THE ECONOMIC IMPACT OF WINE, GRAPES AND GRAPE JUICE PRODUCTS IN NEW YORK STATE

An MKF Research Report

Preliminary Results

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FULL ECONOMIC IMPACT OF WINE, GRAPES AND GRAPE JUICE IN NEW YORK STATE

$ 3.3 Billion[1]

NEW YORK STATE WINE, GRAPES AND GRAPE JUICE PRODUCTS	ECONOMIC IMPACT
Full-time Equivalent Jobs	23 thousand
Wages Paid	$786 million
Winery Sales	$ 419.8 million
Grape Sales	$30 million
Grape Bearing Acres	31 thousand
Grape Juice Product Revenues	$27 million
Wine-Related Tourism Expenditures	$312 million
Number of Wine Related Tourists	4.14 million
Number of Grape Farms	1384
Taxes Paid (State and Local)[2]	$371 million

[1] See Table 6 below.
[2] Underestimate as no data available on property taxes paid by wineries or vineyards other than personal property taxes.

EXECUTIVE SUMMARY

New York's wine, grapes and grape juice products and related industries produced more than $3.3 billion of economic value to New York State in 2004, based on preliminary estimates[3]. This figure should be viewed as conservative in that further data is being collected, and 2004 had an unusually small grape harvest[4] which also reduced wine and grape juice production.

The wine, grape and juice products sectors paid at least $372 million in State and local taxes in New York State.[5]

Wine, grapes, grape juice products and related industries account for more than 23 thousand jobs across the State, for a payroll of more than $785 million.

Table 1
Total Employment –2004
Wine, Grape, Grape Products and Related Industries

Vineyard Development	740
Grapevine/Nurseries	47
Vineyard Development	32
Winery	2,306
Juice Processing	81
Tourism	5,040
Labels	39
Glass, Cases, Closures	17
Distributor	1,919
Trucking	33
Retail/Liquor Store	4,000
Education/Research/Labs	66
Indirect	3,928
Induced	5,002
Total	23,250

Source: MKF Research and NYS Department of Labor

By their very nature, wine and grapes are long-term investments and long-term employers: newly planted vineyards need four years to produce a harvest. Another year to three years are needed to turn those grapes into wine. Not only are these long-term investments but they are inherently tied to "place." Unlike manufacturing or service enterprises, New York vineyards, once planted, cannot

[3] See Table 8 below.
[4] According to the Annual Bulletin of the New York Agricultural Statistics Service, grape production decreased by 28% from 2003 to 2004, from 198 thousand tons to 142 thousand tons. The crop's value fell from $35.8 million to $30.1 million in the same period.
[5] IMPLAN, State of New York Department of Taxation and Finance and New York State Liquor Authority.

simply get up and move to another state which might offer a better business climate or tax incentives.

Wine especially speaks of the soil and climate from which it is drawn; “terroir” as the French put it. Whether Lake Erie, Niagara Escarpment, Finger Lakes, Hudson River, or Long Island, New York wine is about New York.

Moreover, winery and vineyard employment has been stable, and, in the case of wineries, growing, even through the recent difficult economic years, as shown in **Table 2** below.

Table 2
Average Total New York Winery and Vineyard Employment, 2000-2004

	2000	2001	2002	2003	2004
Grape Vineyards	864	1,041	996	821	740
Wineries	2,012	2,010	2,126	2,254	2,306
Total	2,876	3,051	3,122	3,075	3,046
Source: NYS Department of Labor					

GRAPES IN NEW YORK STATE

New York is the third largest grape producer in the United States after California and Washington.[6] There are approximately 1384 grape farmers in the state with 31,000 bearing acres, which produced more than 142,000 tons of grapes in 2004 for a total market value of just over $30 million – the third highest value fruit crop in New York after apples and cherries.[7] Due to a severe winter freeze, the 2004 crop was one of the smallest on record, so the grape crop value would normally be larger – the 2003 crop of 165,000 tons, worth $40 million, was New York’s second largest fruit crop.

