
Amorim Cork America	www.amorimcorkamerica.com	11, 57
Ardagh Group, Glass - North America	www.ardaghgroup.com	45
Auction of Washington Wines	www.auctionofwawines.org	36
Bank of Marin	www.bankofmarin.com/wine	73
Bastos, LLC	www.bastosllc.com	13
Berlin Packaging	www.berlinpackaging.com	5
Bin to Bottle Winery	www.bintobottle.com	27
Bordeaux Sciences Agro	master-wine-management.agro-bordeaux.fr	47
Boswell Co.	www.boswellcompany.com	26, 30
Bouchard Cooperages	www.bouchardcooperages.com	30
BSG Wine	www.bsgwine.com	24
Carlsen & Associates	www.carlsenassociates.com	34
Central Coast Insights	www.centralcoastinsights.com	68
Coastal Viticultural Consultants, Inc.	www.coastalvit.com	37
Cork Supply USA	www.corksupply.com	51
Criveller Group	www.criveller.com	18
Della Toffola USA, Ltd.	www.dellatoffola.us	15
Directory & Buyer's Guide	winesvinesanalytics.com/store	71
Duarte Nursery, Inc.	www.duartenursery.com	33
ETS Laboratories	www.etslabs.com	84
Euro-Machines, Inc.	www.euromachinesusa.com	72
Fine Northern Oak	www.finenorthernoak.com	31
Free Flow Wines	www.freeflowwines.com	74
Gallo Glass Co.	www.galloglass.com	9
Global Package, LLC	www.globalpackage.net	50
GOfermentor	www.gofermentor.com	23
Guala Closures North America	www.gualaclosures.com	55
Gusmer Enterprises	www.gusmerwine.com	24

Company	web address	page
Hall & Bartley, Architecture-Planning	www.hallandbartley.com	78
Hinman & Carmichael, LLP	www.beveragelaw.com	79
InnoVint, Inc.	innovint.link/wbm	65
La Garde	www.lagardeinox.com	7
Lafitte Cork & Capsule, Inc.	www.lafitte-usa.com	59
Lodi Winegrape Commission	lodiwine.com	83
MA Silva USA	www.masilva.com	19
MALA Closure Systems, Inc.	www.mala-usa.com	43
MBF North America, Inc.	www.mbfnorthamerica.com	25
Napa Fermentation Supplies	www.napafermentation.com	40
Oak Solutions Group	www.oaksolutionsgroup.com	22
OCI	www.oakchipsinc.com	31
Oenofrance USA, LLC	www.oenofrance.com/us	31
Portocork America	www.portocork.com	3
Prospero Equipment Corp.	www.prosperequipment.com	56
Ramondin USA, Inc.	www.ramondin.com	53
Sanitary Stainless Welding	www.sanitarystainless.com	40
Saverglass, Inc.	www.saverglass.com/en	2
Scott Laboratories, Inc.	www.scottlab.com	17
Seguin Moreau Napa Cooperage	www.seguinmoreaunapa.com	26
Shelco Filters	www.shelco.com	42
Spec Trellising	www.spectrellising.com	37
Speidel Tank- und Behälterbau GmbH	www.speidel-behaelter.de	20
StaVin, Inc.	www.stavin.com	29
Tonnellerie Sirugue	www.sirugueusa.com	43
UC Davis Continuing and Professional Education	cpe.ucdavis.edu	54
Vicard USA	www.groupe-vicard.com	30
Vinventions USA	www.vinventions.com	67
Waterloo Container Co.	www.waterloocontainer.com	49
Wines Vines Analytics	winesvinesanalytics.com	66
Wonderful Nurseries	www.wonderfulnurseries.com	39
World Cooperage	www.worldcooperage.com	75
Zenport Industries	www.zenportindustries.com	42

David Tegtmeier, founder, winemaker and viticulturist, Liquid Art Winery, Manhattan, KS

“I did not grow up in a region where winemaking was prominent. Without having direct resources or other exposures to the industry, I tried to get my hands on anything that would help guide me. My aunt and uncle gifted me a subscription to *WBM* when I was 16. It was an influential resource, shining light on what it meant to be in the beverage industry. Fifteen years later, it continues to help me be connected to the fine details of new procedures and technology that can be implemented in our vineyard and winery.”



