

# THE ECONOMIC IMPACT OF NEW JERSEY WINE AND VINEYARDS – 2016

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

**December 2017**

This study was commissioned by the

**Garden State Wine Growers Association**

**Frank, Rimerman + Co. LLP**

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[www.frankrimerman.com/businesses/business\\_management/wine\\_research.asp](http://www.frankrimerman.com/businesses/business_management/wine_research.asp)

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FULL ECONOMIC IMPACT OF  
NEW JERSEY WINE AND VINEYARDS --  
2016

**\$323.02 Million**

New Jersey Wine and Vineyards <i>Key Statistics</i>	2016 Economic Impact	2011 Economic Impact	% Change
<b>Full Time Equivalent Jobs</b>	1,979	1,462	35.4%
<b>Wages Paid</b>	\$85.57 million	\$57.65 million	48.4%
<b>Wine Produced (Gallons)</b>	702,671	405,954	73.1%
<b>Retail Value of New Jersey Wine Sold</b>	\$29.53 million	\$21.46 million	37.6%
<b>Vineyard Revenue</b>	\$0.61 million	\$1.80 million	-66.1%
<b>Number of Wineries</b>	50	38	31.6%
<b>Grape Bearing Acres</b>	1,582	1,283	23.3%
<b>Wine-Related Tourism Expenditures</b>	\$19.99 million	\$20.10 million	-0.5%
<b>Number of Wine Related Tourists</b>	108,813	95,850	13.5%
<b>Taxes Paid: Federal / State and Local</b>	\$23.24 million / \$17.73 million	\$15.75 million / \$16.00 million	47.5% / 10.8%

# ECONOMIC IMPACT OF NEW JERSEY WINE AND VINEYARDS – 2016

**Table 1**  
**Total Economic Impact of Wine and Vineyards in New Jersey**

<b>Revenue</b>	<b>2016</b>	<b>2011</b>
Winery Sales	\$25,468,000	\$18,239,000
Retail and Restaurant Sales of New Jersey wine	\$4,021,000	\$2,369,000
Distributors Sales	\$495,000	\$497,000
Non-Wine Revenue (Weddings, Events, etc.)	\$2,315,000	\$1,569,000
Tourism	\$19,986,000	\$20,096,000
Wine Grape Sales	\$610,000	\$1,799,000
Federal Tax Revenue	\$23,236,000	\$15,753,000
State Tax Revenue	\$17,729,000	\$16,000,000
Vineyard Development (excluding vines)	\$7,911,000	\$6,415,000
Charitable Contributions	\$300,000	\$211,000
Allied Industries -- Glass, Labels, Chemicals	\$1,642,000	\$512,000
Indirect (IMPLAN)	\$77,518,000	\$53,253,000
Induced (IMPLAN)	\$56,215,000	\$36,544,000
<b>Total Revenue</b>	<b>\$237,447,000</b>	<b>\$173,255,000</b>
<b>Wages</b>	<b>2016</b>	<b>2011</b>
Winery Employees	\$8,703,000	\$5,061,000
Vineyard Employees	\$10,136,000	\$5,070,000
Tourism	\$12,891,000	\$12,221,000
Vineyard Development and Materials - Labor	\$1,187,000	\$962,000
Retail/Restaurants/Distributors	\$1,033,000	\$793,000
Allied Industries -- Glass, Labels, Chemicals	\$880,000	\$423,000
Indirect (IMPLAN)	\$30,526,000	\$20,174,000
Induced (IMPLAN)	\$20,213,000	\$12,941,000
<b>Total Wages</b>	<b>\$85,569,000</b>	<b>\$57,645,000</b>
<b>Total</b>	<b>\$323,015,000</b>	<b>\$230,901,000</b>

Sources: Frank, Rimerman + Co. Research, IMPLAN, USDA, Bureau of Labor Statistics and various New Jersey wineries, consultants and suppliers surveyed, New Jersey Department of Travel and Tourism.

