

WINE BUSINESS MONTHLY

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Wine Industry Leaders 2019

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How the
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50
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McManis Family Vineyards Expands
Wine Facility, Vineyards

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SALARY SURVEY

Report

Wine Industry Salaries Up 2.6 Percent
Labor Market Remains Tight

2019 WINNERS ANNOUNCED
Wine Packaging Design Awards

Wine Industry 2019 Leaders

A leader is someone who makes an impact or shapes how people act or how things occur—an agent of change. Making and selling wine is a multi-faceted endeavor led by those brave enough (or crazy enough) to pave a new way forward, inspiring generations to come. There are different ways to be a leader. Some of the leaders on this list have discovered new ways of doing things: new ways of marketing, tapping into trends and building brands. Some were entrepreneurial. Others developed a specific expertise; found niches or rallied behind causes they believed in. Some of the influential people on this list are known to virtually anyone who follows the wine industry, while others are influential yet fly “under the radar.” All of them are leaders in the North American wine business.

When **Wine Business Monthly** created this list, we wanted to acknowledge the multitude of leaders shaping the industry today. We have a general list of leaders as well as four trend-based category lists. This year, we saw leaders emerge in understanding environmental shifts, propelling the Oregon wine industry forward, promoting alternative packaging, and spearheading direct-to-consumer and e-commerce efforts—all areas that made an impact on the industry in 2019.

Here’s to WBM’s Top Leaders in the Wine Industry 2019!

The Environment

U.S. wineries continue to build on sustainable practices. At the same time, research shows young consumers are paying attention to the impact of their choices, wine included, on the environment. These leaders have made efforts to raise awareness and find solutions to climate-related problems.

Giancarlo Bianchetti

CEO, Fetzer Vineyards/Bonterra

Guiding the leading supplier of South American wine with sustainable approach

Fetzer Vineyards has long been a sustainability leader, a legacy that continues under **Giancarlo Bianchetti**’s leadership. Fetzer Vineyards recently became the largest winery in the world certified as a **B Corporation**, adopted additional technologies for saving water and energy and was the only wine company to receive a “Momentum for Change” Climate Solutions Award from the **United Nations** at the 2017 Climate Change Conference in Bonn, Germany. Bianchetti oversaw a doubling of Fetzer Vineyards’ sales volume in 2018 with a transaction that brought the Chilean exports of parent company **Viña Concha y Toro** and Argentine property **Trivento** under management of the Fetzer Vineyards marketing organization in the U.S.



Adrian Bridge

CEO, Taylor Fonseca Port Group

Leadership on climate change

Adrian Bridge has been leading **Taylor’s Port** since 1994, taking an active role in consolidating the Port sector, developing distribution while taking Port into the 21st century. He’s been instrumental in revitalizing Porto: boosting tourism, among other things, by developing luxury hotels and attractions. Taylor Fladgate hosted the inaugural **Climate Change Leadership Summit** in 2018 that included a keynote speech by former U.S. President **Barack Obama**. **Al Gore** headlined at the 2019 Climate Change Leadership Summit and the “**Porto Protocol**” was launched. The Porto Protocol involves companies pledging to make changes to mitigate climate change and sharing information.

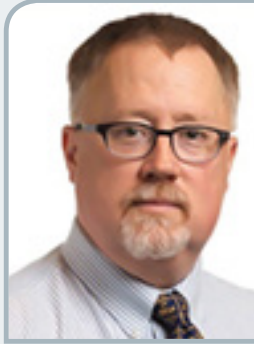


Tom Collins

assistant professor, Washington State University Wine Science Center

Researching smoke-exposed grapes

With wildfires devastating much of the West, the effects of smoke exposure on winegrapes are an increasingly significant concern for wineries and growers. **Tom Collins** is among the world's top researchers looking at the effects of smoke exposure on winegrapes. From an analytical chemistry laboratory and research winery at the **Ste. Michelle Wine Estates WSU Wine Science Center**, Collins studies the composition of grapes and wines, evaluating changes while fruit ripens throughout the winemaking process, correlating chemical composition with sensory perception.



Julian Gervreau

vice president, sustainability, Jackson Family Wines

Helping decarbonize wine

Julian Gervreau leads an internal innovation group developing technology and strategic partnerships, reporting to **Jackson Family Wines'** svp of corporate social responsibility, Katie Jackson. The company has reduced water use by 31 percent since 2008 and is the U.S. wine industry's largest solar producer. JFW achieved a 33 percent drop in greenhouse gas emissions. This year the company launched **International Wineries for Climate Action** with **Familia Torres** of Spain to help wineries measure emissions and develop best practices.



Greg Jones

director of wine education and research climatologist, Linfield College

Teaching the wine industry about climate

Climate change is top of mind and when it comes to climate change and wine, **Greg Jones** is the go-to-guy. He's a climatologist with an interest in growing winegrapes. He has given hundreds of international, national and regional presentations on climate and wine-related research. His family is active in the wine industry with **Abacela** in Southern Oregon. Jones oversees the wine education program at **Linfield College**.



