Presentation
to
SFTA Steering Committee

“Transportation Characteristics of the Washington Wine Industry”

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**Road Map...**

- Study Objectives
- Collecting Information
- Data
- Results and Findings
- Conclusions

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**Objectives**

- Develop an ArcGIS data set providing information on winery location, production, storage and variety.

- Develop an ArcGIS data set providing information on areas of grape production, volume and variety.

- Determine which intrastate routes are critical in the movement of wine grapes, bulk wine and finished product.

- Present an overall picture of the Washington wine industry.


**Collecting Information**

This research project utilized data from a large selection of sources.

- Wine Industry Publications
- Research Reports
- Freight Truck Origin and Destination Survey
- Phone and Email Correspondence

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**The Washington Wine Industry**

- The Washington Wine Industry generates $2.4 billion dollars annually!

- Washington wine has grown substantially in the past 20 years, placing it second only to California in total production
  
  - The number of wineries has grown from 19 in 1981 to over 200 today (>100 since 1997)
  
  - The wine grape acreage in Washington has grown to 28,000 acres (Around 2000 in 1981)
The Washington Wine Industry

- Washington follows concentration patterns similar to the national wine industry

- The top 5 wineries in Washington produce 76% of the total product

1. Columbia Crest: 1,662,020 Cases
2. Chateau Ste. Michelle: 641,400 Cases
3. Hogue Cellars: 450,000 Cases
4. Domaine Ste. Michelle: 448,000 Cases
5. Sunnyside Operations (Apex Cellars, Washington Hills): 360,000 Cases

Dispersion of Wineries in Washington
American Viticultural Areas

AVA Name and Total Wine Grape Acreage

Wine Transportation

The transportation of wine can be broken down into 3 categories

1. Wine grape movements
   - Average payload weight 30,123 lb.
   - Typically use van style trailers

2. Bulk wine movement
   - Average payload weight 37,200 lb (range between 30,000-50,000 lb)
   - Wine carried in tankers

3. Finish wine product movement
   - Average payload weight 41,469 lb
   - Use van style trailers
Wine Grape Movements

SR 26, SR 241, SR 26, SR 241, and SR 240 lay in areas of heavy grape production. Royal Slope, Mattawa, Wahluke Slope, and Cold Creek all fall on these routes.

SR 136 and US 12 are used in the movement of wine grapes to the Walla Walla wineries and from the Walla Walla Valley A/VAs.

I-8 is the gateway to western Washington wineries.

I-8 is the predominant point of entry for California bulk wines. These wines supply many Puget Sound region wineries as well as wineries north to British Columbia.

Bulk Wine Movements

SR 62 is crucial to supplying large Woodinville wineries with their bulk wine needs. Chateau St. Michelle, Columbia Winery, and many other wineries lay near the route.

SR 241 is of particular importance because of the large amount of bulk wine produced by Columbia Crest in Mattawa. They supplied a million gallons to Chateau St. Michelle (Woodinville) alone during 2002.

SR 221 moves Columbia Crest and Canoe Ridge Estates bulk wine to their sister winery in Woodinville (Chateau St. Michelle).

I-8 provides a secondary point of entry to Washington for California wineries. I-82 also lays near several large wineries that participate in bulk wine trade.
Finished Wine Movements

Conclusions

• The Washington wine industry has outpaced growth in other markets and placed increasing stress on the transportation system.

• Because of a high concentration ratio and production focused in only a few key areas, stress on roadways is concentrated on a core of routes.

• Additional truck traffic occurs during the grape harvest months of August through November causing congestion in some rural areas.