The value of the state’s grape production is exceeded only by that of California and Washington. New York State also accounts for approximately one sixth of total US production of non-wine grape juice products.

New York produces several varieties of grapes: Native American grapes (such as Catawba and Concord), French-American hybrid grapes (grapes developed by French scientists such as Aurora, Seyval Blanc and Vignoles, along with American hybrids developed by Cornell researchers such as Cayuga White,

[6] New York Department of Agriculture & Markets, “New York Agricultural Statistics – 2004-2005 Bulletin.”
[7] New York Department of Agriculture & Markets, “New York Agricultural Statistics – 2004-2005 Bulletin.”

Melody, and Traminette) and Vitis vinifera, the traditional European wine grape (such as Cabernet Sauvignon, Merlot, Riesling).

Although there has been a gradual increase in Vitis vinifera production in the state as wine production has increased, Vitis vinifera represents only about 10% of total grape production. Concord remains New York's dominant grape variety, the vast majority of which is used for non-fermented products such as Welch's grape juice.

Table 3
Major Varieties of Grapes Grown in New York State, 2004

	Tons
American (Native) Varieties	
Catawba	5,000
Concord	99,300
Delaware	300
Ives	200
Elvira	4,800
Niagara	19,800
French Hybrids	
Aurora	2200
Cayuga White	600
Other	1000
Vitis Vinifera, All	4,900
All Other Varieties	1,900
TOTAL	140,000

Source: New York Agricultural Statistics, 2004-2005 Annual Statistics

Three-fourths of the New York State's grape production, primarily Concord, was processed for juice in 2004. The remaining one-fourth of production becomes wine, primarily in the form of fortified dessert wines such as port and sherry with a small amount for table wine. Vitis vinifera grapes are used almost exclusively for winemaking, as are about one quarter of the native grapes and all of the hybrid grapes.

New York's diverse varieties of grapes receive widely differing prices in the market, as reflected in the tables below.

Table 4
Average 2004 Grape Prices by Varietal Category
(Average price per ton)

Variety	Average Price
Major Native	$293
Red Hybrid	$569
White Hybrid	$569
Late Harvest Hybrid	$1581
Red Vinifera	$1581
White Vinifera	$1426

Source: Finger Lakes Grape Program, Cornell University Extension

Despite their higher prices, vinifera are not always the profitable varieties for growers because of their increased farming costs and sensitivity to climate.

GRAPE AND WINE REGIONS OF NEW YORK

New York has five major grape growing regions: the Lake Erie region, the Niagara Escarpment, the Finger Lakes, Hudson River Region, and Long Island.

- The Lake Erie region is the traditional center for the production of native grapes for juice and juice products, producing 68% of all of New York's grapes. This region of Western New York was also the original home of Welch's, now the marketing arm of the National Grape Cooperative, which is responsible for 50% of the grape juice and grape juice products produced in the United States.

- The Niagara Escarpment region produces less than 3% of the State's grapes. It is also home to New York's newest American Viticultural Area (AVA), with the "Niagara Escarpment" including the high ground stretching from Lewiston to Johnson Creek in the East. Four wineries are located in this region, with additional wineries in the development stage.

- The Finger Lakes region produces 27% of New York's grapes. While a significant juice grape producer, the Finger Lakes is also New York's largest wine producing region, accounting for about 85% of the state's total production and utilizing native, hybrid and vinifiera varieties.

- The Hudson Valley produces a small but growing amount of New York wines, from native, hybrid and Vitis vinifera grapes.

- The newest area of grape and wine production in the state is the eastern end of Long Island, where 3000 acres of vineyards and 38 wineries produce wine from primarily Vitis vinifera grapes.

Each of these very different regions face quite different business and economic conditions, from land and labor supply and costs to taxation, competition, infrastructure and markets for their products.

NEW YORK AS A CENTER OF THE WINE INDUSTRY

New York is one of the leaders of the United States wine industry:

- New York is the second largest producer of wine in the United States, with at least 193[8] licensed wineries accounting for a total wine production of more than 38 million gallons, or nearly 16 million cases of wine.
- New York is a center of wine retailing and distribution, with 15 percent of the licensed wholesalers of alcoholic beverages in the United States.
- New York is the nation's largest importer of wines, with 9 percent of all licensed importers of alcoholic beverages in the United States.