Allison Jordan

executive director, California Sustainable Winegrowing Alliance;
vice president, environmental affairs, Wine Institute

Building alliances for sustainability and driving continuous improvement

Allison Jordon was involved with developing a benchmarking tool for wineries and growers, the **Code of Sustainable Winemaking Practice**, and more than 1,000 California vineyards have been certified, representing a quarter of the state's vineyard acreage. The certified sustainable logo is starting to show up on wine bottles while research has shown that members of the trade often consider sustainable practices in making wine selections.



Karissa Kruse

executive director, Sonoma County Grapegrowers

Sustainable practices in Sonoma

A few years back, the **Sonoma County Grapegrowers** set a goal of becoming the nation's first 100 percent certified sustainable wine region and they're getting close. Ninety-five percent of the vineyard acreage in Sonoma County has been certified through a sustainability program so far. In addition to these efforts, **Karissa Kruse** spearheaded efforts to create new farmworker housing developments, provide educational and financial opportunities for workers and hold workshops to address labor issues, best practices and grower concerns.

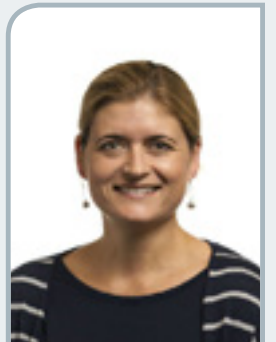


Anita Oberholster

cooperative extension specialist in enology, UC Davis

Making wine research useful

Dr. Anita Oberholster's research focuses on the influence of viticulture practices and environmental factors on grape ripening and wine quality. Dr. Oberholster has been effective in keeping current with fellow researchers and getting new research findings into the hands of practitioners who can make use of it. She earned her Ph.D. from **Adelaide University** in Australia.

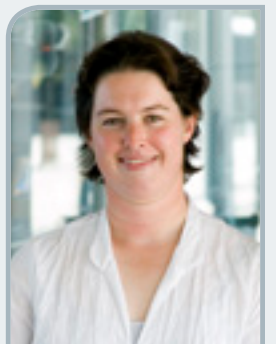


Kerry Wilkinson

associate professor of oenology, University of Adelaide

Improving methods for detecting and mitigating smoke exposure

Dr. Kerry Wilkinson, associate professor of oenology, **University of Adelaide**, leads group focused on applied research: from the improved utility of oak for wine maturation, to objective measures of sparkling wine style and quality, to strategies for managing wine alcohol content. Her most significant contribution to wine science is research into the impact of bushfire smoke on grapes and wine. Her research gave grape and wine producers improved methods for detection and amelioration.



Oregon Rising

The wine industry in Oregon is gaining consumer attention and growing, with 799 wineries in Oregon now open for business, per **Wines Vines Analytics**. A recent report indicated Oregon's wine industry has an economic impact to the state of \$5.6 billion.

Jim Bernau

founder/winegrower, Willamette Valley Vineyards

Champion for Oregon wine

Jim Bernau has long been a leader. He's one of the people that helped build the Oregon wine business. As a young lobbyist, he was involved with creating legislation making wineries a permitted use on farmland and establishing the Oregon Wine Board. That leadership continues: **Willamette Valley Vineyards** has grown to more than 16,000 wine enthusiast shareholders and is listed on **NASDAQ**.



Luisa Ponzi

winemaker, Ponzi Vineyards

Second generation leadership at Oregon winery

Luisa Ponzi combines her winemaking experience with her lifelong work with her father, **Dick Ponzi**, at their Willamette Valley vineyards and winery. Since 1993, Luisa has brought her knowledge of Burgundian practices and personal experience to the family-owned winery since taking over for her father. For more than two decades, she's helped sustain **Ponzi Vineyards'** nearly 50-year tradition of producing world-class wines.



Tom Danowski

president & CEO, Oregon Wine Board

Driving marketing, research and education for Oregon wine

Tom Danowski, an Oregon native and graduate of the **University of Oregon**, joined the **Oregon Wine Board** in 2011, providing leadership and managing growth at a critical time. The Oregon wine sector continues to flourish as shown in an economic impact report released last year indicating the sum of economic activity in Oregon related to wine was \$5.61 billion compared to \$3.35 billion just three years prior.



Sam Tannahill

founder and director of viticulture and winemaking, A to Z Wineworks

Collaborating with growers

After working in wineries and vineyards in Burgundy, California and Oregon, **Sam Tannahill** joined his wife, **Cheryl Francis**, and **Bill** and **Deb Hatcher** in launching **A to Z Wineworks**. A to Z quickly became one of Oregon's largest wineries. Tannahill has served as the president of the **Oregon Wine Board** and the **Oregon Winegrower's Association** and is chair of the **Oregon Businesses Association** and **Oregon Business** and Industry. A to Z has worked with more than 100 vineyards in Oregon, encouraging sustainability certification. Distributed in 50 states, A to Z is still majority-owned by the founding partners.



Eugenia Keegan

general manager, Oregon, Jackson Family Wines

Vision for Jackson Family Wines in Oregon

When **Jackson Family Wines**, the leading California producer of Pinot Noir, started branching out into Oregon with the purchase of what would become **Gran Moraine**, **Eugenia Keegan** was among the first to welcome her new neighbors. She probably didn't realize she'd wind up serving as Oregon general manager for the Jackson family's projects. Keegan acted as founding wine-maker for Gran Moraine, establishing a house style, and continues as a consultant. Keegan has four decades of experience in winemaking and distribution and owns Keegan Cellars, which operates in Roussillon, France.



