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
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
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

Chateau Ste. Michelle

Sunnyside Operations

Columbia Crest & Domaine Ste. Michelle

Hogue Cellars
American Viticultural Areas

- Yakima Valley: 9650 Acres
- Columbia Valley: 16,600 Acres
- Walla Walla Valley: 800 Acres
- Puget Sound: 80 Acres
- Red Mountain: 710 Acres

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**

- **I-5** is utilized in the movement of grapes to Canadian facilities.
- **I-90** is essential in the movement of grapes across the state to supply the Puget Sound Wineries with necessary grapes.
- **I-82** is the lifeline of the Washington wine industry. It goes directly through the Yakima and Columbia Valley AVAs and many wineries fall near/on it.
- **SR 221** and **SR 14** lay in areas of significant grape production. Columbia Crest and Canoe Ridge Estates Winery lie on these routes.
- **SR 24**, **SR 243**, **SR 26**, **SR 241**, and **SR 240** are used in the movement of wine grapes into the Walla Walla wineries and from the Walla Walla Valley AVA.
- **SR 124** and **US 12** are used in the movement of grapes to the Walla Walla wineries.
- **Alderdale Rd.** is a common corridor for grapes entering the state from California.
Bulk Wine Movements

SR 522 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 243 is of particular importance because of the large amount of bulk wine produced by Coventry Vale in Mattawa. They supplied a million gallons to Chateau St. Michelle (Woodinville) alone during 2002.

I 90 is the gateway to western Washington wineries.

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

I 5 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.

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

I-90 is responsible for the intrastate distribution of wine products and provides a corridor to the marine ports or exit to eastern markets.

I-82 is the lifeline of Washington Wine with many large wineries laying on/near it. It also provides a significant point of entry/exit on the Oregon border.

I-5 provides a route through major Washington cities and provides a link from California to the Vancouver, British Columbia region.

Columbia Crest, the state's largest winery with 1.6 million cases produced annually, lays on SR 221.

US 12 lays near several medium sized wineries in the Walla Walla region.
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.