

THE ECONOMIC IMPACT
OF OHIO WINE
AND WINE GRAPES – 2012

A Frank, Rimerman + Co. LLP Report

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This study was commissioned by the

Ohio Grape Industries Committee

Frank, Rimerman + Co. LLP

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www.frankrimerman.com/industries/wine-industry-research.asp

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

\$786 Million

OHIO WINE AND WINE GRAPES	2012 ECONOMIC IMPACT	2007 ECONOMIC IMPACT
Full-time Equivalent Jobs	5,291	4,108
Wages Paid	\$170 million	\$124 million
Wine Produced (Gallons)	1,227,000	1,134,000
Retail Value of Ohio Wine Sold	\$62 million	\$53 million
Number of Wineries	175	124
Grape-Bearing Acres	1,900	1,900
Wine-Related Tourism Expenditures	\$97 million	\$73 million
Number of Wine-Related Tourists	2,737,000	2,158,000
Taxes Paid: Federal / State and Local	\$46 million / \$41 million	\$30 million / \$33 million

ECONOMIC IMPACT OF OHIO WINE AND WINE GRAPES

Table 1
Total Economic Impact of Wine and Vineyards in Ohio

Revenue:	2012	2008
Winery Sales	\$43,182,000	\$37,537,500
Retail and Restaurant Sales of OH wine	\$13,489,000	\$12,171,500
Distributors Sales	\$5,615,000	\$3,377,600
Tourism	\$102,653,000	\$73,410,300
Wine Grape Sales	\$2,849,000	\$1,821,600
Federal Tax Revenues	\$45,671,000	\$29,491,100
State Tax Revenues	\$41,150,000	\$32,789,700
Vineyard Development (excluding vines)	\$1,188,000	\$1,187,500
Charitable Contributions	\$432,000	\$375,400
Advertising/Marketing	\$773,000	\$515,000
Winery Services	\$1,549,000	\$1,430,900
Wine Research/Education/Consulting	\$1,513,000	\$900,000
Winery-Related Events and Other Revenue	\$11,615,000	NA
Indirect (IMPLAN)	\$181,844,000	\$176,354,100
Induced (IMPLAN)	\$161,865,000	\$87,163,400
Total Revenue	\$615,388,000	\$458,525,600
Wages:	2012	2008
Winery Employees	\$16,684,000	\$11,619,200
Vineyard Employees	\$7,239,000	\$6,650,000
Tourism	\$25,484,000	\$18,517,700
Vineyard Development and Materials - Labor	\$178,000	\$178,100
Distributors Employees	\$2,067,000	\$1,571,900
Retail/Liquor Stores - Wine Specific	\$510,000	\$482,600
Restaurant Sales of OH wine	\$2,484,000	\$2,303,300
Winery Services	\$204,000	\$83,700
Wine Research/Education/Consulting	\$380,000	\$283,400
Indirect (IMPLAN)	\$61,845,000	\$56,151,200
Induced (IMPLAN)	\$53,353,000	\$26,398,500
Total Wages	\$170,428,000	\$124,239,600
Total	\$785,816,000	\$582,765,200

Sources: Frank, Rimerman + Co., Ohio Division of Travel & Tourism, IMPLAN, Ohio Grape Industries Committee (OGIC), Bureau of Labor Statistics (BLS), Ohio State University, various Ohio wineries surveyed.

EXECUTIVE SUMMARY

IMPACT OF WINE AND VINEYARDS ON THE OHIO ECONOMY

The Ohio wine industry continues to grow as the number of wineries and cases produced both grew since 2008. The number of wineries in the state of Ohio grew from 124 in 2008 to 175 in 2012, an increase of 41%, while the gallons produced increased 8% from 1.13 million gallons to 1.23 million gallons in 2012 (or 516,000 cases). The majority of the industry's growth is coming from the addition of small wineries – wineries producing less than 5,000 gallons per year. However, a few of the state's larger producers increased their production over the past several years as well. According to the Alcohol Tax and Trade Bureau (TTB), Ohio was the seventh largest wine producer in the United States in 2012.