Can-do Attitudes

The growth of wine in cans was the most notable trend in the wine business this year. There were a number of can-evangelists who helped make it happen in 2019.

Andrew Browne

founder, president and CEO, Precept Wine

Northwest's fastest growing wine producer does cans

Precept Wine is a nimble wine producer focused on innovation with annual sales approaching 2 million cases. **Andrew Browne** has driven growth by focusing on wine quality, but also by nurturing relationships. Precept has been distributing and marketing **House Wine** since 2006 and launched House Wine in cans two years ago.



John Wilkinson

managing partner, Bin to Bottle

Boosting cans at custom crush

John Wilkinson is managing partner at **Bin to Bottle**, a custom-crush winery in Napa providing winemaking services with "high quality/high touch production methods." He had clients waiting to can their wine before he even finished installing a new wine canning line last year.



Ryan Harms

founder, Union Wine Company - Underwood

Pioneering wine in cans

Union Wine Company chief executive **Ryan Harms** was basically first to produce and market wine in cans in the U.S. with the Underwood brand. Now, large international wine companies are entering the category and big grocery chains are carving out real estate in their wine sections for cans. The canned wine segment is actually a segment—not just a fad.



Jordan Kivelstadt

founder, Free Flow Wines

Tapping wine in kegs and cans

Back in the day, there were folks who tried to make a go of wine in kegs but they sputtered. **Jordan Kivelstadt** basically created the wine in kegs category—and made it work. Last year the company moved from Napa into a 58,000-square foot building in Sonoma—a \$10 million investment. The company fills more than 370 wines in kegs and branched out, building its canning business with a new \$5 million automated canning lines by German manufacturer **Krones**. Kivelstadt recently stepped down from the day-to-day operations to pursue new projects but remains active with the company.



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The Future of DTC & E-commerce

The direct-to-consumer segment continues to be an important growth channel for wineries and accounted for \$3 billion in sales in 2018, according to the latest **ShipCompliant** and **Wines Vines Analytics** report. Wineries shipped more than 6 million cases of wine in 2018.

Larry Cormier

VP, general manager, ShipCompliant

The automated DTC compliance standard

Larry Cormier leads **ShipCompliant**, addressing the need for any winery to access up-to-date state regulations and tax rates for direct shipments to consumers and, at the same time, track shipments to ensure compliance. ShipCompliant by Sovos also provides software for shippers, carriers and state alcohol regulators to digitize and streamline the regulatory approval process



Mike Osborn

founder and executive vice president, wine.com

Wine's leading online retailer

Mike Osborn has been a pioneer in online wine retailing since founding eVinyard in 1998. He leads **wine.com**'s merchandising and manages key industry relationships. Wine.com's revenue reached \$130 million in 2018 and has reportedly grown 15 to 20 percent per year for several years. Millennial consumers now make up one-third of wine.com shoppers and are the fastest-growing segment in revenue.



Adam Ivor

co-founder, VP of operations, Gliding Eagle

Facilitating DTC wine sales to China

Founded in 2010 with teams in the San Francisco Bay Area, Europe and China, **Gliding Eagle Inc.** is a technology company specializing in international direct-to-consumer logistics. The company tracks each individual bottle from the winery to consumers in China, reducing barriers to purchase for Chinese customers with marketing support, translation services, Chinese payment platforms, door-to-door white glove delivery, and customer service.



Cory Rellas

CEO and co-founder, Drizly

Changing how wine reaches consumers

Cory Rellas co-founded and now runs an alcoholic beverage e-commerce platform operating in more than 100 markets across the U.S. and Canada. **Drizly** lets users order beer, wine and spirits directly from local retailers within their immediate location through the company's mobile app or website. Drizly charges liquor and wine stores a monthly fee to use its order fulfillment software.



Lisa Mattson

director of marketing and communications, Jordan Vineyard & Winery

Thought leader on marketing luxury wines

With two decades of experience in writing, event planning, public relations, marketing and digital media strategy, **Lisa Mattson** is considered a thought leader in video storytelling, social media and digital brand strategy for luxury wines. Wine marketing is typically stuffy and intimidating—not so at **Jordan Vineyard & Winery**. Video makes it easier to get and keep people's attention. Mattson created a video-centric strategy for wine marketing that exudes personality while telling a story, capturing the fun and personality of people, along with authenticity.



Robert Trone

co-founder, Total Wine and More

Building a retail wine juggernaut

Total Wine & More's "superstores" have a large selection at all price points with low prices on items in wide distribution. A typical store carries 7,000 wine items. For its private label program, Total encouraged direct deals with small suppliers, leaving wholesalers with smaller percentages. Next up for the company: expanding its home delivery services.

