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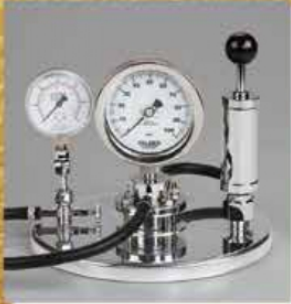
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# WELCOME FROM VINTNER

As I was reading this issue's cover featuring Jon Ruel, the CEO of Trefethen Winery, I felt inspired to visualize the next six months to a year of our lives.

While the previous year has been detrimental to the wine, vineyard and restaurant industries, we now have some potential hope by means of a vaccine. While at the time of writing this our nation is still struggling with rising numbers, Ruel's thoughts on the future truly moved me beyond our immediate circumstances.

Ruel feels that we could be on a resurgence of the roaring '20s in coming months. Personally I've been preaching this to friends and colleagues for months. Some agree, while others who have been devastated by the past year feel that it will take more than six months into 2021.

While I am not in the business of economic forecasts, I do believe there to be a positive future ahead for all of our businesses, especially those consumer facing.

As you know in business nothing changes quickly. That's why we spend days, weeks and months designing five- and 10-year plans. We know that designing a new wine can take months and years. All of us are aware of the time it takes for vines to mature and wines to be made, blended and aged properly. Additionally, it can take years before a beautiful wine finally gains the respect from its large consumer base.

If we can hang our hats on anything it's that we know how to be patient. While our entire world seemed to crash down around us in 2020, and while many business owners feared the worst, in our market we know that true magnificence can emerge from dark times.

I continually feel grateful that Vintner came into fruition. While 2020 was probably not the best year to launch a new title, our company was ready. We had monitored the industry for quite a while and we were ready to bring our style and journalistic expertise to the market.

Never will I regret launching Vintner, and I don't regret launching it in 2020. In regards to business goals, when we reach our own 10-year goal I believe I'll look back fondly on this launch and how we were able to make an impact when very little was known about our future. How a team of journalists and media experts could come together to bring insight to an industry in its darkest hour.

Will our future look like the roaring '20s? In my opinion I say we strive for a roaring '20s, triumphant '30s and an impeccable '40s. I do believe the American beverage industry is on the verge of an even greater boom than it's seen previously in all categories from wine, farm to table restaurants, craft beer, etc.

If our industry has taught us anything it's that patience is key. We have had patience, and now it's time to see its rewards.

Cheers!

*Tyler Montgomery*



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# NOW POURING



## FRANK FAMILY VINEYARDS' TODD GRAFF AWARDED 2020

### *Winemaker of the Year*

Rich and Leslie Frank, proprietors of Napa Valley-based Frank Family Vineyards, announced that Winemaker and General Manager Todd Graff has been awarded 2020 "Winemaker of the Year" for Napa County by the region's leading business publication, North Bay Business Journal.

"With nearly 1,700 wine brands producing outstanding wine from Napa, this award is a true honor for our family-owned winery. Todd's ability to make wines across styles and varieties is outstanding. This recognition is so well-deserved," said Rich Frank.

Frank Family Vineyards Winemaker and General Manager Todd Graff awarded Napa Valley Winemaker of the Year Graff, who joined the winery as winemaker in 2003, spent many years working throughout the world—from France to New Zealand to Portugal—before returning to California and eventually landing at Frank Family Vineyards.

During his tenure, he has managed the winery's steady growth, overseeing estate vineyard purchases, winemaking and operations. Under Graff's leadership, Frank Family achieved Napa Green certification in 2015 for both winery and vineyards.

He continues to hold his team to in-

creasing standards of sustainability each year.

Graff was named the 2020 Napa County Winemaker of the Year as a part of the 8th annual North Bay Business Journal's Wine, Spirits + Beer Industry Awards in an online ceremony.

"Achievements like this are possible because of the team we have built at Frank Family over the years. Some of our cellar team have been with us for 20+ years, and I share this award with them. We are proud to see our family grow and thrive," says Graff.

Frank Family has consistently been recognized as one of the best Napa Valley Wineries in consumer and trade driven rankings.

For eight consecutive years, the tasting room won the reader's choice for "Best Napa Winery" in the annual Bay Area A-List contest.

Frank Family Cabernet Sauvignon and Chardonnay wines consistently rank in the top 20 wines of Wine & Spirits Magazine's Annual Restaurant Poll. Frank Family Vineyards is the only winery in the Napa Valley to be named "Winery of the Year" twice by the Connoisseurs Guide to California Wine.

## O'NEILL VINTNERS & DISTILLERS ANNOUNCES PURCHASE OF RABBLE WINES



O'Neill Vintners & Distillers, one of the fastest growing wine companies in the US, has announced the acquisition of Rabble Wines in Paso Robles, California.

Founded by longtime Paso Robles vineyard manager Rob Murray in 2010, Rabble Wines produces premium, Paso Robles AVA wines with disruptive labels born from wines' struggle with Mother Nature. The acquisition signals another investment by the rapidly growing O'Neill Vintners & Distillers in the burgeoning market for younger wine drinkers.

Rabble Wines is inspired by the everyday

farming challenges Murray encountered as a vineyard manager, grower and entrepreneur. In 2010, Murray set about creating Rabble Wines in Paso Robles to prove that despite Mother Nature's untamable ways, he would succeed in producing rabble rousing wines. According to Nielsen ending November 28, 2020, the core tier has grown +51.3% in the 52-week premium wine category.

"Moving Rabble into the O'Neill portfolio is a great win for our consumer and for the brand," says Murray. "I know Rabble will continue to provide authenticity and adventure under the leadership of visionary entrepreneur Jeff O'Neill. I am enormously proud of what we built with Rabble and am excited about turning my focus towards Tooth & Nail Wine Company, which promises to continue disrupting the stodgier as-

pects of the wine world."

"O'Neill is laser focused on creating sustainable growth through our innovative brands and offering approachable wines to Millennials and upcoming Gen Z consumers. Rob has created a unique brand that maintains relevance in an industry that frequently finds itself a little behind. His efforts resonate with forward-thinking, modern wine drinkers. Rabble fits well within our growing portfolio of nationally-distributed brands," comments Jeff O'Neill, CEO of O'Neill Vintners & Distillers.





# BONTERRA ORGANIC VINEYARDS ADVERTISING CAMPAIGN NAMED

## 2020'S BEST ORGANIC INITIATIVE

### BY THE DRINKS BUSINESS

**B**onterra Organic Vineyards was awarded the 2020 Best Organic Initiative award by the drinks business (UK) for its widely viewed Tastes Like Saving the Planet advertising campaign. In its 11th year, the Green Awards recognize leaders in the global beverage trade industry who are catalyzing change with their environmental and social performance. Bonterra was commended by the publication this year for using humor to raise awareness among consumers about the importance of climate action, while also touting the benefits of regenerative organic farming, including better taste in the glass.

