The Myth of the Family Winery

Global Corporations Behind California Wine

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Executive Summary

Despite the industry-promoted image of mom-and-pop wineries in California, nearly all of the leading wine producers in the state are multinational corporations with offices worldwide. Morever, wine is just merely one aspect of these global operations, having become integrated into massive product portfolios along with spirits and beer brands. Hiding behind a narrative of local, family-owned wineries, the global corporations that own California wine are steadily working to deregulate alcohol in every state through: 1) diminishing the three-tier alcohol system in the U.S.; 2) consolidating distribution to a single entity per state; 3) undue influence on the political process that includes undermining efforts to increase alcohol taxes and fees at the state and federal levels.

For example, as Governor Schwarzenegger's nickel-a-drink increase on alcohol excise taxes in California was removed from the final 2009-2010 budget, wine corporations and trade organizations funded 72 percent of alcohol-related contributions to "Budget Reform Now," the California PAC supporting the final budget proposal and related propositions.

This report details how California wine is an illusion because:

- Six of the seven producers that own 82 percent of U.S. wine are global corporations.
- Six of the ten top wine producers also own spirits and beer brands.
- The Wine Institute, despite its tag line of the "Voice of California Wine," is controlled by executives from Diageo, Constellation Brands, Foster's, and Brown-Forman, multinational conglomerates all based outside of California and with product portfolios that also include major spirits and beer brands.

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The California wine industry promotes an image of small mom and pop vintners in picturesque, rolling hills and valleys of Napa, Sonoma, and around the state. In reality nearly all of the leading wine producers in California are massive corporations that are integrated with "Big Alcohol," multinational conglomerates promoting and controlling politics in Sacramento and Washington, D.C.

The Wine Institute, a California-based trade organization controlled by global industry leaders such as Diageo and Constellation Brands, has created a multitude of media messages with little science but great marketing hype. These messages portray wine as a healthy, less-potent, friendly variety of alcohol, even though five ounces of wine contains the same amount of alcohol as 12 ounces of beer or 1.5 ounces of distilled spirits.[1] Wine plays a crucial role alongside beer and distilled spirits as part of Big Alcohol. Seven wine companies produce 82 percent of all wine sold in the U.S., and six of these are global corporations. Seven of the top ten wine companies (by U.S. sales) are also global corporations with wine, spirits, and beer brands integrated into their product portfolios.

While the wine industry perpetuates myths about wine as a product, it also promotes many inaccurate perceptions about its own role in Big Alcohol's agenda. At the same time that wine comprises nine percent of total annual beverage alcohol gallons sold in the U.S. and 15 percent of annual retail dollar sales of beverage alcohol,[2] the wine industry spends millions of dollars in lobbying and public relations to exert powerful influence on behalf of the entire alcohol industry. The image the industry promotes to the public is one of small, local wineries benefitting their communities and the state of California. Running parallel to that image is another fallacy: that the U.S. alcohol control system is dragging wine companies to near-extinction with regulations including taxation and restrictions on direct shipping. Big Alcohol promotes and benefits from the misperception of wine owners as the local, entrepreneurial "little guy," beaten up by the government and misunderstood by the public. This report dispels these myths and identifies the major wine players in Big Alcohol along with their political interests and influence in Sacramento and in Washington, D.C.

California, Land of Wine and Imports

According to the state's Travel and Tourism Commission, California is the Land of Wine and Food.[3] California is the largest wine-producing state in the U.S. and the fourth largest wine producer in the world.[4] There are more than 2,800 wineries in California, nearly half of the wineries in the United States and double the number in California just ten years ago.[5] California produces 61 percent of the wine sold in the U.S. each year.[6] More than 80 percent of the domestic wine market is owned by corporations with major wine production taking place in California, and these same California-dominated companies also own nearly a quarter of the imported wine market in the U.S.[7]

The inclusion of beer and distilled spirits products is crucial to the success of large alcohol conglomerates. Six of the ten leading wine producers in the U.S. own major beer and/or spirits brands in addition to their California wines. E & J Gallo, Constellation Brands, Foster's Group, Altria Group, Diageo, and Brown-Forman all produce or import spirits and/or beer in addition to wine. Meanwhile,

Domestic and Imported Table Wine* Market Share by Supplier (2008)[8]

	Domestic Wine Market Share	*Imported Wine Market Share*
E & J Gallo Winery	26.9%	6.7%
The Wine Group	21.2%	
Constellation Wines	15.0%	5.9%
Foster's Wine Estates Americas	5.9%	11.1%
Bronco Wine Co.	5.2%	
Trinchero Family Estates	5.1%	
Jackson Family Wines	2.5%	
Others	18.1%	76.4%

**Table wine excludes champagne and sparkling wine, dessert and fortified wine, and vermouth*

Altria Group owns Phillip Morris (the largest tobacco company in the U.S.), Ste. Michelle Wine Estates, and a continuing 28.5 percent economic and voting interest in SABMiller, a major beer conglomerate based in London. SABMiller is a 50 percent owner of MillerCoors, LLC, based in the U.S.

