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**The Global Urban Winery Crush:
Model, Forecast and Prospect**

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THE GLOBAL URBAN WINERY CRUSH: MODEL, FORECAST, & PROSPECT

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Abstract

Keywords: wine, urban winery, history, global, purist model, blended model, oenotourism

When cash-strapped Pierre Lafond opened Santa Barbara Winery, the first urban winery of its kind, in downtown Santa Barbara, CA in 1964, he did not realize that his model one day would become a global movement. Now, after 50 years, the urban winery and movement has burst beyond its initial urban dwelling to over 200 urban wineries on four continents. What initially began as a practical and cost-wise decision by Lafond, against the prohibitively expensive and traditional rural winery-vineyard combination, has ripened into a globalized phenomenon. True to its urban appellation, the urban winery and movement has converged with the recent and on-going gentrification and urban renewal taking place across America and abroad. More importantly, the urban winery and movement has not only captured the attention of world-renown wine critics, such as Robert Parker, but also the newest generation of oenophiles, the Millennials. Indeed, the urban wineries' recent successes mirror those of their sibling industries: beer and spirits. Because the urban winery and movement has and will continue to grow globally, it needs to be adequately examined and defined. As such, an *urban winery* must meet two criteria: first, it is a premise in which wine is produced for consumption or sale within a defined territory or area of more than 2,500 people; second, it is categorized first into one of three "purist" or commercial winery models (proprietary, custom crush, or DIY), then, if applicable, a following "blended" model that incorporates one or more of these functions: gastro, entertainment, oenotourism, and education. Just as humans began to cultivate grapes in the first vineyards millennia ago, globalized grapes are being crushed under humanity's monumental and historical migration from the rural environment into the urban one – a migration marked by the advent of the urban winery. In the end, the urban winery and movement reminds oenophiles everywhere that there is more than one way to crush a grape.

I. Introduction

I've had enough, I'm getting out to the city, the big big city.

- "Big Time" by Peter Gabriel

The history of wine spans millennia. Tracing its roots back to ancient Mesopotamia around 6,000 B.C., viticulture and oenology were staples of the rural environment (*The New York Times*,

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Urban Winery

2007). Wine techniques, production, and trade quickly spread along the first globalized trade routes across the Silk Road into Asia and around the Mediterranean Sea by the Phoenicians, Greeks, and then the Romans. Soon wine could be found in the frontiers of the Roman Empire and the dynastic courts of ancient China.

As time progressed, wine production and consumption grew despite a smorgasbord of religious, social, environmental, political, and economic challenges. Christian clergy kept the traditions of wine-making alive as Europeans stumbled through the Dark Ages. The French wine industry barely survived the environmental devastation wreaked by the *phylloxera* outbreak in 1855. Prohibition marked the political apex of the Temperance Movement in both the United States and Canada which significantly curtailed both domestic alcohol industries for over a decade. The recently documented uncertainties of global climate change cast a long shadow on the viability and sustainability of huge areas of wine production. Notwithstanding these challenges, the fundamental nature of viticulture and oenology remained unchanged: it was still a principally rural enterprise.

However, the rise of the urban winery phenomena over the last five decades in the U.S. has liberated wine production from its traditionally rural confines. With the assistance of technological, logistical, and environmental developments, the grape's inherent fragilities no longer restrict it to the environs of the vineyard and nearby winery after the harvest. Indeed, industrial urban wineries have existed near metropolitan wine producing areas around the world for some time. However, the urban winery that Pierre Lafond established in 1964 in Santa Barbara, CA was something exceptional. What initially began as a practical and cost-wise decision by Lafond, against the prohibitively expensive and traditional rural winery-vineyard combination, has converged with the recent, on-going gentrification and urban renewal taking place across America and abroad. Since then, the trending urban winery and movement has thrust wine production into the urban landscape on a global scale. From the U.S. to Canada to England to South Africa to China, urban wineries are popping up in rapid succession with over 200 urban wineries worldwide. This paper seeks to make two points: first, identify the urban winery and movement; second, to provide a uniform urban winery model. As such, *an urban winery must fulfill two criteria: first, it is a premise in which wine is produced for consumption*

Urban Winery

or sale within a defined territory or area of more than 2,500 people; second, it is categorized into one of two distinct models: “purist” or “blended”. The “purist” model is a commercial winery that can combine one or more functions: custom crush, do-it-yourself (DIY), or proprietary labels. Meanwhile, the “blended” model follows the “purist” arrangement(s), but also combines one or more of the following functions: gastro, entertainment, oenotourism, and education. In some ways, history has repeated itself. Just as grapes followed in the footsteps of the agricultural revolution into the vineyard, grapes now are following humanity’s monumental and historical migration from the rural environment into the urban one – a migration marked by the urban winery and movement.

II. Defining Urban Winery

A. Framing the Urban Winery

There has been no academic or scholarly endeavor to ascertain the *urban winery and movement* thus far. There are many possibilities for this. Perhaps the most plausible explanation is that the winery has generally been assumed to be inherently pastoral in nature because of its close affiliation with *terroir* and proximity to the vineyard. Moreover, wineries were never categorized as either rural or urban; wineries were just wineries.

