

**THE ECONOMIC IMPACT
OF INDIANA WINE
AND WINE GRAPES – 2016**

A Frank, Rimerman + Co. LLP Report

December 2017

This study was commissioned by

**The Indiana Wine Grape Council
The Purdue University Wine Grape Team
The Indiana Winery & Vineyard Association**

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FULL ECONOMIC IMPACT OF INDIANA
WINE AND WINE GRAPES 2016

\$604 Million

Indiana Wine and Wine Grapes <i>Key Statistics</i>	2016 Economic Impact
Full Time Equivalent Jobs	3,919
Wages Paid	\$120.43 million
Wine Produced (Gallons)	2,398,771
Retail Value of Indiana Wine Sold	\$95.05 million
Vineyard Revenue	\$0.59 million
Number of Wineries and Tasting Rooms	116
Grape Bearing Acres	600
Wine-Related Tourism Expenditures	\$93.90 million
Number of Wine Related Tourists	628,741
Taxes Paid: Federal / State and Local	\$38.22 million / \$37.21 million

ECONOMIC IMPACT OF INDIANA WINE AND WINE GRAPES

Table 1 – Total Economic Impact of Wine and Vineyards in Indiana¹

Revenue	2016
Winery Sales	\$70,482,000
Retail and Restaurant Sales of IN wine	\$15,609,000
Distributors Sales	\$8,136,000
Non-Wine Revenue (Weddings, Events, etc.)	\$8,528,000
Tourism	\$93,903,000
Wine Grape Sales from Vineyards	\$593,000
Federal Tax Revenue	\$38,224,000
State Tax Revenue ^a	\$37,212,000
Vineyard Development (excluding vines)	\$900,000
Charitable Contributions	\$942,000
Allied Industries -- Glass/Closures/Chemicals	\$2,319,000
Research/Extension/Education/Marketing	\$95,000
Indirect (IMPLAN)	\$113,671,000
Induced (IMPLAN)	\$92,570,000
Total Revenue	\$483,184,000

Wages	2016
Winery Employees	\$14,344,000
Vineyard Employees	\$696,000
Tourism	\$35,167,000
Vineyard Development and Materials - Labor	\$135,000
Distributors Employees	\$610,000
Retail/Liquor Stores - Wine Specific	\$2,129,000
Restaurant Sales of Indiana Wine	\$1,201,000
Allied Industries -- Glass/Closures/Chemicals	\$503,000
Research/Extension/Education/Marketing	\$442,000
Indirect (IMPLAN)	\$36,806,000
Induced (IMPLAN)	\$28,396,000
Total Wages	\$120,429,000

Total	\$603,613,000
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^a \$0.05 per gallon excise tax funds research, extension, education, and marketing.

¹ Sources: Frank, Rimerman + Co. Research, IMPLAN, Purdue University, IN Department of Commerce, Bureau of Labor Statistics and various Indiana wineries, consultants and suppliers surveyed.

EXECUTIVE SUMMARY

IMPACT OF WINE AND WINE GRAPES ON THE INDIANA ECONOMY

The Indiana wine industry continues to expand as both the number of wineries and cases produced increased over the five year period from 2011. The number of bonded wineries in the state of Indiana grew from 73 in 2011 to 116 in 2016², an increase of 59%, while the cases produced increased 33% from 759,848 cases to 1,008,934 cases in 2016. The majority of the industry's growth is coming from increased tourism and increased consumer demand for Indiana wine within the state. According to the Alcohol Tax and Trade Bureau ("TTB"), Indiana was the 11th largest producer of bottled wine in the United States in 2016, producing 2,349,638 gallons of wine³.

The wine and grape industry in Indiana contributed greatly to the economic strength of the state in 2016. Indiana's wine, grape and related industries had a total economic value to the state of \$604 million in 2016. The wine industry's economic impact to the state of Indiana is based on tourism revenue, wages and jobs and direct winery production. In addition, as noted above, the number of wineries in Indiana are on the rise, indicating the potential for further growth in direct, indirect, and induced revenues and jobs attributable to the industry. We estimate that roughly 630,000 people visited Indiana wineries in 2016.

TOTAL EMPLOYMENT

Wine, grapes and related industries account for 3,918 jobs in Indiana with an associated payroll of \$120 million. As shown below, most of these jobs directly attributable to the economic impact were in the tourism industry.