Giving lie to the notion that California wine is of upmost importance to the industry, most of the top producers also import wine from other countries such as Italy, Australia, and France. For example, E & J Gallo Winery's imported brands include Bella Sera and Ecco Domani; Trinchero Family Estates imports Red Belly Black and Little Boomey; Foster's Group imports Lindeman's and Rosemount Estate; Constellation Brands imports Alice White; and Diageo imports Barton & Guestier French Estates.

Family-owned Multinational Conglomerates

Unlike beer or spirits, the wine industry has the unique opportunity to exploit the perception of small, local, family-owned wineries for all of its members, including giant multinational alcohol conglomerates. Trinchero Family Estates and Jackson Family Wines even use the word "family" in their corporate names. Several of the largest Big Alcohol conglomerates commonly use stories about original winery founders, their wives and children, as well as the word "family" in marketing and advertising content for the corporate-owned California brands.

The Robert Mondavi Winery (owned by global Constellation Brands) website begins with "Robert Mondavi started in his family's wine business…"[11] and talks about Mondavi's and his wife's impact on Napa Valley. Constellation Brands also includes the story of Clos du Bois founder Frank Woods's children selecting the name of the vineyard in the history section of the website, and talks about "esteemed winemaker Erik Olsen [joining] our winery family."[12] The Woodbridge website explains how Mondavi's parents instilled the virtues of hard work in him.[13]

Industry giant Diageo deploys the same family history rhetoric on the Beaulieu website, where it talks about the founder and his wife selecting and naming the land for the vineyards.[14] Another Diageo company, Rosenblum Cellars, tells an extensive story including the winery's founders "…making wine out of their family home..." and describes Rosenblum: "We are like thirty little wineries rolled into one."[15]

Neither Constellation Brands nor Diageo identify themselves as the brands' parent companies in their respective wineries' marketing materials.

Family Winemakers of California (FWC), a wine trade organization, was created in 1991 and renamed in 1992 to reflect the "little guy's point of view."[16] Jess Jackson, founder of Jackson Family Wines (ninth largest wine producer in the U.S.), was the first president of FWC. A representative of Jackson Family Wines remains on the FWC board of directors today.

Top Ten Wine Companies in the U.S. Based on 2008 Case Sales[9]

Rank	*Owner*	*Headquarters*	*Annual U.S. Case Sales*	*Top California Brands*[10]	*Non-Wine Products*
1	E & J Gallo Winery	California	67 million	Carlo Rossi Twin Valley Barefoot Cellars Turning Leaf	Bartle's & James Boone's Farm E & J Brandy
2	The Wine Group	California	56 million	Franzia Almaden Inglenook Cupcake Cellars	
3	Constellation Brands	New York	46 million	Woodbridge Clos du Bois Robert Mondavi	Corona beer Corona Light Modelo Especial SVEDKA vodka
4	Bronco Wine Co.	California	20 million	Charles Shaw Grand Cru Napa Ridge	
5	Foster's Group	Australia	18 million	Beringer Stone Cellars Meridian	Foster's Lager Crown Lager SKYY vodka
6	Trinchero Family Estates	California	12 million	Sutter Home Menage a Trois Wild Bunch Paul Newman	
7	Altria Group (St. Michelle Wine Estates)	Virginia	6 million	Conn Creek Villa Mt. Eden Distant Bay	Miller beer Coors beer Marlboro cigarettes Skoal smokeless tobacco
8	Diageo	England	5.7 million	Beaulieu Sterling Rosenblum Chalone	Guinness Red Stripe Bailey's Irish Cream Captain Morgan Smirnoff José Cuervo
9	Jackson Family Wines	California	5 million	Kendall-Jackson La Crema	
10	Brown-Forman	Kentucky	4.5 million	Bonterra Fetzer Sonoma-Cutrer Little Black Dress	Jack Daniels Southern Comfort el Jimador Finlandia

Who Really Controls the Wine Institute?