The annual Green Awards celebrate businesses that are going above and beyond to reduce their impact on the environment, making a difference in combating the climate crisis, and promoting news of their efforts to a wide audience. Acknowledging that organic wines, beers

and spirits have entered the mainstream as a popular consumer choice, the judges this year sought to recognize a company or brand for its work in bringing a fresh approach to organics in the production, retail or on-trade arena, with an emphasis on efforts launched in the last 12 months.

"We are honored that our campaign was recognized by the drinks business among global organic initiatives as one that stands out, and makes an impact," noted Rodrigo Maturana, VP of Marketing & International Business at Fetzer Vineyards, parent company for Bonterra.

"We had a lot of fun with this campaign, which pokes fun at wine clichés while highlighting the important fact that regenerative organic farming can help save the planet," he added.

Bonterra's innovative Tastes Like Saving the Planet campaign ran from August through

November 2020 predominantly on popular streaming platforms and targeted digital media networks. Garnering some nine million completed video views, the campaign was an on-brand complement to Bonterra's regenerative organic advocacy efforts and comprehensive sustainability initiatives, ultimately elevating awareness for the transformational power of organics while building brand loyalty. Crucially, it also helped grow consumer awareness for how their purchases can help the planet—with a sip of good humor on the side.

In addition to the drinks business commendation, Bonterra is also the recipient of the 2020 California Green Medal in the Environment category, awarded earlier this year.

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# BREATHING ROOM:

HOW BARREL OAK CONTINUED TO SERVE CUSTOMERS AT A TENTH OF THE COST

Open air space is a valuable commodity for a winery during a pandemic, but serving guests outside can be a challenge during the cold weather months.

One Virginia winery has found a solution in social distancing "bubbles" that allow its guests to enjoy a glass while staying warm and dry. Needing to form a cost-effective contingency plan ahead of potential stringent statewide mandates, Barrel Oak Winery and Farm Taphouse in Delaplane purchased and installed several Garden Igloo bubbles on its grounds.

At a total cost of \$14,000 to purchase and install, the eight bubbles that added 1,152 square feet of sheltered outdoor space were a palatable alternative to a permanently covered expansion of its existing concrete patios, Barrel Oak Proprietor Brian Roeder said.

"I was a builder in a past life and building out 1,150 square feet of space on our existing exterior concrete patios would have cost at least \$125 square feet or \$144,000," Roeder said. "Plus, we would have had to build about twice that space due to social-distancing table spacing requirements.

Bonus, the bubbles are relocatable and disassemble-able and with some effort can be repurposed away from their very desirable outdoor location when we get back to nice weather."

With much unknown about the pandemic and how it would affect the future, Roeder placed the order for the bubbles in September and received them in mid-November. To prepare, they built platforms, filled them with roll insulation and decked them with plywood. When the bubbles arrived, they were assembled and screwed onto the platforms. Staff then ran extension cords to each to provide power for lighting and small electric heaters and furnished the spaces with outdoor lounge furniture and rugs.

Doing nothing and hoping to successfully weather the pandemic was not an option, he said.

"Based upon the broad-based and repeated warnings of epidemiologists, it seemed likely that we were looking at a potential complete shutdown of our interior 8,000 square feet of seating space in the winter," Roeder explained. "While this has not yet happened, it remains likely.

"Our business carries a very large amount of debt and we need to generate revenues beyond our offsite and shipping sales. Because the bubbles are self-contained and available only to each individual group that rents them, we believe that an indoor seating shut-down will not prevent their rental no matter how bad things get.

"Finally, in looking at the probable psychol-

ogy of our potential guests in the dead of winter, we believe that the desire to escape home will drive business our way provided that we can accommodate visitors in a safe and legal way. Clearly, our bubbles were the only complete solution to this challenge."

Between uses, the bubbles are electrostatically sprayed with sanitizer, then aired out with a box fan, then again sanitized and wiped down.

"We also do not allow our staff to enter the bubbles when occupied by guests and all ordering and delivery is provided from outside the bubble," Roeder said.

The bubbles rent for \$95 an hour during the week, \$145 an hour on Saturdays, and \$125 an hour on Sundays. Just 12.5 hours after going live and retooling its website with off-the-shelf software, Roeder reports that Barrel Oak had received 83 bookings for total prepaid revenue of \$22,500, offset by a cost of about \$1,000 marketing the bubbles on Facebook.

Customer feedback has been positive and appreciative.

"Our Facebook page has lit up with 750 comments and 1,895 likes in [the first] three postings," Roeder said. "In fact, it is the most popular business promotion in our history."



# THE WAYS FLAT CREEK USED ITS NATURAL BEAUTY TO GENERATE REVENUE

**E**mploying outdoor space, keeping customers engaged and finding ways to generate new revenue continue to be focal points for wineries and other businesses as the COVID-19 pandemic endures.

Years before most people had ever heard the term "coronavirus," Flat Creek Estate Winery & Vineyard in Marble Falls, Texas optimized unused portions of its grounds by building an 18-hole disc golf course, capitalizing on a sport that has grown more popular over the past decade.

The course, which includes two options for play — a recreational set-up for beginners and a professional layout for tournaments and avid disc golfers — was created by renowned course designer John Houck of Houck Design.

The course opened in 2017, Director of Business Operations Amanda Koraska said, adding that the original plan was to develop a 9-hole course on their own.

"I was eager to find an incentive for guests to tour some of the scenic parts of the property," Koraska recalled. "Disc golf provided an opportunity for guests of all ages to enjoy the property and spend additional time (and money) at the estate. Meeting with John provided us with a broader vision for the course inclusive of a disc golf club, local and national level tournaments, and a pro-shop."

Houck mapped the course, and the vineyard crew went to work clearing rural parts of the land and installing walkways over creeks. Flat Creek Estate owner Rick Naber — being a for-

mer engineer — helped with the course development. Naber's construction background, along with timing the project between post-harvest and pre-pruning allowed Flat Creek staff to turn their attention to the project.

Once they opened, it didn't take long for the tournaments to begin, with the winery starting with small local tournaments and hosting its first professional tournament, The Open, sponsored by Disc Craft, in March 2018.

"The Open brought players from all over the world with prize payouts exceeding \$16,000," Koraska said. "It was our first glimpse into the world of professional disc golf tournaments complete with sponsors and hundreds of spectators."

While Flat Creek's course build out was about \$150,000, that price tag represents a championship-level course with extensive land clearing, concrete tee pads (a requirement for Pro Disc Golf Association tournaments) and several bridges.