Table 2 – Total Indiana Wine/Grape Industry Employment⁴

Employment	2016
Winery	557
Vineyard	34
Distributors	43
Tourism	1,649
Vineyard Materials	7
Restaurants	53
Retail/Liquor Stores - Wine Specific	144
Allied Industries -- Glass/Closures/Chemicals	13
Wine Research/Education/Consulting	8
Indirect (IMPLAN)	719
Induced (IMPLAN)	692
Total Employment	3,919

² TTB - Freedom of Information Act - Internal Revenue Code Section 6103(s) – Bonded Wine Producers Count By State

³ TTB - Wine - 2016 Statistics – Summary Calendar Year

⁴ Sources: Frank, Rimerman + Co. Research, IMPLAN, Purdue University, IN Department of Commerce, Bureau of Labor Statistics and various Indiana wineries, consultants and suppliers surveyed.

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. Additionally, all wine sold in Indiana is subject to a \$.05 per gallon excise tax to fund and to support research, extension, education, and marketing. Indiana's wine, wine grape and allied industries generated \$38 million in federal taxes and \$37 million in state and local taxes in 2016, including \$6 million in total excise taxes.

Table 3 – Estimated Tax Revenues

Type of Tax	Total
Federal Tax Revenues	
Excise	\$5,230,000
Payroll	\$15,855,000
Income	\$15,973,000
Other (corporate profits, etc.)	\$1,166,000
Total Federal Tax Revenues	\$38,224,000
State Tax Revenues	
Excise	\$1,127,000
Sales	\$20,744,000
Payroll	\$148,000
Property	\$2,818,000
Other (dividends, licenses, fines, fees, etc.)	\$10,309,000
Total State Tax Revenues	\$37,212,000
Total Tax Revenues	\$75,436,000

TOURISM

Tourism is a material factor in the Indiana wine and wine grape industry's overall impact on the broader state economy. Our survey of Indiana wineries estimates that 628,741 tourists visited Indiana wineries in 2016. Supporting these winery visitors is a diverse labor force of approximately 1,649 employees with total wages of \$35 million. Based on our experience conducting similar studies for other Midwestern states, tourism growth has a high correlation to the increase in the number of Indiana wineries and continued improvement in wine quality, providing more destinations and opportunities for visitors to experience Indiana wine country. Additionally, the continued improvement in the broader U.S. and local Indiana economies also likely contributed to the impressive tourism impact.

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 revenue, employment and support services. Some wineries we surveyed in Indiana incorporated these new functions with traditional facilities to take full advantage of these profitable ancillary activities. By our estimation, based on direct feedback from the wineries we surveyed, there was nearly \$8 million in revenue generated from these wine-related events and facilities.

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 Indiana 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. Based on our survey results, we note that the majority of the state's wineries made wine with grapes sourced from non-Indiana vineyards.

In our data collection and discussions with Purdue University's Wine Grape Team ("Purdue Wine Grape Team") we noted several contract bottling facilities in Indiana that bottle wine for non-Indiana wineries. While we believe that this production is included in the TTB numbers above, we note that the data provided by IMPLAN (discussed below) adjusts for this production in its calculation of indirect and induced economic impact. Thus, we elected to include the TTB data in our overall gallon production to determine our coverage of wineries surveyed and to extrapolate data for non-surveyed wineries, also discussed below.

In 2016, there were 116 bonded wineries in Indiana producing wine from Indiana and non-Indiana grapes, up 59% from 73 wineries in 2011 per information from the TTB. This number includes active Farm Wineries and active Farm Winery Satellite Dealers. Additionally based on information from the TTB, total wine bottled in Indiana in 2016 was nearly 2.4 million gallons, or approximately 1,009,000 nine-liter equivalent cases.

Table 4 – Trend of Growth in Bonded Indiana Wineries

Year	# of Wineries
2016	116
2011	73
2006	39
2001	31

Source: Wine Institute, TTB

While the majority of the state consists of small wineries with production of less than 5,000 nine-liter equivalent cases, the state’s overall wine sales are concentrated within a few larger winery producers. Two of the largest wineries, Oliver Winery and Easley Winery sell the majority of their wines through the three-tier distribution system. These sales account for a majority of Indiana wine sales. However, the vast majority of Indiana wineries primarily sell direct to consumers through winery tasting rooms or direct to retail and restaurants, allowing them to obtain higher margins on their product. Based on winery survey responses, we estimate at least 64% of Indiana wine was sold direct to consumers in 2016.

As outlined below, the retail value of Indiana wine sold in 2016 is estimated at \$95 million, with actual sales generated by the wineries themselves totaling \$70 million.

Table 5 – Total Indiana Wine Retail Value in 2016

Type of Sale	Sales
Retail Sales	45,591,000
Direct to Trade Value	482,000
Wholesale Value	24,409,000
Total Winery Sales	70,482,000
Direct to Trade Value	161,000
Wholesale Value	24,409,000
Total Wine Retail Value	95,052,000

This total retail value includes sales to consumers in the winery tasting rooms, winery mailing lists and e-commerce/Internet sales. Excluded from these figures was the additional \$9 million generated in non-wine revenue associated with wineries hosting special events/weddings and selling various merchandise on-site.