NAME AND TITLE: David Tegtmeier, founder, winemaker and viticulturist

WINERY NAME AND LOCATION: Liquid Art Winery & Estate is located in Manhattan, Kansas. The estate is perched on top of an area of the Midwest known as “The Flint Hills.” The terroir of the area replicates the soil profile and terrain of some of the most prominent grape-growing regions in the world, allowing us to craft premium wine with Old World grape varietals using sustainable viticulture.

ANNUAL CASE PRODUCTION: 10,000 cases

PLANTED ACRES: 120 acres

CAREER BACKGROUND: I am a sixth-generation Kansas farmer. At the age of 16, I decided to go against the grain and focus on grapes instead of traditional row crops. I planted my first vineyard in 2006 on my parents’ home place and crafted my first batches of wine using my great-great-grandfather’s antique grape processing equipment. My interest and passion in winemaking grew, and I graduated with a B.S. in enology from CSU Fresno in 2011. Following graduation, my career took me through Washington and Colorado, eventually leading me back to Kansas to build a winery of my own. Traditionally, the Midwest is known for sweet wines made from hybrid grapes. Since opening Liquid Art in 2014, we have successfully grown vitis vinifera varietals, utilizing proprietary techniques and modern technology. We have grown to be one of the largest grape and wine producers in our region of the Midwest.

WHAT HAS BEEN YOUR BIGGEST PROFESSIONAL CHALLENGE? In October 2018, an unfortunate chemical incident involving our cross-flow filter resulted in immediate blindness of both eyes. My role, as a business owner and winemaker, changed in an instant. As a result, my other senses, particularly smell and taste, were heightened. After countless surgeries and over a year of complete blindness, I have been blessed with some restored vision. While many would view this negatively, I realize I was given an opportunity to see the world in a way many never get to experience. I was able to uniquely grow as a leader, husband and father. Our wine label series, 20/20, was inspired to share my experience in ways others can relate--through hope, humor, humility and perseverance.

VARIETALS THAT YOUR WINERY IS KNOWN FOR: Chardonnay, Cabernet Sauvignon and Red Blends

Things to Do

ONE YEAR INTO THE pandemic and Jake Lorenzo finds himself making lists. This detective has already changed every bad light bulb, fixed the leaky faucets and trimmed all the trees. I've cleaned out gutters, painted several rooms and reorganized the wine cellar three times. I make sure to fire up the generator once every six weeks, rack my jugs of Beaujolais every month and top my wine barrel twice a month. Basically, I've run out of things to do, so I make lists.

Since adhering to the Regional Stay-Home Order provides lots of time, I planted a winter garden in November. The first item on my daily list is to harvest that garden. I am still waiting for the fennel to mature, but we are loaded with different lettuces, lots of baby bok choy and so much spinach that Jakelyn's mother and I made spanakopita for the first time this week. It was delicious, with a flakey phyllo dough crust and the spinach filling set off with the incredible feta cheese kept in the back room of the produce stand that only locals know to ask for. We're out of Greek wine for now, but it went really well with the Massican Annia, a blend of Tocai Friulano, Ribolla Gialla and Chardonnay.

A couple of times a week, my list reminds me to take the car out for a drive. Machines need to be used if they are to work well, so cars need to be driven. It keeps the battery charged and hopefully discourages rodents from setting up condos under the hood. Every now and then Jake Lorenzo will drive all the way out to Marshall to visit Hog Island Oyster Co. It's a nice ride, and I get to come home with fresh oysters.

Scratching that line through an item gives me a sense of accomplishment that just wouldn't be the same if I didn't have my list. I know it sounds stupid, but we are in a pandemic.

Most of the time when exercising my car, I visit local vineyards. I prefer the mountain vineyards for the views. Monte Rosso is a classic, as is Hanzell Vineyards. In the full of winter, the vines sit bare, expressing a cool assurance of their place in history and looking forward to the coming harvest. Across the valley, up on Sonoma Mountain, the great Pasatiempo Vineyard rests as if catching its breath to fight another year of Red Blotch while trying to crank out enchanting Cabernet Sauvignon grapes. A few times I've parked the car and hiked up the mountain to my chanterelle mushroom spots, but the paucity of rain conspires to deprive this detective of any delightful discoveries.