It was well worth it, Koraska said, adding that wineries looking to add a recreational course can do so more inexpensively.

"Designing a course of this caliber is a financial investment," she said. "We saw this as not only an investment in the disc golf course, but an overall improvement to the property. Several acres that were once un-walkable are now easily accessible including a gorgeous overlook at the north side of the property where a picnic area has been added. For wineries looking to dip their toe into disc golf, a self-designed recreational 9-hole course could be developed for less than \$10,000.

"The biggest deciding factor for us was the interest we had in hosting high-level tournaments that would bring avid disc golfers and spectators to the course."

Upkeep involves less than you might

expect.

"Once the initial clearing was completed, the upkeep isn't much more than what we were already doing to keep the property manicured," Koraska noted. "Some of the more rural parts of the property where we did not mow in the past now need to be mowed, but disc golf courses don't require near the amount of maintenance of a traditional golf course. Part of the lure of the sport is enjoying the natural habitat. Most disc golfers are happy as long as the grass isn't more than ankle height. The fairways are all-natural and we don't do any watering.

"For upper-level tournaments, there is some additional maintenance involved to get the course ready. Flagging or spray painting out-of-bounds areas, mowing the grass to specific heights and roping off spectator areas, but tournaments of this caliber bring additional revenue to support the extra effort."

Disc Golf members have added approximately \$12,000 in annual revenue for Flat Creek, but that's a conservative estimate, said Koraska, who added that the winery's leadership estimates the course broke even at three years after installation despite leadership not heavily pursuing larger tournaments.

"For wineries looking to invest in a championship level course, I would recommend hiring a Disc Golf Pro whose job description would include full-time promotion of the course. This includes hosting monthly tournaments, member events, beginners classes, and recruiting sponsored PDGA tournaments in the A-tier and above," Koraska said. "Investing in a dedicated staff member to coordinate disc golf specific events can really show in the final revenue numbers."

## ARE WINE ALTERNATIVES A SEGMENT TO EXPLORE? ACID LEAGUE BELIEVES SO

WHO SAID YOU NEED TO SELL WINE TO OFFER A WINE CLUB?

Toronto-based food and beverage maker Acid League, which is known for vinegars, condiments, spices and other specialty foods, recently debuted three wine alternatives that are sold directly to consumers.

The products were derived from Acid League's diverse lineup of vinegars, which include unique ingredients and go beyond the usual apple cider, white wine and balsamic types that line your grocery store shelves.

"It's not about marketing the product itself but the different experience you're getting from wine proxies compared to other wine alternatives," said co-founder Scott Friedmann. "They're not wines that have been stripped of alcohol; they're layered, complex blends of unique ingredients that create a beverage that's an experience all on their own."

Friedmann said his company saw a business opportunity that led to the creation of the wine proxies that are available through Acid League's new wine club.

"Conventional non-alcoholic wines are made by stripping the alcohol out of wine, and usually cheap bulk wine at that, which ends up tasting next-to nothing like the real thing because they're sweet, lack complexity and don't pair well with food," Friedmann said. "As the popularity of low- and no-alcoholic beverages continue to grow, we saw an opportunity to create something new and different with wine proxies."

"There are plenty of non-alcoholic spirits and



craft beers, but nobody is really addressing wine. Restaurants are limited to serving non-alcoholic cocktails with meals, but drinkers don't typically have cocktails with their food — they have wine. So instead of de-alcoholized wine, we craft layered blends of juices, teas, spices, bitters, and more to create a new type of beverage that looks, feels and drinks like wine but doesn't have alcohol. They have acidity, texture, tannin, and spice, and pair really well with food, just like traditional wine does."

Because the products are non-alcoholic, Acid League is not limited by alcohol regulations.

"We could live on the shelves of any number of stores but wine retailers and restaurants obviously remain a natural fit as well," Friedmann said.

The company markets its wine club to non-drinkers, casual drinkers or people sim-

ply looking for something new to try.

Through its new club, Acid League is offering three unique, rotating bottles per month, launching with Blanc Slate, a take on white wine that pays homage to Marlborough Sauvignon Blanc; Cuvée Zero, a French-red-inspired beverage, and a play on orange wine, Zest Contact. Orders, which begin shipping this month, are \$60 per month with a subscription or \$70 for one month without a subscription, with additional availability to follow throughout 2021.

Future proxies in the line are set to include takes on saké, Gewürztraminer, Champagne, rosé, and big, bold reds.

Acid League plans to make versions of its products for sale in restaurants and stores later this year. When it makes that move, it won't face the obstacles that present themselves to alcoholic beverage makers.

## HOW SIGNORELLO ESTATE KEPT LEARNING DURING COVID SHUTDOWN

If you were making wine in California in 2020, you were hit with a double whammy: the COVID-19 pandemic and the wildfires that ravaged much of California wine country.

Like employees at many wineries, the staff at Signorello Estate in Napa found themselves with some unplanned downtime amid shutdown orders but made lemonade out of lemons, taking the oppor-

tunity to take continuing education classes.

Winemaker Priyanka Dhar French said she believed continuing education was something every business should implement.

"I think it helped tremendously to ensure employees felt secure and engaged at work," said French, who became Signorello Estate's winemaker in 2019. "We scheduled classes with the Napa





Resource Conservation Department, which offers free classes in Spanish on a number of different subjects. Apart from this, we did a few trials of our own and incorporated education into it."

The continuing education opportunity turned having downtime into a strength, giving staff an opportunity to gain knowledge on topics that could help promote the health of their vineyards.

"The crew felt more confident about their ability to pursue tasks, and we were able to identify diseases and pest pressure, and make key vineyard decisions more effectively as a team," French said.

The wines released in 2021 will be the first for Signorella Estates' current management team, which includes French, Consult-

ing Director of Winemaking Celia Welch and Viticulturist Steve Matthiason.

"In spite of the pandemic, we were able to stay on schedule for vineyard and winemaking related efforts. We used some of the downtime to work on individual skills and to approach tasks with more focus and in-depth thought," French said.

"I think in the long run, this has definitely improved our focus on quality and methods to achieve them at the estate. Being able to work in spite of the pandemic and see our results has been encouraging and has really built up team spirit."

