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The Wine Industry Today

Volume 3

Prepared by the Sonoma State University School of Business' Wine Business Institute

Fall 2024

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Greetings from the Wine Business Institute,

Welcome to the third edition of *The Wine Industry Today*. In this issue, we highlight the important research of our dedicated faculty, who are committed to shaping the future leaders of our wine business programs at Sonoma State University. Their work not only deepens our understanding of the industry but also tackles the real challenges affecting the business of wine.

This issue begins with Professor Dr. Chong Kim's examination of the trade factors that drive wine sales between Australia and China. It offers a revealing discussion on how tariffs can drastically impact an entire industry and the lessons we can learn for the future. From there, we move to a conversation with Professor Dr. Rob Eyler about our domestic economy and its impact on wine sales. Following that, Assistant Professor Dr. InHaeng Jung will analyze generational and lifestyle factors that may be driving decreased wine consumption among younger consumers.

Additionally, we feature an engaging interview with Caroline Coleman Bailey, a key member of the Wine Business Institute Board and its founding board president. Caroline's marketing expertise and extensive experience in the wine sector have been vital in shaping the WBI's vision. Her ongoing support for our students through scholarships and mentorship helps nurture the next generation of leaders in this thriving field.

It is a pleasure to be back at the Wine Business Institute as Interim Executive Director and to see that my colleagues are still global leaders of research in wine business. As a result of all of their hard work and dedication, our wine business faculty continues to garner both national and international recognition for both the undergraduate and graduate programs.

The Wine Business Institute's Board of Directors has expanded, featuring an impressive membership eager to support our growth at Sonoma State University as the leader in wine business education. The progress made at the WBI over the last twenty-five years is remarkable, and with your help, the next phase of our journey will continue to prioritize our students and their lifelong careers in the wine industry.

Dr. Linda Nowak

Interim Executive Director
Wine Business Institute

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Global Market Analysis: The Impact of China's Retaliatory Tariffs on Australian Wine

Insight into the Australian wine market – unpacking the ripple effects of tariffs on the global wine market

Written by Chong Kim, Ph. D Department Chair and Professor of Economics, Sonoma State University

This report focuses on analyzing the impact of China's retaliatory tariffs on the Australian wine industry. In March 2021, China imposed anti-dumping tariffs ranging from 116.2% to 218.4% on Australian wine for a period of five years. Although China cited Australia's unfair trade practices, such as dumping or subsidies, as the reason for the tariffs, no mutually recognized evidence was presented by either side. It is widely understood that the tariffs were a form of retaliation by China in response to the diplomatic dispute that arose after the Australian government supported international calls for an investigation into the origins of COVID-19. This report aims to analyze the impact of China's retaliatory tariffs on the Australian wine industry by dividing the timeline into three periods: before the tariffs, from March 2021 to March 2024 when the tariffs were in place, and after the removal of the tariffs in March 2024.

China-Australia Free Trade Agreement and Trade with China

Australia established diplomatic relations with China in 1972 and set up an embassy in Beijing in 1973. Based on strong economic complementarities, trade between these two countries increased, and Australia adopted China's "One-China Policy," refraining from recognizing Taiwan as a separate state. The diplomatic relationship between the two countries was elevated

to a “Comprehensive Strategic Partnership” in 2014, and finally, in 2015, they implemented the free trade agreement known as the “China-Australia Free Trade Agreement (ChAFTA).” The agreement included the removal, effective January 1, 2019, of existing tariffs of 14-20% on Australian wine and up to 65% on spirits. ChAFTA led to a rapid increase in Australian exports to China. According to data from the World Trade Organization (WTO), Australia’s exports to China rose from \$61 billion USD in 2015 to \$100 billion USD in 2020, an approximately 64% increase over the period, resulting in one-third of Australia’s total exports being concentrated in the Chinese market.

ChAFTA had a significant impact on the Australian wine industry and wine exports to China. From 2015 to 2019, Australian wine showed an average annual growth of 33% in the Chinese market, and by 2020, it became the largest wine supplier in China in terms of value. According to data from the Australian government, out of 1,061 exported wines, 765 were shipped to China, with 40% of all wine exports concentrated in the Chinese market. This accounted for about 25% of total Australian wine production. During the same period, Australia not only focused on exports but also invested directly in local wine production in China and made significant efforts to expand the wine industry infrastructure there, including educating Chinese wine producers and distributors.

