

THE ECONOMIC IMPACT
OF PENNSYLVANIA WINE,
WINE GRAPES AND
JUICE GRAPES – 2011

A Frank, Rimerman + Co. LLP Report

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This study was commissioned by the

Pennsylvania Winery Association

Frank, Rimerman + Co. LLP

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www.frankrimerman.com/businesses/business_management/wine_research.asp

TABLE OF CONTENTS

Highlights 2

Executive Summary 4

Methodology..... 12

About Frank, Rimerman + Co. LLP..... 14

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND
JUICE GRAPES

FULL ECONOMIC IMPACT OF
PENNSYLVANIA WINE, WINE GRAPES
AND JUICE GRAPES -- 2011

\$1.9 Billion

PENNSYLVANIA WINE AND GRAPES ¹	2011 ECONOMIC IMPACT
Full-time Equivalent Jobs	8,629
Wages Paid	\$401 million
Winery Revenue	\$44 million
Wine Produced (Cases)	525,000
Pennsylvania Grape Value	\$27 million
Number of Wineries	160
Number of Grape Growers	280
Grape-Bearing Acres	13,600
Wine-Related Tourism Expenditures	\$222 million
Number of Wine-Related Tourists	1.2 million
Taxes Paid: Federal, State and Local	\$186 million

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

Table 1¹
Total Economic Impact of Wine and Vineyards in Pennsylvania

Revenue:	2011 Total	2011 Wine	2011 Juice
Winery Sales	\$43,695,000	\$43,695,000	
Wine Grape Sales	5,711,200	5,711,200	
PLCB Sales of PA Wine	2,421,000	2,421,000	
Restaurant Sales of PA wine	1,454,000	1,454,000	
Juice Grape Sales	20,945,800		20,945,800
Juice Retail Sales	11,536,000		11,536,000
Juice Broker Sales	3,460,800		3,461,000
Tourism	222,323,000	222,323,000	
Winery Suppliers	6,276,000	6,276,000	
Vineyard Suppliers	8,500,000	1,750,000	6,750,000
Wine Research/Education/Consulting	1,050,000	1,050,000	
Charitable Contributions	1,490,000	1,490,000	
Tax Revenues - Federal	108,989,000	48,290,000	60,699,000
Tax Revenues - State & Local	77,138,000	50,169,000	26,969,000
Indirect (IMPLAN)	658,866,000	207,421,000	451,445,000
Induced (IMPLAN)	293,678,000	152,589,000	141,089,000
Total Revenue	\$1,467,534,000	\$744,639,000	722,895,000
Wages:			
Winery Employees	\$31,976,000	\$31,976,000	
Vineyard Employees	8,309,000	6,487,000	1,822,000
Juice Processor Employees	23,686,000		23,686,000
Tourism	63,559,000	63,559,000	
PLCB Sales of PA Wine	386,000	386,000	
Restaurant Sales of PA wine	15,000	15,000	
Winery Suppliers	1,051,000	1,051,000	
Vineyard Suppliers	902,000	451,000	451,000
Wine Research/Education/Consulting	815,000	815,000	
Indirect (IMPLAN)	171,929,000	78,454,000	93,475,000
Induced (IMPLAN)	98,211,000	51,025,000	47,186,000
Total Wages	\$400,839,000	\$234,219,000	166,620,000
Total	\$1,868,373,000	\$978,858,000	\$889,515,000

¹ Based on 2011 data.

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

EXECUTIVE SUMMARY

IMPACT OF WINE AND VINEYARDS ON THE PENNSYLVANIA ECONOMY

The Pennsylvania wine industry experienced steady growth in the number of wineries and increased demand of Pennsylvania wine since 2007. The number of bonded wineries in the state of Pennsylvania grew from 114 in 2007 to 160 in 2011. The industry continues to expand with all of the growth coming from the addition of smaller wineries – wineries producing less than 5,000 cases per year. According to the Pennsylvania Liquor Control Board, wine production in Pennsylvania in 2011 was over 1.24 million gallons, ranking Pennsylvania as the nation's twelfth largest wine producer. This represents approximately 34% growth over the 920,000 wine gallons produced in the state in 2007. Additionally, the state produced a significant amount of juice grapes (74,800 tons) from an estimated 10,800 acres of juice grapes in Pennsylvania in 2011.

