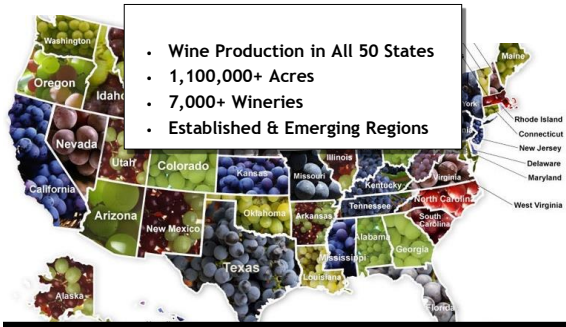




The Judgement at Sautee
 At Yonah Mountain Vineyards in Sautee, Georgia
 January 15, 2011

<u>Chardonnay</u>	
Kistler Dutton Ranch 2008	165.95
Yonah Mountain Vineyards 2008	163.4
Yonah Mountain Vineyards 2009	162.15
<u>Cabernet Blend</u>	
Yonah Mountain Vineyards Genesis 2 NV	171.05
Jordan Napa 2006	171.0
Yonah Mountain Vineyards Genesis 2006	169.3
Ghost Horse Napa 2000	156.35

The Judgement



Emerging Wine Regions

- Original Colonies



Making wine in colonial Virginia, using grapes from a vineyard rather than collected from wild vines.

A History of Diversity

- Original Colonies
- Southwest



Spanish Colonial Wine Vat (Cow-Skin)
Hacienda de Los Carbonnere's, Las Cruces, c. 1894



"Nature seemed to have intended Texas for a vineyard to supply America with wines"
Stephen F. Austin
Texas, c. 1820

A History of Diversity

- Original Colonies
- Southwest
- Midwest



Image from a pamphlet advertising Nicholas Longworth's wines, c. 1866.

A History of Diversity

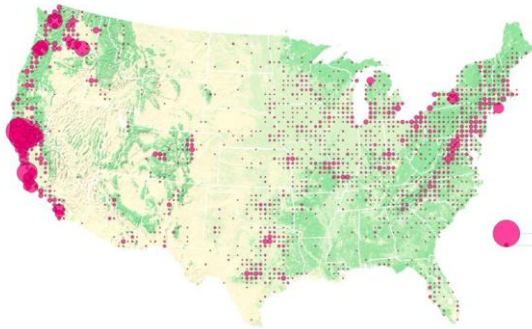
- Original Colonies
- Southwest
- Midwest
- The Long Pause



Phylloxera, Pierce's Disease & Prohibition

A History of Diversity

7



Re-Emergence

8

California	667,552,032	88.518%	Illinois	374,088	0.050%
New York	26,404,066	3.501%	Colorado	334,089	0.046%
Washington	24,506,226	3.250%	Maryland	337,231	0.045%
Oregon	6,829,808	0.906%	Idaho	315,615	0.042%
Pennsylvania	3,589,603	0.476%	Tennessee	296,436	0.039%
Ohio	3,048,054	0.404%	Mass.	268,911	0.036%
Kentucky	2,379,512	0.316%	Iowa	243,571	0.032%
Missouri	1,034,917	0.270%	Arizona	181,328	0.024%
Florida	1,946,162	0.258%	Minnesota	154,753	0.021%
New Jersey	1,561,365	0.207%	Georgia	147,734	0.020%
Texas	1,376,144	0.182%	Connecticut	122,628	0.016%
Michigan	1,347,837	0.179%	Nebraska	81,641	0.011%
North Carolina	1,215,332	0.161%	Kansas	68,504	0.009%
Indiana	1,069,775	0.142%	Oklahoma	48,496	0.006%
Virginia	1,033,191	0.137%	West Virginia	43,879	0.006%
New Mexico	742,873	0.099%	Maine	43,136	0.006%
Wisconsin	612,885	0.081%	Alabama	31,312	0.004%
			South Dakota	19,373	0.003%
			Montana	18,375	0.002%

Production of still wine per state in 2012. Gallons of wine produced and percentage of national production.

Re-Emergence

10

Snapshot

Wineries: 200+
 Acres of Vineyard: 3,000
 Leading Wines:
 Chardonnay, Cab Franc,
 Merlot, Vidal Blanc,
 Viognier, Norton

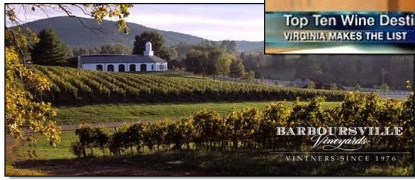


King Family Vineyards
 Crozet, VA

Virginia

10

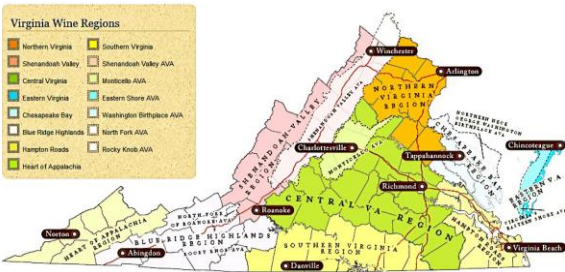
Re-Emergence



BARBOURSVILLE
Vineyards
 WINEMAKERS SINCE 1976

Virginia

11



Virginia

12



Virginia

13



SPOTLIGHT ON...
Chateau Morrisette
 Floyd, VA

Virginia

14


Snapshot

Wineries: 60+

Acres of Vineyard: 1,200

Leading Wines:
 Sparkling Wine,
 Chardonnay, Riesling, Cab
 Sauvignon, Merlot

"America's Champagne."