At first glance, it would seem urban wineries are a completely new business model in the wine industry. Yet, this is far from the truth; the urban winery’s genetic roots trace back over 100 years. It is estimated that up to 40 urban wineries existed in downtown San Francisco in 1905 (Bonné, 2011). But it is doubtful that the industrialized wine production centers of a century ago engaged the public’s oenological enthusiasm in the same way that the urban winery and movement do today. On the contrary, the modern urban winery espouses a desire “to be another piece to the fabric of the city”, not just an isolated industrial wine production facility (Bonné, 2011). Some urban wineries even tout their

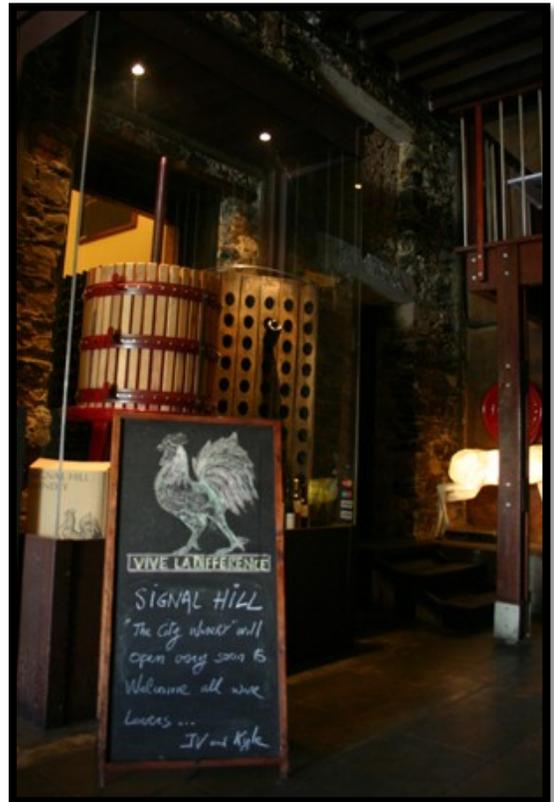


Figure 1 Signal Hill Urban Winery, Cape Town, South Africa, courtesy Signal Hill Urban Winery

Urban Winery

urban appellation in their names, such as the *Vancouver Urban Winery* in Canada or the *PDX Urban Wineries* alliance in Portland, Oregon. The urban winery is not just a community winery in an urban setting; it is a part of a budding movement that is expanding from state to state and continent to continent. But first, the ground rules for what an *urban winery* “is” must be established.

B. Competing Definitions for Urban and Winery

Unfortunately, *urban winery* is not defined by either the *Merriam-Webster* or the *Oxford-English* dictionaries. But the term’s two components, *urban* and *winery*, when identified separately, reveal significant interpretations between local, national, regional and global regimes. Luckily, two of the greatest wine producing areas, the U.S. and Europe, provide substantial legal support in their respective civil codes to decipher the best and most accurate understanding for both terms. These are reconciled with supranational organizations, such as the United Nations (UN) and World Trade Organization (WTO), which have provided some interpretations both in official pronouncements and legal disputes. It is noteworthy that U.S. and Europe have such robust definitions because, as will be pointed out later, they were the birthplace and are now the incubators for the urban winery movement. In the end, it is essential to establish a concise definition for both terms separately, before constructing a new, blended definition for the *urban winery* combo.

1. Urban

The first step in describing the urban winery is to find a suitable definition for *urban*, but *urban* has not been the only term used to describe this novel winery model. *Beverage World* (2009) has described them as *concrete* wineries, while wine journalist, Ty Strenk (2009), has referred to them as *city* wineries. It is important to point out that *urban*, *concrete*, and *city* are used as adjectives to describe the noun *winery*. Surprisingly, no commentator has advanced *metropolitan* or *metro* as a suitable descriptor. Despite these alternate descriptors, the media commentaries and discussions have selected *urban*, perhaps unknowingly, as *urban* has been the most frequently cited and broadly used descriptor.

The *Merriam-Webster* (2014a) defines the adjective *urban* as that “of or relating to cities and the people who live in them”. But this definition lacks depth, clarity, and precision. As mentioned earlier, the U.S. and two supranational organizations, the European Commission (EC) and United Nations (UN), have specific organizations devoted to determining what qualifies as *urban*.

a. U.S. Census Bureau

The Census Bureau refined its definition of *urban* when it conducted the 2010 census. It classified *urban* as:

All territory, population, and housing units located within urbanized areas (UAs) and urban clusters (UCs), both defined using the same criteria. The Census Bureau delineates UA and UC boundaries that represent densely developed territory, encompassing residential, commercial, and other nonresidential urban land uses. In general, this territory consists of areas of high population density and urban land use resulting in a representation of the "urban footprint." Rural consists of all territory, population, and housing units located outside UAs and UCs. (Census Bureau, 2014).

The Census Bureau continues to note that urban areas (UAs) have 50,000 or more people and urban clusters (UCs) contain at least 2,500 people but less than 50,000 (2014). Utilizing this classification system, it delineated 486 UAs and 3,087 UCs (2014). Further, it estimates that roughly 81% or 249 million people reside in urban areas (2014). This is the highest level of urban residents by percent ever and reflects the monumental migration from rural to urban areas presently occurring in the U.S.

b. Supranational Governance: EC & UN

The EC statistical organization, Eurostat, has created what at first glance would appear to be a less complex explanation for *urban*:

The Urban-rural typology is based on a classification of grid cells of 1 km² as either urban or rural. To be considered as urban, grid cells should fulfil two conditions: a

Urban Winery

population density of at least 300 inhabitants per km² and a minimum population of 5,000 inhabitants in contiguous cells above the density threshold (EC Eurostat, 2014).

But this definition does not include the more overarching complex standard that the EC uses to determine the urban environment: NUTS (*Nomenclature des Unités Territoriales Statistiques*). NUTS methodology collapses EU territory into 1 km² grid cells and then assesses the cells by how their populations are clustered in those grid cells in order to assign a NUTS classification. The cells are then classified into three different levels: predominantly urban, intermediate, and predominantly rural (2014). Eurostat found that 316 areas are *predominantly urban* and 496 areas are *intermediate* (2014). Even though both the Census Bureau and Eurostat diverge on their methodology, they are similar in the way they discern urban by measuring a set territory with its population. This is not the case for the UN, which relies on a completely qualitative approach, rather than one of the former quantitative methodologies.