## EXECUTIVE SUMMARY

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### IMPACT OF WINE AND VINEYARDS ON THE NEW JERSEY ECONOMY

The New Jersey wine industry continues to grow as the number of wineries increased since 2011. The number of wineries in the state of New Jersey grew from 38 in 2011 to 50 in 2016, an increase of 31.6%, the majority of which produce less than 5,000 cases per year. 2016 wine production in New Jersey was approximately 702,671 gallons (or 295,488 cases), up 73.6% from 405,954 gallons (or 170,712 cases) produced in 2011. Consistent with the analysis completed in 2011, these figures exclude any wine that is bottled in New Jersey by Kedem Winery, a New York-based winery that bottles all of its wine in New Jersey, which did not provide information for this study.

The wine and grape industry in New Jersey, however, contributed greatly to the economic strength of the state. New Jersey's wine, grape and related industries had a total economic value to the state of \$323.02 million in 2016, an increase of 39.9% from the \$231 million economic impact in 2011. We estimate that 108,813 people visited New Jersey wineries in 2016, an increase in 13.5% from the estimated 95,850 winery visitors in 2011. Wine, grapes and related industries accounted for 1,979 jobs (up 35.4% from 1,462 jobs in 2011) in New Jersey with an associated payroll in excess of \$85.57 million. As shown below, the majority of these jobs were in the actual wineries and vineyards as a result of the increase in number of wineries and gallons produced.

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

<b>Employment</b>	<b>2016</b>	<b>2011</b>
Winery	365	186
Vineyard	366	258
Tourism	357	380
Vineyard Materials	32	39
Retail/Restaurants/Distributors	50	35
Allied Industries -- Glass, Closures, Chemicals	24	8
Indirect (IMPLAN)	426	299
Induced (IMPLAN)	359	256
<b>Total Employment</b>	<b>1,979</b>	<b>1,462</b>

Sources: Frank, Rimerman + Co. Research, IMPLAN, USDA, Bureau of Labor Statistics and various New Jersey wineries, consultants and suppliers surveyed, New Jersey Department of Travel and Tourism.

**TOTAL TAXES COLLECTED**

The wine and 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. New Jersey’s wine, grape and allied industries paid \$23.24 million in federal taxes and \$17.73 million in state and local taxes in 2016, including roughly \$2.35 million in total excise taxes.

**Table 3  
Estimated Tax Revenue**

Type of Tax	Total
<b>Federal Tax Revenues</b>	
Excise	\$1,737,000
Payroll	\$9,631,000
Income	\$8,746,000
Other (corporate profits, etc.)	\$3,122,000
Total Federal Tax Revenues	\$23,236,000
<b>State Tax Revenues</b>	
Excise	\$615,000
Sales	\$13,998,000
Payroll	\$110,000
Property	\$2,311,000
Other (dividends, licenses, fines, fees, etc.)	\$695,000
Total State Tax Revenues	\$17,729,000
<b>Total Tax Revenues</b>	<b>\$40,965,000</b>

**TOURISM**

Tourism continues to be a material factor in the New Jersey wine and grape industry’s overall impact on the broader state economy. Our survey of New Jersey wineries estimates that 108,813 tourists visited New Jersey wineries in 2016. Supporting these winery visitors is a diverse labor force of approximately 357 employees with total wages of approximately \$12.9 million. The continued increase of tourist visits over the past several years can be attributed to the increased number of New Jersey wineries and continued improvement in wine quality, providing more destinations and opportunities for visitors to experience New Jersey wine country.

However, despite the increase in winery related visitors from 2011, total tourism revenue industry wide has declined from \$20.10 million in 2011 to \$19.99 million in 2016. This decrease is directly attributable to lower average spending per visitor statewide across all tourism sectors as well as fewer number of wineries visited per visit. Specifically, tourism spending per visitor has decreased from \$209.66 in 2011 to \$183.67 in 2016, a drop of approximately 12.4%. We believe that this decrease is largely attributable to the effects of declining tourism to Atlantic City as well as the ongoing impact of tourism to the Jersey Shore as a result of Hurricane Sandy. The US Department of Commerce estimated the loss in tourism revenue to the state of New Jersey from Hurricane Sandy in 2013 alone to have exceeded \$950 million<sup>1</sup>. While the state has since progressed significantly towards recovery, it is likely the high-end tourism market that largely supports the wine industry has not fully recovered.