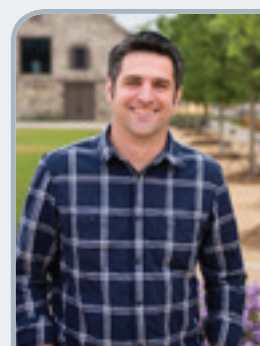


Jeff Zappelli

GM Hall/WALT Wines

Driving successful DTC efforts

Jeff Zappelli joined **HALL Wines** in 2006, helping define one of the most successful direct-to-consumer efforts in Napa Valley. In 2012 his role expanded to both HALL and the **WALT** brand and in 2016, he was appointed general manager of WALT. Zappelli is an active speaker and has been part of the conversation on direct-to-consumer trends, wine industry technology, CRM and direct marketing campaigns.



2019 Honorees

Annette Alvarez-Peters

chief wine buyer, beverage alcohol division, Costco

Leading Costco's wine program

Costco sells at least \$4 billion each year in wine, beer and spirits, if not more. The company has members in 49 million households. Costco has 12 wine buyers spread throughout the U.S. **Annette Alvarez-Peters** aims to select brands that deliver the quality and low prices Costco is known for.



Greg Baird

president and CEO, Breakthru Beverage Group

Running a \$6 billion wholesale juggernaut

Greg Baird runs **Breakthru Beverage Group** which was formed by the merger of **Charmer Sunbelt** and **Wirtz Beverage** with operations in 19 markets representing more than \$6 billion in annual sales.



Corey Beck

CEO, The Family Coppola

Innovation, creativity, and giving back

Winemaker **Corey Beck** was promoted to CEO earlier this year. He oversees **Francis Ford Coppola Winery** in Geyserville, **Virginia Dare Winery**, **Great Women Spirits**, **Mammarella Foods** pastas and sauces, **Cafe Zoetrope** in San Francisco and more. Beck, a believer in giving back and in mentoring others, is a frequent speaker at industry seminars and is active in several industry organizations and non-profits.



Gordon & Marjorie Burns

co-founders/technical directors, ETS Laboratories

Created the analytical backbone of the wine industry

Gordon and Marjorie Burns founded **ETS Laboratories** in 1978, and ETS has been a leader in wine analysis since. This year, ETS made significant contributions to **Cal Poly San Luis Obispo** and **Fresno State University's** wine and viticulture programs.



Jim Clerkin

president, Moët Hennessy strategic development

Driving growth in volume and profit

Jim Clerkin, long time **Moët Hennessy** North America president and CEO, was just appointed to a president of Moët Hennessy strategic development and will be an advisor to Paris-based global CEO **Philippe Schaus**. He's mentored numerous industry executives and, going forward, will focus on global distribution, mergers and acquisitions.

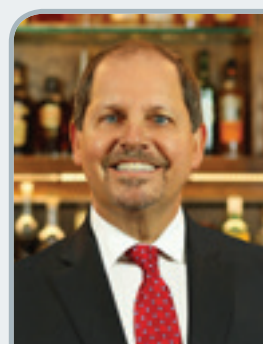


Tom Cole

CEO, Republic National Distributing Co.

Merging two of the industry's largest distributors

While the merger of **RNDC** and **Breakthru Beverage Group** didn't come to fruition (the FTC threw in a monkey wrench), **RNDC** merged with **Young's Market** this year with no geographic overlap between Young's and **RNDC** outside of a joint venture in Arizona. The combined company now serves 33 markets.



Nick Dokoozlian

vice president of viticulture, chemistry and enology, E&J Gallo Winery

Defining flavor/Brix relationships

Dr. Nick Dokoozlian is responsible for research and innovation in grape and wine production, including growing practices that improve yield and quality, the development and application of grape and wine chemical quality metrics and the impacts of processing but, most recently, Dokoozlian and his team developed a 100-point metric scale to define flavor/Brix relationships and found many of the flavor/Brix relationships are disconnected, mostly due to undercropping related to hang time.



David Duncan

proprietor/chairman & CEO, Silver Oak Cellars

Continuous improvement and commitment to sustainability

David Duncan's commitment to continuous improvement fuels **Silver Oak's** evolution. When a fire destroyed Silver Oak's Oakville winery, Duncan saw the opportunity to build an ideal space—the first commercial winery in the world to be **LEED Platinum** certified. Most energy needs are met through onsite solar, and 100 percent of processed water at the Alexander Valley winery is treated onsite and reused.



Merry Edwards

chief executive officer, Merry Edwards Winery

Shattering glass ceilings

Merry Edwards, the Pinot Noir specialist known as one of the women who shattered glass ceilings in California winemaking, has been a leader in wine for nearly five decades. The accolades and awards are many. This year Edwards sold her Sonoma County winery to The Louis Roederer Champagne house and stepped down as winemaker though she remains chief executive. Edwards' career began at Mount Eden Vineyards in the Santa Cruz Mountains after she graduated from UC Davis. She was with Matanzas Creek and consulted prior to establishing her own winery.



Margareth Henriquez

president & CEO, Krug Maison De Champagne

Improving luxury marketing at Krug

Margareth Henriquez was named president of estates and wines at luxury company **LVMH**. As president and CEO of the Champagne house **Krug**, Henriquez recognized luxury brands are often tied to an individual, usually the founder, and a vision that goes beyond what others are doing with a particular product. Realizing that buyers of luxury products won't buy products they don't understand, she provided transparency in terms of composition of the blends with individual identification codes on back labels.