The UN Statistics Division official pronouncements provide a squishy and broad definition for *urban*. Per the UN, urban areas provide a “different way of life and usually a higher standard of living” (UN Statistical Division, 2014). As the UN concedes, there is no internationally accepted definition for *urban*:

Because of national differences in the characteristics that distinguish urban from rural areas, the distinction between the urban and the rural population is not yet amenable to a single definition that would be applicable to all countries or, for the most part, even to the countries within a region . . . In many industrialized countries, this distinction has become blurred and the principal difference between urban and rural areas in terms of the circumstances of living tends to be a matter of the degree of concentration of population (UN Statistical Division, 2014).

Because the UN’s definition is vague and Eurostat’s methodology is overly complex, **the Census Bureau’s definition for *urban* will be adapted to denote a territory or area of more than 2,500 people.** While there is sizeable differentiation for the term *urban*, the term *winery* is even more varied.

2. Winery

Merriam-Webster defines a winery as a “place where wine is made” (2014b). Regrettably, this is an oversimplified explanation as there are a variety of legal interpretations for *winery* that differ from the local up to the global levels of governance as manifested by the U.S., Canada, and World Trade Organization (WTO).

a. U.S. Federal, State, & Local Variations on Winery

Since Prohibition’s repeal under the 21st Amendment, alcohol laws and regulations have experienced numerous challenges, interpretations, and revisions. This has created a latticework of codes, regulations, and laws that vary at the each level of government (Beliveau & Rouse, 2010). As a result, the various legislative histories reflect their unique interests in the alcohol industry, especially the wine industry. The states of Virginia, New York, and California are cases on point.

To being, the U.S. Government’s Code of Federal Regulations (CFR) does not define *winery*. The CFR states that a *wine premise* is that “which wine operations or other operations are authorized to be conducted”, while a *bonded winery* is that “which wine production operations are conducted and other authorized operations may be conducted” (27 CFR §24.10). On contrary, if the CFR’s definition for both a *wine premise* and *bonded winery* are distilled into one, the byproduct is a definition of *winery* that is similar to *Merriam-Webster*’s.

Even though Thomas Jefferson, the third U.S. president, tried unsuccessfully to plant vineyards at his estate in Monticello with vines carried over from France, Virginia now is a rising wine state with over 250 wineries (Virginia Wine, 2014). As such, the Virginia General Assembly has provided various statutes governing wine and wine production that have an overwhelmingly rural depiction. One section of Virginia’s statutory definition for *farm winery*:

means an establishment (i) located on a farm in the Commonwealth with a producing vineyard, orchard, or similar growing area and with facilities for fermenting and bottling wine on the premises where the owner or lessee manufactures wine that contains not more than 18 percent alcohol by volume (Code of Virginia §4.1-100, 2014).

Urban Winery

While Virginia law rings with a rural tone, the East Coast's leading wine producing state, New York, takes a different approach.

New York state's grape and wine industry accounted for nearly \$4.8 billion in 2012 with over 1,400 vineyards and 350 wineries (Tresize, 2014). The economic prowess of New York's grapes in the vineyard and wine in the bottle has been matched by its progressive legal tradition manifested in its laws. The New York State Legislature has not only laid out a singular definition of *winery*, but has also expanded *winery* to include *micro* (§3.20-b), *farm* (§3.12-a), and *custom crush facility* (§3.9-b). Per the New York Alcoholic Beverage Control Act:

"Winery" means and includes any place or premises wherein wines are manufactured from any fruit or brandies distilled as the by-product of wine or other fruit or cordials compounded and also includes a winery for the manufacture of wine in any state other than New York state . . . (§3.37, 2014).

The inclusion of a *custom crush facility* under the definition of *winery* is a novel and important step by the legislature. Many of the urban wineries in New York City that are pioneering the movement, such as *City Winery*, qualify under this important provision.

Tracing its wine roots to the early Spanish missionaries, California is not only the largest wine producing area in the U.S., but also one of the largest in the world. Unlike Virginia and New York, *winery* does not appear in the California codes. Rather, California has chosen a more simplistic approach. It places the intent of *winery* under the term *winegrower* which "means any person who has facilities and equipment for the conversion of grapes, berries or other fruit into wine and is engaged in the production of wine" (California's Alcohol Beverage Tax Law §23013, 2014).

As one of the leading wine producing American Viticulture Areas (AVA) in California, Napa's interpretation, definition, and expansion of winey is noteworthy because it exemplifies the differentiation between federal, state and local alcohol laws. The Code of Napa County defines a

Urban Winery

winery as “an agricultural processing facility used for: (1) the fermenting and processing of grape juice into wine; or (2) the fermenting of still wine into sparkling wine” (Ordinance No. 947 §12047, 2002). Napa County’s *winery* is more descript than the state of California’s *winegrower*, shorter and more concise than the state of Virginia’s *farm winery*, and meets the basic guidelines for both *wine premise* and *bonded winery* established by CFR. However, Napa County exercised local discretion with the inclusion of sub-section (2). Whatever the reason for this inclusion, Napa’s ordinance characterizes the legal and constitutional balancing act that occurs in the U.S. between the federal, state, and local alcohol laws.

b. British Columbia’s Winery

Since its first vineyard planting in 1859, British Columbia has expanded to over 215 wineries and 9,800 acres of vines (Wine of British Columbia, 2014). Even though the U.S. and Canada are different countries, their wine laws are not that dissimilar. British Columbia’s legislature, almost mirroring the CFR’s *wine premise* and *bonded winery*, notes that a *winery* means the “establishment in respect of which a winery licence is issued” in connection with a winery licence that means a “licence issued . . . to a person who produces or manufactures wine in British Columbia” (B.C. Reg. 244/2002, 2014).

c. WTO

The WTO was established in 1995 when it assumed the previous responsibilities of the General Agreement on Tariffs and Trade (GATT). Unlike the UN, the WTO has specific duties and responsibilities with regards to international trade among its 159 member nations (WTO, 2014a). Eventhough it is an integral part of global trade, the WTO does not interfere with its member nation’s internal legal definitions or terms, but it has on occasion sought to delineate certain key terms for the purpose of negotiating agreements or settling disputes. Two such occasions that precipitated the WTO to assess, but not define, *winery* took place in 1985 and 1992. Even if *winery* was not defined in these two disputes, they reveal the difficulty and reticence that supranational organizations have in defining common terms and phrases.

