

**THE ECONOMIC IMPACT  
OF ILLINOIS WINE  
AND WINE GRAPES – 2012**

**A Frank, Rimerman + Co. LLP Report**

**June 2013**

This study was commissioned by the

**Illinois Grape Growers and Vintners Association**

**Frank, Rimerman + Co. LLP**

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FULL ECONOMIC IMPACT OF ILLINOIS  
WINE AND WINE GRAPES -- 2012

**\$692 Million**

<b>ILLINOIS WINE AND WINE GRAPES</b>	<b>2012 ECONOMIC IMPACT</b>	<b>2007 ECONOMIC IMPACT</b>
Full-time Equivalent Jobs	3,887	2,064
Wages Paid	\$153 million	\$72 million
Wine Produced (Gallons)	651,800	356,500
Retail Value of Illinois Wine Sold	\$39 million	\$29 million
Number of Wineries	105	91
Grape-Bearing Acres	1,107	1,115
Wine-Related Tourism Expenditures	\$50 million	\$40 million
Number of Wine-Related Tourists	500,000	200,000
Taxes Paid: Federal / State and Local	\$54 million / \$34 million	\$23 million / \$18 million

# ECONOMIC IMPACT OF ILLINOIS WINE AND WINE GRAPES

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**Table 1**  
**Total Economic Impact of Wine and Vineyards in Illinois**

<b>Revenue:</b>	<b>2012</b>	<b>2007</b>
Winery Sales	\$21,048,000	\$23,530,000
Retail and Restaurant Sales of IL wine	\$16,655,000	\$4,343,000
Distributors Sales	\$905,000	\$1,205,000
Tourism	\$50,240,000	\$39,643,000
Wine Grape Sales	\$1,125,000	\$1,142,000
Federal Tax Revenues	\$53,896,000	\$22,734,000
State Tax Revenues	\$33,837,000	\$17,829,000
Vineyard Development (excluding vines)	\$1,052,000	\$930,000
Charitable Contributions	\$210,000	\$235,000
Winery Services	\$822,000	\$450,000
Wine Research/Education/Consulting	\$488,000	\$300,000
Indirect (IMPLAN)	\$165,837,000	\$74,212,000
Induced (IMPLAN)	\$192,993,000	\$60,935,000
<b>Total Revenue</b>	<b>\$539,108,000</b>	<b>\$247,513,000</b>
<b>Wages:</b>		
Winery Employees	\$6,656,000	\$2,427,000
Vineyard Employees	\$9,139,000	\$8,189,000
Tourism	\$13,499,000	\$11,256,000
Vineyard Development and Materials - Labor	\$158,000	\$139,000
Distributors Employees	\$684,000	\$650,000
Retail/Liquor Stores - Wine Specific	\$96,000	\$97,000
Restaurant Sales of IL wine	\$2,641,000	\$1,529,000
Winery Services	\$332,000	\$178,000
Wine Research/Education/Consulting	\$484,000	\$250,000
Indirect (IMPLAN)	\$54,280,000	\$26,707,000
Induced (IMPLAN)	\$65,117,000	\$20,043,000
<b>Total Wages</b>	<b>\$153,086,000</b>	<b>\$71,465,000</b>
<b>Total</b>	<b>\$692,194,000</b>	<b>\$318,978,000</b>

Sources: Frank, Rimerman + Co., Illinois Office of Tourism, IMPLAN, University of Illinois, USDA, IGGVA, various Illinois wineries surveyed.

## EXECUTIVE SUMMARY

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### IMPACT OF WINE AND VINEYARDS ON THE ILLINOIS ECONOMY

The Illinois wine industry continues to grow as the number of wineries and cases produced both grew since 2007. The number of wineries in the state of Illinois grew from 91 in 2007 to 105 in 2012, an increase of 15%, while the cases produced increased from 150,000 to roughly 274,000, an increase of 83%. The majority of the industry's growth is coming from the addition of small wineries – wineries producing less than 5,000 cases per year. However, some of the state's larger producers have significantly increased their production over the past several years as well. Wine production in Illinois was approximately 652,000 gallons in 2012, ranking Illinois as nineteenth in the nation in wine production.