New York is the third largest consumer of wine in the country, with an 8% share of total US consumption of all types of wine – and the New York metropolitan area is the second largest consumer of wine in the nation and the largest consumer of imported wines.

WINERY SIZE

While the major share of New York wine, by volume, is produced by very large wineries (wineries producing more than one million cases of wine), the vast majority of New York's wineries, by number, are very small.

[8] According to the New York State Liquor Authority there are 158 Farm Winery licenses and 35 Commercial Winery licenses in effect as of September 2, 2005. According to the United States Alcohol and Tobacco Tax and Trade Bureau there are 212 licensed producers of wine in New York State. There is often a delay between receipt of the federal basic permit and state license (and some license recipients choose not to operate), accounting for the difference.

Table 5
Size Distribution of New York Wineries

Annual Case Capacity	Number of Wineries
Less than 3,000	107
3,001-6,000	37
6,001-11,000	28
11001-18000	17
18001-27000	8
27001-38000	4
38001-999999	9
1,000,000 +	2
Total	**217**

Source: New York Wine and Grape Foundation

NEW YORK'S WINEMAKING INDUSTRY

The winemaking industry in New York is actually several different types of businesses:

- A handful of very large wineries, producing value priced wine (often sparkling, specialty and dessert wines) for the national market and selling primarily through the "three-tier system:" through independent, licensed distributors to retailers and some restaurants

- A large number of small and very small wineries (under 40,000 cases and often under 5,000 cases) selling primarily direct to consumer and some restaurants and retailers, primarily in their local regions. These wineries tend to produce a large variety of table wines, from vinifiera, hybrids and native grapes, selling for under $10/ 750ml bottle. These wineries tend to be visitor-driven, at times called "destination wineries."

- A small number of small wineries producing primarily Vitis vinifiera grapes with prices averaging closer to $20 per bottle. While direct sales are also critical to these wineries, some will have national third party distributors for as much as 30-50% of their sales.

FARM WINERIES

The passage of the Farm Winery Act of 1976 enabled New York's grape producers to find a new, higher value market for their crops as demand for traditional juice products and traditional Concord grape wines diminished. Farm wineries are defined as wineries producing less than 150,000 gallons (60,000 9-liter cases) of wine using exclusively New York State fruit.

The Farm Winery Act enabled small wineries to sell their product directly to consumers, retailers and restaurants in the state[9]. Today close to 70% of the production of these wineries is sold directly – and only a relatively small number of New York's wineries have access to licensed distributors.

Farm wineries represent 82% of wineries licensed by the New York State Liquor Authority in 2005. Farm wineries accounted for 87% of wineries responding to the New York Agricultural Statistics Service (NASS) 2004 survey but represented only 9% of total New York State winemaking capacity and only 5% of the total wine produced in the state – although this does represent a 1% increase in farm wineries' share of the state's total production since 2000.

Since the passage of the Farm Winery Act, the number of wineries in New York has increased dramatically each decade. The 1980s saw an additional 69 wineries established in the state, more than doubling the number of established wineries. In the 1990s 74 additional wineries were established in the state, and 30 have been added since the beginning of 2000. This growth has been entirely in the development of "farm wineries."

CHALLENGES AND OPPORTUNITIES

Challenges

New York's grape, wine and grape juice producers face a complex array of challenges.

Grape Prices

Prices for juice grapes, the dominant segment of the grape industry, have been declining for several years, descending to barely above the break-even point for many growers. Prices continued to fall despite the small 2004 harvest. Growers have been exploring opportunities in the wine grape market but growing grapes for wine is somewhat different, more complex and more expensive than juice grape cultivation, although there has been significant success by many growers.

Trained Labor and Availability of Training

New York has a serious shortage of trained viticulture professionals, a shortage which has constrained the continued expansion of the wine grape industry as well as its continuing efforts to improve grape quality.

[9] Until the Farm Winery Act, wineries were required to sell at least 95% of their production through licensed distributors.