In 1985, the American Grape Growers Alliance for Fair Trade filed a petition with the U.S. Government against the European Economic Community (EEC) claiming that some European

Urban Winery

table wines were being sold below fair value price because of EEC subsidies (WTO, 1986). In order to arbitrate the dispute, GATT had to establish how and to what extent grape-growers were distinguishable from wine producers in both the U.S. and Europe, as well as how inter-related the industries were. While GATT and the other parties did not define *winery*, the panel surmized that wine was produced from grapes within a defined premises, contextually a *winery*. In the end, GATT deemed the U.S. and European wine industry substantially different and ruled in favor of the EEC.

The U.S. and Canada squared off in 1992 over the non-tariff barriers to trade (NTBs) in regards to alcohol products that were distributed, taxed, and sold throughout the U.S. under the various post-Prohibition state alcohol regimes (WTO, 1992).² Canada asserted that these were, ineffect, a major NTB in violation of GATT trade principles. The WTO agreed and struck down the U.S.'s "inconsistent federal and state measures" (1992). Even though this dispute focused on the NTB issue, the panel found "winery" in the same context of "wine-grower" and "farm winery" (WTO, 1992).

To round out the meaning of *winery* from the smorgasboard of analagous terms (*wine-grower*, etc), **a winery is a place where wine is made per *Merriam-Webster Dictionary* (2014b). Therefore, an urban winery is a place where wine is made within a territory or area of more than 2,500 people.** Before assessing the urban winery models, a brief look at the pre-cursors of the current urban winery and movement, the modern breweries and distilleries, is in order.

C. Trail-Blazers for the Urban Winery: Distilleries & Breweries

The emergence of the urban winery movement is analogous to the recent revival and astounding global growth of breweries and distilleries over the last three decades.

The American "craft beer trend" was pioneered by Fritz Maytag when he established Anchor Brewing Company in San Francisco in 1971 (Elzinga, 2011). After experiencing double digit growth for the last four years, breweries currently number above 2,500. This is the most since the

² Indeed, the post-Prohibition regimes are one of the biggest hurdles that urban wineries face when starting-up.

Urban Winery

end of Prohibition (Rotunno, 2013; *CBS News* 2014). Additionally, Kenneth Elzinga points out that “wine and beer are sibling industries. Like siblings, there may be disagreements on many topics, but there is no denying a family connection” (2011). It seems that the same is true for the spirits industry. The American Distilling Institute’s President Bill Owens keenly observed that their “renaissance” is shared with beer and wine (Steinmetz, 2012). For some historical perspective, the *Economist* attested that in the 1700s “one in four London houses boasted a still”, but by the 1900s, only Beefeater was distilled in London (*Economist*, 2010). In the U.S., *Time* reporter Katy Steinmetz found that micro-distilleries have grown from just 250 in 2005 to over 400 in 2013 (Stall, 2013; Steinmetz, 2012). More interesting still, Steinmetz’s research tracked the distillery revival back to wineries in California. She found “American craft-distilling traced to the work of a couple grape-based California outfits in 1982 . . . many micro-distillers were still set up at wineries, producing products such as brandies on the side” (2012).

Breweries and distilleries do share many of the same descriptors, such as *artisanal*, *micro*, and *craft*, even though they are not defined as either urban or rural. This is probably due to the fact that their main ingredients (malt, barley, and grains) are not as fragile or temperamental as recently harvested and perishable grapes. This would explain why beer and spirits have been produced in both rural and, more importantly, urban environments for some time. Despite the fact that geography governed the production and accessibility of grapes, it would seem that geography played only a minor role in the recent revival of distilleries and breweries. Now there is “no longer a focus on climate or geography” for the alcohol beverage triangle of beer, wine, and spirits - only meal time (Elzinga, 2011).

III. Urban Winery Models

Because no categorization existed, wine journalists and commentators have advanced their own methodologies for classifying the urban wineries surrounding them. In 2008, John McKinsey observed that the urban winery model predominantly focused on proprietary wine production (2008). Three years later, wine journalist Talia Baiocchi laid out three categories: commercial winery, DIY winemaking facility, and DIY/commercial winemaking complex (2011). Indeed, the urban winery model has expanded beyond McKinsey and Baiocchi’s separate methodologies

Urban Winery

because of the various services that urban wineries now provide. Both observations are excellent barometers in the evolution of the urban winery movement from 2008 to 2011.

Because urban wineries are primarily a commercial winery, they must be categorized first under a “purist” model, then, if applicable, a “blended” model. Figure 2 illustrates the model layout to be discussed.