The perpetuation of the small, local winery image extends from the corporate conglomerates to the industry's lobbying groups. The Wine Institute, a major trade organization, is based in California. The Wine Institute calls itself the Voice of California Wine and says that its efforts benefit the California wine industry.[17] Yet most of the organization's leadership comes from Big Alcohol, and its successes benefit the owners and executives of those corporations, whether they are located in California, New York, Kentucky, Virginia, England, or Australia. The Wine Institute supports: the reduction or elimination of alcohol taxes/fees/tariffs; direct shipping from producer to consumer; eliminating the wholesaler tier;[18] education about individual responsibility and moderation; and self-regulation of advertising.[19, 20]

At its annual meeting in June 2009, Wine Institute members elected multinational leadership from Big Alcohol to lead the organization. The new Chair of the Wine Institute is Ray Chadwick (President & CEO, Diageo Chateau & Estate Wines); the second vice chair is David Kent (CEO, The Wine Group); and the secretary is José Fernandez (CEO, Constellation Wines North America). In addition, leadership from Foster's, Diageo, Brown-Forman, Constellation Brands, The Wine Group, E & J Gallo Winery, and Trinchero Family Estates hold two at-large director and two alternate director positions per corporation, respectively, on the Wine Institute Board. Big Alcohol dominates fourteen of twenty at-large director positions, and another fourteen of the twenty alternate director positions.

Consolidating Distributors and Direct Shipping

In the U.S., states operate a system of alcohol control created after the end of Prohibition. In most states, this system consists of three distinct tiers: alcohol producers make the beverages, wholesalers distribute the beverages to outlets, and retailers sell the beverages to the public. The structure helps ensures adequate oversight of alcohol sales, and helps prevent aggressive marketing and sales tactics by producers. It is intended to maintain order in the marketplace and protect public health and safety.

The distribution tier is a vital component of the three-tier system. Distributors help act as a buffer between potentially overzealous producers and retailers. Yet there is much tension between the producers and distributors, and the large wine producers actively seek to consolidate distributors for their brands and control the distribution channels to benefit their own brands.

For example, Constellation Brands (based in upstate New York) is consolidating its U.S. distributor networks as fast as it can, while treating the distributors it keeps to enhanced profit levels.[21] As of September 2009, Constellation had achieved its goal of one distributor per state in 19 markets, with plans to transition another 11 states within 2010. These 30 states represent two-thirds of Constellation's total U.S. wine and spirits volume. The new distribution teams are exclusive to Constellation. The company's CEO Robert Sands remarked: "As you can imagine, as you're in the process of terminating some distributors and them becoming aware of the fact that they might be terminated they're going to have less focus on our brands."[22]

Diageo continues to consolidate to a single distributor in each state, with plans to complete its consolidation as soon as possible. So far, Diageo has consolidated its distribution in 39 states and Washington, D.C., representing more than 80 percent of the company's U.S. wine and spirits volume.[23]

The industry claims that a distributor “cartel”[24] is to blame for the three-tier system, and is responsible for the ongoing consolidation of distributors across the nation. Yet the push to consolidate the distribution tier comes directly from the producers. As Gerry Ruvo, Skyy Spirits Chief said recently: “Consolidation is inevitable, even more so in tough economic times. Everybody needs to build scale so you have more influence over distributors.”[25]

In theory, the three-tier system of alcohol control applies to wine, beer, and distilled spirits equally. Yet a great deal of the wine industry’s efforts to influence alcohol control is comprised of efforts to gain special exemptions from alcohol regulation. One arena where the distribution tier can potentially be circumvented is in the direct shipment of wine from a supplier to an individual.

According to an industry campaign called “Free the Grapes,” as of January 2008, 35 states allow wineries to ship wine directly to individuals, and 12 more allow retailers to do the same.[26] While neither beer nor distilled spirits can be sold via direct shipment in California, California wineries can generally ship wine to other states that have reciprocity with California. Wine producers’ success in gaining authorization to ship their product directly to consumers sets a precedent for beer and distilled spirits producers to circumvent the three-tier system as well.