The state's overall wine sales and production are not concentrated within a few large wineries; rather the majority of the state consists of small wineries with production under 5,000 cases. There are only a few wineries we surveyed that sold more than 5,000 cases of wine in 2016. Additionally, very few wineries we spoke with sold wine through the three-tier system, as the majority of the wineries, especially the ones with less than 5,000 cases sold, sell their wine direct-to-consumer through their tasting room or direct to trade through restaurants and retail outlets.

As in the past, the state's wineries remain focused on wine quality and attracting more visitors in order to fuel growth. Some existing wineries have expanded their facilities to incorporate space for private parties, weddings and festivals in support of additional revenue streams. These investments have resulted in increased winery employment and support services, and increased rural economic development. Some wineries we surveyed in New Jersey incorporated these new functions with traditional facilities and even restaurant operations to take full advantage of these profitable ancillary activities. By our estimation, based on direct feedback from the wineries we surveyed, there was approximately \$2.32 million in revenue generated from these wine-related events.

### **WINE PRODUCTION AND SALES**

Growing grapes and making wine is a long-term commitment to a community, both financially and physically. New vineyard plantings require three to five years before yielding a full crop, with another one to three years of aging for wine to be ready for sale. Unlike many industries, once vineyards and wineries are established they are effectively rooted and tied in place – a New Jersey vineyard cannot simply be relocated to another region or outsourced to another country.

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<sup>1</sup> <https://www.esa.gov/sites/default/files/sandyfinal101713.pdf>

## ECONOMIC IMPACT OF NEW JERSEY WINE AND VINEYARDS – 2016

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 2016, there were 50 wineries in New Jersey producing wine, up from 31.6% from 38 wineries in 2011. Based on information collected from the Garden State Winegrowers Association, total wine produced in New Jersey in 2016 was 702,671 gallons (after adjustment for Kedem winery), or approximately 295,488 nine-liter equivalent cases. Gallons produced was up 73.6% from 405,954 gallons (or 170,712 cases) produced in 2011. As a result of our contact with these wineries, we estimate that roughly 69.5% of this wine came from grapes grown and sourced in New Jersey. The growth of wineries in the state has so far kept pace with the growth of overall grape production as well as the increased demand for wine in state.

Based on our research and interviews with winery owners, the state's wineries provided employment for approximately 365 full-time equivalent jobs in 2016, with a payroll totaling approximately \$8.70 million. Wineries employ full and part-time workers for bottling, storage, maintenance and winemaking needs in addition to the traditional hospitality (tasting room), finance, sales and marketing functions. Many wineries also employ seasonal workers, particularly during harvest season.

In 2016, New Jersey was one of the smaller wine producers in the United States but still ranked 13 out of 50 states (all states have at least one winery). 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.

**Table 4**  
**Top States' Annual Gallons Produced in 2016**

Rank	State	Total Produced (Gallons)	% of Total
1	California	707,362,715	84.40%
2	Washington	41,513,161	4.95%
3	New York	30,658,310	3.66%
4	Pennsylvania	12,419,122	1.48%
5	Oregon	12,015,762	1.43%
6	Ohio	5,943,836	0.71%
7	Michigan	2,696,120	0.32%
8	Kentucky	2,176,059	0.26%
9	Vermont	2,172,526	0.26%
10	Virginia	2,157,395	0.26%
<b>13</b>	<b>New Jersey</b>	<b>1,901,492</b>	<b>0.23%</b>
---	All Others	17,098,875	2.04%
	<b>Total</b>	<b>838,115,373</b>	<b>100.00%</b>

As mentioned earlier, most of New Jersey's wine is sold directly to consumers or direct to trade (restaurants and retail shops). Roughly 15.4% of the wine produced in New Jersey is distributed through the three-tier distribution system, of which only a few of the larger New Jersey wineries use. Since wineries generate significantly more margin by selling direct, we anticipate New Jersey wineries will continue to focus their selling efforts on selling wine direct in the near-term. However, as the industry and the state's wine production increase in the future, we believe more wine will have to be sold through the three-tier system to satisfy consumer demand as well as reach new consumers.