John Hinman

founding partner, Hinman & Carmichael LLP

Leading attorney for alcoholic beverage compliance

John Hinman has been advising and representing alcoholic beverage industry clients in all phases of industry regulation, from trade practice, distribution, importation to product fulfillment, retail licensing and production. He's defended more than 200 administrative accusations and hearings, both at TTB and the ABC, in the last 25-plus years.



Chris Indelicato

president & CEO, Delicato Family Vineyards

Leading a third generation of family management

Chris Indelicato leads one of the fastest growing wineries and one of the largest wine companies (production exceeds 11 million cases)—a company that has more than 90 years of California wine-making and grapegrowing history. His grandfather, **Gaspere Indelicato**, broke ground on the family's first vineyards in 1924. Chris Indelicato assumed the role of president and CEO at **Delicato Family Vineyards** in 2004.



Sahap Kaan Kurtural

assistant cooperative specialist in viticulture, UC Davis

Improving production efficiency and pushing vineyard mechanization forward

Dr. Kaan Kurtural's research focuses on improving production efficiency in vineyards by applying principles of canopy and crop load management using vineyard mechanization and applied water amounts, as well as identifying quality improvement traits in berry composition by translating fundamental research into applied production practices in vineyards.

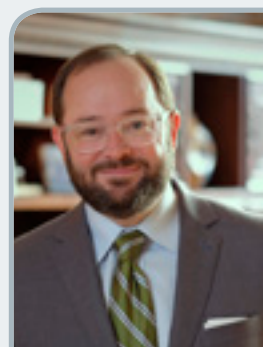


Eric McLaughlin

CEO and managing partner, Metis

Getting deals done in the Northwest

Eric McLaughlin runs the Northwest's leading mergers and acquisitions firm specializing in alcoholic beverages and hospitality. Metis advises privately-held businesses, including wineries, on capital transactions including mergers, acquisitions, divestitures and recapitalizations.



Towle Merrit

general manager, Walsh Vineyard Management

Bringing mechanization to luxury wine

As general manager at **Walsh Vineyard Management**, which operates in Napa Valley, **Towle Merritt** has helped move the level of knowledge and the dialogue on mechanical harvesting forward. His firm continues to encourage customers to try new technology cost-effectively and has been instrumental in educating clients.

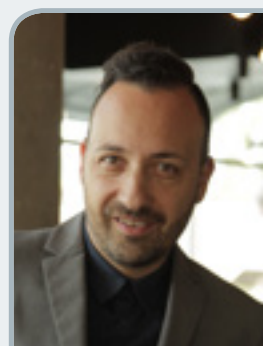


Juan Munoz-Oca

executive vice president, winemaking, vineyards and operations, Ste. Michelle Wine Estates

Taking a legacy of innovation forward

In January 2019, **Juan Munoz-Oca** was promoted to executive vice president, winemaking, vineyards and operations, at **Ste. Michelle Wine Estates**, succeeding **Doug Gore**, when he retired. Munoz-Oca a third-generation winemaker from Argentina, oversees all winemaking. One of the most upbeat and down-to-earth winemakers you'll meet, he worked his way up through the winemaking ranks.



Beth Novak Milliken

president & CEO, Spottswoode Estate Vineyard & Winery

Early adopter of organic vineyards

Spottswoode Estate, founded by the Novak family in 1972, began farming 100 percent organically more than 30 years ago—before "sustainable" and "green" were buzzwords. Because its Cabernet Sauvignons are highly regarded, this approach influenced other wineries. Spottswoode also contributes to organizations that share its environmental values.



Dan Petroski

winemaker, Larkmead Cellars/Massican/Band of Vintners

Thought leader among winemakers

Dan Petroski is winemaker at **Larkmead Cellars** as well as founder of his own label, **Massican**. Petroski has hosted a number of salons gathering leaders to discuss strategic issues, such as the future of Cabernet Sauvignon in Napa Valley. Larkmead recently planted a three-acre research block to test grape varieties that could potentially be blended with Cabernet if Napa Valley becomes too hot.



David Ramey

founder, Ramey Wine Cellars

Calling attention to the role of oxygen transmission

After earning a graduate degree at **UC Davis**, with his thesis on how aromas evolve in wine, **David Ramey** worked for **Matanzas Creek**, **Chalk Hill**, **Dominus Estate** and **Rudd Estate**, then founded **Ramey Wine Cellars**. Through the years, he's emphasized artisan techniques, such as eliminating skin contact for whites, using oxidized juice in making white wine and sur lie aging whites in barrel. Ramey is keen on the continual use of wine trials to elevate quality and has also been outspoken on using closures to customize oxygen transmission in the bottle.



Karen Ross

secretary, California Department of Food and Agriculture

The advocate for agriculture

Karen Ross, secretary of the **California Department of Food and Agriculture**, was appointed to that post by **Governor Jerry Brown** and reappointed by **Governor Newsom**. She served as chief of staff to U.S. secretary of agriculture **Tom Vilsack**, and from 1996 to 2009 was president of the **California Association of Winegrape Growers**.