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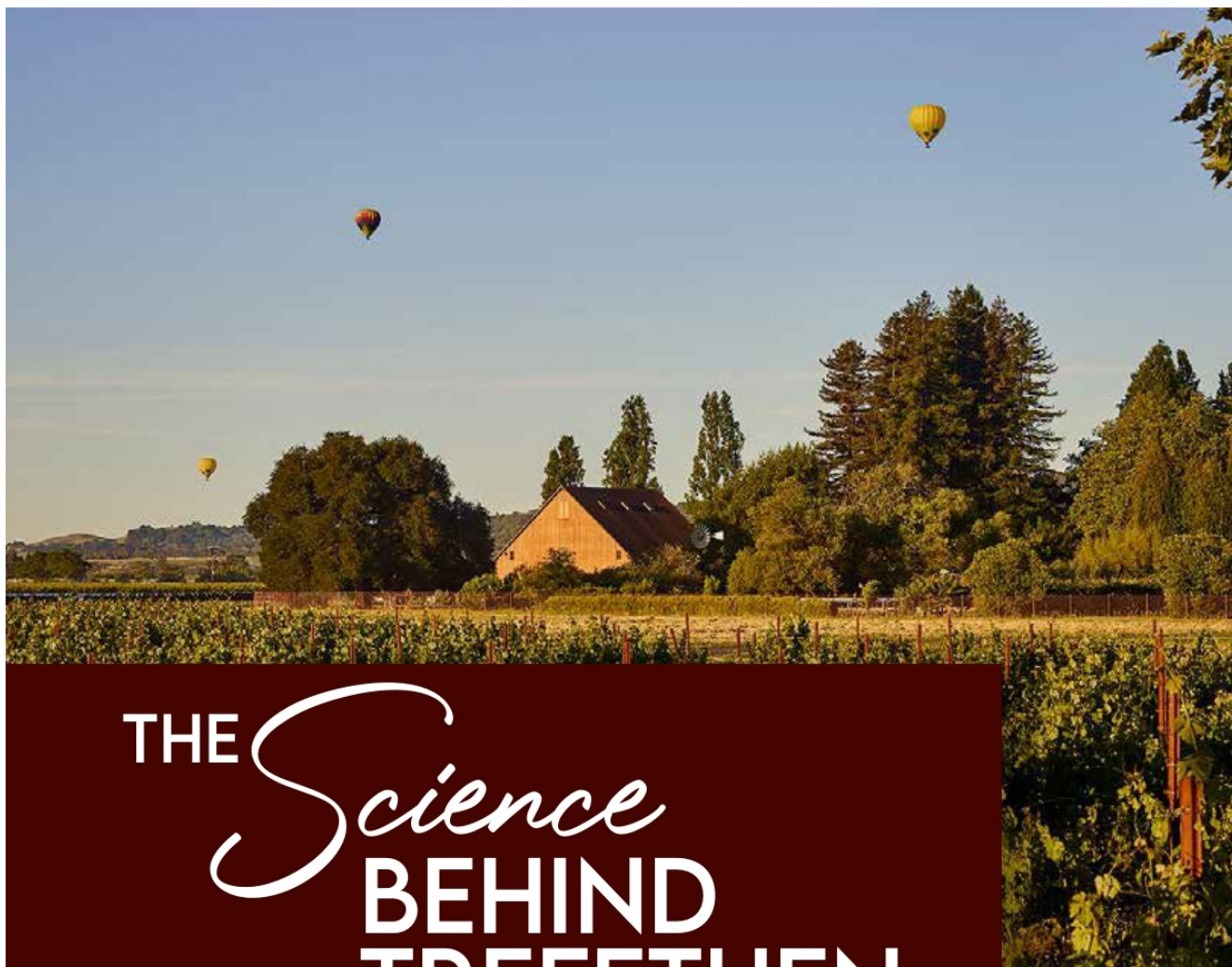
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# THE *Science* BEHIND TREFETHEN

BY JON SICOTTE  
PHOTOGRAPHY BY ADRIAN GREGORUTTI

**L**ike a large locomotive, Trefethen Winery doesn't turn on a dime. It doesn't start something quickly and it takes time for it to stop and maneuver. Being a part of the third generation of a family-owned company means large growth isn't a necessity for CEO Jon Ruel.

Ruel is the first CEO from outside of the Trefethen family. Yet, in his chat with Vintner he slipped in 'our family' when talking about the ownership more than once. It shows how much he feels he is a part of the company that he joined in 2004 and has risen from work-

ing as a vineyard assistant to CEO of the Napa Valley winery. Although the company is the family, the farm is the wine and Ruel is quick to combine the two. The dirt and the blood are the success and the growth.

"Wherever [multi-generational businesses] can succeed, you have to take the long term view," Ruel said. "It's true in agriculture, specifically, you need to take care of your land if you want that land to give you good crops 10 years from now ... or a generation from now.

"It's important for those reasons that we take the long term view. It's specifically because of our business model and those constraints."





That doesn't mean functioning on a five-year plan or even a 10-year forecast. Instead, Ruel sets out each year to plot success in the vineyard 25 years out. Above his desk is a plot of the two vineyards that the winery maintains: a total of 440 acres. Every 20 acres is a part of a year and a lifecycle for the future.

"I know the vines in each pocket have a character, and its personality," Ruel said. "Maybe it's a difference in rootstock or trellis or variety, but at some point, that block is going to come to the end of its life and be replanted."

But that 25-year plan is constantly updated by Ruel.

"I think one of the things that has kept me so engaged ... one of the benefits of this estate model — and what I really worked on when I first got here — was the connectedness between winemaking and viticulture. The exchange of information. The result is measured in the glass, but the work is in the vineyard. You have to connect those."

Ruel said they taste everything blind, from competitive tastings done in-house against other wineries or to each block of grapes, even blends. All is done with many of the 160 employees from all over the business taking part, not just the winemakers and family ownership.

"We'll sit down with 26 different Chardonnays," Ruel explained. "We start to unveil which blocks scored well across the group and for what reasons. Then we go into what we did in the vineyard? And if we say, 'Oh we limited the irrigation or we increased the yield, or that's that new clone we planted.' We take that information, and we put it right back into the business. So the next time we have an opportunity to plant Chardonnay. I can say let's plant backflow. Why? Because the block that we planted two years ago was doing really well. It just made it into this wine."

Ruel is so ingrained in the function of the vineyard not just because Trefethen only

uses its estate's grapes, but because his background started in those fields. Not completely unheard of, but with no MBA or business background, Ruel runs the company now and admits he is a long-term placeholder and mentor for the next generation of Trefethens to run the family business.

"As a scientist by trade, evidence-based decision making is one of the fundamental ways I'm integrating science into our companies," he said. "How do we measure things appropriately, and then use that information to make smart decisions right back into the company."

"Often when you're in school, you're learning about science, I had to talk in generalities, and even when you get to viticulture, they might talk in generalities. ... But when you're running a business, you realize it kind of doesn't matter what happens on average, it matters what happens at your address, like not just in your zip code, but on your farm. If you're a corn farmer, it's nice to know what your neighbors are doing. But it really matters how your crop did last year, and what could you do differently this year to do it better. And that iterative process of constant improvement using the variables that we have, at the scale that we do. To have nine different varieties planted in one ranch, to have





13 different combinations of clones and rootstocks — just in Chardonnay — gives us a living laboratory to constantly be learning and then putting that information back into the business. And that's how we grow and evolve."

