

WINE BUSINESS INSIDER

Cyril Penn, Editor

The Leading Source for Analysis of the Wine Industry

January 17, 2003 • Volume 13 No. 3

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Wine Business Insider Published Weekly by
Wine Business Communications, Inc.
(ISSN 1057-8544)

110 W. Napa Street, Sonoma, CA 95476

Subscription Rates:

(email) \$295/Year; (USPS and fax) \$395/Year

Publisher: Richard N. Shell • **Editor:** Cyril Penn

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More Consolidation: Constellation, BRL Hardy to Form Largest Global Wine Company based in Australia

In a development sure to have profound implications for the global wine business, **Constellation Brands** this week announced plans to acquire **BRL Hardy**, Australia's largest wine producer. The transaction will bring Constellation's sales to \$3.2 billion annually and make it the world's largest wine company at \$1.7 billion in wine sales.

Constellation has offered shareholders of BRL Hardy A\$10.50 per share—approximately \$1.1 billion. Including the assumption of around \$325 million in net debt, the total purchase price is valued at approximately \$1.4 billion.

Considering that the two companies already worked together through their **Pacific Wine Partners** joint venture, the announcement that the companies were in advanced talks was not that surprising. Still, it is a watershed event.

The expected merger adds to the growing ties between Australian and US producers. Control of the world's biggest winemaker will be in Australia and BRL Hardy's managing director, **Stephen Millar**, will become chief executive of Constellation Wines based in Adelaide. He will take charge of global strategy, reporting to Constellation Brands president **Richard Sands** in New York.

The merger is expected to trigger yet more consolidation among wineries. It will be interesting to see how companies like **Allied Domecq**, **Southcorp**, **Beringer-Blass** and **Mondavi** respond.

Moreover, the transaction will likely lead to more changes within the wholesale tier of the distribution chain, just as Diageo's acquisition of Seagram did. Once the deal closes, the new entity can be expected to reevaluate distribution options and consolidate.

Alternative Closure Eliminates Corkscrews Yet Retains "Traditional" Packaging Look

Gardner Technologies Says New Closure to Become Industry Standard

Gardner Technologies, a start-up company based in Napa, California, has quietly been working on a new alternative wine closure that it believes will revolutionize wine packaging and become the industry standard for wine closures of the future.

With crucial intellectual property issues tackled, the company is no longer bound by non-disclosures and is ready to start talking publicly. Gardner is poised to make an announcement during the upcoming **Unified Wine & Grape Symposium** in Sacramento, California, and a product launch is slated for later this year.

This new closure provides the traditional look of a foil capsule but is removed with a twist of the wrist and can easily reseal the bottle once opened. Gardner says this will answer concerns about wine quality and consistency, functionality for both the consumer and the producer, and aesthetic appeal.

By increasing a short section of spiral threads around the outside of the upper neck of the bottle and by also replacing the flexible capsule with a rigid one, Gardner created an integrated bottle/capsule package that looks like a traditional cork-and-foil-finished bottle, with threaded-cap technology.

"Consumers need to feel comfortable with wine as a beverage and need a tool to get them into it," Gardner's vice president of sales and marketing **Kerry Manahan-Ehlow** said.

Inventor **William Gardner** wanted to give traditional wineries the option of using a natural cork as the primary seal on their bottle. He knew that some consumers would never be happy with anything else. His solution was to install an anchor into the cork — an anchor with a head that would rest on an annular, or ring-shaped, lip inside the capsule. As the rigid capsule is slowly and gently turned off the bottle, it just as slowly and easily pulls the cork out of the bottle. No corkscrew is needed.

Gardner's initial efforts to develop an innovative technology for wine stopper removal began in mid 1996 when he was a professor of engineering at **UC Davis**.

MetaCork™ consists of a cork removal and reseal device that is integrated with the wine bottle and closure. It responds to the need, provides easy

access to the beverage, yet it retains compatibility with both natural and synthetic corks.

MetaSeal™ provides a "non-cork" seal while retaining the traditional look of a foil-finished cork-closed bottle of wine.