The wine and grape industry in Ohio contributed greatly to the economic strength of the state in 2012. Ohio's wine, grape and related industries had a total economic value to the state of \$786 million in 2012, an increase of 34% from the \$583 million economic impact in 2008. This increase in total economic impact is a result of an increase in direct jobs, increased wine production and significantly more induced benefit from IMPLAN multipliers. In addition, tourism revenue, wages and jobs all increased from 2008, consistent with an increase in both overall state tourism and the number of wineries in Ohio. As the number of Ohio wineries increases, so will the number of tourists visiting them. We estimate that roughly 2.74 million people visited Ohio wineries in 2012, up 27% from approximately 2.16 million winery visitors in 2008. Wine, grapes and related industries account for 5,291 jobs in Ohio with an associated payroll of roughly \$170 million. As shown below, most of these jobs were in the actual wineries and vineyards, as well as the tourism industry.

Table 2
Total Ohio Employment: Wine, Grape and Related Industries

Jobs:	2012	2008
Distributors	41	32
Research/Education/Consulting	7	4
Restaurants	174	166
Retail/Liquor Stores - Wine Specific	34	30
Vineyard	381	350
Vineyard Materials	6	6
Winery	924	785
Winery Services	6	3
Winery Tourism	1,218	970
Indirect (IMPLAN)	1,168	1,006
Induced (IMPLAN)	1,333	756
Total Employment	5,291	4,108

Sources: Frank, Rimerman + Co., Ohio Division of Travel & Tourism, IMPLAN, OGIC, BLS, Ohio State University, various Ohio 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. Ohio's wine, wine grape and allied industries generated \$46 million in federal taxes and \$41 million in state and local taxes in 2012, including almost \$4 million in total excise taxes.

Table 3
Estimated Tax Revenues

<u>Type of Tax</u>	<u>Total</u>
Federal Tax Revenues	
Excise	\$2,782,000
Payroll	\$17,962,000
Income	\$20,198,000
Other (corporate profits, etc.)	\$4,729,000
Total Federal Tax Revenues	\$45,671,000
State Tax Revenues	
Excise	\$786,000
Sales	\$1,265,000
Payroll	\$679,000
Income	\$7,040,000
Property	\$12,492,000
Other (excise, dividends, licenses, fines, etc.)	\$18,889,000
Total State Tax Revenues	\$41,150,000
Total Tax Revenues	\$86,821,000

TOURISM

Tourism continues to be a material factor in the Ohio wine and wine grape industry's overall impact on the broader state economy. Our survey of Ohio wineries estimates that over 2.74 million tourists visited Ohio wineries in 2012. Supporting these winery visitors is a diverse labor force of approximately 1,218 employees with total wages of \$25.5 million. The continued increase of tourist visits over the past several years can be attributed to the increase in the number of Ohio wineries and continued improvement in wine quality, providing more destinations and opportunities for visitors to experience Ohio 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 Ohio 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 \$11.6 million in revenue generated from these wine-related events and facilities.

WINE PRODUCTION AND SALES

Growing grapes and making wine is a long-term commitment to a community, both financially and physically. New vineyard plantings require three to five years before yielding a full crop, with another one to three years of aging for wine to be ready for sale. Unlike many industries, once vineyards and wineries are established they are effectively rooted and tied in place – an Ohio 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 175 wineries in Ohio producing wine, up 41% from 124 wineries in 2008. Based on information we collected from the Ohio Grape Industries Committee and the Ohio Department of Taxation, total wine produced in Ohio in 2012 was 1,227,000 gallons, or approximately 516,000 nine-liter equivalent cases. Several of the state's wineries made wine with grapes sourced from Ohio vineyards, representing approximately half of all wine produced in Ohio being made from Ohio grapes. However, a few of the larger producers relied on bulk wine and grapes sourced from outside of Ohio. Based on our discussions with several Ohio wineries, the primary states relied on for non-Ohio grapes were California, New York and Pennsylvania.

Overall, 90% of the state's wineries had sales or production of less than 5,000 gallons annually (roughly 2,100 cases). Additionally, less than ten wineries had wine production of between 5,000 and 10,000 gallons in 2012. Less than 5% of the remaining wineries had production in excess of 10,000 gallons in 2012, or sales in excess of 5,000 cases.

Similar to the production section above, less than 5% of the state's wineries had sales exceeding \$1.0 million in 2012. The overwhelming majority of the state's wineries had sales of less than \$0.5 million (over 90%). In fact, roughly 50% of the wineries we surveyed had sales between \$0 and \$150,000 in 2012.