Ruel says that Trefethen is a unique size for a Napa Valley winery as it's bigger than 10,000 cases, but it's not in the millions either. Even though it does have a robust Direct-to-Consumer wine club of more than 6,000, it also looks for lots of on-premise sales and connecting with off-premise retailers in smaller chains while also driving consumers to the tasting room.

"I love a direct connection to the consumer," Ruel said. "I love getting them here on the property, showing them how beautiful it is here, sharing the stories of how we grow the grapes and making the wine. They become fans for life."

"Does that mean they're always buying the wine directly from us? No, they buy it at a wine shop and at a restaurant."

Pre-COVID, Trefethen was still doing more than half of its volume through wholesale with half of that sold in restaurants. But because the winery is, as Ruel said, a 52-year-old startup company, the pandemic hasn't been quite as bad as they thought.

"People really like our wine, we have incredible brand loyalty built up," he said. "We didn't have any decrease in demand. Just like a regular recession, people get to drinking. It's just a question of what they're drinking and where they're drinking it and what they're paying for it. So COVID has very much been a channel disruption, more than anything else. It didn't disrupt demand, it just disrupted the path for the consumer."



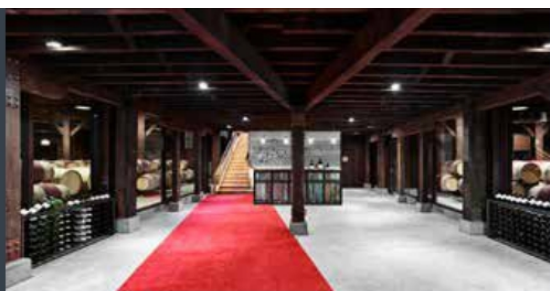
Another category that Ruel says they call outbound sales, where the winery is calling and emailing customers to touch base with them has also been a boon.

"I think demand for on-premise is going to just be nuts when restaurants can really open and we can all breathe again," Ruel said. "I think what we're going to see in late 2021 is the rebound of the restaurant industry. And it will be very much like the 'Roaring 20s,' which is the

last time this country recovered from a pandemic.

"On top of that, we're gonna recognize some incredible silver linings. One of them is the increase in internet wine sales. We've been so late to the game there, both as wineries and as consumers. We are used to buying everything online, it's super easy. Wine? I'll get that at the grocery store. It's such a bizarre shopping habit. I think we're going to have greater customer engagement for internet sales. It has been





very much accelerated, incredibly more than I could have ever imagined, and that that will stick."

Being a more mature winery that is seeing its new generation of owners take over — John and Janet Trefethen's children Hayley and Lorenzo have started to work with Ruel to run the company on a day-to-day basis — that means also connecting with a new generation of wine drinkers.

"You probably won't get your favorite brand of tequila from your parents, but you probably are going to get a favorite wine brand from your parents," Ruel said in likening the succession of running the company to the consumers Trefethen has. "I have been at many of our consumer events where they say, 'Hey Jon, I want to introduce you to my daughter, she just turned 21 and we gave her a membership to your wine club.' That's perfect. That's succession and brand loyalty. That's one path.

The other path means capturing Haley and Lorenzo's energy, he said. The younger Trefethens are becoming more of the face of the company to the public and on its website.

"I think that people are going to find them very relatable," Ruel said, noting that John and Janet are much more blue jeans and boots people than high heels and loafers.

"They're just not fancy people. They're very grounded, very down to earth. And that's true with Haley and Lorenzo as well," Ruel said. Along with a younger face, being what the winery has always been but marketing it differently is also key. Being able to tell the story of how the wine is grown on the property is a key aspect.

Giving experiences, like sharing food tips online from the winery's chef, to showing consumers how to pair the wine at home gives value to many new consumers.

"I want take-home value," Ruel said. "I want someone to walk out of here and go, 'That wine was amazing. That food was amazing and Honey, I want you to plant tarragon, because the chef said if we just had that fresh herb, that that would be just transformative to anything we did with chicken.'

"It's trying to give him some little tips that they can use in terms of food and wine pairing or cooking. And then they're gonna say, 'Oh, yeah, I learned that at Trefethen, I met the chef.' That's just a way to create that experience, that engagement. And the next time they come back, they bring their friends and maybe they sign up for a different kind of experience. We're building a relationship and a connection with them that is very authentic."





John and Janet Trefethen built the winery on its Chardonnay, but Ruel said when he joined in 2004 John pushed him to improve the reds. Using that science background, Ruel worked with the staff to discover what the land could offer and the best ways to develop red wine grapes on the land.

"I have a lot of reasons and now I really understand what makes Napa so special beyond the climate and the soils," he said. "We're in a cool spot in Napa Valley. We're in the Oak Knoll district and we're closer to the Bay. We get a strong marine influence: fog and breeze rolling in in the afternoon or evening, keeping us quite cool until 11 or noon the next day. So it just doesn't get as hot as it does up in Santalina, Oakville, or Calistoga. We like to call it the Napa Valley sweet spot where Chardonnay overlaps with Cabernet. But we have to be really smart about how we do the Cabernet. Every vintage, we have to pay attention. And it's not to say that before I got here, the red wines were no good. There was some exceptional wine, but they weren't consistently exceptional."

It certainly is a category that has changed the most in Ruel's tenure, specifically Cabernet, but also a newer blend called Dragon's Tooth that launched in 2007 which has Malbec and some other varieties. But that took telling John Trefethen early in his tenure at the winery to rip out plots that were less than 10 years old to start over with a better Cabernet plot.

"It was a financial hit on us, but boy, are we glad we did," Ruel said. "The younger blocks are now producing, it's like night and day. We're just paying attention on a very detailed level in terms of the farming, doing the work that needs to be done."

It's not that Trefethen turned Oak Knoll into Oakville.

"That never was our goal, we want to taste like Oak Knoll," Ruel said. "What is Cabernet when it's grown on the cooler side of Napa Valley? Well, it's ripe without being overripe. It's not shying away from a touch of herbaceousness, like maybe just a little bit of a bay leaf. But what you want is fruit. Fresh, ripe, fruit and freshness on the palate."

"We make wines with real acidity that comes from the grapes. That definitely includes the red wines. If I was to taste the wine blind, knowing the Trefethen, it'd be the brightness. The signature brightness on the palate, it really sets our wines apart. If I'm comparing them to red wines that come from up valley where it's warmer, and the winemakers are shooting for a style of jammy ... beyond ripe. They're gonna end up with a wine that has less acid, that's just the basic chemistry — as sugar goes up, acid goes down — as the grapes hang out. Sure, they get jammy flavors — but the acid every day they hang out there, especially in the warmer environment — starts to fade away. So they either add acid, or they have a wine that's kind of flabby and doesn't age well."