The wine and grape industry in Illinois contributed greatly to the economic strength of the state in 2012. Illinois' wine, grape and related industries had a total economic value to the state of \$692 million in 2012, an increase of 117% from the \$319 million economic impact in 2007. This large increase in total economic impact is a result of an increase in direct jobs, increased wine production and significantly more indirect and induced benefit from IMPLAN multipliers. In addition, tourism revenue, wages and jobs all increased from 2007, consistent with an increase in both overall state tourism and the number of wineries in the Illinois. As the number of Illinois wineries increases, so will the number of tourists visiting them. We estimate that roughly 500,000 people visited Illinois wineries in 2012, up from approximately 200,000 winery visitors in 2007. Wine, grapes and related industries account for 3,887 jobs in Illinois with an associated payroll in excess of \$153 million. As shown below, most of these jobs were in the actual wineries and vineyards, as well as the tourism industry.

**Table 2**  
**Total Illinois Employment: Wine, Grape and Related Industries**

	<u>2012</u>
Distributors	8
Research/Education/Consulting	9
Restaurants	155
Retail/Liquor Stores - Wine Specific	4
Vineyard	481
Vineyard Materials	8
Winery	416
Winery Services	8
Winery Tourism	462
Indirect (IMPLAN)	925
Induced (IMPLAN)	1,411
<b>Total Employment</b>	<b><u>3,887</u></b>

Sources: Frank, Rimerman + Co., Illinois Office of Tourism, IMPLAN, BLS, University of Illinois, USDA, IGGVA, various Illinois wineries 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. Illinois's wine, wine grape and allied industries paid \$54 million in federal taxes and \$34 million in state and local taxes in 2012, including over \$3 million in total excise taxes.

**Table 3**  
**Estimated Tax Revenues**

<u>Type of Tax</u>	<u>Total</u>
<b>Federal Tax Revenues</b>	
Excise	\$2,183,000
Payroll	\$21,499,000
Income	\$23,908,000
Other (corporate profits, etc.)	\$6,306,000
Total Federal Tax Revenues	\$53,896,000
<b>State Tax Revenues</b>	
Excise	\$906,000
Sales	\$11,096,000
Payroll	\$384,000
Income	\$4,317,000
Property	\$11,736,000
Other (excise, dividends, licenses, fines, etc.)	\$5,397,000
Total State Tax Revenues	\$33,837,000
<b>Total Tax Revenues</b>	<b>\$87,733,000</b>

## TOURISM

Tourism continues to be a material factor in the Illinois wine and wine grape industry's overall impact on the broader state economy. Our survey of Illinois wineries estimates that close to 500,000 tourists visited Illinois wineries in 2012. Supporting these winery visitors is a diverse labor force of approximately 462 employees with total wages of \$13.5 million. The continued increase of tourist visits over the past several years can be attributed to the increase in the number of Illinois wineries and continued improvement in wine quality, providing more destinations and opportunities for visitors to experience Illinois wine country.

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 Illinois 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 over \$1.5 million in revenue generated from these wine-related events.

### 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 – an Illinois 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.

In 2012, there were 105 wineries in Illinois still producing wine, up 15% from 91 wineries in 2007. Over 90% of the state's wineries had sales less than 5,000 cases annually. Total wine produced in Illinois was 652,000 gallons, or roughly 274,000 cases. This increase of 83% is primarily a result of increased production from a few of the state's larger wineries. Additionally, we relied on information collected by the USDA-NASS Illinois Field Office as part of their 2011 report titled *The Illinois Grape and Wine Industry* so there is increased support in the wine production volume, which differed significantly from the number provided by the Alcohol and Tobacco Tax and Trade Bureau (TTB).

**Table 4.1**  
**Trend of Growth in Illinois Wineries**

2012	105
2007	91
2006	83
2005	68
2004	55
2003	42
2002	31

Source: University of Illinois, IGGVA

## ECONOMIC IMPACT OF ILLINOIS WINE AND WINE GRAPES

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The state's overall wine sales are not concentrated within a few large wineries; rather the majority of the state consists of small wineries with production less than 5,000 cases. 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 through their tasting room, wine clubs and various wine events and festivals. However, a few of the larger producers sell a significant portion of their wine through the wholesale channel or directly to restaurants, which skews the state's overall distribution figures. Overall however, winery sales are roughly split 50/50 between direct to consumer and through either distributors or directly to restaurants. As a result, retail and restaurant sales of wine increased 283% from 2007 to 2012, up from \$4.3 million to \$16.7 million. This is primarily a result of one winery selling a large portion of its wine directly to restaurants and not through any distributors. Consequently, distributors' sales of Illinois wine decreased 25% from 2007 to 2012, however.