The retail value of New Jersey wine sold in 2016 is estimated at \$29.53 million with actual sales generated by the wineries themselves totaling \$25.47 million, which include sales to consumers in the winery tasting rooms, wine clubs, winery mailing lists and e-commerce/Internet sales. The channel margins from retail, restaurant and distributor sales were only \$4.52 million in 2016. In addition, excluded from all of these figures was the additional \$2.32 million generated in non-wine revenue associated with wineries hosting special events/weddings and selling various merchandise on-site.

### **GRAPE PRODUCTION**

In 2016, we estimated 151 commercial growers operating in New Jersey, up from 115 commercial growers in 2011. These growers had a combined estimated acreage of 1,582 bearing acres, an increase of 23.3% from 1,283 bearing acres in 2011. Based on survey responses from vineyards in the state, we estimate that the average yield in New Jersey over the past three years was 1.93 tons of grapes per planted acre. Given the relatively harsh climate in this part of the country relative to more favorable growing conditions on the West Coast (California, Oregon and Washington), low yields are not entirely uncommon; however, if New Jersey 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. It will also be important for the industry to continue increasing the available grape-bearing acreage to support future industry growth. Research performed by Rutgers University shows the state has a tremendous amount of potential to increase grape production and acreage in New Jersey based on key growing factors like climate, soil drainage and slope. An investment in these agricultural improvements will only add to the overall economic impact of the industry in the future.

As shown below, New Jersey is not in the top ten in the United States in terms of grape production or bearing acreage. While we cannot accurately determine the state's ranking in terms of grape bearing acreage, it is likely in the top twenty in the country with about 1,582 acres of planted vineyards according to the data from our survey.

**Table 5  
United States Grape Production, 2016  
(Ranked by 2016 Total Production)**

<b>Rank</b>	<b>State</b>	<b>2016 Bearing Acreage (all types of grapes)</b>	<b>2016 Total Production (Tons)</b>
1	California	841,000	6,726,000
2	Washington	73,000	488,000
3	New York	37,000	171,000
4	Michigan	12,600	93,400
5	Pennsylvania	13,000	85,800
6	Oregon	23,000	67,000
7	Texas	4,500	13,600
8	Virginia	3,400	8,500
9	Ohio	1,500	5,500
10	Missouri	1,700	5,330
	Others	2,300	4,900
<b>Total U.S.</b>		<b>1,013,000</b>	<b>7,669,030</b>

Wineries in the state of New Jersey rely heavily on wine grapes grown in state (roughly two thirds of all wine is made from state-grown grapes), which generally contributes to lower costs. By continuing to increase the grape quality and amount of New Jersey acreage available for grape production, the New Jersey wine industry can rely less on grapes produced outside the state while in turn building more credibility and a stronger reputation for wine quality as well as potentially reducing costs.

**VINEYARD DEVELOPMENT**

Vineyard development is the process of converting land into a developed vineyard. The land must be prepared to plant vines. Once the vine is planted it must be trellised and trained, and from the time a vine is planted in the ground, it can take between three to four years before the vine bears fruit. During this time, pre-productive (non-fruit bearing) vines must be tended and cared for in accordance with sound viticultural practices to ensure healthy productive (fruit bearing) vines.

The vineyard development process is very capital and labor intensive, with development costs for wine grapes in New Jersey averaging approximately \$8,368 per acre, excluding land acquisition costs. This approximate cost includes all land preparation, capital improvements, vine layout, planting and trellising, vines, irrigation, materials and equipment, farming costs, direct and allocated overhead, utilities, property taxes, and financing costs during the pre-productive period. In addition, we also surveyed all vineyard owners on their annual maintenance costs per vineyard. The average maintenance cost was approximately \$5,000 per vineyard. This cost includes any capital improvements made to each vineyard. Based on the acreage and maintenance cost outlined above, we estimate that there was over \$7.91 million in vineyard development and maintenance revenue generated in New Jersey in 2016.