The mating threads on the capsule differ from screw caps because they are much longer and in the form of a triple helix. The capsule itself is used as a device for removing natural or plastic corks from the bottle or for sealing the bottle without a separate stopper.

The MetaCork capsule has also been designed so that, when twisted back onto the bottle, it will act as a drip resistant pouring spout.

"This is of benefit to the category as a whole."

Tom Meyer, Fetzer Vineyards

A product rollout will be conducted in phases. In the first phase three wineries will use the closures: **Amusant Winery** in Napa will bottle 1,000 cases with it (Manahan-Ehlow is a partner in the winery), **Fetzer** will bottle 1,000 cases, and **Allied Domecq** will bottle 1,000 cases. Other wineries are interested in using this new product in subsequent phases of the rollout.

Tom Meyer, vice president of marketing for Fetzer Vineyards, told *Wine Business Insider* he believes the new closure will revolutionize the way people think about packaging, cork and appearance on the packaging.

"We are excited because they are starting at the super-premium end of the business and are talking to suppliers of critical mass that can afford to and are willing to risk and invest in such an innovation. They have every opportunity to create a revolution in the packaging side of the industry."

"There should be a good level of consumer interest in this product, said Meyer. "We have pooled some sources to do consumer research that will give us the information we need to know how to use this innovation to raise depletion growth."

After wineries go through a supply chain analysis and look at how the product is accepted by the consumer as an innovation, Phase 2 of Gardner's launch could involve perhaps 50,000 cases of a more mainstream product so the industry can get a real read on broad-based consumer interest.

Manahan-Ehlow said that the key conclusion that has come back in consumer research thus far is that consumers do not want to deviate from the traditional package. Most consumer research to date has had to do with the name and intuitive clues about the alternative closure on the package.

Wines will initially be bottled with a semi-automatic machine but Gardner is working with bottling manufacturers on adopting existing equipment for the new closures and a mobile bottling line with the appropriate application machinery is also in the works.



"The point is to have this be an accepted way of packaging wine, an innovation in itself that helps drive the consumers' ease of accepting wine," Meyer said. "We hope it makes it to all wine and all wineries. It is our hope that everybody will benefit from the research we do. We are all committed to making it easier for the consumer to accept wine, open wine and drink wine. This is of benefit to the category as a whole."

Update on ADA Litigation

According to the **Wine Institute**, more than 130 wineries have been sued by the **Americans with Disabilities Advocates** for violations of the Americans with Disabilities Act. The ADA board of directors has focused on winery compliance, and it has stated that it will continue to do so. The organization has announced that it will file 105 additional complaints against wineries within the next few weeks.

Wine Institute has been in discussions with **George Louie**, the director of the ADA and Louie made a proposal to Wine Institute members. This proposal would apply to wineries that have not already been sued and involves a sign-up period where participating wineries must: pay ADA \$250 as a fee for possible inspections; Within six months of sign-up, the retention of a compliance consultant to come into compliance; Within one year after the compliance consultant makes the report, the winery must have completed all work necessary to come into compliance. Louie is scheduled to attend the a Wine Institute Public Policy Committee meeting on January 21.

California Proposes New Water Waste Discharge Regulations

As **Wine Institute** has reported to its members, the **Central Valley Regional Water Quality Control Board** has issued for public comment a draft proposal of what will be several General Orders that address winery water waste discharge requirements. Thirteen percent of the estimated 320 wineries within the region are currently operating under region-imposed waste discharge requirements. It is the express intent of the Board to regulate most of the remaining wineries through compelling compliance with one of several general orders that will be issued within the year. In this first general order, waste discharge requirements address operations of wineries that conduct on-site storage and off-site disposal of wastewater. Comments on this general order must be submitted to the Central Valley Regional Water Quality Control Board by February 10, 2003.

The order itself is scheduled for discussion at the Regional Board in March.

Wineries that use off-site disposal for waste discharge are advised to pay attention to the discharge prohibitions and solids discharge specifications of the general order. Copies of the proposed general order can be downloaded from the Regional Board's web site at www.swrcb.ca.gov.