Ruel said that Trefethen is making wines that parallel with food, because they have good acidity, and they're going to go the distance as they will age beautifully because they go into the bottle with natural acidity in the grapes.

"That's really key to our style. And just fits so nicely into this narrative," he said. "This is a long term business. The Trefethens believe that they deserve a reputation as being a world-class, multi-generational family-owned estate. And if that's true, your wines shouldn't go bad after a year or two, they should only get better."



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# FUNDAMENTALS

## STAINLESS & WOOD:

### STRATEGIES FOR VESSEL USAGE & MAINTENANCE

BY JON SICOTTE

PHOTOS COURTESY TASSEL RIDGE WINERY & PAGE SPRINGS CELLARS

**K**nowing the direction you want to take your wine before aging is a key cog in developing flavors, depth, and brightness to the final product.

For Page Springs Cellars, the wine production team conducts blind “batch assessments” of every newly produced wine as soon as fermentations are complete.

“We critique each wine and discuss its desired direction while establishing a plan of action,” said Brand Manager Lukas Bernard. “These wines are then reassessed early after any strategies are implemented to evaluate our initial decisions and guide them towards our desired state.”

The Arizona winery’s barrel-aging program primarily leans heavily on neutral French Oak, Bernard explained.

Determining strategies for usage in wooden barrels and blending along with wines that are stainless steel fermented can be up to each individual winery in choosing direction and style. But sometimes, storage is an issue that can also determine how a wine’s direction must go.

“I wish I could do all my eds in 100% barrels but my storage capacity limits what we can do each year,” said Cannon River Winemaker Sam Jennings.

For the Minnesota winery’s higher-end American hybrids — such





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as Marechal Foch and Marquette — Jennings said he does as much as possible in barrels for the winery's Reserve and Estate programs.

"Anything left over goes into stainless," he said. "I am not a big fan of 'oak alternatives' such as bags of cubes, chips or tank staves, so whatever goes into stainless usually stays natural."

When the production team gets into blending mode, Jennings said they will sort through barrels.

"Anything that doesn't meet the profile for the Reserve and Estate programs gets blended with the stainless aged reds," he said. "It's not a perfect world, but it works for our facility very well."

Charlie Edison — the founder and Senior Winemaker for Michigan's Bel Lago Vineyards — said his goal is to match the barrel regime with the aromatic and textural goals for the wine.

"This means careful selection of the type of wood, the mix of new and older barrels, and of course, toast levels," he said. "Length of time in barrels is also important to balance the oak impact and subsequent integration, particularly with a longer time in the barrel."

A shorter time gives a greater aromatic impact while longer time gives richness, complexity, integrated oak flavors, he

said.

"All these factors must match the desired wine style," Edison said. "We typically age wines in barrels for 8-36 months, depending on the wine."

Occasionally Bel Lago will mix tank-fermented wines with barrel-aged wine, particularly if they wish to bring a fresh, aromatic "pop" to a barrel-aged wine that will augment the richness and weight gained in a barrel.

At Tassel Ridge Winery, owner Bob Wersén said many of the Iowa winery's red wines tend to be fruit-forward and sweet so barrel-aging would not be useful.

"Some of our dry red wines do see a little barrel aging but we think oak is not very useful for wines made with Northern Climate grapes," he explained. He added that Tassel Ridge uses some barrels, usually French oak with medium toast made by Tonnellerie Radoux in Santa Rosa, California.

Bel Lago purchases a mix of French and American oak barrels from several suppliers, Edison said.

"This varies each year based on the wines we anticipate making," he explained, adding that Bel Lago uses French Oak exclusively for its Pinot Noir and Chardonnay, and American and French Oak in varying percentages for

blended reds and other red varietals.

When it comes to care, Jennings said there is no substitute for steam-cleaning barrels.

"Steam coupled with a high-pressure barrel rinse like a Gamma Jet barrel cleaner or similar high-pressure/temp rinse system ensures you're doing all you can to keep your barrel program sound," he said. "If you look at big wineries out west with 10,000-barrel programs they all use steam and high-pressure rinse to protect their wines and barrel investment."

Page Springs typically turns over a small handful of barrels each year due to structural damage or spatial needs. Bernard said that structural issues can include leaky heads and staves, as well as cracked bungholes.

Turnover is very low for Bel Lago, as it ages some whites in neutral Oak, so Edison says they value the careful maintenance of barrels with some barrels being used for up to 25 years.

"When removing a barrel from production, we consider the soundness of the barrel — does it leak? — and check carefully for any off aromas.

"If either is found the barrels are retired."

Using a good mix of American Oak, French Oak, and European Oak in the





Cannon River program, Jennings said they usually hang onto barrels for 5-6 years to help keep costs low.

"Typically we do a third of new oak barrels per variety each year, we are not making oak-bomb California reds out in Minnesota and the hybrids tend to take a lot less oak to get to where I want them to be," he explained.

Cannon River's SOP for a smaller facility is to keep everything full while Jennings said to use your nose and anything questionable gets tossed out.

Another tip he shared was if they have questionable fruit coming in that may have *Brettanomyces* they will opt to keep that press out of the barrel program altogether.

Under the MAWBY brand, the winery only makes sparkling wines and uses just stainless steel for fermenting and aging. But the Michigan brand does use some barrels for another brand. There, said Winemaker Mike Laing, neutral barrels can be stored full of water and dosed with a blend of Potassium Metabisulfite and citric acid for storage.

"Sulfur gas can be added to empty newer barrels, then sealed, and re-gassed every month," he said. "To refresh a barrel one can steam, bung for two minutes, then rinse." Jennings is also a firm believer in keeping barrels full.

"It takes some planning to ensure your barrels are always full of

wine, but in my experience keeping empty barrels around for months is never a good idea," he said.





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# GETTING • CLOSURE •

## THE CASE FOR *Screw Caps*

Tassel Ridge made the decision to use screw caps starting in 2004. At that time, Tassel Ridge owner Bob Wersen said a significant percentage of wine bottles were corked.

"Some well-intentioned cork producer decided to wash their corks in a chlorine-based cleaning solution," he said, explaining why he was turned off by the idea of corking the lowa winery's products. "I suspect that several cork producers were doing the same thing."

"We were just getting started and my objective was to make good wine. I didn't want the wine damaged by the cork."

So Tassel Ridge chose screw caps made by G3 Enterprises.