Undue Political Influence

Wine is an important part of the Big Alcohol political machine, especially in California. In 2008, E & J Gallo Winery contributed $492,645 to California politicians and ballot measures.[27] That same year, Diageo and Diageo-Guinness USA contributed $327,068,[28] while the Wine Institute contributed $227,745,[29] and Family Winemakers of California spent $17,694.[30]

Big Alcohol’s 2009 political contributions in California largely went to “Budget Reform Now,” the California PAC supporting Governor Schwarzenegger’s final budget proposal and six related propositions intended to ward off the state’s fiscal crisis on the May ballot. The governor originally proposed a “nickel a drink” alcohol excise tax increase in his 2009-2010 budget to reduce the deficit and support alcohol-related services,[31] but the increase disappeared within weeks, despite polling that demonstrated it was the governor’s most popular idea, with an 85 percent approval rating.[32] Six of the nine contributors to the PAC were from the wine industry. Constellation Brands, Diageo, Gallo, and the Wine Institute each contributed $100,000, Brown-Forman contributed $20,000, and the California Association of Winegrape Growers contributed $5,000. In all, wine-related contributions were nearly 75 percent of Big Alcohol contributions to Budget Reform Now in 2009.[33]

Influence also comes from lobbying as well, perhaps even more so than campaign contributions. In California alone in 2008, Constellation Brands had eight registered lobbyists[34] while Diageo had thirteen. In the first three quarters of 2009, Diageo spent $365,244 lobbying the legislature and governor on issues including alcohol taxes, the state budget, and the alcohol fee measure, Assembly Bill 1019.[35] During that same time frame, the Wine Institute spent $439,438 lobbying on issues that included the state budget and excise taxes/fees.[36, 37]

In early 2009, California Assembly Member Jim Beall (D-San Jose) introduced Assembly Bill 1019 to establish the Alcohol-Related Services Program. The bill would create a $1.44 billion annual alcohol mitigation fee to fund the program and mark the first time the alcohol industry will begin to pay its fair share of California’s annual alcohol-related trauma care, hospitalization, treatment, prevention, and criminal justice costs.[38] Although the proposed fee would be levied across the entire alcohol industry, and despite the fact that wine makes up only 14 percent of all alcohol sales in California, the wine industry ruled the day in Sacramento. At the Assembly Health Committee hearing on April 28, 2009, the Wine Institute pressed its case hard, predicting massive job losses without any scientific evidence to back up its claims. The scare tactics worked, as the measure failed to garner enough votes to pass out of committee.

The wine industry, in the form of Big Alcohol, doesn't only lobby in California. In May 2009, forty executives and their family members from California wine companies such as Gallo and Bronco attended the Wine Institute's annual "fly-in" to Washington, D.C. to lobby against increased federal wine taxes. During the event, U.S. Representative George Radanovich (R-Mariposa), co-chair of the Congressional Wine Caucus with Representative Mike Thompson (D-St. Helena), echoed Wine Institute claims of industry economic harm and job losses from tax increases. He also stated that the Congressional Wine Caucus could weigh in on California's AB 1019 with letters and other expressions of opposition.[39]

In a 2002 interview available on the Congressional Wine Caucus's website, Rep. Radanovich explained how easy it is to get support for the wine cause:

> *It's not real hard to get members in the Wine Caucus, because all you do is lend your name and then you get invited to a lot of nice wine tastings. What we do is we make wine an enjoyable experience on Capitol Hill…A big [wine issue] was the interstate shipment issue in the last few years. There's also the neo-Prohibitionist presence. There's also the sin tax folks who want to impose taxes on alcoholic beverages. We need constant maintenance on the Hill because these issues creep up from time to time.*[40]

Although the Congressional Wine Caucus website says the Caucus has more than 250 members and is bipartisan, no list of member names is publicly available and the list is deemed confidential by Radanovich's office.

Conclusion

Despite their efforts to be seen as small and local, the companies that own wine in California are a vital part of Big Alcohol. They are global corporations with integrated, robust product portfolios of wine, spirits, and beer, with many brands being imported into the state. These multinational conglomerates spin false and misleading stories of small, community-based wineries just trying to survive, while they lobby hard through their well-funded and aggressive trade organizations, influencing state and federal politicians, waging successful lobbying campaigns to undermine critical public health policies.

Hiding behind a narrative of local, family-owned wineries, the global corporations that own California wine are determined to deregulate alcohol in every state through diminishing the three-tier alcohol system, consolidating distribution, and most importantly, by applying undue influence on the political process that includes defeating efforts to increase alcohol taxes and fees at both the state and federal levels. Policymakers and the general public should not be fooled by industry rhetoric. California wine is synonymous with Big Alcohol.

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Marin Institute fights to protect the public from the impact of the alcohol industry's negative practices. We monitor and expose the alcohol industry's harmful actions related to products, promotions and social influence, and support communities in their efforts to reject these damaging activities.

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