Susan Selby Counter Sues Erich Russell

As previously reported, **Erich Russell**, owner of **Rabbit Ridge Winery**, filed a suit alleging "breach of contract and fraud" against **Susan Selby**, a former Rabbit Ridge winemaker now with **Selby Winery**, (docket #231528). At issue is a piece of property in San Luis Obispo that, according to the complaint, was purchased jointly by Selby and Russell. Russell alleges Selby breached an agreement by "failing to convey," his interest in the property to him and that she "thereafter secretly sold the property to a third party and retained the proceeds of sale." Russell claims he bought out Selby and she never signed over the deed to his name—and that then she sold it secretly.

Selby, who was engaged to Russell from 1994 to 1996 and worked for him from 1994 through 2000, has filed a counter-complaint that denies this and makes numerous allegations with respect to common business dealings. Among other things, it also alleges Russell told prospective purchasers of Selby's wine that if they bought her wine, he would no longer do business with them.

Wells Fargo Owns Priest Vineyard

Wells Fargo is now the owner of Napa's **Priest Vineyard**, the 330-acre ranch that was put up for bid in a foreclosure sale last week. The property was purchased a few years ago, by **Jeff** and **Sandra Gee Gwinn** of Long Beach, who defaulted on a \$7.5 million redevelopment loan. The property had been listed for sale for some time. Despite some competitive bidding, the property reverted back to Wells Fargo for just \$239,000, according to a source.

Stonegate Falls Out of Escrow — Sources

Silver Oak owner **Ray Duncan** was in escrow to purchase **StoneGate Winery** for approximately \$9.5 million, according to sources, but the deal fell out of escrow last week. **MKF** is handling the potential sale. Located just south of Calistoga, Stonegate is owned by **Paul Croft**, who left his investment banking career a couple years ago when he was smitten with the wine bug. Croft has made many improvements to the winery

Katherine Hall Vineyards Expanding

Katherine Hall Vineyards is in escrow on the **TbarT Ranch** in Alexander Valley owned by **Forrest Tancer**, winemaker at **Iron Horse**, according to sources. In December, Kathryn Hall Vineyards closed on the 230 acre **Rigi Vineyard** in Napa Valley near the Silverado Trail and Big Ranch Road.



Wine Business Analysis

ACNielsen/Winery Exchange WineScan Data

Four-Week Periods Ending November 23 and December 21, 2002

Because Thanksgiving is something of a moveable feast, the data for the 4-week period ending November 23 ended before the holiday was celebrated. This means that the data for this

- Imported holiday wine sales volume up 17.30%
- Domestic holiday wine sales up 0.73%
- Total holiday wine sales up 3.61%

period were distorted and are artificially somewhat lower than the data for the previous year.

Unfortunately, the

following period, which ended December 21, 2002, was likewise distorted in the opposite direction. Consequently, in an effort to compare apples and apples, we have combined these two datasets for an eight-week comparison that more properly includes the consumer holiday purchases linked to the Thanksgiving holiday.

For the eight-weeks ending December 21, 2002, total table wine sales saw an increase in retail case-sales of 4.10 percent over the same eight-week period during 2001, as recorded by **ACNielsen/Winery Exchange WineScan**. At the same time, the total value of these sales increased 3.61 percent versus 2001. Although they currently comprise only a quarter of the market, these gains were almost entirely due to sharp increases in the sale of imported wine.

For the eight-weeks ending December 21, 2002, retail case-sales for imported wines surged ahead 17.30 percent of the comparable period of the previous year. Likewise, the total value of these sales grew by 19.22 percent over the previous year.

By contrast, domestic wine sales, during eight-week period ending December 21, 2002, barely held their ground, gaining only 0.73 percent over the comparable period during 2001. The inherent value of these sales was similarly flat, gaining 0.72 percent over the previous year.

The nominal case prices further illustrate this point. During the eight-weeks ending December 21, 2002 the nominal case-price for domestic wines rose one cent over the nominal case-price during the comparable period of the previous year. At the same time the nominal case-price for imported wine fell by \$1.25 (1.62 percent). This would seem to indicate that, taken as a whole, importers are cutting prices to gain market share.