The most important determinant of the cost of planting a vineyard is the vine spacing. Grape growing regions use various vine spacing based upon environmental site attributes, desired grape flavors, and development cost considerations. Regardless of the ultimate development plan selected, the investment in terms of capital and time required is significant. Vineyard owners and their employees do the majority of vineyard development in New Jersey, with the assistance of vineyard development consultants in some cases.

### **VINEYARD EMPLOYMENT**

Many New Jersey 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, many grape growers in New Jersey manage smaller vineyards and can do so without outside labor. Based on our research, the median vineyard size was approximately nine acres for all vineyards, including those owned and operated by both wineries and independent grape growers. Based on surveys with wineries and vineyard owners, approximately 366 full-time equivalent workers were employed in the vineyards in both a development and ongoing vineyard maintenance/development capacity for a total payroll of approximately \$10.14 million in 2016.

### **COMMUNITY SUPPORT**

Based on our estimates, wineries and growers throughout the state of New Jersey have donated approximately \$300,000 to charities in 2016, 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. Many different types of small businesses exist in New Jersey that supply the wine and grape industry as a portion of their overall business. These firms include bottle suppliers, farming chemical providers and label producers. As the New Jersey wine industry continues to grow, so will the number of ancillary businesses that supply the industry. By our estimate and based on feedback from wineries, vineyards and other industry sources, there were eight employees working at various industry suppliers that are focused on the wine and grape industry. Total wine or grape-related revenue was approximately \$7.91 million while compensation was approximately \$1.19 million.

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

State and regional organization support is critical to the success of the renewed industry. New Jersey's state, regional and private organizations need to become more prominent in the industry in order to become more effective and organized at supporting and promoting the local wine industry. The Garden State Wine Growers Association in particular, however, has demonstrated leadership and support to the industry, which is helping drive growth of the industry and get much needed attention from New Jersey's state and local governments.

In order for the New Jersey wine industry to continue its successful growth of wineries from 2011, 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 New Jersey 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 New Jersey wine industry, including intangible benefits is much greater. This conservative approach is consistent with our analysis in 2011. As a result of our analysis, we estimate that the measure of economic impact is approximately \$323.02 million within the state of New Jersey, for an industry that is a unique partnership of nature, entrepreneurship, artistry and technology.

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

## **METHODOLOGY**

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### **DATA COLLECTION**

Data for this study was collected from a variety of public sources supplemented by primary research with wineries, suppliers, growers and other economic entities and supported by a variety of studies undertaken by industry and professional organizations. For several data items, the numbers provided are only partial, given the limited availability of information, and therefore are considered conservative.

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

All economic activities have “ripple” effects: employment of one person creates economic activity for others, whether the salesman who sells the employee a car or the restaurant where she eats lunch. Economic impact studies endeavor to measure those “ripples” as well as the direct activity, to help assess the impact of the potential gain or loss of an industry.

Economic impact studies estimate the impact of an industry in a defined geographic region by identifying and measuring specific concrete and economic events, such as the number of jobs, the wages, taxes and output generated by each job.

IMPLAN<sup>2</sup> is the acronym for “**IM** impact analysis for **PLAN**ing.” IMPLAN is a well established and widely used economic model that uses input-output analyses and tables for over 500 industries to estimate these regional and industry-specific economic impacts of a specific industry.

The IMPLAN model and methodology classifies these effects into three categories, Direct Effects, Indirect Effects and Induced Effects.

Direct Effects are economic changes in industries *directly* associated with the product’s final demand. Thus, direct effects consider the direct employment and spending of wineries, vineyards, distributors and immediately allied industries.

Indirect effects are economic changes – income created through job creation in industries that supply goods and services to the directly affected industries noted above. For example, the purchases of electricity and gasoline by wineries and of cash registers purchased for a tasting room.