The Pennsylvania wine and grape industry continues to contribute greatly to the state's overall economic strength. The impact of Pennsylvania's wine industry on the overall state economy was \$979 million in 2011, a 13% increase from the \$868 million impact in 2007. The juice grape industry's economic impact was \$890 million in 2011, a 40% decrease from the \$1.5 billion impact in 2007.

Overall, Pennsylvania's wine, grape and related industries had a total economic value to the state of \$1.9 billion in 2011. This is a 20% decrease from the \$2.35 billion economic impact in 2007. The decline in the overall juice grape industry impact was responsible for the lower overall economic impact in 2011. According to IMPLAN, there are several reasons for a decline of this magnitude when compared to 2007. First, deflation in the economy from 2007 to 2011 caused 2011 economic impacts to be lower when compared to 2007. Second, both output and labor income per worker were lower in 2011 than in 2007. Output per worker specifically for the IMPLAN industry code used for the majority of grape juice industry direct jobs (grape juice and concentrate manufacturing) reflected a significant decrease from 2007. Lastly, overall direct jobs, primarily tourism jobs, were lower in 2011 than in 2007, mostly attributable to a different statewide tourism economic impact methodology that resulted in a more conservative estimate of statewide direct tourism jobs. Combined, these differences created less overall economic impact in 2011 than in 2007.

We estimate that roughly 1.2 million people visited Pennsylvania wineries in 2011, up 35% from the 894,000 winery visitors estimated in 2007. Wine, grapes and related industries also accounted for 8,629 jobs in Pennsylvania with an associated payroll in excess of \$400 million. The wine and wine grape industry accounted for 5,570 jobs with a payroll of over \$234 million while the juice grape industry accounted for 3,059 jobs and a payroll of \$167 million.

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

Table 2
Total Pennsylvania Employment: Wine, Wine Grapes, Juice Grapes and Related Industries

Employment:	2011 Total	2011 Wine	2011 Juice
Winery	675	675	
Vineyard	392	306	86
Juice Processors	500		500
Tourism	2,016	2,016	
Pennsylvania Liquor Control Board	10	10	
Restaurants	1	1	
Winery Supplies	17	17	
Vineyard Materials	14	7	7
Research/Education/Consulting	12	12	
Indirect (IMPLAN)	2,706	1,338	1,368
Induced (IMPLAN)	2,286	1,188	1,097
Total Employment	8,629	5,570	3,059

Sources: Frank, Rimerman + Co., Pennsylvania Tourism & Lodging Association, wineries, PLCB, various wineries, Wine Grape Program at Penn State Grape Extension, Welch's and IMPLAN

TOTAL TAXES COLLECTED

The wine and wine grape industry generates significant tax dollars, benefiting federal, state and local governments. Tax dollars are raised through sales taxes, excise taxes, income taxes, estate and gift taxes, payroll taxes, property taxes and other business taxes and fees. Pennsylvania's wine, wine grape, juice grape and allied industries paid \$109 million in federal taxes and \$77 million in state and local taxes and in 2011, including over \$4 million in excise taxes.

Table 3
Estimated Tax Revenues

<u>Type of Tax</u>	<u>Total</u>
Federal Tax Revenues	
Excise	\$4,321,000
Payroll	\$41,108,000
Income	\$29,169,000
Other (corporate profits, etc.)	\$34,392,000
Total Federal Tax Revenues	\$108,989,000
State Tax Revenues	
Sales	\$26,529,000
Payroll	\$895,000
Property	\$24,944,000
Other (dividends, licenses, fines, fees, etc.)	\$24,769,000
Total State Tax Revenues	\$77,138,000
Total Tax Revenues	\$186,127,000

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

TOURISM

Tourism continues to be a major factor in the Pennsylvania wine and grape industry's overall impact on the state economy. Our survey of Pennsylvania wineries estimates that over 1.2 million tourists visited Pennsylvania wineries in 2011. Supporting these winery visitors is a diverse labor force of approximately 2,016 employees with total wages of roughly \$64 million. The continued increase of tourist visits over the past several years can be attributed to the increased number of Pennsylvania wineries and continued improvement in wine quality, providing more destinations and opportunities for visitors to experience Pennsylvania wine country.