Based on our research, interviews with winery owners and reliance on the USDA-NASS Illinois Field Office report in 2011, wineries in Illinois provided employment for 416 full-time equivalent jobs in 2012, with a payroll totaling approximately \$6.7 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.

As mentioned above, over 90% of Illinois' wineries are considered small producers, producing less than 5,000 cases. In fact, only five wineries we spoke with produced wine in excess of 10,000 cases in 2012. Based on the data we received directly from the wineries and extrapolating for data we did not directly receive, less than 20% of the wine produced in Illinois in 2012 was made from grapes grown in Illinois. The growth of wineries in the state has so far kept pace with the growth of overall grape production as well as the increased demand for wine in state.

In 2012, Illinois was one of the smaller wine producers in the United States at 19th out of 50 states (all states have at least one winery). That being said, the number of new wineries producing wine in Illinois increased dramatically in the last ten years (a 239% increase). Illinois'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 4.2**  
**Top States' Annual Gallons Produced in 2012**

<b>Rank</b>	<b>State</b>	<b>Total Produced (Gallons)</b>	<b>% of Total</b>
1	California	690,155,261	88.58%
2	New York	27,558,262	3.54%
3	Washington	24,905,637	3.20%
4	Oregon	6,845,045	0.88%
5	Vermont	4,205,258	0.54%
6	Pennsylvania	3,601,188	0.46%
7	Ohio	3,059,784	0.39%
8	Kentucky	2,379,512	0.31%
9	Florida	1,946,162	0.25%
10	New Jersey	1,586,028	0.20%
<b>19</b>	<b>Illinois</b>	<b>651,800</b>	<b>0.08%</b>
---	Others	12,215,917	1.57%
	<b>Total U.S.</b>	<b>779,109,854</b>	<b>100.00%</b>

Source: www.ttb.gov

As mentioned earlier, roughly half of Illinois's wine is sold directly to consumers and half is distributed through either the three-tier distribution system or sold directly to restaurants and other retail outlets. Since wineries generate significantly more margin selling direct, we anticipate Illinois wineries will continue to focus their selling efforts on this channel in the near-term. As the industry and the state's production increase in the future, however, we believe more wine will have to be sold through the three-tier system to both satisfy consumer demand as well as try to reach new Illinois consumers.

The retail value of Illinois wine sold in 2012 is estimated at \$38.6 million, with actual sales generated by the wineries themselves totaling \$21.0 million. This includes sales to consumers in the winery tasting rooms, wine clubs, winery mailing lists and e-commerce/Internet sales. Retail, restaurant and distributor sales were \$17.6 million in 2012. Excluded from these figures was the additional \$1.5 million generated in non-wine revenue associated with wineries hosting special events/weddings and selling various merchandise on-site.

## GRAPE PRODUCTION

In 2012, there were approximately 312 grape growers operating in Illinois with a combined acreage of 1,107 bearing acres, the majority of which were commercial vineyards. Based on our discussions with wineries, vineyard owners and industry professionals, it appears several vineyards closed in recent years as yields and crop value varied dramatically. Our prior economic impact study as of 2007 noted that there were 450 grape growers at the time, representing a decrease of 31% fewer grape growers in Illinois in 2012. The severe economic downturn in the broader U.S. economy as well as that in Illinois also surely had a significant impact on grape growers shutting down their vineyards.

We estimate that the average yield in Illinois over the past three years was two to two and a half tons of grapes per planted acre. Given the harsh climate in this part of the country, low yields are not entirely uncommon; however, if Illinois is to gain traction and continue producing enough wine in state to meet consumer demand, the industry will need to try to improve yields going forward, if possible, and also continue increasing the available grape-bearing acreage, which has not grown in the past five years. As shown below, Illinois is not in the top ten in the United States in terms of grape production or acreage.