Cornell University's newly announced undergraduate Enology & Viticulture program will make a major contribution towards improving the supply of trained professionals. New York is also fortunate to have a substantial viticulture extension and research service provided by Cornell. However, most of the states with growing wine making and grape growing industries supplement their formal degree programs and extension services with extensive in-service, part-time courses for mid-career professionals to continue to improve their skills. Continuing to build this institutional infrastructure will help ensure the long-term strength of New York's wine and grape industry.

Changing Retail Environment, and Consumer Patterns and Lifestyles

The grape juice producers are finding it increasingly difficult to compete in the rapidly changing and consolidating American retail environment. These companies have relatively limited resources to compete with the very large alternative juice companies structured to serve a national market. Grape juice competes not only with other popular fruit juices such as apple and orange, but with a very broad range of consumer products involving aggressive marketing and fierce price competition.

Responding to the American consumer's rapidly changing lifestyle, demand for new style products and communicating the potential benefits of grape juice products also require marketing resources beyond those currently available to these companies.

Building a Reputation for New York Wine in a Crowded Wine Market

New York's wineries need to build a clear profile and reputation for their products to compete in an already crowded wine marketplace. Wine is a discretionary consumer good – clear product image and consistent quality are essential to claim a place through distributors, retailers and restaurants to reach the consumer or to build a direct-to-consumer brand.

New York Wine is in fact several different products, ranging from casual drinking modestly priced wines from hybrid and native grapes to luxury style vinifera wines emerging from both upstate New York and Long Island.

"New York Wine" has made great progress in the market but more work is needed to establish a strong national reputation as an attractive wine beyond the New York region. The recent onset of direct interstate shipment will help not only in terms of sales, but also in that national wine writers are now able to cover New York wines because the can be purchased on a national scale. In 2005, there has been unprecedented coverage of New York wines in national consumer magazines such as The Wine Spectator, The Wine News, Food & Wine, and Bon Appetit; and such coverage is likely to expand in the future.

Grape Shortage

Shortage of quality grapes also remains an issue for wineries, as demand for the best grapes outstrips their supply as wine sales continue to grow. The small 2004 crop and reduced 2005 vinifera harvest, both reflecting losses from severe winter weather, further inhibits the growth of the New York wine industry in the immediate future.

Scarcity of Financing

The capital-intensive nature of the winery and vineyard sectors is often underestimated[10]. It appears that some parts of New York's winery and vineyard sectors may be under-capitalized as well as under-served by credit and other financial institutions, especially institutions which understand the business of wine and grapes.

Limited Retail Outlets

Unlike the majority of the States in the US, wine cannot be sold in New York's grocery and drug stores but only in licensed liquor specialty stores. Thus, the average consumer, shopping for dinner, does not come across wine alongside other beverages. Wine is meant to be served with meals. Other states that allow wine sales in grocery and drug stores have found that wine sales in all channels increase, the overall general market expanding as the consumer realizes that wine is a food-friendly product.

In California and Washington, the nation's #1 and #2 wine-producing states and New York's main domestic competitors, consumers may purchase wine in six times as many places per person as in New York, where wine sales are confined to about 2400 liquor stores serving a population of 18 million. While New York State is #3 in total wine sales, it is #13 in per capita consumption, most likely due to the inconvenience of buying wine.

A recent study has found that allowing wine sales in grocery and drug stores would provide sizable economic benefit through the creation of 2000 additional jobs, $93.4 million in added tax revenue, and increased consumer spending in the State[11]. Overall wine sales would increase by nearly 19%.

[10] An MKF Research survey of about 25% of NY wineries found more than $36 million in new investments just in 2004 by New York wineries.
[11] American Economics Group, "Economic Gains from Wine Sales in New York State Food Stores", January 2002. Between 28-53 million dollars in additional taxes would be raised in the first year alone through the collection of first time license fees.