Ray Rouleau

sales and service, Vermont Information Processing (VIP)

Leading the "revolution" in sales data and depletions

Software and information provider **Vermont Information Processing (VIP)** purchased **Beverage Data Network**, a supplier of wholesaler depletion data to the wines and spirits industry, five years ago. The company makes daily transactional data for three-tier wine sales available to wineries, a step forward in the way wineries track and manage depletion allowances.



Heidi Scheid

senior vice president, Scheid Vineyards

Championing Monterey and growing the family business

Heidi Scheid's family farms 4,000 acres of grapes, sells grapes and operates a large custom crush facility, while also making wines for its own brands, which are growing quickly, accounting for some 600,000 cases this year. She served on the **California Association of Winegrape Growers** board for nine years, and was chairman for two, and is a long-time director of the **Wine Market Council**.

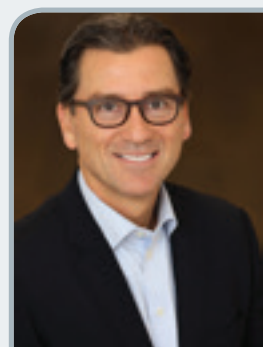


Tom Steffanci

president, W.J. Deutsch & Sons

Stewarding the fastest-growing wine brand

Tom Steffanci leads **Deutsch Family Wine & Spirits**, the marketer and importer of wine and spirits behind **Josh Cellars**, the fastest-growing wine brand in the U.S. **Deutsch Family Wine & Spirits** markets wine and spirits from family-owned companies around the world. **Deutsch** brands include: **[yellow tail]**, **Kunde Family Estate**, **Girard**, **Cigar Zin**, **Vidal-Fleury**, **Barone Fini** and more.



Bob Trincherro

chairman, Trincherro Family Wines

Retired CEO chairs second-largest family owned winery

Louis "Bob" Trincherro's family business rose following the popularity of **White Zinfandel** and then the move toward higher-end wine. Now retired from running the family business (**Bob Torkelson** was promoted to CEO), **Trincherro** continues as chairman. **Bob Trincherro** and brother **Roger Trincherro** are not just known for building a sustainably minded wine company, they're also known for taking care of their employees and supporting their local communities.



Brian Vos

president & CEO, The Wine Group

Innovating in the "premium-plus" price segment

While **The Wine Group** has long been a leader in value, the company continues to grow its premium business in the \$8 to \$15 segment, while introducing new brands and line extensions. At the helm is **Brian Vos**, named president and CEO in 2012.



Emeritus

David Adelsheim

founder and director, Adelsheim Vineyards

David Adelsheim founded **Adelsheim Vineyard** with **GINNY Adelsheim** in 1971. On behalf of the Oregon wine industry, he has led work on clonal importation, wine labeling regulations, establishing statewide and regional industry organizations, and creating the **International Pinot Noir Celebration** and **Oregon Pinot Camp**. As one of the founders of the Oregon wine industry, he's helped set standards of excellence.



Barbara Banke

chairman and proprietor, Jackson Family Wines

Jackson Family Wines' chairman and proprietor has spent the last two decades leading the company she co-founded with her late husband **Jess Jackson** while building and expanding some of the most well-known wineries in the nation. Jackson Family Wines is the leading supplier of Pinot Noir and Chardonnay. **Barbara Banke** takes a hands-on role in the development and promotion of various Jackson Family wine estates. After a wave of acquisitions in recent years, Banke has focused on digesting them and on developing vineyard and winery operations in Oregon.



Ted Baseler

former chief executive officer, Ste. Michelle Wine Estates

Ted Baseler dedicated his career to building Washington state into one of the world's top wine regions. He led the expansion and acquisitions with a "string of pearls" strategy, a self-described collection of estate wineries whose vineyards produce some of the best wines in the world. Under Baseler's leadership, **Ste. Michelle Wine Estates** ran a big tent, a widely inclusive operation that was welcoming to all. Baseler has been committed to community service, serving on boards for several organizations, the **Wine Market Council** among them. He announced his retirement after 34 years with the company earlier this year.



Andy Beckstoffer

vineyard owner, Beckstoffer Vineyards

One of the most important early leaders in the evolution of the Napa Valley's emergence as a world-class grape-growing region, **Andy Beckstoffer**, a founding director of the **Napa Valley Grapegrowers Association**, tied the price of grapes to retail bottle prices. He led the Napa Valley Grapegrowers in establishing the **Winery Definition Ordinance**, requiring 75 percent of grapes used in Napa Valley labeled wines to come from the appellation. Beckstoffer Vineyards owns and farms 3,600 acres.



Linda Bisson

former professor, UC Davis Department of Viticulture & Enology

Dr. **Linda Bisson** retired from the viticulture and enology faculty at the end of 2017. Through extension courses and professional organizations like ASEV, where she has been the science editor of the AJEV for many years, her research in yeast genetics is a scientific legacy that will not be surpassed easily. Most of the teaching material she used for the initial UC Davis Extension winemaking class is accessible to all and can be found on the UCD V&E website.



Harvey and Wayne Chaplin

chairman and CEO of Southern Glazer's Wine & Spirits, respectively

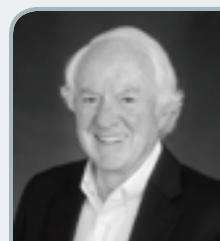
Following the merger of **Southern Wine & Spirits** and **Glazers Distributors**, the nation's largest distributor is **Southern Glazer's Wine & Spirits**, operating in 44 states with more than 20,000 employees and distributing more than 150 million cases of wine and spirits annually. **Harvey R. Chaplin** serves as chairman while **Wayne E. Chaplin** is chief executive.



