



TURRENTINE

GRAPES & WINE

Turrentine Brokerage | 415.209.9463 | March 20, 2014 | Vol 26, No. 2 | Copyright 2014

Striving For Excellence

For three years in the late 70s, legendary Champagne winemaker, Guy Devaux, employed Turrentine Brokerage in a secret project to sample Pinot Noir, Chardonnay and Pinot Blanc grapes from various regions of California and Oregon for the production of luxury class sparkling wine. This complicated and fascinating project eventually became Mumm Napa Valley. After the winery was built and had finished its first crush, Guy invited my wife and I to a dinner at the winery, which was organized to recognize key contributors to the winery's success, including the architect and contractor, the winemaking team and the marketing team. After these folks were commended and applauded, Guy began to describe someone who had diligently labored in the shadows for several years to help them figure out the best regions and sources of grapes to achieve the product they wanted to make.

As he spoke, I realized that what he was saying could apply to me and as he continued it became clear that he was in fact talking about me. I literally felt my ears tingle with interest and joy at the recognition!

Some of our clients have recently made our ears tingle through Vineyard and Winery Management magazine. Based on the magazine's survey of the industry, with nearly 1,100 responses, Turrentine Brokerage has been named the best grape and bulk wine broker for 2014. We appreciate the recognition and consider it a good opportunity to revisit the question: What does excellent service look like from our clients' point of view? Clients have told us that excellence in grape and bulk wine brokerage consists of:

- Knowledge of the possible pitfalls and dependable help in avoiding them
- Accurate and unbiased advice on the current market, based on many transactions and a long history
- Personal service and an energetic staff who respond quickly to client needs and inquiries
- The ability to add value with creative solutions
- Attention to detail which helps deals go smoothly
- Experience and skill at mediating disputes
- An understanding of the powerful, long-term supply cycles that can often determine success or failure in the wine business

Our goal is to provide excellent service to our clients, service that helps clients take advantage of opportunities, avoid problems and achieve a competitive advantage in a challenging business. Please let us know how *you* think we are doing.

-Bill Turrentine



Turrentine Brokerage Important Announcement (TBIA):

The final tally is complete and we have a winner in our 2013 Baby Photo Christmas Card Contest. The contest involved matching a picture of current staff members with their baby pictures. The championship was hotly contested and we thank all of you who participated.

We are proud to announce the winner (drum roll, please) is none other than Chris Smith of Bogle Winery!

Chris is shown below at the well-publicized media event accepting his prize from none other than Brian Clements. Notice their matching hairstyle.

Congratulations Chris!!





Today!

Central Coast Grape broker **Audra Cooper** and Bulk Wine broker **William Goebel** are at booth #A12 to give market updates to current and potential clients.

A promotional graphic for Turrentine Brokerage. It includes the ProWein logo, a photo of a man, and a photo of wine glasses. The text reads: "Turrentine Brokerage Attending ProWein Düsseldorf, Germany March 23rd-25th Please contact us if you would like to set up a meeting or are interested in any international bulk markets. Prost! 415-209-9463".

ProWein

International Trade Fair

Marc Cuneo and **Steve Fredricks** will be attending the 2014 ProWein show in Dusseldorf, Germany from March 23rd-25th. While there, Turrentine will be meeting with their strategic partners, including CIVS, Austwine, and San Nicolas Wine Services along with clients from all over the world for bulk wine and private label branded opportunities. Contact us now for any opportunities you would like us to research or to set up some meetings if you are there.



19th Annual Vineyard Economics Seminar May 14th, 2014 Napa Valley Marriott, Napa CA

Mike Needham and **Steve Fredricks** will be speaking at this event for a bulk wine and grape market update. More details to come.

Publications



Wine Industry Benchmark Survey

We're pleased to provide you with the results of our 2013 Wine Industry Financial Benchmarking Report. Moss Adams LLP, the Farm Credit Alliance, and Turrentine Brokerage are committed to continuing to serve as thought leaders in the wine industry, and

we view the report as an opportunity to provide wineries, grape growers, and negociants with comparative and insightful information. This survey builds on the results published by Moss Adams in 2009 that analyzed a range of topics including general industry trends, sales and production data, viticulture data along with operating and financial metrics by region. The goal of the survey? To bring you valuable, insightful data and analysis that will help you benchmark your operating and financial results against industry leaders. We believe the information gathered in the 2013 Wine Industry Financial Benchmarking Survey is an important tool as you measure your results and consider future business strategies. Go to our website to purchase a copy.

Market Opportunities



Bulk Wine Available

- 2012 California Cabernet Sauvignon & Chardonnay: multiple lots
- 2012 California Zinfandel & Merlot: numerous lots
- 2012/2013 Central Coast Merlot: multiple lots
- 2013 Central Coast Pinot Noir: multiple lots, load sizes
- 2013 Central Coast Chardonnay: multiple lots, load sizes
- 2013 Napa Valley Sauvignon Blanc: various sizes



Bulk Wine Needed

- 2013 Sonoma Coast Chardonnay: load size
- 2012/2013 Napa & Sonoma counties Cabernet Sauvignon: 1,000 gallons +
- 2013 Lake & Mendocino counties Cabernet Sauvignon: load size
- 2012/2013 California/North Coast Petite Sirah: load size
- 2013 North Coast Reds: load size



Grapes Available

- Alexander Valley Merlot: 60 tons
- Mendocino County Chardonnay, multiple truckloads
- Clarksburg Chenin Blanc: multiple truckloads
- Lodi Pinot Noir: multiple truckloads
- Lodi & Oakdale Petite Sirah: multiple truckloads
- Santa Barbara County Rhônes: truckload quantities
- Santa Barbara County planting opportunity
- Paso Robles Petite Sirah: multiple truckloads from 3 different vineyards
- San Antonio Valley Roussanne, Marsanne, Pinot Grigio, Syrah and Zinfandel: 1-2 loads each
- Paso Robles new planting opportunity for Cabernet Sauvignon, 1st production year 2016
- Paso Robles new grafting opportunity for Cabernet Sauvignon.



Grapes Needed

- Santa Barbara County Chardonnay & Pinot Noir: truckload quantities
- Paso Robles Westside Syrah, Grenache & Mourvedre: small lots
- Interior Pinot Grigio, truckload quantities

Bulk Broker Contacts	Grape Broker Contacts
Steve Fredricks: (415) 847-0603 President-Grapes and bulk wine throughout California and International	Brian Clements: (707) 495-8151 Vice President-Grapes throughout CA, Napa, Sonoma, Mendocino & Lake Counties
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Steve Robertson: (415) 827-0110 Bulk wine throughout California	Audra Cooper: (805) 400-9930 Grapes throughout the Central Coast
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