COVID-19 and Retaliatory Tariffs

In March 2021, China imposed retaliatory tariffs on Australian exports to China, including wine, in response to Australia’s support for an international investigation into the origins of COVID-19. For wine, tariffs ranging from 116.2% to 218.4% were imposed for the next five years. For example, Treasury Wine Estates, known for the brand Penfolds, faced a tariff of 175.6%. This led to a sharp decline in the price competitiveness of Australian wine in China and resulted in a significant drop in demand for Australian wine in the Chinese market. In 2021, after the tariffs were applied, Australia’s wine exports to China decreased by 62% in value and 78% in volume compared to the previous year, leading to an overall decline of 24% in total wine exports.

Following the imposition of tariffs in 2021, Australian wine exports to China failed to recover, resulting in persistent market disruption. Consequently, Australian winemakers faced considerable challenges in identifying alternative markets capable of absorbing the surplus wine that had been primarily allocated for export to China. This situation precipitated substantial financial losses for the industry and contributed to an oversupply of unsold wine, exacerbating the economic strain on producers and highlighting the sector’s dependency on the Chinese market.

Tariff Removal and Market Outlook

In March 2024, the Chinese government officially abolished the heavy tariffs on Australian wine, potentially providing a crucial opportunity for an industry grappling with low prices and a global oversupply. Aside from a few exceptions, the majority of tariffs on Australian exports to China have been lifted. Following the removal of these tariffs in March, a marked increase in Australian wine exports to China has been documented. According to a report from Wine Australia dated October 22, there is substantial evidence indicating a rapid recovery in wine

exports to China, highlighting the positive implications of the tariff removal for the Australian wine industry.

Despite the removal of tariffs, skepticism persists regarding the potential for Australian wine to reclaim its pre-tariff position in the Chinese market. The detrimental impact of previous restrictions, combined with shifts in market dynamics, suggests that it will require considerable time for Australian wine to restore its former market share. Furthermore, in light of a pronounced decline in wine consumption in China, analysts caution that exports are unlikely to approach their peak levels, even with the elimination of tariffs. This confluence of factors underscores the challenges facing the Australian wine industry in reestablishing a foothold in a rapidly evolving market.

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Domestic Economic Insights: Wine Industry Headwind and Tailwinds Analysis of the macroeconomic outlook of wine sales

Written by Rob Eyler, Ph.D, Professor of Economics, Sonoma State University

Persistent inflation and demographic shifts are influencing trends that are slowing wine demand. The pandemic-driven surge in retail sales has tapered off, with data suggesting that consumers are facing pressures from ongoing inflation, competing options, and a growing mindfulness around consumption. Additionally, demographic changes in the U.S. may indicate a slow but steady decrease in wine consumption that rising incomes alone may not offset. Meanwhile, a softening in travel demand is impacting both tasting room and broader direct-to-consumer (DTC) sales.

Looking ahead, there is cautious optimism for the U.S. economy through 2027, though headwinds continue to mount. Employment and income growth remain steady, though more people are entering the workforce, contributing to gradual economic expansion. Interest rates and inflation appear to be both falling and stabilizing, which could help maintain consumer spending. However, the International Monetary Fund recently downgraded global growth forecasts for 2025 and 2026, citing inflation and geopolitical tensions as significant risks, particularly with potential energy cost spikes due to the ongoing Ukraine-Russia conflict and uncertainties in the Middle East.

As of late 2024, equity markets are holding up well, buoyed by slower inflation and job growth. Some analysts describe the U.S. economy as “late-cycle” and speculate about the possibility of a recession within a few years. California’s economy is slowing in terms of job growth, though state-based hiring remains stable, creating challenges in regional labor markets like the North Bay, where employers report difficulty finding qualified workers locally. Housing prices across California continue to rise modestly, with some relief from slower rent inflation.

In wine country, primary concerns center on continued travel demand and inventory adjustments following the 2024 harvest, particularly in Napa and Sonoma. Reduced grape purchases, also seen in Oregon and Washington, are adding to market pressures. The demand for tasting rooms, hotels, restaurants, and retail spending across Napa, Sonoma, Mendocino, Lake, Marin, and Solano counties was softer in 2023 than anticipated, with similar trends persisting in 2024, likely influenced by inflation and high interest rates that are constraining discretionary spending.

The upcoming presidential election could bring further uncertainty, particularly around tariffs, cannabis legalization, and corporate tax policy—all of which have implications for consumers and the wine industry. Despite these challenges, the U.S. economic outlook remains relatively strong compared to other major global economies, providing a stable foundation amid the current headwinds.