Climate and Other Issues

New York grape growers also often face a challenging natural environment. New York is a cool climate grape production[12] environment. Periodically, severe winters can damage harvests. Sudden changes in temperature pose the greatest viticultural hazard. Finger Lakes growers lost a major share of their crop in 2004's extremely cold winter and then rebounded with a slightly reduced crop in 2005. Long Island's humidity, attracting pests and diseases, increases grape farming costs; and the region is sometimes affected by hurricane-generated weather during the harvest season.

Water use constraints, environmental issues, and rising land prices in the spreading metropolitan regions further exacerbate costs and complicate vineyard development.

Opportunities

However, the grape and wine sectors also face attractive opportunities.

Direct Shipping

Growing numbers of visitors are discovering the attractions of New York's wineries. The NASS 2004 Survey found that 23% of the visitors of the more than 4 million visitors to New York wineries in 2003 came from other states. The recent direct shipment legislation facilitates sales to these new markets and could have a major impact on New York's small wineries. For example, the NASS Survey found that 13% of the total visitors to wineries – or some 540,000 visitors – came from states affected by the direct shipping legislation and the Supreme Court Decision. Should each of these visitors make the average $20 expenditure in the winery to ship wine home, winery sales could increase by as much as $11 million.

This figure should be seen as very conservative, however, as direct shipping would likely increase the average per customer expenditure at the winery, enabling the purchase of full cases of wine, worth about $200, rather that the bottle or two which a visitor might currently personally transport home. For example, MKF Research's 2004 survey of California winery direct sales, with shipment just then allowed to several "reciprocal" states, found that average direct sales of six bottles per person from the tasting room, several times the average New York tasting room sale.

[12] Most existing New York grape production regions have a seasonal degree day accumulation of 2,200 or more which would place them in Region I, which is similar to the coolest European regions such as Champagne in France and the Rhine in Germany. According to UC Davis, degree day accumulation is calculated as the summation of temperatures above 50 degrees between April and October.

Moreover, the new direct shipping legislation might also encourage the growth of wine clubs and winery mailing lists. These sales channels together generated an average of 3000 case sales per year for each of California's wineries.

The opportunities presented by direct shipping are just beginning to be explored. Several states have included complex compliance obligations that may be a challenge to some smaller wineries although training is being offered by several winery organizations including the New York Wine & Grape Foundation. Experience in direct shipping from other regions suggests that the greatest challenge to wineries seeking to build their direct sales is developing adequate information management systems and efficient fulfillment structures. New York has not had shipping volume sufficient to justify outsourced order fulfillment but such services may become appropriate as the market grows.

Rapidly Improving Grape and Wine Quality

The quality of New York wine and viticulture has been steadily increasing and receiving growing international recognition, reflected in rising sales on more profitable terms. The New York Wine & Grape Foundation, established in 1985, has supported viticulture and enology research at Cornell averaging about $400,000 to $500,000 annually with a focus on improving quality and productivity in vineyards and wineries. The Foundation's "New York Gold" section on its web site (www.newyorkwines.org) is clear evidence that many New York wines are now world-class and judged as such by wine experts from around the world.

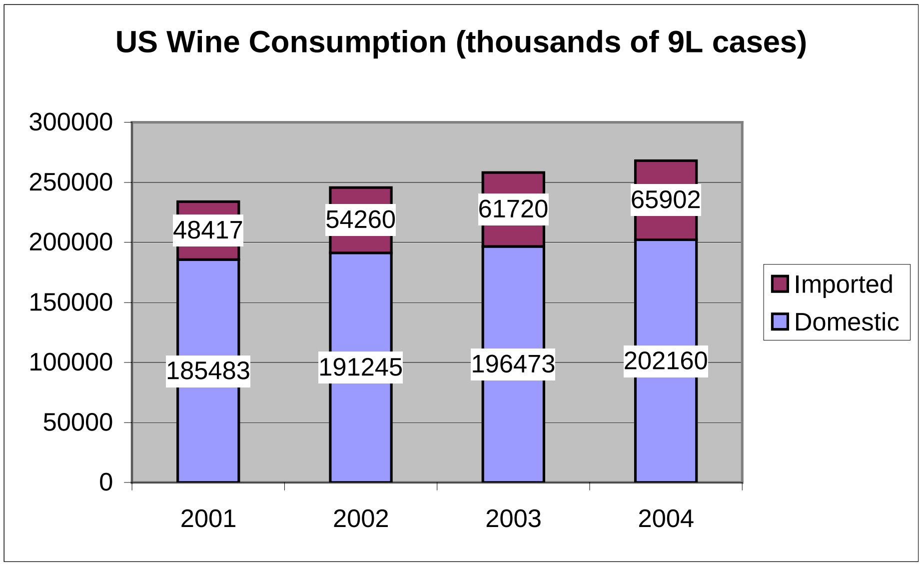
Coordinated and Sustained Promotion and Research Programs