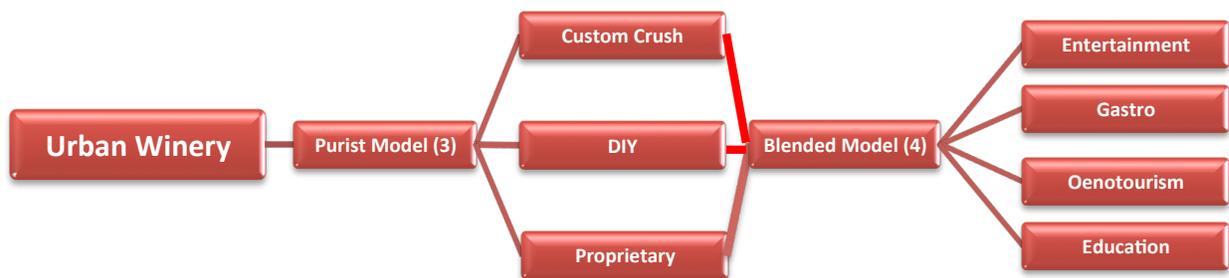


Figure 2

A. *Purist Model*

The essential function of the “purist” model is wine production. If the urban winery did not produce wine, it would simply be an expensively equipped wine bar or wine shop. The “purist” or commercial approach can take on many manifestations either as a proprietary, DIY, custom crush, or a combination of one or more of these winery functions.

1. Proprietary

The first urban wineries, such as Santa Barbara Winery in Santa Barbara and Edmunds St. John Winery in Berkeley, solely focused on proprietary wine labels made in-house with grapes sourced from proprietary vineyards or other nearby vineyards. The primary advantages of sourcing localized grapes was two-fold. First, sourcing local grapes was cheaper than transporting grapes from further afield. Second, quality and quantity control by the urban winery could be better assessed locally. Nowadays, globalization and the commoditization of grapes in concert with modern logistics has allowed grapes to be received in all corners of the globe. Unless conditions change drastically, this is the likely trend for most urban wineries. This is particularly true if the urban winery is established in a non-viticultural area or has a minimal

amount of locally available grapes, such as London Cru in London, England (London Cru, 2014; Moore, 2013; *BBC*, 2013). London Cru actually had to write off seven tonnes of French grapes as a result of the bad 2013 harvest and follow-on transportation spoilage (Millar, 2013). In the end, “the best wines are made from perfect grapes, wherever they’re grown or processed” concluded Ben Parsons of The Infinite Monkey Theorem urban winery in Denver, CO (Weinberg, 2011).

2. DIY & Custom Crush

Besides producing proprietary labels, urban wineries are providing customized or personalized production for their clientele. This is commonly referred to as DIY or custom crush wine (Baiocchi, 2011; McKinsey, 2008). It is not entirely clear when or where this offering first occurred and if it was new service provided by the winery or in response to a customer request. Either way, DIY and custom crush wine operations have become a full or partial business offering for many urban wineries.

One of the most publicized examples of a DIY urban winery is the now defunct Crushpad.³ It was created by software engineer Michael Brill in San Francisco in 2004 and expanded to a second location at Lynch Bages in Bordeaux, France in 2009. The basic premise behind Crushpad was to provide wine enthusiasts that could not afford their own winery or vineyard the opportunity to source and create their own wine under Crushpad supervision at its urban winemaking facility. Under Crushpad’s formula, personalized wine could be purchased in quantities as little as a few bottles up to multiple barrels. Customers also were allowed to choose their level of involvement in the overall winemaking process, from extremely active on one end of the spectrum to inactive on the other end. The concept proved to be successful and generated tremendous buzz. One urban winery that adopted the Crushpad formula was Dogpatch Wineworks. It opened in 2011 under the guidance of two previous Crushpad investors, Gifford and Kevin Doucet (Bonné, 2011). At that time Dogpatch counted on its roster “about 30 private clients, who are paying \$6,000 to \$10,000 per barrel, or about \$22 to \$35 per finished bottle, to make wine from a host of noted vineyards” (Bonné, 2011).

³ It is worth pointing out that Crushpad has now been rebranded into The Wine Foundry in Sonoma and Vinivwine in Bordeaux.

But not all oenophiles universally support the DIY concept. The concept has meet criticism from some wine commentators:

Eric Asimov, wine critic for the New York Times, asked his readers exactly why he should care about urban wineries. He questions the utility and significance of the second category of urban winery, the DIY facility. His conclusion is that he'd prefer to "spend my \$10,000 on some really good wine rather than on my own plonk" (Biaocchi, 2011).

Even if Crushpad is no longer in existence and its DIY/custom crush concept is not universally embraced, its concept has been rapidly adopted by many urban wineries.

B. Blended Model

The “blended” approach provides one or more services beyond the “purist” model which include: entertainment, gastro, oenotourism, and education. Besides complementing the urban winery’s wine creations, these services can generate additional income.

1. Gastro Experience

W.C. Fields famously said, “I cook with wine, sometimes I even add it to the food”. Wineries and vineyards have long offered a gastro experience to accompany their wine. Currently, urban wineries offer a wide menu selection from simple to complex dishes and cuisines that match all varieties of wallet sizes. For example, Henke Winery in Cincinnati provides customers with an economical and gracious “Two for Tuesday” deal that includes two glasses of wine, two pizzas, and two salads for \$22, while the City Winery franchise includes premium food and wine menu items at its New York City, Napa, and Chicago locations (Henke Winery, 2014; City Winery, 2014).

2. Entertainment

Most urban wineries boast music accompaniment as part of the tasting and drinking experience. These can range from a local musical soloist at a small urban winery to a Grammy-award winning band at one of the larger ones. However, music is not the only form of entertainment.

Urban Winery

Comics, dramatic plays, movie screenings, burlesque shows, and art viewings are just a sampling of the variety of entertainment options that urban wineries can incorporate into their promotional offerings. Even though many of these options remain strictly seasonal, single-run, or periodic, there are a handful of urban wineries that have incorporated one or more entertainment formats into their permanent repertoire, such as City Winery's extensive music venue and listings (City Winery, 2014).