Based on our research and interviews with winery owners, wineries in Indiana provided employment for 557 full-time equivalent jobs in 2016 with an overall payroll totaling \$14 million. Additionally, these wineries provided 34 full-time equivalent jobs associated with vineyard employment for a total payroll of \$0.7 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.

ECONOMIC IMPACT OF INDIANA WINE AND WINE GRAPES

Many Indiana wineries depend on grapes grown outside of the state, as 90.2% of cases of wine bottled by Indiana wineries were sourced from grapes that were grown outside of Indiana. A primary reason for this is that a large amount of wine is made from Concord and other labrusca varieties, which are widely grown in the Great Lakes region and readily available to wineries at prices below what they could be produced for in Indiana. As a result, the industry is tied to weather issues and market conditions in other major growing regions. The industry will need to consider methods of mitigating market risk associated with tonnage fee and spot prices for juice in these regions outside of Indiana.

In 2016, Indiana was the 11th largest producer of bottled wine by gallon in the United States, according to data provided by the TTB. That said, the number of new wineries producing wine in Indiana increased dramatically in the last five years since 2013, growing 59% (based on data from the TTB). Indiana'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 6 – Top States' Annual Bottled Wine Gallons Produced in 2016

Rank	State	Gallons Produced	% of Total
1	California	565,263,440	79.74%
2	New York	32,704,950	4.61%
3	Washington	30,441,101	4.29%
4	Pennsylvania	25,591,648	3.61%
5	Oregon	11,589,513	1.63%
6	Ohio	8,914,288	1.26%
7	Vermont	4,872,759	0.69%
8	Texas	3,855,594	0.54%
9	Michigan	2,635,704	0.37%
10	Virginia	2,445,150	0.34%
11	Indiana	2,349,638	0.33%
	All Others	18,202,008	2.57%
	Total U.S.	708,865,793	100.00%

GRAPE PRODUCTION

According to the National Agricultural Statistics Service (“NASS”), there were approximately 462 grape-bearing acres in Indiana in 2012. This marked a 14.9% increase from 402 grape-bearing acres in 2007. Yield information is not tracked within the state of Indiana. Grape production in the state largely varies due to occasionally unfavorable weather conditions such as late spring frost, mid-winter cold and hail storms, harmful herbicide drift from neighboring fields and, to a lesser extent, vine loss due to insects and diseases. The state’s geographic location, creates a large spectrum of climates between Southwest Indiana and Northeast Indiana.

About two-thirds of the wineries in Indiana have small vineyards that supply some, but not all of the grapes they need each year. As a result, the majority of the state’s wineries made wine with grapes sourced from non-Indiana vineyards, resulting in approximately 9.8% of all wine produced in Indiana being made from Indiana grapes. For those wineries who grew their own grapes, most of these vineyards were located on-site, at the winery’s estate property. A few wineries we surveyed also indicated that they sell grapes, other fruit and/or juice to other wineries as well. Every one of them sold grapes and/or bulk wine to other wineries in Indiana, although only a few also indicated they sold to wineries out of state as well.

VINEYARD DEVELOPMENT

Vineyard development is the process of converting land into a developed vineyard. The land must be prepared to plant vines. Once the vine is planted it must be trellised and trained, and from the time a vine is planted in the ground, it can take between three to four years before the vine bears fruit. During this time, pre-productive (non-fruit bearing) vines must be tended and cared for in accordance with sound viticultural practices to ensure healthy productive (fruit bearing) vines.

The vineyard development process is very capital and labor intensive, with development costs for wine grapes in Indiana averaging approximately \$8,400 per acre, excluding land acquisition costs. This approximate cost includes all land preparation, capital improvements, vine layout, planting and trellising, vines, irrigation, materials and equipment, farming costs, direct and allocated overhead, utilities, property taxes, and financing costs during the pre-productive period.

The investment in terms of capital and time required is significant. Vineyard owners and their employees do the majority of vineyard development in Indiana, with the assistance of vineyard development consultants in some cases.

VINEYARD EMPLOYMENT

Larger Indiana 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 currently-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 business management functions.

However, many grape growers in Indiana manage smaller vineyards and can do so without outside labor. Based on surveys with wineries and vineyard owners, as confirmed with information collected by the USDA-NASS and the Bureau of Labor Statistics, approximately 34 full-time equivalent workers were employed in the vineyards in both a development and ongoing vineyard maintenance or development capacity for a total payroll of \$0.7 million in 2016.

COMMUNITY SUPPORT

Based on our estimates, wineries and growers throughout the state of Indiana have donated approximately \$942,000 to charities in 2016, 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.