The state's overall wine sales and production are not concentrated within a few large wineries; rather the majority of the state consists of small wineries with production under 5,000 cases. In fact approximately 80% of the state's wineries produced less than 10,000 gallons of wine in 2011. The Pennsylvania Liquor Control Board (PLCB) controls the sale of all wine in the state. There are very few wineries that sell wine through the three-tier system as the majority of the wineries sell their wine direct-to-consumer and through their tasting room and various wine events and festivals.

Wine tasting tours are being widely promoted with positive sales results. In order for the industry to continue growing and attracting new visitors, wineries not only need to continue focusing on improving wine quality, but consider expanding into more wine-related events like private parties, weddings, and festivals held on winery properties. Some existing wineries have expanded their facilities to incorporate these additional revenue streams resulting in increased winery employment and support services, and increased rural economic development.

WINE PRODUCTION AND SALES

Growing grapes and making wine is a long-term commitment to a community, both financially and physically. New vineyard plantings require three to five years before yielding a full crop, with another one to three years of aging for wine to be ready for sale. Unlike many industries, once vineyards and wineries are established they are effectively rooted and tied in place – a Pennsylvania vineyard cannot simply be relocated to another region or outsourced to another country. Wine and grapes are inextricably tied to the soil from which they are grown. Moreover, wine and their products and allied industries diversify local economies and create employment and new market opportunities.

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

In 2011, there were 160 wineries in Pennsylvania producing wine, up 40% from 114 wineries in 2007. By our account, approximately 90% of all wineries had sales under 5,000 cases annually. Total wine produced in Pennsylvania was 1.23 million gallons, or roughly 518,000 cases.

Based on our research and interviews with winery owners, wineries in Pennsylvania provided employment for 675 full-time equivalent jobs in 2011, with a payroll totaling approximately \$32.0 million. Wineries employ full and part-time workers for bottling, storage, maintenance and winemaking needs in addition to the traditional hospitality (tasting room), finance, sales and marketing functions. Many wineries also employ seasonal workers, particularly during harvest season.

In 2011, Pennsylvania was one of the larger wine producers in the United States at twelfth out of 50 states (all states have at least one winery). That being said, the majority of the state's new wineries are producing less than 10,000 gallons of wine annually. Pennsylvania's increased number of wineries can be partially attributed to increased tourist visitors throughout the state. In order to continue growing production and attracting interest from visitors and wine consumers in general, the state's wineries need to continue focusing on improving their winemaking and vineyard practices to keep pace with the overall wine industry at large.

Table 4.1
Top States' Annual Gallons Produced in 2011

Rank	State	Total Produced (Gallons)	% of Total
1	California	629,117,667	88.62%
2	New York	26,523,435	3.74%
3	Washington	25,564,659	3.60%
4	Oregon	5,539,736	0.78%
5	Vermont	3,356,568	0.47%
6	Kentucky	2,196,055	0.31%
7	Florida	1,920,638	0.27%
8	Michigan	1,612,467	0.23%
9	Ohio	1,578,806	0.22%
10	New Jersey	1,523,643	0.21%
12	Pennsylvania	1,232,877	0.17%
---	Others	9,762,225	1.38%
	Total	709,928,776	100.00%

Source: www.ttb.gov and PLCB

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

We estimate the total sales of Pennsylvania wine sold in 2011 at \$43.7 million with actual sales generated by the wineries themselves totaling approximately 60% of that. Over half of Pennsylvania's wine is sold directly to consumers on premise. Additionally, approximately 10% of the wine volume sold in Pennsylvania is sold through the PLCB. The remainder is sold at PLCB-approved locations like state-controlled liquor stores and restaurants or out of state distributors (less than 5% of total sales). When wineries sell their wine directly to the consumer, they receive the full retail price of the wine. When selling directly to restaurants, they receive about 80% of the full retail price. When selling to the PLCB, wineries receive approximately 50% of the full retail value. Any wines sold through licensed distributors out of state would also return just 50% of retail to the winery.