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Diversity Research: Generational and Lifestyle Shifts in Wine Consumption

Factors impacting wine consumption among young consumers

Written by InHaeng Jung, Ph.D Assistant Professor of Wine Business, Sonoma State University

I remember my time in the southern states, where lemonade stands were a common sight along the streets during the hot summer, each serving not just a refreshing drink but also a lesson in entrepreneurship for the kids who ran them, which is now the backbone of the US economy. Today, those stands are rare. Kids are preoccupied with preparing for college, and adults often pass by too hurriedly to notice. It's more than just a story about lemonade—it mirrors the evolving landscape of the Wine Industry Today. Ironically, in our increasingly fast-paced, competitive world, the simple act of quenching thirst with a leisurely drink has lost its place.

Generation Z, born roughly between 1997 and 2012, shows a significant decline in alcohol consumption compared to previous generations, influenced by a heightened awareness of personal image, a focus on mental and physical health, and economic mindfulness. Research from Berenberg indicates that Gen Z drinks 20% less alcohol than Millennials (Pringle, 2024). Instead, mocktail bars and juice crawls are on the rise, marking a shift towards more health-conscious beverage choices.

This transition is driven by several key factors. Heightened awareness of personal image is central to Gen Z's lifestyle, pushing them toward products that align with their values and are consistent with the social norms of their peer groups, yet showing off their individuality (Francis & Hoefel, 2018). The emphasis on maintaining a positive personal brand image via social media plays a crucial role in their consumption choices. For Gen Z, each post and share is a reflection

of their identity and values, making it essential for them to choose products that reinforce their public image. This generation is not only avoiding alcohol for health reasons but also because being seen engaging in healthy behaviors aligns with the carefully curated personal brands they maintain on social media. This trend has fueled the popularity of low-calorie, low-alcohol, and even non-alcoholic beverages among them, meeting their desire to enjoy socially but healthily.

Moreover, while Gen Z is the most health-conscious generation yet (Ludmir, 2023), religiously avoiding sugar, it is important to note that there is often a gap between their perceptions of health and truth. For example, the popularity of gluten-free products among those without any dietary needs suggests a disconnect; these products are not inherently healthier and could even be problematic (Zerbini et al., 2024). This irony is noticeable in consumer behavior, where traditional sodas are declining in sales, yet energy drinks—often loaded with sugar and caffeine—are gaining traction. It is a misconception to believe that a few grams less sugar or alcohol will significantly alter consumption patterns. Instead, Gen Z highly values unique experiences and is not hesitant to spend money on offerings that are cool to show off and will be memorable. To truly resonate with this demographic, the wine industry needs to innovate by creating offerings that no other wineries have.

Economic considerations also play a critical role. A recent Deloitte (2023) study revealed that Gen Z faces greater financial pressures than previous generations, with over half living paycheck to paycheck. Bank of America's 2024 survey also supports the finding that Gen Z prioritizes cost-saving behaviors, dining out less, and making value-oriented spending choices. However, their findings further suggest that Gen Z does spend a majority of their remaining income (36%) on dining out and entertainment. They simply do not make enough money yet, but this systematic approach to spending could be a positive sign for their financial health and our future economy.

While alcohol consumption among younger generations like Gen Z is declining, there remain significant untapped segments within the broader population. Studies show a growing demand for wine among consumers who haven't traditionally been core wine drinkers—namely, Hispanic, Black, and Asian communities. According to a 2021 Wine Market Council study, wine consumers were composed of 70% White non-Hispanic, 13% Hispanic, 12% Black, and 4% Asian (Thach, 2022). Recent data from the National Survey on Drug Use and Health (NSDUH) reveals slight shifts in these proportions, especially highlighting growth potential among Hispanic consumers. Additionally, with over half the global population residing in Asia and Africa projected to lead population growth (Statista, 2024), the wine industry has an opportunity to expand its reach by engaging with these rising demographics. As the population landscape evolves, adapting marketing strategies to appeal to this emerging majority is essential to drive future growth and inclusivity within the wine market.

Just as fine wine needs time to mature and develop its full character, so does Generation Z requires understanding and patience as they define their preferences and influence market trends. I invite industry professionals and enthusiasts to visit Sonoma State University to meet our students—the future consumers—and gain deeper insights into their evolving tastes and

expectations. Engaging directly with them can provide invaluable perspectives that can shape more effective marketing strategies and product developments.

In conclusion, the relationship between Gen Z and alcohol is changing, reflecting broader societal shifts towards health, image consciousness, and economic caution. Imagine a world where “Organic Craft Kombucha” replaces those nostalgic childhood lemonade stands—this could be the innovation the beverage industry needs to captivate modern consumers. Despite these shifts, the cultural significance of wine remains a resilient aspect of human society, one that continues to evolve with each generation’s unique attitudes and preferences.