3. Oenotourism

Wine sales, especially tastings, constitute the lion's share of oenotourism (Great Wine Capitals, 2014). Urban wineries across the U.S. have benefited by incorporating urban wine trails, communal websites, promotional events, and tours as part of their oenotourism offering. Indeed, oenotourism is alive and well in the urban winery model, just as it is in its rural counterpart.

4. Education

Wine education has become an integral part of oenotourism and the urban winery. The DIY model is perhaps the best at both capturing the educational perspective of winemaking and building a solid customer relationship. Chris Nelson, one of Crushpad's previous winemakers and founder of Bluxome Street Winery in San Francisco, pointed out that:

the urban winery is bringing the consumer closer to the winemaking experience and in some way — at the risk of sounding a bit too idealistic — integrating wine into the fabric of the community in a more meaningful way than a simple wine bar or retail space might . . . if we're pressing Viognier, we'll grab a glass and let you taste it (Biaocchi, 2011).

IV. History of the Urban Winery and Movement

A. First Urban Winery

The most important factor contributing to the start and rise of the urban winery movement remains the prohibitively high cost constraints imposed by the traditional vineyard-winery model. Tim Patterson from *Wines & Vines* estimated that buying and developing 20 acres of vineyard land with accompanying wine production and sales expenses can run between \$2 and \$3 million, before a single bottle is sold (2007). Urban areas offer a cheaper alternative. While

Urban Winery

square footage is very expensive across San Francisco, urban wineries were leasing pockets of affordability in industrial areas at well under \$1 per square foot in 2009 (Bonné, 2009). McKinsey ascertained that many new urban wineries “have chosen the more industrial but convenient setting as a short-term, get-established plan, and look to make a move, after a few years of success, to a more commercial setting” (McKinsey, 2008).

Pierre Lafond faced this same dilemma when he opened the first urban winery in Santa Barbara in 1964. But his decision pre-dated the larger trend that played out a decade later in northern California under the leadership of Steve Edmunds:

By the time Napa and Sonoma came of age in the 1970s, wineries - and the wine lifestyle - had shifted away from the city. Many properties were run by urban escapees who saw winemaking as a new rural way of life.

What paved the way for a reversal, curiously, was the very success of this model. As real estate prices rose in wine regions, so did construction and permit costs in what were increasingly designated as agricultural areas.

The alternative for cash-poor winemakers? Abandon the vineyards for less glamorous, less expensive space. Some rented warehouses; others turned to custom-crush facilities, where many labels are made under a single roof. These methods upended the concept of the estate winery, but by the early 1990s, no one much cared. (Bonné, 2009)

Urban wineries are no different from their rural counterparts with regards to varietal, locations of origin, or price points. But urban wineries may be uniquely positioned to better capture the economic benefits because of their location or close proximity to the urban and sub-urban customer base than their rural counterparts (McKinsey, 2008). It remains to be seen if urban wineries will create a ‘WholeFoods-effect’, thereby boosting the commercial and real-estate value of the area they inhabit (Doig, 2012).

Figure 3 U.S. Urban Winery Trend. Pierre Lafond *courtesy* of Paul Wellman and Steve Edmunds *courtesy* of GangofPour.com

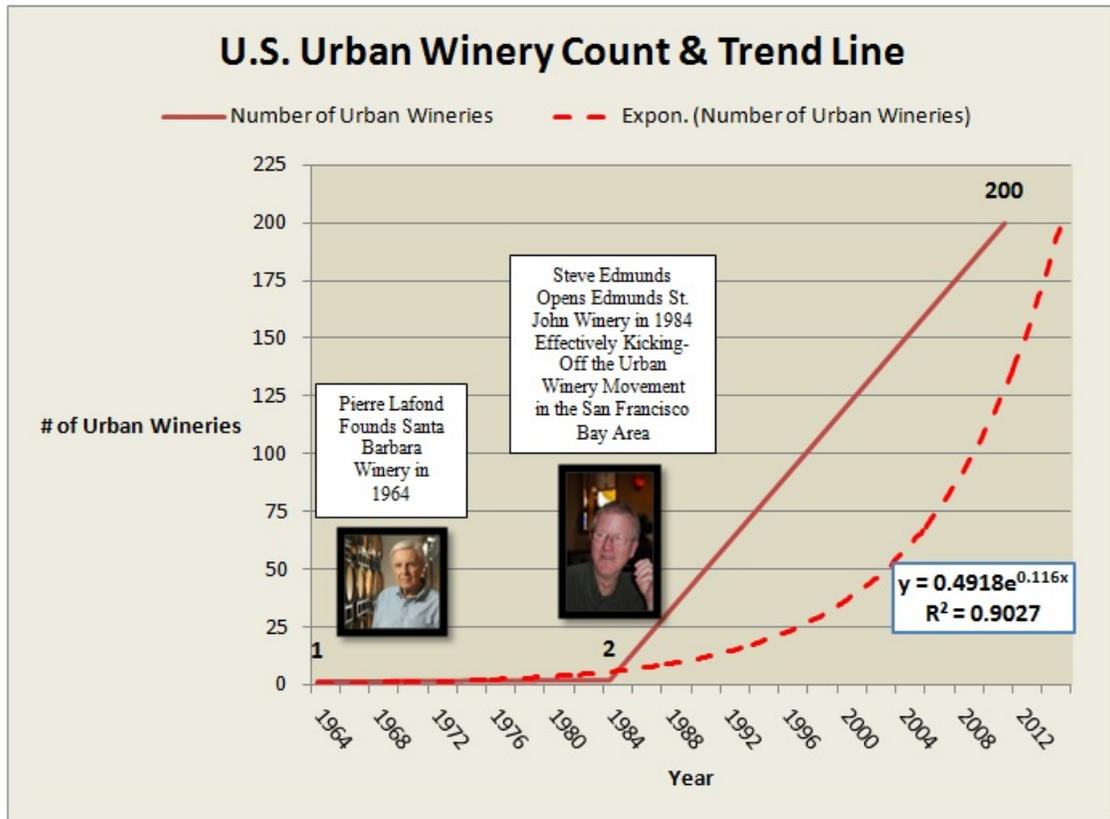


Figure 3 displays the upward trend in urban wineries while recognizing two of the urban winery and movement’s pioneers: Pierre Lafond and Steve Edmunds.