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<sup>2</sup> IMPLAN is the standard economic model for economic impact studies, developed by the University of Minnesota and the US Forestry Service in the 1980s and currently used by over 1,500 organizations, including most federal, state and local organizations. For more information on IMPLAN, go to [www.implan.com](http://www.implan.com).

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

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

### **ABOUT FRANK, RIMERMAN + CO. LLP**

Frank, Rimerman + Co. LLP, founded in 1949, is the largest, locally-owned provider of accounting and consulting services in California. With offices in San Jose, Palo Alto, San Francisco and St. Helena, California, New York, New York and over 200 professionals, Frank, Rimerman + Co. LLP offers strategic business and information consulting services, tax consulting and planning, audit and financial reporting, accounting services, litigation and valuation services.

Frank, Rimerman + Co. LLP is the leading research source on the U.S. wine industry. We continue to strive to raise the bar on the quality of information and analysis available to the wine industry.

Frank, Rimerman + Co. LLP produces original research on the business of wine and wine market trends, publishes a number of industry studies and provides business advisory services and conducts custom business research for individual companies and investors.

Frank, Rimerman + Co. LLP has a dedicated Wine Business Services practice which lists many wineries, vineyards, industry suppliers and industry trade organizations as clients. Services provided include:

- Economic impact studies
- Custom industry research
- Financial benchmarking
- Financial audits, reviews and compilations
- Income tax consulting and compliance
- Business valuation
- Financial modeling and business plan development
- Accounting services
- Enterprise sustainability
- Transaction readiness
- Business planning and general winery consulting

## **FRANK, RIMERMAN + CO. LLP PUBLICATIONS**

### ***Grape Trends***

By combining the annual crush and acreage reports into one easy-to-use quick reference guide, Grape Trends provides, in one source, all the information needed to make informed decisions about California's grape supply for production planning. Provided in electronic form, Grape Trends includes a complete summary of current, past (since 1997) and projected tons, prices, and bearing acres for all of California's major grape growing regions and counties for all varieties recorded, including: Chardonnay, Sauvignon Blanc, Cabernet Sauvignon, Merlot, Syrah, Zinfandel, and Pinot Noir.

### ***Grape Price Analysis Tool***

The Grape Price Analysis Tool enables users to take a deep dive into the California Grape Crush Report and analyze estimated bottle prices in relation to tonnage prices. The tool makes the data from the Crush Report easy to access and provides actionable results to help determine tonnage prices based on an estimated finished bottle price.

### ***Economic Impact Reports***

Frank, Rimerman + Co. LLP completed the first study of the Impact of Wine, Grapes and Grape Products on the American Economy for Wine America, the Wine Institute, Winegrape Growers of America and the National Grape and Wine Initiative as well as the first economic impact study of the Wine and Grape Industry in Canada. Additionally, Frank, Rimerman + Co. LLP produced economic impact studies for the following US states: Arkansas, California, Illinois, Iowa, Michigan, Missouri, New York, North Carolina, Ohio, Illinois, Pennsylvania, Tennessee, Texas, Virginia and Washington.

## ECONOMIC IMPACT OF NEW JERSEY WINE AND VINEYARDS – 2016

Recent Economic Impact Studies and Updates published by Frank, Rimerman + Co. LLP include the following:

- Economic Impact of Wine and Wine Grapes in North Carolina 2016
- Economic Impact of Wine and Wine Grapes in Ohio 2016
- Economic Impact of Wine and Grapes in Canada 2016
- Economic Impact of Texas Wine and Vineyards 2015
- Economic Impact of Virginia Wine and Vineyards 2015
- Economic Impact of Kentucky Wine and Wine Grapes 2014
- Economic Impact of North Carolina Wine and Wine Grapes 2013
- Economic Impact of Missouri Wine and Wine Grapes 2013
- Economic Impact of Texas Wine and Vineyards 2013
- Economic Impact of Wine and Wine Grapes in Iowa 2012
- Economic Impact of Wine and Wine Grapes in Ohio 2012
- 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