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Alumni Interview: Cultivating Leadership and Legacy

Caroline Coleman Bailey's Journey with the Wine Business Institute

An interview with Dr. Linda Nowak

Interim Executive Director of the Wine Business Institute, and Caroline Coleman Bailey, Wine Business Institute Board Member and Founding Board President

Linda: When I served as Executive Director of the Wine Business Institute (WBI), from 2007 to 2010, I had the pleasure of working closely with Caroline Coleman Bailey, a third-generation member of the Gallo family. Caroline brought her deep experience in the family business, where she held senior leadership roles and led strategic marketing initiatives for over 18 years. Recently, I had the opportunity to reconnect with Caroline and discuss her journey with SSU and WBI.

Linda: How did you come to serve on the WBI Board?

Caroline: My journey with Sonoma State began in the early 2000s while I was working at Gallo in Healdsburg. I had the opportunity to open our first tasting room in 2002, which deepened my connection with the local community, including SSU. Around that time, Gary Heck of Korbel, who founded WBI in 1996, invited me to join the Wine Business Institute Board. Our focus was on ensuring WBI's local impact while expanding its global reach. Those early years helped shape my approach to board service and community involvement. It was a time of tremendous growth for WBI, similar to the evolution we're seeing now with new leadership. Today, I continue to serve on the WBI Board and recently represented the Board on the school's selection committee for the new Executive Director.

Linda: What key achievements of the WBI are you most proud of?

Caroline: Much of my work at WBI centered on serving the local community, strengthening ties with the wine industry, and building global recognition for our wine business education. 'Think

global, act local' was my mantra as we expanded beyond viticulture and enology to offer a range of wine business courses at all levels—undergraduate, graduate, and extended education. We also prioritized access to education through scholarships, supporting both first-generation college students and seasoned professionals. It's been incredibly rewarding to see these students thrive in the wine industry and beyond, leveraging their education to reach new career heights.

Linda: Tell me about your involvement with the Wine Industry Scholars Program (WISP).

Caroline: I'm especially proud to support WISP because it helps students from first-generation agricultural families achieve their educational goals, regardless of their field of study. Hearing stories from graduates about the impact of these scholarships is truly rewarding. It reaffirms my commitment to WISP, knowing that it makes a meaningful difference in students' lives.

Linda: You earned your MBA at SSU. Can you tell me more about that experience?

Caroline: Earning my MBA was a long-time personal goal, although I didn't have the opportunity during my earlier career. My great uncle Ernest and grandfather Julio both had high school educations and believed in learning through on-the-job experience. While I gained valuable knowledge from them, starting my own business made me realize the value of furthering my education. The MBA program at SSU gave me new skills and perspectives that have helped me approach business challenges and life decisions with greater clarity and confidence. It was a powerful reminder that it's never too late to pursue new goals and lifelong learning.

Linda: I understand you collaborated on an academic textbook.

Caroline: Yes, Armand Gilinsky, a Emeritus Professor of Wine Business at SSU, invited me to co-author a chapter titled "Sustainable Succession in the Wine Industry: Leadership Skills the Next Generation Will Need." This was part of a global collaboration for the Handbook of Research on Sustainability Challenges in the Wine Industry (2023). He knew about my work with family businesses and my MBA case study, which aligned with the book's theme. Our chapter includes several case studies and features a diagnostic tool I co-developed, the Family Enterprise Assessment Tool (FEAT), which is used globally to support family business succession planning.

Linda: What inspired you to write your book, *Rooted in Family: Honoring the Past While Creating Our Future*?

Caroline: Writing a book was always a dream of mine, and during the great pause of 2020, I found the time to reflect on what truly matters. *Rooted in Family* is a reflection of my experiences growing up in entrepreneurial families, working in the family business, and ultimately carving my own path. It explores the challenges and opportunities of navigating a

multigenerational family business. My hope is that the insights and lessons I share can help others create lasting impact while honoring their family's legacy.

Linda: What led you to start your own business?

Caroline: Starting Premier Growth, The Business of Family, in 2010 felt like a natural progression given my family's entrepreneurial roots. It allowed me to use my experience to help families make informed decisions about their business and legacy planning. Transitioning to a governance role in the family business, I founded our Family Council and continue to serve as Chair. I also remain active in the wine industry through my board roles at Gallo, the Wine Institute, and WBI.

Linda: What do you envision as the next steps for the WBI?

Caroline: I believe there's a significant opportunity for SSU to expand the visibility and reach of WBI. As a comprehensive wine business education program in the heart of wine country, it's a hidden gem. There's a need to create more awareness about how students can engage with SSU's diverse offerings and how the community can support them through internships, job placements, and scholarships. SSU and WBI are well-positioned to elevate their wine business education programs, making WBI a premier destination for students and the wine industry alike.