GRAPE PRODUCTION

In 2011, there were approximately 280 commercial growers operating in Pennsylvania with a combined acreage of 13,600 grape-bearing acres (including wineries). Based on our discussions with wineries, vineyard owners and industry professionals, approximately 2,800 of those acres were wine grape vineyards, up from 2,000 acres in 2007. Wine grape sales in 2011 were \$5.7 million. The remaining 10,800 acres produced 74,800 tons of juice grapes with a total farm gate value of \$20.9 million. According to the USDA, the average yield in Pennsylvania in 2011 for all grape vineyards was 6.7 tons per acre, up from 4.7 tons per acre in 2009. As shown below, Pennsylvania is ranked fifth in the United States in grape production and sixth in grape-bearing acreage.

Table 4.2
United States Total Grape Production, 2011

Rank	State	2011 Total Production (Tons)	2011 Bearing Acreage (all types of grapes)
1	California	6,612,000	796,000
2	Washington	316,000	67,000
3	New York	188,000	37,000
4	Michigan	94,400	14,600
5	Pennsylvania	91,000	13,600
6	Oregon	41,500	17,500
7	Ohio	7,480	1,900
8	Virginia	6,900	2,600
9	Texas	5,330	4,400
10	North Carolina	5,200	1,700
	Others	9,900	3,900
	Total U.S.	7,377,710	960,200

Source: USDA Noncitrus Fruits and Nuts 2011 -- Fresh and Processed Grapes

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

Wineries in the State of Pennsylvania rely heavily on wine grapes grown in state, which generally contributes to lower costs. By continuing to increase the grape quality and amount of Pennsylvania acreage available for grape production, the Pennsylvania wine industry can rely less on grapes produced outside the state while in turn building more credibility and a stronger reputation for wine quality as well as potentially reducing costs.

Table 4.3
Pennsylvania Wine Grape Crop Production and Value

Harvest Year	2003	2005	2007	2009	2011
Tons Produced	10,500	15,100	14,500	8,400	11,800
Crop Value (\$)	2,793,000	6,387,000	7,033,000	3,805,200	5,711,200
Change in Crop Value		129%	10%	-46%	50%

USDA, National Agriculture Statistics Service

VINEYARD EMPLOYMENT

Most Pennsylvania wineries reported utilizing both full-time and seasonal vineyard employees. Often grape production uses seasonal labor for harvests and vineyard development and full-time positions for maintenance of grape-bearing acres and development of new vineyards yet to bear fruit, as well as both full and part-time staff for finance, sales and other operational functions.

However, most grape growers in Pennsylvania manage smaller vineyards and can do so without outside labor. As noted above, based on surveys with wineries and vineyard owners, approximately 392 full-time equivalent workers were employed in the vineyards in both a development and ongoing vineyard maintenance/development capacity for a total payroll of approximately \$8.3 million in 2011. Of those 392 employees, 306 of them worked in wine grape vineyards, up from 195 workers in 2007. The remaining 86 employees worked in the juice grape vineyards. Wine grape vineyard payroll was \$6.5 million and juice grape vineyard payroll was \$1.8 million.

COMMUNITY SUPPORT

Based on our estimates, wineries and growers throughout the state of Pennsylvania have donated approximately \$1.5 million to charities in 2011 (over 3% of total wine sales), including gifts of wine and gift certificates. The amount of charitable contributions is likely underestimated as many wineries do not track in-kind contributions, which can be substantial. However, the majority of the wineries we spoke with described their charitable contributions as usually being in-kind donations of wine, tasting/tours and the like.

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

WINEMAKING EQUIPMENT, SUPPLIES AND SERVICES

The number of in-state suppliers or distributors of winemaking equipment, supplies and services is relatively small. Many different types of small businesses exist in Pennsylvania that supply the wine and wine grape industry as a portion of their overall business. They include bottle/glass suppliers, farming chemical providers, vineyard equipment suppliers, cooperage, lab equipment and label producers. As the Pennsylvania wine industry continues to grow, so will the number of ancillary businesses that supply the industry.

Our research and discussions with several winemaking suppliers in the state indicated that there were 17 full-time employees focused on the wine industry in Pennsylvania. Total wine-related supplier revenue in 2011 was \$6.3 million while wages accounted for \$1.1 million.