Joe Ciatti

principal, The Zepponi Company

Joe Ciatti has more than 40 years of industry experience, a deep network and a long track record. Ciatti's grandfather, **Guiseppe Bagnani**, owned Sonoma County's **Geyser Peak Winery** in Alexander Valley for several decades after Prohibition ended. **Joe Ciatti** established the **Joseph W. Ciatti Company**, which grew into the world's largest brokerage of grapes and bulk wines. These days, Joe Ciatti is active in mergers and acquisitions as a principal with **Zepponi & Company**.



Tony Correia

principal, The Correia Co.

It's often said, "You can't get the deal done without Tony." **Tony Correia** specializes in the appraisal of large, complex agricultural properties and difficult appraisal assignments. He is a frequent instructor of appraisal courses and seminars throughout the nation, and a public speaker on agricultural, appraisal, taxation and estate planning issues, and the vineyard and wine industries.



John DeLuca

former president and CEO, Wine Institute

John DeLuca served as president and chief executive officer of **Wine Institute** from 1975 to 2003. Not only did he direct the industry's legal and governmental activities in the U.S. and overseas, but he was arguably the most important spokesman and behind-the-scenes player representing the California wine industry's hundreds of wineries and thousands of winegrowers.



Nat DiBuduo

former president, Allied Grape Growers

Nat DiBuduo is a native of the San Joaquin Valley, and his family was among the first to plant varietal winegrapes in the valley in the early 1970s. He joined the **Allied Grape Growers** cooperative in 2000 and retired from just Allied this year. Allied represents 550 growers throughout the San Joaquin Valley and North Coast, marketing some 200,000 tons of grapes.

**Mel Dick**

Driving force with distribution

Mel Dick has been in the industry for six decades, five of them with **Southern Wine & Spirits**, now **Southern Glazer's**. He has played a part in shaping the wine market in America, introducing Americans to higher-quality wines from California and Europe, while boosting educational programs to expand knowledge. He's also been key to the annual **South Beach Wine & Food Festival** in Miami benefiting FIU's **Chaplin School of Hospitality & Tourism Management**. The festival has raised more than \$28 million.

**Paul Draper**

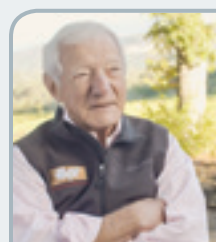
former winemaker, Ridge Vineyards

Paul Draper, a verifiable legend in the California wine industry, developed a philosophy about how to make wine and how to treat people—and he stuck with it. For nearly 50 years, Draper has championed traditional winemaking techniques, promoted the concept of terroir and became one of the first to recognize the opportunities of site-specific, single-vineyard winemaking. He was also among the first to treat Zinfandel with respect and champion the variety as an age-worthy wine of greatness. Draper officially retired as winemaker for **Ridge Vineyards** in 2016 but he's still involved. He turned operation of the winery over to key staff members who have worked at Ridge for decades.

**Frank Farella**

founding partner, Farella Braun + Martel

Frank Farella, a founding partner of **Farella Braun + Martel**, supervises many of the firm's mergers and acquisition transactions and plays a leading role in the firm's international hotel practice. Farella has a long history in the wine industry and has been a key player in the growth of the Napa Valley. He served on the board of directors of the **Robert Mondavi Corporation** and represented **Robert Mondavi** with respect to his philanthropic activities, including the establishment of the **Robert Mondavi Institute** and the **Robert and Margrit Mondavi Center for the Performing Arts** at UC Davis.

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Fred Franzia

co-founder, Bronco Wine Company

Calling **Fred Franzia** a colorful character would be an understatement. **Bronco Wine Co.** changed the industry in 2002 by selling \$1.99 wines at **Trader Joe's** stores under the **Charles Shaw** label. It's now sold something like 1 billion bottles of "Two Buck Chuck." Bronco is the fourth-largest wine company by volume. The latest: Launching **Shaw Organic** with the capacity to ramp up to 1 million cases of organic wine.



Jon Fredrickson

founder, Fredrikson & Co

Jon Fredrikson runs America's oldest consulting firm specializing in wine industry matters, offering a broad range of consulting services in wine industry economics, strategic market planning and wine property acquisitions and divestitures.



David Freed

co-founder, Wine Industry Symposium Group

David Freed served as chairman of **Silverado Wine Growers** and **Silverado Premium Properties**, privately held real estate investment funds with more than 10,000 acres of vineyard holdings in California. Freed also made another major contribution to the industry: He helped bring new sources of capital into the industry at a time when there wasn't much of it available, co-founding the annual **Wine Industry Financial Symposium**.



Joseph Gallo

president and CEO, E&J Gallo

E&J Gallo is the world's largest family-owned winery with sales exceeding 85 million cases. During the past two decades years, the company has completely transformed itself, continuing to dominate in popularly priced wines while also producing wines at the higher price tiers, and moving into the spirits business. He will step aside for his son, **Ernest**, to take the reins.