Of course, while occasionally interesting, four- or eight-week data are not as indicative of the real trends of the market as the 52-week data. For the 52-weeks ending December 21, 2002, the total volume of wine sales, as recorded by **ACNielsen/Winery Exchange WineScan**, gained 6.8 percent over the previous year. At the same time, the total value of these sales increases 4.7 percent.

Domestic wines fare a little better in the 52-week data than they do in the eight-week data listed above. During the 52-weeks ending December 21, 2002, sales of domestic wines increased 4.5 percent in sales-volume and 2.8 percent in dollar-volume over the same period in 2001.

Given the apparently lackluster growth of domestic wine sales against sales for imported wine is indicated by the 15.6 percent volume growth seen by imported wine-sales during the 52-weeks ending December 21, 2002. Interestingly, the actual volume-change for both domestic and imported wine sales during 2002 was within 3.37 percent as reported by **ACNielsen/Winery Exchange WineScan**. The difference in the growth rates is due to the much smaller base-volume of imported wine sales compared to those for domestic wine sales.

WineScan data are collected from in-store sales scanners in grocery, liquor and mass merchandise stores in 34 US markets. WineScan is an exclusive offering of **Winery Exchange, Inc.**, published in cooperation with **ACNielsen**. The term "YAG" is an acronym for "Year AGo." Volume is listed as 9-liter case equivalents. The term "global" refers to total sales of both domestic and imported wine. The phrase "A/O Color Wine" refers to all wine not classified as either "red," "white," or "blush" wine.

Within the **ACNielsen/Winery Exchange Premium WineScan Market Update** there are two sets of data. The first dataset, entitled "4 Weeks Ending...", compares sales data for a one-month (4-week) period with the same period of the previous year. The second set, entitled "52 Weeks Ending...", is a Moving Annualized Total (MAT) which compares one-year (52-weeks) with the same period of the previous year. Because MATs look at an entire year, albeit one that moves forward with each new dataset, they factor out seasonal variations and are good indicators of trends. Taken in isolation, the monthly data provide snapshots of the most recent sales trends. Since they are year-on-year, rather than month-on-month, comparisons, they also factor out most of the seasonal variations. When the monthly data are compared to the annual data, they indicate whether the rate change is increasing or decreasing.

For example, in this month's data we see that for the 4 weeks ending 12/21/02 Merlot sales increased in volume by 17.9 percent compared to the same four weeks in 2001. At the same time, for the 52 weeks ending 12/21/02, Merlot sales increased 11.2 in volume over the same 52 weeks in 2001.



ACNielsen/Winery Exchange Premium WineScan Wine Market Update — Total US Over \$2 Mm - Food

8 Weeks Ending December 21, 2002

	\$ Vol YAG	\$ Vol	\$ Pct Chg vs YAG	\$ Share	Eq Vol YAG	Eq Vol	Eq Pct Chg vs YAG	Eq Share	Nom Case \$ YAG	Nom Case \$	Nom Case \$ Pct
Total Table Wine	596,686,749	621,161,524	0.04	97.48	10,026,110	10,387,904	0.04	96.33	59.51	59.80	0.00
Total Domestic Wine	475,138,933	478,591,953	0.01	75.12	8,462,894	8,524,201	0.01	79.07	56.14	56.15	0.00
Total Imported Wine	121,547,816	142,569,571	0.17	22.36	1,563,216	1,863,704	0.19	17.26	77.75	76.50	-0.02
Total White Wine	249,289,573	253,406,216	0.02	39.80	3,897,878	3,991,211	0.02	37.04	63.96	63.49	-0.01
Total Red Wine	269,433,224	293,831,413	0.09	46.12	3,841,281	4,190,190	0.09	38.87	70.14	70.12	0.00
Total Blush Wine	77,688,711	73,763,150	-0.05	11.54	2,283,196	2,204,923	-0.03	20.41	34.03	33.45	-0.02
Total A/O Color Wine	275,243	160,746	-0.42	0.02	3,755	1,581	-0.58	0.01	73.30	101.67	0.39
Total Global Chardonnay	155,464,966	155,545,376	0.00	24.44	1,972,012	2,028,473	0.03	18.82	78.84	76.68	-0.03
Total Global Cab Sauv	75,076,253	78,446,898	0.04	12.32	871,121	926,415	0.06	8.60	86.18	84.68	-0.02
Total Global Merlot	91,197,956	97,874,732	0.07	15.35	1,164,424	1,276,046	0.10	11.83	78.32	76.70	-0.02
Total Global White Zin	54,751,110	51,201,280	-0.06	8.00	1,399,890	1,342,533	-0.04	12.40	39.11	38.14	-0.02