EDUCATION, CONSULTING AND WINE INDUSTRY RESEARCH

The majority of the state's education and research is provided by the Pennsylvania Wine Grape Program at the Penn State Cooperative Extension and its viticulture extension educator Mark Chien. The Cooperative Extension's Enologist, Denise Gardener, also provides educational programming and support for the wine industry. Additionally, there are enology and viticulture programs at the Harrisburg Area Community College. The long-term strength of Pennsylvania's wine and grape industry will likely benefit from the development of more viticulture and enology programs such as these. Aside from resources, wine grape growers and winemakers in Pennsylvania need to either rely upon themselves, their peers or go out of state for additional expertise.

With a total of 12 full time equivalent employees, funding of \$1.05 million and wages totaling \$815,000, education and research in the Pennsylvania wine and grape industries have a significant resource to help improve crop and product quality.

SUPPORT BY STATE AND REGIONAL ORGANIZATIONS

State and regional organization support is critical to the success of the renewed industry. Pennsylvania's state, regional and private organizations are becoming more effective and organized at supporting and promoting the local wine industry. These organizations include the Pennsylvania Winery Association and the Pennsylvania Wine Grape Program at the Penn State Cooperative Extension.

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

In order for the Pennsylvania wine industry to continue growing, it is critical that wineries and all associated organization and vendors receive significant support from the state and local governments, particularly with funding dollars that will enable better marketing of the industry as a whole. In addition to improving winemaking and vineyard practices, it is this kind of financial support that will help the industry's growth better reflect that of many of its neighboring states such as New York and Michigan.

A CONSERVATIVE MEASURE OF VALUE

Statistics alone do not adequately measure the intangible value the wine industry brings in terms of overall enhanced quality of life, limitation of urban sprawl and greater visibility for the state of Pennsylvania worldwide. Accordingly, the figures provided in this report should be viewed as a conservative baseline measure of the economic impact, as the true impact of the Pennsylvania wine industry, including intangible benefits is much greater. That measure of economic impact is approximately \$1.9 billion within the state of Pennsylvania, for an industry that is a unique partnership of nature, entrepreneurship, artistry and technology.

Pennsylvania wine and wine grape producers face sizable challenges to their continued growth and success. Working to support the Pennsylvania wine industry and to ensure its long-term success will protect the significant benefits the industry provides to the Pennsylvania economy.

METHODOLOGY

DATA COLLECTION

Data for this study was collected from a variety of public sources supplemented by primary research with wineries, suppliers, growers and other economic entities and supported by a variety of studies undertaken by industry and professional organizations. For several data items the numbers provided are only partial, given the limited availability of information, and therefore are considered conservative.

DIRECT, INDIRECT AND INDUCED EFFECTS (IMPLAN)²

All economic activities have “ripple” effects: employment of one person creates economic activity for others, whether the salesman who sells the employee a car or the restaurant where she eats lunch. Economic impact studies endeavor to measure those “ripples” as well as the direct activity, to help assess the impact of the potential gain or loss of an industry.

Economic impact studies estimate the impact of an industry in a defined geographic region by identifying and measuring specific concrete and economic events, such as the number of jobs, the wages, taxes and output generated by each job.

IMPLAN² is the acronym for “**IM** impact analysis for **PLAN**ing.” IMPLAN is a well established and widely used economic model that uses input-output analyses and tables for over 500 industries to estimate these regional and industry-specific economic impacts of a specific industry.

The IMPLAN model and methodology classifies these effects into three categories, Direct Effects, Indirect Effects and Induced Effects.

Direct Effects are economic changes in industries *directly* associated with the product’s final demand. Thus, direct effects consider the direct employment and spending of wineries, vineyards, distributors and immediately allied industries.

Indirect effects are economic changes – income created through job creation in industries that supply goods and services to the directly affected industries noted above. For example, the purchases of electricity and gasoline by wineries and of cash registers purchased for a tasting room.

² IMPLAN is the standard economic model for economic impact studies, developed by the University of Minnesota and the US Forestry Service in the 1980s and currently used by over 1,500 organizations, including most federal, state and local organizations. For more information on IMPLAN, go to www.implan.com.

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

Induced effects are the effects of these new workers spending their new incomes, creating a still further flow of income in their communities and a flow of new jobs and services. Examples are spending in grocery and retail stores, medical offices, insurance companies, and other non-wine and grape related industries.