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 Indiana that supply the wine and grape industry as a portion of their overall business. These firms include bottle suppliers, farming chemical providers and label producers. As the Indiana wine industry continues to grow, so will the number of ancillary businesses that supply the industry. By our estimate and based on feedback from wineries, vineyards and other industry sources, there were eight employees working at various industry suppliers that are focused on the wine and grape industry. Total wine or grape-related revenue was approximately \$2 million while compensation was approximately \$0.5 million.

EDUCATION, CONSULTING AND WINE INDUSTRY RESEARCH

Approximately 8 people were employed on a full-time basis in Indiana in wine-related education, consulting and research capacity at various universities and trade organizations, with total wages of roughly \$442,000. Total funding/revenue was \$537,425 in 2016. As stated previously, all wine sold in Indiana is subject to a \$0.05 per gallon excise tax to fund and support wine education that directly funds the Purdue Wine Grape Team budget.

SUPPORT BY STATE AND REGIONAL ORGANIZATIONS

State and regional organization support is critical to the success of the industry. Indiana's state, regional and private organizations are becoming more effective and organized at supporting and promoting the local wine industry. The Purdue Wine Grape Team as well as the Indiana Wine Grape Council in particular significantly helped support and drive industry growth for Indiana's wine and grape industry. The Indiana Winery and Vineyard Association provides organizational and lobbying support for the industry.

In order for the Indiana wine industry to continue growing, it is critical wineries and all associated organizations and vendors receive significant financial 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.

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 Indiana 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 Indiana wine industry, including intangible benefits is much greater. That measure of economic impact is approximately \$604 million within the state of Indiana, for an industry that is a unique partnership of history, nature, community, artistry and technology.

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

THANKS

We would like to thank all wineries that participated in the survey. This study would not exist without the strength of the data from this year's survey respondents and the generous support of the wineries who provided this information. We are also grateful to the state and provincial governments and tourism bureaus, winery associations and universities who responded to our requests for information for this analysis. Additionally, we would like to thank Robert Eyler, PhD of Economic Forensics & Analytics for his guidance and review in understanding the methodology, application, and impact of the IMPLAN data on this analysis.

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. The survey covered 66.8% of the overall Indiana production during 2016 based on the 2,349,638 gallons of bottled wine from the TTB data⁵. For several data items the numbers provided are only partial, given the limited availability of information, and therefore are considered conservative. For this analysis, we relied upon 2015 IMPLAN figures for Indiana.

DIRECT, INDIRECT AND INDUCED EFFECTS (IMPLAN)⁶

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.

IMPLAN 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.

⁵ TTB - Wine - 2016 Statistics – Summary Calendar Year

⁶ 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.

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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.

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.

ABOUT 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, New York and over 300 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 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 has a dedicated Wine Business Services practice which lists many wineries, vineyards, industry suppliers and industry trade organizations as clients. Services provided include:

- Economic impact studies
- Custom industry research
- Financial benchmarking
- Financial audits, reviews and compilations
- Income tax consulting and compliance
- Business valuation
- Financial modeling and business plan development
- Accounting services
- Enterprise sustainability
- Transaction readiness
- Business planning and general winery consulting

FRANK, RIMERMAN + CO. LLP PUBLICATIONS

For further information on the industry:

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 the first economic impact study of the Wine and Grape Industry in Canada. Additionally, Frank, Rimerman + Co. LLP produced economic impact studies for the following US states: Arkansas, California, Illinois, Iowa, Michigan, Missouri, Indiana, New York, Ohio, Oklahoma, Pennsylvania, Tennessee, Texas, Virginia and Washington.

ECONOMIC IMPACT OF INDIANA WINE AND WINE GRAPES

Recent Economic Impact Studies and Updates published by Frank, Rimerman + Co. LLP include the following:

- Economic Impact of Wine and Wine Grapes in North Carolina 2016
- Economic Impact of Wine and Wine Grapes in Ohio 2016
- Economic Impact of Wine and Grapes in Canada 2016
- Economic Impact of Texas Wine and Vineyards 2015
- Economic Impact of Virginia Wine and Vineyards 2015
- Economic Impact of Kentucky Wine and Wine Grapes 2014
- Economic Impact of Missouri Wine and Wine Grapes 2013
- Economic Impact of Texas Wine and Vineyards 2013
- Economic Impact of Wine and Wine Grapes in Iowa 2012
- Economic Impact of the Wine and Grape Industry in Canada 2011
- Economic Impact of Wine and Wine Grapes in Illinois 2011
- Economic Impact of Wine and Grapes in Canada 2011
- Economic Impact of Texas Wine and Vineyards 2011
- Economic Impact of Pennsylvania Wine, Grapes and Juice 2011