4 Weeks Ending December 21, 2002

	\$ Vol YAG	\$ Vol	\$ Pct Chg vs YAG	\$ Share	Eq Vol YAG	Eq Vol	Eq Pct Chg vs YAG	Eq Share
Total Table Wine	294,532,308	337,755,206	14.7	97.3	4,948,683	5,563,588	12.4	96.0
Total Domestic Wine	234,434,284	259,816,193	10.8	74.8	4,176,674	4,550,784	9.0	78.5
Total Imported Wine	60,098,024	77,939,013	29.7	22.4	772,008	1,012,804	31.2	17.5
Total White Wine	120,559,532	136,675,193	13.4	39.4	1,894,107	2,118,355	11.8	36.5
Total Red Wine	134,955,189	159,638,784	18.3	46.0	1,913,920	2,233,989	16.7	38.5
Total Blush Wine	38,833,456	41,335,509	6.4	11.9	1,138,220	1,210,237	6.3	20.9
Total A/O Color Wine	184,132	105,720	-42.6	0.0	2,436	1,008	-58.6	0.0
Total Global Chardonnay	74,928,158	83,438,685	11.4	24.0	953,568	1,077,476	13.0	18.6
Total Global Cabernet Sauvignon	37,618,759	42,178,219	12.1	12.1	432,827	489,513	13.1	8.4
Total Global Merlot	45,847,028	53,439,265	16.6	15.4	581,441	685,411	17.9	11.8
Total Global White Zinfandel	27,412,781	29,200,672	6.5	8.4	701,061	754,633	7.6	13.0

52 Weeks Ending December 21, 2002

	\$ Vol YAG	\$ Vol	\$ Pct Chg vs YAG	\$ Share	Eq Vol YAG	Eq Vol	Eq Pct Chg vs YAG	Eq Share
Total Table Wine	3,264,848,555	3,486,223,149	6.8	97.2	56,218,060	58,863,586	4.7	96.0
Total Domestic Wine	2,600,928,485	2,718,960,467	4.5	75.8	47,641,000	48,985,660	2.8	79.9
Total Imported Wine	663,920,065	767,262,676	15.6	21.4	8,577,062	9,877,925	15.2	16.1
Total White Wine	1,411,836,849	1,498,934,952	6.2	41.8	22,531,358	23,577,093	4.6	38.4
Total Red Wine	1,419,235,678	1,567,188,249	10.4	43.7	20,765,514	22,678,534	9.2	37.0
Total Blush Wine	433,230,674	419,281,284	-3.2	11.7	12,913,314	12,599,818	-2.4	20.5
Total A/O Color Wine	545,356	785,026	43.9	0.0	7,873	8,016	1.8	0.0
Total Global Chardonnay	876,594,108	923,987,906	5.4	25.8	11,160,784	11,908,102	6.7	19.4
Total Global Cabernet Sauvignon	402,864,191	427,861,076	6.2	11.9	4,762,949	5,074,492	6.5	8.3
Total Global Merlot	474,204,010	522,736,587	10.2	14.6	6,127,663	6,815,296	11.2	11.1
Total Global White Zinfandel	297,250,827	286,012,033	-3.8	8.0	7,573,393	7,426,521	-1.9	12.1

Source: ACNielsen/Winery Exchange — Premium WineScan provides the first online food store research reports designed for premium wine marketers. To obtain these valuable reports covering premium American and imported wines in 35 key U.S. markets and the information-packed premium WineScan executive summary, please contact Demetri Koston at Winery Exchange at 415-382-6730, E-Mail to Demetri@Wineryexchange.com, or log onto Wineryexchange.com.