The New York Wine & Grape Foundation was created by State legislation in 1985, during an economic crisis in the grape and wine industry, as a private not-for-profit statewide trade organization to support the industry through promotion and research. Its legislative mandate is to foster cooperation among the industry, and to centralize and coordinate comprehensive programs of promotion and research to advance the industry. As reflected in the NASS 2004 Survey of New York Wineries, since the Foundation's creation visits to wineries have multiplied 10-fold, the number of wineries has increased dramatically, the quality of wines has improved, and the industry has achieved national and even international recognition. Continuation and expansion of the Foundation's programs will be vital to the industry's success in the future.

Rising Demand for Wine Among US Consumers

New York's wine and grape industry will benefit from American's steadily rising demand for wine – and for better wine. Wine is that most sought-after consumer good of this era: an affordable luxury. The growth of visitors' numbers to New York's wineries attests to its attractions.

Table 6



Source: MKF Research and Adams Wine Handbook, 2005

Although slowing from the peak growth rates of the 1990s, American wine consumption is still rising, increasing overall by 3.8% in 2004 and by more than 6% to date in 2005. Wine consumption in New York State alone grew by 5% in 2004. A recent survey found that wine was the preferred alcohol beverage among the generation just turning 21, overtaking beer.

Wine demand is itself a function of complex factors:

- Demography:

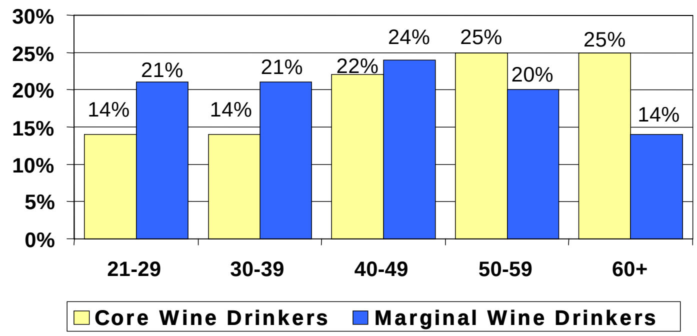
  ✓ The Baby Boomer generation has driven the rising US consumption of wine.

  ✓ Substantial emerging evidence suggests that the adult segment of the "millennial" generation also favors wine, particularly higher end red wines.

  ✓ Moreover, research also indicates that wine drinking increases with age – and that consumers move toward higher end wines as they age and as disposable income increases.

  ✓ Thus, the aging of the American population favors increased consumption of higher end wines, as shown in **Table 7** below.

Table 7
Wine Drinkers by Age Group



Source: Wine Market Council

- Health issues:

    - ✓ Wine consumption, especially for red wines, has increased steadily with the acceptance of the "French Paradox," suggesting elements of red wine assist in protecting healthy hearts.

- General affluence and preference for premium products:

    - ✓ Much current consumer research documents the American consumer's increasing preference, at all income levels, for higher quality goods, "small luxuries" and premium products – recently described as the "trading up" phenomenon.
    - ✓ In the wine industry, this has been reflected in the rapid expansion of sales in the higher end segment of the wine market.

All of these factors will accelerate American demand for wine over the coming decade, expanding the market for the wines of New York.