"We have gotten only very occasional comments about our use of screw caps and most are positive," Wersen said. "In the few instances that we have gotten complaints about our use of screw caps, we've ex-

plained our reasoning and our explanation seems to have resolved the customer's concern."

The screw cap mindset is changing as more and more higher-end wineries are going that way, explained Cannon River's Sam Jennings.

"Also as people age, I'm finding most elderly people don't want to mess with a corkscrew to open wine," he said. "They will specifically buy screw caps or box wine so they don't have to deal with a corkscrew."



## THE CASE FOR *Corks*

Page Springs Cellars focuses on sustainability and environmentally sound practices throughout its business, so Lukas Bernard explained to Vintner that the Arizona winery uses Nomacorc Select corks, which are plant-based and fully recyclable.

"Our current use of Nomacorc is partially in response to the amount of TCA-infected (corked) bottles that we were encountering in the past," he said. "We consider this a win-win."

And although aesthetics are key within Page Springs branding, Bernard said they do not box themselves in as sustainability efforts can override those choices.

Cannon River has been using Nomacorc for the past 10 years after Jennings said they found that the Minnesota winery was having TCA issues.

"The new 'green series' of corks have been awesome," Jennings said. "Like a screw cap, you can now choose your oxygen pick-up rates and still have a cork in a bottle."

Like screw caps, synthetic corks have also come a long way the past 15 years," Jennings added.

"Nomacorcs are also environmentally friendly, never dry up, don't have any TCA issues and you can do some pretty fun colorful printing on them as well," Jennings said, pointing out they are highly recommended for wineries that have TCA issues in older facilities that used to use chlorine-based cleaning agents.

So Cannon River had to make the choice of going to screw caps or using a synthetic cork.

"Our bottling line already had a corker so

it was a no-brainer to just switch over to Nomacorc," Jennings said. "There is still a stigma floating around about screw caps as well, even though science has proven that screw caps are a great closure."

MAWBY's Mike Laing said the sparkling wine facility is committed to using cork and wire hood packaging.

"We feel it is the right finish for the style of wines we produce," he said.

The winery also has launched a series of new products in 12-ounce aluminum cans to give consumers a new choice of packaging. MAWBY can releases are lower in alcohol and infused with organic teas.

"We saw a demand for lower ABV products in alternative packaging," Laing said.



# CHOOSING *the right* TOPPER FOR YOUR BOTTLE



## THE CASE FOR USING BOTH, OR *Alternate Packaging*

RCNY made the decision to use twist-off caps for the wines that will be consumed rather fast, such as most of its whites and Rosé.

"We do cork for wines that are meant to age a little more like our Blanc de Noir and most of our reds," a company spokesman told Vintner. "We used to do all cork but consumers want easy, so twist-offs are getting more and more popular these days and we jumped into that boat with our Sci-elo line."

Whatever topper RCNY uses, they say they

look for good quality.

"Cost always comes into play but quality has to go first and then storage," they said. "Then you have to properly store the materials before using them and bottle in a clean efficient way to avoid any problems in the future."

The New York winery also is doing small cans and half bottles (375ml) for tasting while belting kits have hit a high note during the pandemic for the company.

"People want something different to do at home," they said.

Jennings said that Cannon River has also dabbled into cans and boxed wines.

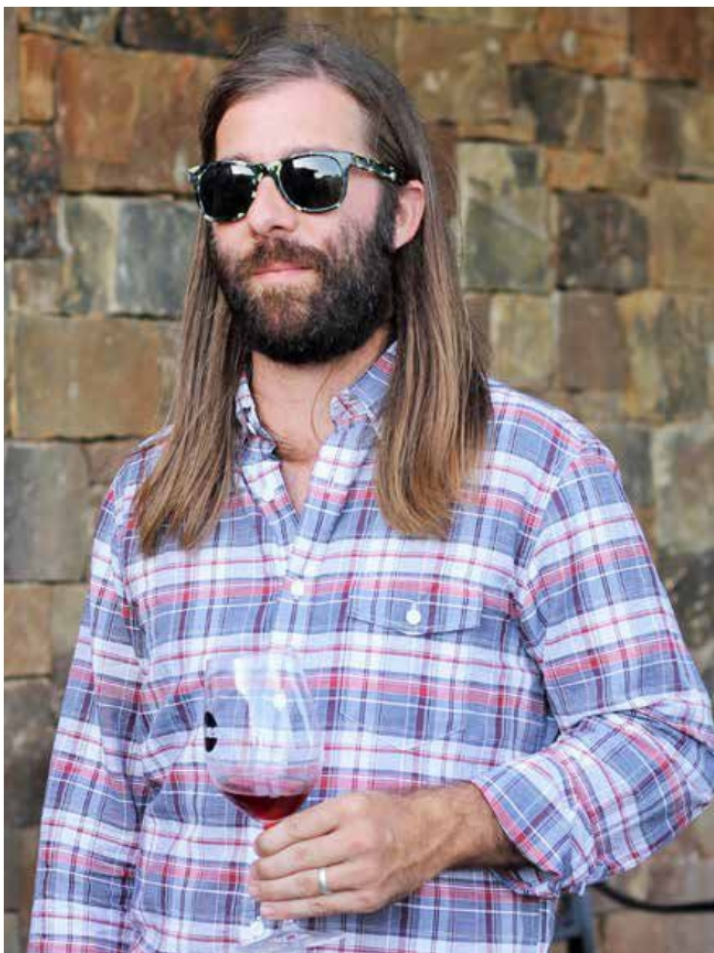
"The problem is the cost of the packaging equipment — if you want to do it yourself — such as printed boxes for boxed wine, and the cost of printed cans ... it becomes a numbers/volume game that most small wineries can't break even on," he said. "We have plenty of customers and distributors asking us 'why don't you do this package' and it always boils down to the costs and it not making financial sense."



## Q&amp;A

WITH **RON YATES,**  
SPICEWOOD VINEYARDS

*This is a part of a continuing series of Q&As with members of the American wine community from across the U.S. Vintner Magazine will share business and personal insights from Winery Owners, Vintners, Marketing Managers, Sales Directors, QCQA staff and others each month to help you get to know each other better in the industry and learn more to better develop your own brand.*



Ron Yates, Owner/President, Spicewood Vineyards - Spicewood, Texas

**VINTNER:** *How has your business strategy evolved to help grow and stay competitive?*

**YATES:** We had to swiftly move into an online business during the lockdown. We were closed for four of the first eight months of the year and we really had to find new ways to reach our customers. We started doing online wine tastings and meetups as a way to stay connected to our fans. This really helped to drive online sales and curbside pick-up sales which helped us stay in business until we could open the doors again.