**Table 5**  
**United States Grape Production, 2012**

<b>Rank</b>	<b>State</b>	<b>2012 Total Production (Tons)</b>	<b>2012 Bearing Acreage (all types of grapes)</b>
1	California	6,678,000	796,000
2	Washington	370,000	69,000
3	New York	115,000	37,000
4	Oregon	46,000	18,000
5	Michigan	38,200	14,700
6	Pennsylvania	61,000	13,600
7	Texas	7,420	3,400
8	Virginia	6,900	2,600
9	Ohio	5,335	1,900
10	North Carolina	4,950	1,800
	Others	10,600	4,100
	Total U.S.	7,343,405	962,100

Source: USDA Non-citrus Fruits and Nuts 2013 Summary

Wineries in the state of Illinois rely heavily on wine grapes grown out of state, which generally adds increased costs. By continuing to increase the grape quality and amount of Illinois acreage available for grape production, the Illinois 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.

### **VINEYARD EMPLOYMENT**

Larger Illinois 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, most grape growers in Illinois manage smaller vineyards and can do so without outside labor. Based on our research, the average vineyard size was approximately three acres for all vineyards, including those owned and operated by both wineries and independent grape growers. Based on surveys with wineries and vineyard owners, as confirmed with information collected by the USDA-NASS, approximately 481 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 approximately \$9.1 million in 2012.

### **COMMUNITY SUPPORT**

Based on our estimates, wineries and growers throughout the state of Illinois have donated approximately \$210,000 to charities in 2012 (1% of total winery 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.

### **WINEMAKING EQUIPMENT, SUPPLIES AND SERVICES**

The number of in-state suppliers or distributors of winemaking equipment, supplies and services is relatively small. Only a handful of small businesses exist in Illinois that supply the wine and wine grape industry as a portion of their overall business. They primarily include bottle suppliers, farming chemical providers and label producers. As the Illinois wine industry continues to grow, so will the number of ancillary businesses that supply the industry.

**Table 6**  
**Illinois Winemaking Suppliers for Illinois Wine**

Direct Employment	8 employees
Total Wages	\$332,000
Total Revenue	\$822,000

Source: Frank, Rimerman + Co. LLP

## **EDUCATION, CONSULTING AND WINE INDUSTRY RESEARCH**

Approximately nine people were employed on a full time basis in Illinois in wine-related education, consulting and research at various universities and organizations, with a total payroll of roughly \$484,000.

**Table 7**  
**Impact of Wine-Related Education, Consulting and Research**

Direct Employment	9 employees
Total Wages	\$484,000
Total Funding	\$488,000

Source: Frank, Rimerman + Co. LLP, University of Illinois, Rend Lake College, IGGVA and various consultants in Illinois.

## **SUPPORT BY STATE AND REGIONAL ORGANIZATIONS**

State and regional organization support is critical to the success of the renewed industry. Illinois's state, regional and private organizations are becoming more effective and organized at supporting and promoting the local wine industry. These organizations include the Illinois Grape Growers and Vintners Association and the Northern Illinois Wine Growers Association.

In order for the Illinois wine industry to continue growing, it is critical 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.

### **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 Illinois 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 Illinois wine industry, including intangible benefits is much greater. That measure of economic impact is approximately \$692 million within the state of Illinois, for an industry that is a unique partnership of nature, entrepreneurship, artistry and technology.

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

## METHODOLOGY

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### 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. For this analysis, we relied upon 2011 IMPLAN figures for Illinois and grossed them up for 2012 inflation and multipliers.

### DIRECT, INDIRECT AND INDUCED EFFECTS (IMPLAN)<sup>2</sup>

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<sup>1</sup> is the acronym for “**IM**ppact 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.

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<sup>1</sup> 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](http://www.implan.com).

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**

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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 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 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**

### ***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, New York, North Carolina, Ohio, Pennsylvania, Tennessee, Texas, Virginia and Washington.

## ECONOMIC IMPACT OF ILLINOIS WINE AND WINE GRAPES

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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 Wine and Grapes in Canada 2011
- Economic Impact of Texas Wine and Vineyards 2011
- Economic Impact of Pennsylvania Wine, Grapes and Juice 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