Linda: Thank you for sharing your journey and insights, Caroline. It's been wonderful to hear about your accomplishments and your continued dedication to SSU and WBI.

To learn more about Caroline Coleman Bailey and her work visit www.premiergrowth.com

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Graduate & Certificate Programs: Executive MBA: Wine Business

With a focus on wine business, this fast-paced Executive MBA program offers a low-residency format with online and in-person course work, and an international study tour.

Top Four Reasons Graduates Pursue Our EMBA

- 1. Advance Career Opportunities**
- 2. Improve Job Effectiveness**
- 3. Develop Professional Leadership**
- 4. Increase Salary Potential**

EXPLORE beyond the classroom...

Each EMBA cohort travels abroad on an international business study tour to gain insights into Wine Business and innovation in diverse economies and environments.

EMBA Snapshot

Duration: 18 months

Program Start: October

Minimum Work Experience: 8 Years Professional

No GMAT

*Program schedule, activities, locations, and delivery modes are subject to change. *Conferred as an MBA.

“Every class has provided something I could take away and use immediately. The networking opportunities are also invaluable. If you’re dedicated to furthering your career in wine and are willing to put in the time, I recommend the program 100%.” - Maggie Tillman, *Owner/Sales & Marketing, Alta Colina Vineyard & Winery*

Now accepting applications for Fall 2025. For more information, visit sonoma.education/WBT-emba

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Industry Specific Insight – HR 2025: Courses, Workshops, & Boot Camps

Tailored for Wine Business Professionals

Gain the skills you need to get ahead today and the edge to conquer whatever comes next. Our wine business programs are led by wine industry professionals who engage directly with students in the classroom (either virtually online or in-person) and are scheduled conveniently for working professionals.

Courses, workshops, and boot camps can be taken individually or assembled into a certificate. For added convenience, most courses are offered in the evenings, online, and are 4 to 12 weeks.

Spring Course Offerings*

- Introduction to Wine Business
- A Survey of the Key Drivers in a Wine Business
- Social Media & Wine Marketing
- Strategic Wine Marketing
- Foundation & Best Practices
- of Wine Industry Accounting
- HR Audit Intensive Workshop
- Operational Reporting Workshop
- Sales Channels & Out of State
- Licensing Workshop

Summer Course Offerings*

- How to Build a Profitable Wine Club
- Introduction to Wine Business
- Direct to Consumer Marketing &
- eCommerce for the Wine Industry
- Financial Management &
- Strategy for Wine Businesses

Fall Course Offerings*

- A Survey of Key Drivers in a Wine Business
- Financial Management & Strategy
- Strategic Wine Club Management
- Cost Analysis & Pricing Strategies
- Wine Import & Distribution

**Course availability may vary, please check the website for current course schedule.*

Get Ready for 2025: Practical HR Steps Wineries Can Take Now

Every business feels the ripple (or tsunami) of change after an election year, and wineries are no exception. Our industry faces unique challenges: multiple work centers, seasonal labor, and balancing employee and guest expectations. With shifts in consumer habits, like low- and no-alcohol trends, and compliance changes on the horizon, an HR assessment can provide crucial clarity and direction.

An HR assessment isn't just a formality; it's a proactive step to evaluate where your people strategy stands versus where it needs to be. Understanding your framework and identifying gaps equips you to make informed decisions—before your team's first inkling of new 2025 laws comes through TikTok.

Why Now?

With a new administration, federal and state regulations affecting employment may change, and wineries need to be ready. An HR assessment lets you confirm compliance, identify gaps, and confidently pivot as political shifts unfold.

Prioritize Fair Pay and Role Clarity

Transparency around pay and roles is becoming a legal and cultural expectation. Key questions: Are roles accurately classified? Do we have consistent pay bands? Can we justify salary differences across similar roles? Wage claims are rising, so addressing these areas now can safeguard your winery.

Practical Steps

1. Define your HR assessment goals.
2. Update compliance records.
3. Standardize job roles and pay structures.

4. Gather employee feedback.
5. Analyze workforce trends to stay ahead.

Starting your HR assessment now can ensure your winery is compliant, competitive, and ready for 2025. If this is new to you, or you find it overwhelming—SSU is proud to host a workshop to help you do this in 2025.

HR Audit Intensive for the Wine Industry

Date & Time: Friday, Feb. 7, 9am–3:30pm

Cost: \$525

Instructor: Jessica Hart

Contact us at wbcertificates@sonoma.edu

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Acknowledgements

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