**VINTNER:** *What has your winery changed because of the pandemic that you believe benefits your company and will be sustainable when things go back to normal?*

**YATES:** The online tastings and events have been a wonderful new revenue stream as well as a great introduction to people who don't know of us yet. We will continue to do the online tastings and we have created a new tasting and music show that we do from the wine cellar on the first Monday of every month which will continue once things are back to normal. While these new avenues may not be as fully useful as they were when everyone was at home, they have shown us a great ability to reach customers and will be a part of our overall strategy moving forward.



**VINTNER:** Who is your mentor in the industry and why? What have you learned from them?

**YATES:** I have a few mentors in the wine industry and I believe that I have learned things from all of them. Jim Johnson from Alamosa Cellars and Dan Gatlin from Inwood Estates were two people I called when we first got started because they were already successful with the Tempranillo grape and that was the wine I wanted to make here in Texas. My cousins Ed and Susan Auler who own Fall Creek Vineyards were very helpful when we were just getting started and we owe them a lot of favors for all of the knowledge they gave us.

**VINTNER:** What idea did you or your team come up with lately that has been a big benefit to how your winery functions?

**YATES:** We started taking reservations for wine tastings once we were able to reopen and that has really improved our ability to better serve our customers. Knowing when a group will arrive and being ready for them before they get here has really benefited our ability to function more smoothly.

**VINTNER:** If you had one business strategy that you could implement to better the wine industry, what would it be?

**YATES:** I don't know if it's a strategy as much as a wish, but it would be great if we could actually ship our wines into all of the other 49 states without distributors or expensive licenses. We have traveling customers from all over our country who fall in love with our wines and once they leave we can't get it to them.



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# LAST SIP

## IT TAKES TWO: TEXAS WINERIES TEAM UP TO HELP BUILD STATE'S REPUTATION

BY MILES SMITH

### GROWING WINE, NOT MAKING IT. AND CREATING AN AMAZING PLACE FOR PEOPLE TO WORK.

It sounds simple, but the drive to build Texas's wine reputation by sticking to these two goals is what the owners of Lost Draw Cellars in Fredericksburg, Texas and William Chris Vineyards in Hye, Texas say led them to make their longtime working relationship official. The wineries now comprise William Chris Wines, and the owners are optimistic the move will give the new company some horsepower as it works to help build the reputation of Texas's developing wine industry.

"These are two primary focuses of our company which have brought us to this place," said William Chris Wines CEO Chris Brundrett, who co-founded William Chris Vineyards in 2008. "Right now there is a need for more leadership from wine companies in our state. Building Texas up by promoting and improving our growing regions is something that needs more focus from its key players. We want to help guide the state's wine industry towards becoming a legitimate, recognized winegrowing region."

"We're still a bit dismayed by some wine companies in our region depending on out-of-state bulk wine for their business models. We as an industry and a region have to grow out of that behavior to be taken seriously, in our opinion. The good news is there is a huge crop of new wine pro-

ducers in Texas that are equally focused on making this happen. The even-better news is there is a tidal wave of consumers who are driving this market change. They are pushing for regionality with their buying decisions.

"The wineries that do not pay attention to this currently will have to adapt if they want those types of consumers. Like any direct-to-consumer driven wine region we have a unique mix of serious enthusiasts, collectors, and weekend warriors. Throw in a bunch of proud and thirsty Texans looking for local brands and products and you've got the recipe for a wide market."

The partnership between Lost Draw and William Chris had been fermenting for a couple of years before the merger.

Prior to the October announcement of its new parent company, Lost Draw and William Chris had been splitting vineyard blocks in Central Texas and the Texas High Plains as a way to maximize buying power, controlling more acreage and developing long-term relationships with farmers.

"Quite frankly, both wineries had already begun pooling fruit lots and production for a couple of years as a way to help ensure the needs of both wineries' programs were met through various vintages," said COO Andrew Sides, who co-founded Lost Draw.

The branding of the new parent company will be used in a trade and industry setting, Brundrett said. The cellar teams will continue to learn and model the techniques of each winemaker to benefit those distinct wine programs. From a marketing standpoint, preserving the identities of the individual wine brands and continuing to tell their stories remains a key strategy.





"The right balance of marketing will be a process," Brundrett explained. "We have been using the analogy of 'switching caps' when representing our portfolio of brands, and again, we do want the customer experience and relationship with each brand to remain unique, so the distribution and marketing will often reflect that."

Joining forces on the business side allows each wine brand under the William Chris Wines to benefit from a beefed up management team.

"We're working through the transition and right now everyone has had to 'level up' and let go of some things, which, while challenging, has been really great for the organization," Brundrett said, "And we are starting to gain traction."

As COO of William Chris Wines, Sides is working with Lost Draw winemaker Brad Buckelew, managing company-wide logistics and operations, and directing all production and wholesale programs. That allows existing COO Anthony Harvell to focus on direct-to-consumer sales for the entire company. As CEO, Brundrett will focus on leading the executive team and working with William Chris Vineyards and Skelton Key winemaker Tony Offill.

Sides said paring down William Chris's overall wholesale portfolio to provide focus for programs within each brand is necessary from a distribution perspective.

"We don't want to compete with ourselves across the market, so we have strived to give each wholesale wine its own opportunity to shine," Sides said. "And to be honest, for us to make the best wine possible, we

need to focus on making fewer wines. We produce wines from over 100 blocks, but we don't need to make 100 SKUs. We need to produce 20-40 amazing, elegant, focused wines.

"Who knows, in three years we could be down to 10 wines across our wholesale program. As an example of the synergistic overlap: LDC has always had a heavy focus on Tempranillo so it has been great to slide some of the Temp that WCV has contracted into the LDC programs since WCV's focus will remain on other varieties such as Mourvèdre.

"In the end, our wholesale and marketing teams have grown significantly, which allows us to really drill down and work towards our immediate goal of spreading our portfolio all over the state and beyond."



# A CONVENIENT WAY TO PICK UP & CARRY BEVERAGES

## *Can Handle Solutions*

Roberts PolyPro's mission is centered around developing innovative handle carrier solutions for every-day consumer-based products that offer a high level of functional performance. Leveraging over 25 years of injection molded plastic experience, Roberts PolyPro has crafted a can carrier solution that surpasses every other competitive option in the craft brewing industry. Our open-top can handle rings are designed to provide an easy release for cans while maintaining the hold strength necessary for optimal can security, ensuring your customers are left with an enjoyable experience. Made with 30% less plastic than competitive style carriers and comprised of 100% recyclable HDPE, our can carriers are offered in multiple sizes to accommodate slim, sleek, standard, and 16-ounce cans in 4-pack and 6-pack configurations, available in many custom color options.

800-269-7409 / [RobertsPolyPro.com](https://RobertsPolyPro.com)