Table 8

Total Economic Impact (Sum of Total Spending) of Wine, Grapes and Grape Juice Products in New York State

Revenue:	
Winery Sales	$419,817,023
Retail and Restaurant Wine Sales	$49,573,552
Distributors Sales	$10,459,527
Juice Processor Sales	$27,000,000
Juice Retail Sales	$33,042,600
Juice Broker Sales	$1,200,000
Grapes Sales	$30,100,000
Tourism	$312,633,472
Glass, Cases, Closures	$14,000,000
Stainless Steel	$500,000
Tax Revenues	$371,679,607
Financing Revenues - Debt	$36,000,000
Vineyard Development (exclucing vines)	$2,297,700
Wine Labels	$7,865,000
Grapevines	$3,795,000
Trucking	$6,500,000
Charitable Contributions	$1,037,476
Winery Research	$2,280,000
Indirect (IMPLAN)	$645,834,490
Induced (IMPLAN)	$578,518,057
Total Revenue	$2,554,133,504
Wages:	
Winery Employees	$116,300,178
Vineyard Employees	$7,337,089
Juice Processor Employees	$3,000,000
Juice Retail Employees	$3,258,915
Juice Broker Employees	$600,000
Tourism	$79,221,360
Vineyard Development - Labor	$765,000
Stainless Steel	$211,160
Glass, Cases, Closures	$335,767
Distributors Employees	$18,055,316
Wine Labels	$1,980,342
Grapevines/Nurseries	$1,353,000
Retail/Liquor Stores - Wine Specific	$104,136,000
Trucking	$1,282,710
Education	$3,150,081
Indirect (IMPLAN)	$232,370,370
Induced (IMPLAN)	$212,480,756
Total Wages	$785,838,044
Total	**$3,339,971,548**

ABOUT MKF RESEARCH

MKF Research LLC, publishes this report. MKF Research is a leading research source on the U.S. wine industry. MKF conducts original research on the wine business and wine market trends and publishes a number of industry economic studies. MKF also conducts specific market research for individual wine companies on a consulting basis. In addition, the firm conducts a number of industry seminars on its research work. The mission of MKF Research is to help our clients make confident decisions that improve their business performance and help them attain their goals.

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A major part of MKF Research's business is providing confidential custom consulting to wine industry enterprises, investors and suppliers. For example, over the last several years MKF Research consulting projects have included:

- Feasibility and market studies for new wine industry related businesses, products and investments;
- Market analyses and market, brand and financial benchmarking;
- Economic and environmental impact studies for a variety of wine and vineyard related businesses and public and private organizations interested in the industry; and
- Market and strategic studies of potential new import and export products.

MKF RESEARCH PUBLICATIONS

MKF Research Monthly

The ***MKF Research Monthly*** provides in-depth analysis of the critical business challenges facing the wine industry today. Available by subscription, at $195/10 issues per year, this targeted, concise report reflect the questions and concerns MKF hears daily from its wine business clients and industry analysts. Recent issues have explored Direct Sales trends, Wine Sales in Casual Dining Restaurants, the Mexican Wine Industry, Wine-by-the-Glass sales patterns and success factors and Demand and Supply for Vineyards.

MKF Grape Trends (annual)

MKF's ***Grape Trends*** provides complete Excel tables allowing readers to examine the interaction of supply, price, varietal and region for California's wine grape industry. It includes a complete summary of current, past (since 1997) and projected tons, prices, and bearing acres for all major grape growing regions and counties for seven major varietals: *Chardonnay, Sauvignon Blanc, Cabernet Sauvignon*, *Merlot, Syrah*, *Zinfandel*, and *Pinot Noir*.

By combining the crush and acreage reports into one easy-to-use quick reference guide, MKF has developed one source for all the information needed to make informed decisions about grape supply for production planning.

Economic Impact Reports

Economic Impact Studies published by MKF Research include:

- ***Economic Impact of California Wine 2004***
- ***Economic Impact of Wine and Vineyards in Sonoma County***
- ***Economic Impact of Wine and Vineyards in Napa County***
- ***Economic Impact of the Washington State Wine and Wine Grape Industries***
- ***Economic Impact of the Wine and Wine Grape Industries in Santa Barbara County***
- ***Economic Impact of California Wine 2000***

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