Table 4.1
Trend of Growth in Ohio Wineries

Year	# of Wineries
2012	175
2008	124
2004	109
2000	77

Source: Wine Institute, OGIC, TTB

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 of less than 5,000 cases. There are only a handful of 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 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 60%/40% between direct to consumer and through either distributors or directly to restaurants. As a result, retail and restaurant sales of wine increased 11% from 2008 to 2012, up from \$12.2 million to \$13.5 million. This is primarily a result of a few wineries selling a large portion of its wine directly to restaurants and self-distributing as opposed to through any wholesale distributors. One large producer in particular began selling the majority of its wine through the wholesale channel, however, which partially influenced overall distributors' sales of Ohio wine to increase 66% from 2008 to 2012.

The retail value of Ohio wine sold in 2012 is estimated at \$62.3 million, with actual sales generated by the wineries themselves totaling \$43.2 million. This includes sales to consumers in the winery tasting rooms, winery mailing lists and e-commerce/Internet sales. Excluded from these figures was the additional \$11.6 million generated in non-wine revenue associated with wineries hosting special events/weddings and selling various merchandise on-site. Surprisingly, however, not a single winery we surveyed or spoke with allowed customers to make wine on premise. However, based on our conversations with industry professionals and trade organizations, we do know there are a handful of wineries in the state that do currently offer custom crush/winemaking services to customers, but it is not something that is widely offered. If the industry wants to continue to develop, this could be an area that may worth considering offering customers, both professional and hobby wine-makers.

Based on our research and interviews with winery owners, wineries in Ohio provided employment for 924 full-time equivalent jobs in 2012, up from 785 full-time employees in 2008, with an overall payroll totaling approximately \$16.7 million.

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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 Ohio's wineries are considered small producers, producing less than 5,000 gallons (2,100 cases). In fact, only seven 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, approximately half of the wine produced in Ohio was made from grapes grown outside of Ohio in 2012. The growth of wineries in the state appears to be outpacing the grapes available to wineries in recent years. The extreme growth in number of wineries and planted acreage that has been unchanged for the past several has led many wineries to look elsewhere for bulk wine or grapes to meet its production needs. The industry needs to quickly consider how to alleviate what appears to potentially become a larger problem down the road if the industry wants to continue to grow and develop into a profitable business for local wineries, as opposed to paying higher prices for grape/wine sourced outside of the state.

In 2012, Ohio was the seventh largest producer in the United States, according to data provided by the TTB. That being said, the number of new wineries producing wine in Ohio increased dramatically in the last ten years (a 92% increase). Ohio'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

Rank	State	Total Produced (Gallons)	% of Total
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%
---	Others	12,867,717	1.65%
	Total U.S.	779,109,854	100.00%

GRAPE PRODUCTION

According to the National Agricultural Statistics Service (“NASS”), there were approximately 1,900 grape-bearing acres in Ohio in 2012, the same number there was in 2008. While vineyard acreage in Ohio remained fairly steady over the past several years, yields have varied. On average, the wineries we spoke with had yields of three tons per acre in 2012, but ranged anywhere from one to six (and zero in some extreme cases). This is largely due to occasionally unfavorable weather conditions such as late spring frost and mid-season hail storms, harmful herbicide drift from neighboring fields and, to a lesser extent, vine loss due to insects, black rot and phylloxera.

Given the harsh climate in this part of the country, low yields are not entirely uncommon; however, if Ohio 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, Ohio is in the top ten in the United States in terms of both grape production and acreage; however the state lags significantly behind the larger wine-producing states of California, Washington, New York, Oregon, Michigan and Pennsylvania.

The majority of the wineries we spoke with had vineyards of their own that they sourced fruit from. The average vineyard size was 26 acres, although the median was closer to six acres, which indicates a few wineries had large vineyards that skewed the overall data. Most of these vineyards were located on-site, at the winery’s estate property. Several wineries also indicated that they sell grapes and/or juice to other wineries, ten wineries in total. Every one of them sold grapes and/or bulk wine to other wineries in Ohio, although only a few also indicated they sold to wineries out of state as well.