B. Movement Takes Hold

As the number of urban wineries began to rise in the last decade, many wine commentators and journalists began to articulate their impressions of the urban winery and movement. Baiocchi remarked that an urban winery:

Doesn’t just refer to a commercial winery in an urban space anymore. The revival [in urban wineries] has bred new concepts built around urban winemaking, with new ideological goals and sets of questions about what the cultural significance of each incarnation really is (Baiocchi, 2011).

She also conceded that urban wineries may be a force of wine “democratization” (Baiocchi, 2011). Finally, she acknowledged the added communal benefit of the urban winery:

Urban Winery

On a community level, commercial wineries that exist in urban areas are bringing local wine closer to urbanites in the same way California food visionaries created a new appreciation for local produce among the citified. In other words, they are — in some small way — rounding out the urban locavore experience (Biaocchi, 2011).

Biaocchi's comments reinforce the proposition that the urban winey has become intertwined with the larger gentrification and urban renewal movement currently sweeping through America's urban areas. To this point, Jon Bonné, *Decanter* columnist and *San Francisco Chronicle* Wine Editor, observed vintner as saying urban wineries only "want to be another piece to the fabric of the city" (2011). It would also seem that this movement embodies a wine counter-culture element as Bay Area wine writer Jessica Yadegaran echoes wine educator and historian Karen MacNeil's remarks:

The urban wine movement is a reflection of the "wild West spirit" of those late 1970s and early 1980s "mavericks," like Rosenblum, Berkeley's Steve Edmunds and Rick Longoria of Lompoc's Wine Ghetto."They developed their own wine equivalent of the counterculture, and it continues today" (2014).

Despite some of their avant-garde demeanor, urban vintners and garagistes' creations have grabbed some international acclaim. The world-famous wine aficionado Robert Parker has recognized the urban appellation's quality for decades:

Jeff Cohn of JC Cellars is what you'd call a Parker darling, regularly scoring above 90 points for his luscious syrahs and elegant zinfandels since he started the Oakland winery in 1996 (Yadegaran, 2014).

C. Potential Urban Winery Clientele

Many customers initially greet urban wineries with curiosity because the urban winery does not fit the concept of the traditional winery model. Either way, these concerns are quickly assuaged. Jay Shriver noted the experience of customers to Henke Winery in Cincinnati, Ohio:

"People had never seen anything quite like this before," says Joe of the barrel room/restaurant/tasting bar/retail shop known as Henke Winery. "But I think they've found a Cheers-like home they're comfortable with. We see a lot of locals who walk here, enjoy the food and wine, and then walk home (Shriver, 2008).⁴

Locally made wine does have its appeal. Ian Becker, manager of Arlequin Wine Merchant in Hayes Valley, notes that urban wineries are unique because "people want to drink locally, and even though these wines aren't grown locally, it fits into that ideal" (Bonné, 2009). In any event, customers in Ohio and San Francisco aren't the only ones drawn to the taste, flavor, and bouquet of urban wine. The newest generation of oenophiles, the 78 million strong Generation Y or *Millenials* (Solomon, 2013), are attracted to the novelty of the movement because they "are more adventurous and more willing to try new things" (McIntyre, 2013). In fact, *Millenials* are flocking to urban wineries because they favor the idea of "artisanal entrepreneurship over big business - with a more specific penchant for urbanizing the pastoral" (Baiocchi, 2011).

V. Urban Winery Forecast & Prospect

A. Status Quo of the Urban Winery Movement

There are now over 200 urban wineries currently in operation on four continents and in six different countries. Four of the biggest urban winery areas in the U.S. are San Diego, Portland, Seattle, and the San Francisco Bay area with 11, 11, 20, and 50 respectively (San Diego Urban Wineries, 2014; PDX Urban Wineries, 2014; Seattle Urban Wineries, 2014; East Bay Vintners Alliance, 2014; Yadegaran, 2014). New York City has three. Hong Kong, China and London, England initiated the first in those countries in 2013. It is no coincidence that most concentrations of urban wineries coincide with major wine producing states or countries. Even though the movement has not been detected in Argentina, Spain, Germany, or Australia. It is likely that urban wineries are planned or currently exist and need to be re-classified as such.

⁴ Unfortunately, it seems most Ohioans have forgotten their past as Ohio's wine industry stretches back to 1822 and was ranked 4th in U.S. wine production at the turn of the 20th century (Morrison, 1936).

Urban Winery

But there is also a correlation between the creation of urban wineries with major wine consumption areas that do not necessarily produce wine, such as London and Hong Kong. The movement will most likely expand into more major wine consumption areas, even if there is no corresponding wine production. Indeed, the beauty of the urban winery and movement is that a country does not necessarily have to produce wine in order to reap the benefits and services of an urban winery. It will be interesting to see if countries, such as Monaco or Jamaica, that fit this criteria will join the movement.

B. Forecast & Prospect

The biggest obstacle in counting and forecasting the movement is that urban wineries are not officially listed or dated as such on public records. The aforementioned methodology seeks to clarify this and reconcile the dearth of data. This disparity is manifested in the 116% growth rate forecasted on the trend line in Figure 3 which may prove to be an overestimation. Since this methodology proposes a new way of categorizing what otherwise would have been considered traditional wineries, it will prove beneficial for oenological researchers and urban winery enthusiasts. In any event, double digit growth of between 10-25% is more probable for the global urban winery movement moving forward.