Beginning in late 2009, the Minnesota IMPLAN Group released version 3.0 of its flagship IMPLAN software product, which makes it possible to include Trade Flows in an impact analysis. We used this latest version with its increased functionality to produce this report although we did not use the Trade Flows model to complete our analysis.

ABOUT FRANK, RIMERMAN + CO. LLP

Frank, Rimerman + Co. LLP is the leading research source on the U.S. wine industry. We continue to strive to raise the bar on the quality of information and analysis available to the wine industry.

Frank, Rimerman + Co. LLP produces original research on the business of wine and wine market trends, publishes a number of industry studies and provides business advisory services and conducts custom business research for individual companies and investors.

FRANK, RIMERMAN + CO. LLP PUBLICATIONS

Grape Trends

By combining the annual crush and acreage reports into one easy-to-use quick reference guide, Grape Trends provides, in one source, all the information needed to make informed decisions about California's grape supply for production planning. Provided in electronic form, Grape Trends includes a complete summary of current, past (since 1997) and projected tons, prices, and bearing acres for all of California's major grape growing regions and counties for all varieties recorded, including: Chardonnay, Sauvignon Blanc, Cabernet Sauvignon, Merlot, Syrah, Zinfandel, and Pinot Noir.

Grape Price Analysis Tool

The Grape Price Analysis Tool enables users to take a deep dive into the California Grape Crush Report and analyze estimated bottle prices in relation to tonnage prices. The tool makes the data from the Crush Report easy to access and provides actionable results to help determine tonnage prices based on an estimated finished bottle price.

Economic Impact Reports

Frank, Rimerman + Co. LLP completed the first study of the Impact of Wine, Grapes and Grape Products on the American Economy for Wine America, the Wine Institute, Winegrape Growers of America and the National Grape and Wine Initiative, as well as economic impact studies for California, Illinois, Iowa, Michigan, Missouri, New York, North Carolina, Ohio, Oklahoma, Pennsylvania, Tennessee, Texas, Virginia and Washington.

ECONOMIC IMPACT OF PENNSYLVANIA WINE, WINE GRAPES AND JUICE GRAPES

Recent Economic Impact Studies and Updates published by Frank, Rimerman + Co. LLP include the following, all available for purchase from Frank, Rimerman + Co. LLP:

- Economic Impact of Texas Wine and Vineyards 2011
- Economic Impact of Arkansas Wine and Vineyards 2010
- Economic Impact of Oklahoma Wine and Vineyards 2010
- Economic Impact of Virginia Wine and Vineyards 2010
- Economic Impact of Texas Wine and Vineyards 2009
- Economic Impact of Wine and Wine Grapes in North Carolina 2009
- Economic Impact of Wine and Wine Grapes in Iowa 2008
- Economic Impact of Wine and Wine Grapes in Ohio 2008
- Economic Impact of Wine and Wine Grapes in Illinois 2007
- Economic Impact of Pennsylvania Wine and Grapes 2007
- Economic Impact of Wine and Grapes on the State of Texas 2007
- Economic Impact of Wine and Grapes on the Missouri Economy 2007
- Economic Impact of Wine and Wine grapes in Tennessee 2007
- Impact of Wine, Grapes and Grape Products on the American Economy, 2007
- Economic Impact of California Wine 2006
- Economic Impact of Washington Grapes and Wine 2006
- Economic Impact of Wine and Wine Grapes in North Carolina 2005
- Economic Impact of Wine and Wine Grapes in Texas 2005
- Economic Impact of Michigan Grapes, Grape Juice and Wine 2005
- Economic Impact of New York Grapes, Grape Juice and Wine 2005

Frank, Rimerman + Co. LLP

Frank, Rimerman + Co. LLP, founded in 1949, is the largest, locally-owned provider of accounting and consulting services in California. With offices in San Jose, Palo Alto, San Francisco and St. Helena, California, New York, NY and over 200 professionals, Frank, Rimerman + Co. LLP offers strategic business and information consulting services, tax consulting and planning, audit and financial reporting, accounting services, litigation and valuation services.

Frank, Rimerman + Co. LLP continues to build its wine industry practice, based in St. Helena, CA, committing the full resources of this major professional services firm to the industry.