The list has my errands, less to remind me and more to have something to check off. Going to the bank, stopping at the market or taking a package to the post office doesn't work for this detective until I can cross the item off my list. Scratching that line through an item gives me a sense of accomplishment

that just wouldn't be the same if I didn't have my list. I know it sounds stupid, but we are in a pandemic.

The pandemic has led to all sorts of perplexing behavior. Because I rarely leave the house or entertain guests, Jake Lorenzo started wearing the same clothes repeatedly. During spring and summer, I wore shorts with short-sleeve golf shirts. After three or four days, I'd do a load of wash and then put on the same shorts and shirts because they were on top in my drawer. I realized I was wearing the same three shirts and shorts time and again for weeks on end. This detective has an aversion to long pants; but once the weather changed conclusively, I switched to jeans and long-sleeved Henley shirts, but I still repeated wearing those same clothes for weeks.

One day, Chuy was coming over for happy hour and the sun was out, so I decided to put on one of my Hawaiian shirts. Jake Lorenzo is no clothes horse, but over the years, this detective has curated an impressive collection of brightly colored, creatively patterned sport shirts. To celebrate happy hour with my dear friend, I pulled down a favorite shirt but found a telltale line of dust along the shoulders where the shirt had rested on the hanger. I pulled down hanger after hanger, but all the shirts had the line. Just goes to show that shirts need to be exercised too. I needed to wash and iron all those shirts, but I didn't have time because Chuy was on his way, so I put "laundry" on the list. It will give me something to do. Making the list, so I can cross off the items once completed, has gotten ridiculous. Yesterday I thought about writing down "put in new toilet paper roll," but I realized that was excessive.

Two things never go on the list: the food I'll be preparing for the day and the wine we'll drink with it. This detective doesn't really plan meals. I prefer to rummage around the garden, the pantry and the refrigerator and then come up with a two or three course meal for Jakelyn's mom and myself. I see a bit of caviar left in the fridge, and we have some Acme Bakery baguettes, so we'll start with caviar on toast with sour cream and red onion. Looks like sparkling wine to start.

Jake Lorenzo is getting sick of steamed bok choy, so I'll try a quick stir-fry that incorporates my new homemade pancetta, the bok choy, lemon grass from the garden and some oyster sauce. It will give me a chance to try the Longevity 2019 Pinot Grigio that sits on the skins before pressing, which makes the wine pink.

I cooked a turkey on the Weber grill earlier this week. We had a nice turkey dinner. The next night we had turkey tacos. Last night we took a turkey break by dining on lamb riblets and oven-baked french fries. Tonight, I'm thinking turkey mole using the last of the mole en polvo that the Fonsecas brought on their last visit. The broth I made from the turkey carcass will make for a rich mole. It might work with the 2016 Guigal Côtes du Rhône or perhaps a ripe Ribera del Duero. It's a hard choice, but I don't think we'll go wrong, whichever one I choose.

This detective needs to pop that cork on the sparkling wine so I can get dinner started, but first I have to cross off "Jake Lorenzo column" from my list. **WBM**



ILLUSTRATION BY BOB JOHNSON



LODI WINE
CALIFORNIA



The legend of owl box Tom.

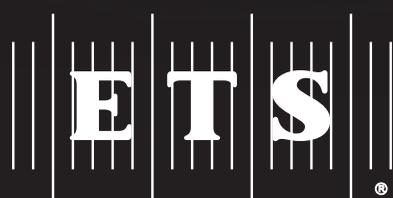
Listen, do you hear that? Neither does that rodent about to fall prey to that fast approaching barn owl. It was this stealthy observation that inspired Tom Hoffman to build himself some owl boxes and put them up all around his family's fourth generation vineyard. You see, rodents eat the roots and owls eat the rodents and—well, Tom figured letting nature take its course was a far healthier pest control solution than letting some chemical do it; an idea that quickly had Tom filling owl box orders from vineyards far and wide. It's this kind of out of the box thinking—the desire to farm in a way that is environmentally and socially responsible—that eventually led to the creation of Lodi Rules. With continuous input from farmers, scientists and environmentalists, Lodi Rules has become the most comprehensive (and most copied) sustainable winegrowing program in America. Why, everyone from winegrape growers to winemakers to wine drinkers is singing its praises. As for the owls, they're staying silent. And that's a good thing. A very good thing indeed.

 **There's something happening here.**

Visit: LodiRules.org



ENHANCING
CRAFT
SINCE 1978



LABORATORIES

etslabs.com