VI. Conclusion

The world consumed \$168.3 billion worth of wine in 2012 (VINEXPO, 2013). The economic impact of the wine industry can't be understated. Urban wineries certainly will play a growing part in the overall economic success of the wine industry and may well become the industry's fastest growing segment. Michael Dorf, founder of the City Winery franchise, enthusiastically plans to "open new City Wineries in cosmopolitan centers around the globe" (City Winery, 2014). Oenophiles should relish in the urban winery movement's future vintages, as there is more than one way to crush a grape.

Appendices I

<i>Noted U.S. Urban Wineries</i>		
<i>State</i>	<i>City</i>	<i>Urban Winery</i>
New York	New York City	City Winery
	New York City	Brooklyn Winery
	New York City	Redhook Winery
California	Oakland	Adams Point Winery
	St. Helena	Andrew Lane
	Oakland	Aubin Cellars
	Alameda	Carica Cellars
	Oakland	Cerruti Cellars
	Oakland	Dashe Cellars
	Alameda	Ehrenberg Cellars
	Berkeley	Donkey and Goat Winery
	Berkeley	Eno Wines
	Berkeley	Edmunds St. John
	Oakland	Irish Monkey Cellars, LLC
	Oakland	JC Cellars
	Oakland	John Robert Eppler Wines
	Angels Camp	Prospect 772 Wine Co.
	Alameda	R&B Cellars
	Alameda	Rock Wall Wine Company
	Alameda	Rosenblum Cellars
	Oakland	Tayerle
	Oakland	Stage Left Cellars
	Oakland	Urban Legend
Emeryville	Urbano Cellars	
San Francisco	Dogpatch Winery	
San Francisco	Bluxome Street Winery	
San Francisco	VIE Winery	
San Francisco	Fat Grape Winery	
San Francisco	Stein Family Wines	
San Francisco	Von Holt Wines	

Urban Winery

<i>Noted U.S. Urban Wineries</i>		
<i>State</i>	<i>City</i>	<i>Urban Winery</i>
	San Francisco	Treasure Island Wines
	San Francisco	Winery SF
	San Diego	2Plank Vineyards
	Escondido	BK Cellars
	Vista	California Fruit Wine
	Solana Beach	Carruth Cellars
	Vista	Fifty Barrels Winery Group
	San Diego	San Diego Cellars
	La Mesa	San Pasqual Winery
	Leucadia	Solterra Winery & Kitchen
	Escondido	Stehleon Vineyards
	Escondido	Vesper Vineyards
	San Diego	Vinavanti Winery
	Carlsbad	Witch Creek Winery
	Santa Barbara	Sanford
	Santa Barbara	Sanguis
	Santa Barbara	Silver
	Santa Barbara	Carr Vineyards & Winery
	Santa Barbara	Santa Barbara Winery
Illinois	Chicago	City Winery
Colorado	Denver	Infinite Monkey Theorem
North Carolina	Cary	Chatham Hill Winery
Texas	Dallas	Times Ten Cellars
Tennessee	Nashville	City Winery (planned 2014)
Ohio	Cincinnati	Henke Winery
	Perry Village	Benny Vino Urban Winery
Oklahoma	Tulsa	Girouard Winery
Oregon	Eugene	Capitello Wines
	Eugene	Eugene Wine Cellars
	Eugene	J. Scott Cellars
	Portland	Bow & Arrow Wines

Urban Winery

<i>Noted U.S. Urban Wineries</i>		
<i>State</i>	<i>City</i>	<i>Urban Winery</i>
	Portland	Clay Pigeon Winery
	Portland	Division Winemaking Co.
	Portland	ENSO Winery
	Portland	Fullerton Wines
	Portland	Helioterra Wines
	Portland	Hip Chicks Do Wine
	Portland	Jan-Marc Wine Cellars
	Portland	Seven Bridges Winery
	Portland	Viola Wines
	Portland	Vincent Wine Co.
Maryland	Olney	The Winery at Olney
New Mexico	Albuquerque	Gruet Winery
Washington	Seattle	Almquist Family Vintners
	Seattle	Animale
	Seattle	Bartholomew
	Seattle	Cloudfit
	Seattle	Domanico Cellars
	Seattle	Eight Bells Winery
	Seattle	Falling Rain Cellars
	Seattle	Laurelhurst Cellars
	Seattle	Lost River Winery
	Seattle	Nota Bene Cellars
	Seattle	Omnivore Cellars
	Seattle	OS Winery
	Seattle	Pine Lake Cellars
	Seattle	Queen Anne Winery
	Seattle	Siren Song
	Seattle	Stomani Cellars
	Seattle	Structure Cellars
	Seattle	Two Brothers Winery
	Seattle	Ward Johnson Winery

Urban Winery

<i>Noted U.S. Urban Wineries</i>		
<i>State</i>	<i>City</i>	<i>Urban Winery</i>
	Seattle	Welcome Road Winery
	Seattle	Wildridge Winery
Virginia	Norfolk	Mermaid Winery

<i>Noted Canadian Urban Winery</i>		
<i>State</i>	<i>City</i>	<i>Urban Winery</i>
British Columbia	Vancouver	Vancouver Urban Winery

<i>Noted English Urban Winery</i>		
	<i>City</i>	<i>Urban Winery</i>
	London	London Cru

<i>Noted Chinese Urban Winery</i>		
	<i>City</i>	<i>Urban Winery</i>
	Hong Kong	8th Estate Winery

<i>Noted French Urban Winery</i>		
	<i>City</i>	<i>Urban Winery</i>
	Bordeaux	Vinivwine

<i>Noted South African Urban Winery</i>		
	<i>City</i>	<i>Urban Winery</i>
	Cape Town	Signal Hill Winery

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