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	Year	Appellation	Gallons/Tons	Sale Price
Cabernet Sauvignon	2001	San Luis Obispo County	40,000 gallons	\$4.00 per gallon
Merlot	2001	Lodi	10,000 gallons	\$3.75 per gallon
Chardonnay	2001	Carneros	2,500 gallons	\$11.00 per gallon
Pinot Grigio	2002	California	12,000 gallons	\$7.00 per gallon
Pinot Grigio	2002	Mendocino County	1,400 gallons	\$8.00 per gallon
Syrah	2002	Lodi	13,000 gallons	\$6.00 per gallon
Zinfandel	2002	Paso Robles	22,000 gallons	\$4.00 per gallon
Sauvignon Blanc	2002	Napa Valley	4,000 gallons	\$6.50 per gallon

Jim Beam Goes With Romano

Jim Beam Brands, which owns **Geyser Peak**, is changing distributors in Illinois, moving from **Union Beverage Company** to **Romano Brothers Beverage Co**, according to sources. Union is owned by **National Distributing Co.** while Romano Brothers is owned by **Southern Wine & Spirits**. The change is seen as a blow to Union following **Diageo's** recent decision to move its brands from Union to **Judge & Dolph Ltd**. There is some speculation that there could soon be two dominant distributors in Illinois.

Who's Who and Where:

Dan Soloman was recently named president of the **Academy of Wine Communications**, and plans to revitalize the organization with meetings of interest to the public relations community of the wine industry. The organization is about encouraging wine writing throughout the United States and the board includes **Paul Wagner**, **Margaret Clark**, **Harvey Posert**, and **Sam Folsom**. Soloman is with **Balzac Communications**, was director of public relations for **E&J Gallo** for two decades and also worked for **Allied Domecq**.

Reorganization at **Young's Market**: California distributor Young's Market is reorganizing to bring all trade channels together under **Chris Nix** in the north and **Henry Weaver** in the south, so that they will handle both the on- and off-premise markets. **Southern Wine & Spirits** has a similar structure in California, with **Jack Brennan** in the north and **Brad Vassar** in the south.

Texas Wine and Grape Growers Association has hired **Dianna Offutt** as executive director, replacing **David Miller**, who resigned. Texas now has 60 wineries, up from 42 wineries last year.

Robert Quail joined **Clement, Fitzpatrick & Kenworthy** after nearly a decade as vice president and general counsel for **Kendall-Jackson Wine Estates** and vice president, legal services for **Jackson Enterprises**. **Clement, Fitzpatrick & Kenworthy** is a business, wine industry and real estate law firm. Quail will continue to represent wineries and grape growers in the areas of beverage alcohol law, general business and compliance, as well as serving the firm's clients in real estate transactions.

Neocork Technologies, Inc, one of leading synthetic closure producers, appointed **Craig Finetti** as domestic sales representative. Finetti brings practical wine industry experience to Neocork's customers, including bottling line management, cellar work and field sales at **Alexander Valley Vineyards** and **Michel Schlumberger**.

Allied Domecq announced a new hires in sales and marketing: **Sarah Halstead**, previously with **Pomery Champagne**, and **Fabien Gay**, previously with **Hess**, joined the Champagne Ambassador Team.

Elsewhere, **Donna Pace** was tapped as director of national accounts for the Central US, a position she held with **Diageo**. **Jerry La Vecchia** was promoted to New Jersey region manager and **Kristine Collier** has filled his previous position as New Jersey district manager. In the marketing department, **John Maxwell** was named marketing director for core brands. He was most recently director of trade marketing at K-J. Long-time Callaway vineyard manager **Craig Weaver** is now vineyard manager for **Buena Vista**. **Kathy DeVillers** was named Controller for Allied Domecq Wines USA and **Corinne Rossi** is taking over duties as financial planning and analysis manager.

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