Table 5
United States Grape Production, 2012

Rank	State	Total Production (Tons)	Bearing Acreage (all types of grapes)
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 Ohio rely heavily on wine grapes grown out of state, which generally adds increased costs. By continuing to increase the grape quality and amount of Ohio acreage available for grape production, the Ohio 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 increasing profitability.

VINEYARD EMPLOYMENT

Larger Ohio 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 Ohio manage smaller vineyards and can do so without outside labor. As mentioned above, our research indicates the median vineyard size was approximately six 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 and the Bureau of Labor Statistics, approximately 381 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 \$7.2 million in 2012.

COMMUNITY SUPPORT

Based on our estimates, wineries and growers throughout the state of Ohio have donated approximately \$432,000 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 Ohio 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 Ohio wine industry continues to grow, so will the number of ancillary businesses that supply the industry.

Based on our research and discussions with wineries and trade professionals, we estimate there were six full-time employees working at wine and grape industry-related suppliers. Total wages were \$204,000 while total revenue was \$1.5 million.

EDUCATION, CONSULTING AND WINE INDUSTRY RESEARCH

Approximately seven people were employed on a full-time basis in Ohio in wine-related education, consulting and research at various universities and trade organizations, with a total payroll of roughly \$380,000. Total funding/revenue was \$1.5 million in 2012.

SUPPORT BY STATE AND REGIONAL ORGANIZATIONS

State and regional organization support is critical to the success of the renewed industry. Ohio's state, regional and private organizations are becoming more effective and organized at supporting and promoting the local wine industry. Two of the most prominent and widely recognized organizations are the Ohio Grape Industries Committee and the Ohio Wine Producers Association. Wineries we spoke with also mentioned they belong to other trade organizations, albeit to a less degree; examples included Wine Growers of Ohio, Central Ohio Wine Country and Wine America. In general wineries we surveyed belonged to an average of one to two Ohio trade organizations.

Additionally, most of the wineries we surveyed participated in at least one wine festival in Ohio annually. On average, wineries get involved in roughly three Ohio wine festivals each year, with some wineries participating in over ten annually. There were several festivals that wineries we spoke with participated in throughout the year in all areas of the state; however, below are the most frequently mentioned festivals:

- Grape Jamboree
- North Market Food & Wine Festival
- Taste of Ohio
- Vintage Ohio
- Wine & Walleye Festival
- World Series of Wine

In order for the Ohio 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 Ohio 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 Ohio wine industry, including intangible benefits is much greater. That measure of economic impact is approximately \$786 million within the state of Ohio, for an industry that is a unique partnership of nature, entrepreneurship, artistry and technology.

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

METHODOLOGY

DATA COLLECTION

Data for this study was collected from a variety of public sources supplemented by primary research with wineries, suppliers, growers and other economic entities and supported by a variety of studies undertaken by industry and professional organizations. 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 2012 IMPLAN figures for Ohio.

DIRECT, INDIRECT AND INDUCED EFFECTS (IMPLAN)²

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.

IMPLAN¹ 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.

¹ 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.

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Induced effects are the effects of these new workers spending their new incomes, creating a still further flow of income in their communities and a flow of new jobs and services. Examples are spending in grocery and retail stores, medical offices, insurance companies and other non-wine and grape related industries.

Beginning in late 2009, the Minnesota IMPLAN Group released version 3.0 of its flagship IMPLAN software product, which makes it possible to include Trade Flows in an impact analysis. We used this latest version with its increased functionality to produce this report.

ABOUT FRANK, RIMERMAN + CO. LLP

Frank, Rimerman + Co. LLP, founded in 1949, is the largest, locally-owned provider of accounting and consulting services in California. With offices in San Jose, Palo Alto, San Francisco and St. Helena, California, New York, New York and over 250 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 Jersey, New York, North Carolina, Ohio, Oklahoma, Pennsylvania, Tennessee, Texas, Virginia and Washington.

ECONOMIC IMPACT OF OHIO WINE AND WINE GRAPES

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 the Wine and Grape Industry in Canada 2011
- Economic Impact of Wine and Grapes in New Jersey 2011
- Economic Impact of Wine and Wine Grapes in Illinois 2011
- Economic Impact of Wine and Grapes in Canada 2011
- Economic Impact of Texas Wine and Vineyards 2011
- Economic Impact of Pennsylvania Wine, Grapes and Juice 2011
- 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