Agustin Huneeus Sr.

owner/partner, Huneeus Vintners

Agustin Huneeus Sr. purchased a stake in **Concha y Toro** in 1960, transforming it from jug producer to export powerhouse, the largest winery in Chile. In 1971, he moved to New York to head **Seagram's** worldwide operations, including **Paul Masson** wines and other brands. He moved to California in 1977, founding **Noble Vineyard** in the San Joaquin Valley, later acquiring **Concannon Vineyard** in Livermore. Huneeus has influenced California wine with a focus on the principle of attaching wine to a place.



Robert P. (Bobby) Koch

president and CEO, Wine Institute

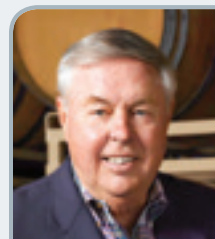
Bobby Koch leads the largest advocacy and public policy association for California wine, representing the industry at the state, federal and international levels. He was named president and CEO of Wine Institute in 2003, having joined Wine Institute in 1992. Wine Institute is the voice for California wine representing 1,000 wineries and affiliated businesses.



Jerry Lohr

chairman, J. Lohr Wines

Jerry Lohr's work on behalf of the entire wine industry has included posts as director and chair of the **Wine Institute** and chair of the **Monterey Winegrowers Council**. He was one of the four founding members of **Wine Vision**, an industry group that promoted a long-range view of the wine industry. Lohr founded the **National Grape and Wine Initiative**, representing grape growers, processors, wineries and academic institutions committed to improving the industry.



Norm McKibben

founder, Pepper Bridge Winery

Norm McKibben, a founding father of Walla Walla's wine industry, is known as "Stormin' Norman," because of his endless energy. In his 30-plus years in Walla Walla, the valley has evolved and credit for that goes largely to McKibben. He's served as a partner and director at **Canoe Ridge Vineyards** and **Hogue Cellars**, and worked closely with Walla Walla's leading vintners. By 1996, in partnership with **Gary Figgins** of **Leonetti Cellar** and **Marty Clubb** of **L'Ecole No. 41**, McKibben increased his vineyard holdings to 200 acres. He started **Pepper Bridge Winery** in 1998.



Michael Mondavi

founder, Folio Fine Wine Partners and Michael Mondavi Family Estate

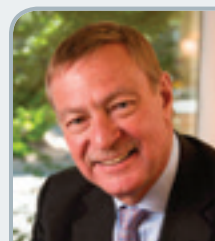
Michael Mondavi helped establish and build the Napa Valley wine industry through the family business fifty years ago and the legacy continues through **Michael Mondavi Family Estate** and **Folio Fine Wine Partners**, a sales and marketing company for family-owned wine estates around the world.



Robert Nicholson

principal, International Wine Associates

Robert Nicholson has completed more than 55 separate transactions with a combined value of more than \$1.5 billion, including sales of many well-known wine estates, vineyards and businesses.



Robert Parker

founder, Wine Advocate

Robert M. Parker Jr. is the best known, and most influential, U.S. wine critic. His wine ratings using a 100-point scale and his newsletter, **The Wine Advocate**, are a major factor in setting the prices for newly released Bordeaux wines. Parker has now formerly retired.



Linda Reiff

president and chief executive officer,
Napa Valley Vintners

For the past 23 years, **Linda Reiff** has guided the evolution and extraordinary growth of the **Napa Valley Vintners** with a mission of promoting, protecting and enhancing the Napa Valley appellation. She not only guided the direction of the nation's leading wine auction, but created it: **Premiere Napa Valley**, the nation's leading charity barrel auction.



Michaela Rodeno

former CEO, St. Supéry and Domaine Chandon

Michaela Rodeno is one of just a few female CEOs in the wine business, with a four-decade career in Napa Valley. Her career spans the development of two prominent French-owned Napa Valley wineries, **Domaine Chandon** (1973-1988) and **St. Supéry** (1988-2009), from inception to financial success. Rodeno is active in wine industry leadership, serving on two trade association boards: **Visit Napa Valley** and the **Wine Market Council**.



Marvin Shanken

publisher, *Wine Spectator*

Wine Spectator is the dominant magazine for wine consumers. In many ways the magazine's growth has mirrored that of the U.S. wine industry. *Wine Spectator* helped the premiumization of wine by showcasing wine as a lifestyle.



Richard Smart

Founder, Smart Viticulture

Richard Smart has been involved with viticulture since 1966. He studied agricultural science and sunlight use by vineyards in Australia before earning a Ph.D. from Cornell University and then a D.Sc. Agric. degree from the University of Stellenbosch, South Africa. He authored or co-authored more than 380 publications, including the internationally acclaimed book *Sunlight into Wine*, regarded as the reference on canopy management. He's helped popularize the role of viticulture in an industry where the limelight is usually given to winemakers.



Mario Zepponi

founder, Zepponi & Co.

Mario Zepponi's firm has served as a transaction advisor to several companies with recent transactions such as **Meiomi, Kenwood Vineyards, Chalk Hill Estate, Murphy-Goode, Siduri, Goosecross Cellars, Robert Hall and Four Vines**.





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