New Mexico

15

Re-Emergence

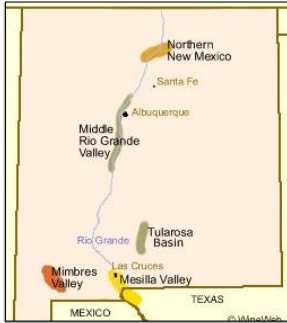


NMSU's Los Lunas Experiment Station



New Mexico

16



New Mexico

17



New Mexico

18

Snapshot

Wineries: 100+

Acres of Vineyard: 3,000

Leading Wines:

Cab Franc, Chardonnay, Gewürztraminer, Pinot Noir, Riesling, Ice Wine

“Great Lake Effect.”

Tabor Hill Winery
Buchanan, MI



Michigan

19

Re-Emergence

Michigan Wines

The meal was fine but would have been more enjoyable if accompanied by a Michigan wine.

Signature:

See a list of restaurants that serve Michigan wines at:
www.michiganwines.com

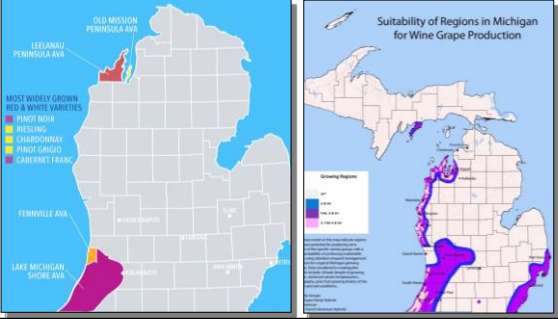
Contact the Michigan Grape and Wine Industry Council:
mda-michigan-wines@michigan.gov • 517-241-4468



Charles Sheneman, a current student in the Michigan State University viticulture program, recently opened his own Torch Lake Cellars.

Michigan

20



Michigan

21



Michigan

22



SPOTLIGHT ON...
Black Star Farms
Suttons Bay, MI

Michigan

23

Snapshot

Wineries: 40+

Acres of Vineyard: 1,000+

Leading Varieties:
Cabernet Franc, Cabernet Sauvignon, Chambourcin, [Chardonnay](#), [Vidal Blanc](#)

Heritage Winery
Mullica Hill, NJ

New Jersey

24



Re-Emergence



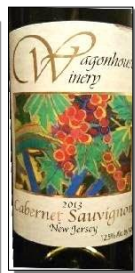
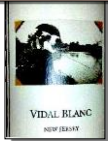
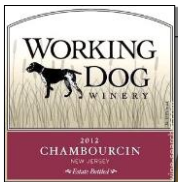
New Jersey

25



New Jersey

26



New Jersey

27

Snapshot

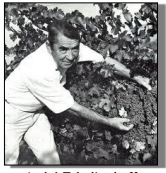
Wineries: 350
 Acres of Vineyard: 4,000
 Leading Varieties:
 Rhone Reds, Tempranillo,
 Viognier, Montepulciano




Texas

28

Re-Emergence



André Tchelistcheff



Texas

29

Texas American Viticultural Areas



- Bell Mountain AVA
- Davis Mountain AVA
- Escondido Valley AVA
- Fredericksburg in the Texas Hill Country AVA
- Mesilla Valley AVA
- Texas High Plains AVA
- Texas Hill Country AVA
- Texoma AVA

Texas

30



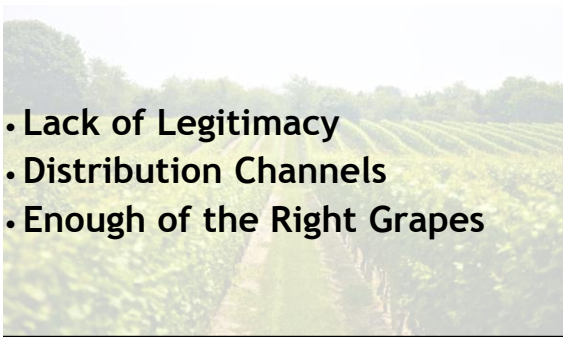
Texas

31



Texas

32



- Lack of Legitimacy
- Distribution Channels
- Enough of the Right Grapes

Challenges

33

"Some of the varieties we are currently growing won't be viable in those vineyards in 10 to 15 years time"
 Russ Brown, CEO Brown Brothers

temperature rises of between 0.3C and 1.7C by 2030

average ripening creep

1.7 days a year from 1993 to 2009

0.8 days a year from 1985 to 2009

Climate Change

38

An Icon Product
 Cohesion of Producers
 A Common Story
 Effective Brand Manager
 Tourism
 Favorable State Laws

The Future

39

Emerging Wine Regions of the US

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