



# Economic Impact of the Wine Industry in Iowa

June 18, 2024

## Report by Fourth Economy



Fourth Economy is a national community and economic development consulting firm. Powered by a vision for an economy that serves the people, our approach is centered on principles of competitiveness, equity, and resilience. We partner with communities and organizations, public and private, who are ready for change to equip them with tools and innovative solutions to build better communities and stronger economies.

**[www.fourtheconomy.com](http://www.fourtheconomy.com) • [engage@fourtheconomy.com](mailto:engage@fourtheconomy.com)**

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## Executive Summary

Fourth Economy, a national community and economic development consulting firm, was hired by the Iowa Economic Development Authority to conduct an economic impact analysis of the beer, wine, and distillery industries in the state. This report focuses on the wine industry.

The report compares Iowa's wine industry to other states'. In particular, **Iowa ranks twenty-fifth in top wine-producing states**, and Fourth Economy's analysis estimates that **Iowa is home to 111 wineries**.<sup>1</sup>

**Iowa wineries created an economic impact of \$374 million in 2022.** A large share of this impact is from winery-related tourism, an item explicitly referenced in the 2022 report but absent from the 2019 report, which recorded an economic impact of \$31.7 million from Iowa wineries.<sup>2</sup> Accordingly, winery-related tourism accounts for a significant share of the additional impact that was not estimated in the 2019 report.<sup>3</sup> **Projected growth for the wine industry is estimated at 1.8 percent** over the next five years, with a 3 percent increase in jobs.

**The workforce of the Iowa winery industry totaled 1,597 employees in 2022 for winery and vineyard operations and trade, an overall increase of only 1 percent** after recovering from the COVID-19 pandemic.<sup>4</sup> Throughout the supply chain and worker spending, the industry supports a total of 5,432 jobs in Iowa. Average earnings among core and supporting jobs in the winery industry ranged from \$17,761 for Drinking Place (Alcoholic Beverages) to \$71,310 for Wine and Distilled Alcoholic Beverage Merchant Wholesalers in 2022.<sup>5</sup> Average wage calculations include wages for both full-time and part-time workers.

From a tourism perspective, the beer, wine, and distillery industries play an important role. Based on the number of tourists who visited wineries, and their expenditures in Iowa for transportation, food, beverages, retail, recreation, and entertainment, visitors to Iowa breweries, distilleries, and wineries spent a total of \$410 million in 2022. Half of these expenditures, or **\$205 million, were related to tourism at Iowa's wineries**.

**Overall, Iowa's wine industry continues to provide an economic impact to the state through sales, employment, tourism, and taxes and is expected to continue to grow its footprint.**

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<sup>1</sup> Fourth Economy Analysis of Lightcast™ and Internal Data

<sup>2</sup> [2019 Iowa Wine Industry Economic Impact Study](#). The survey conducted for this study had a limited response, so sales were estimated from the Iowa Alcoholic Beverages Division Monthly Gallonage Reports, which do not account for all sales.

<sup>3</sup> *Winery-related tourism* refers to tourism that results when a visitor's primary motivation to travel is to visit a winery or wine festival to experience the production process and/or tasting of wine. See [Calculating Tourism Impact](#) on page 12. Visitor data from the Iowa Tourism Office – [2022 Economic Impact Report](#).

<sup>4</sup> Fourth Economy Analysis of Lightcast™ Data, 2012–22

<sup>5</sup> Fourth Economy Analysis of Lightcast™ Data, 2018–22

# Introduction and Wine Industry Overview

Fourth Economy, a national community and economic development consulting firm, was hired by the Iowa Economic Development Authority to conduct an economic impact analysis of the beer, wine, and distillery industries in the state. This report focuses on the wine industry.

## National Industry Overview

America’s wine industry is a \$60 billion market.<sup>6</sup> The industry’s total economic impact is \$276 billion, including 1.84 million jobs, \$95 billion in wages, \$16 billion in tourism expenditures, and nearly \$23 billion in taxes.<sup>7</sup> There are over 10,600 wine producers and nearly 120,000 acres of vineyards in the US. Wine is produced in all fifty states. The primary economic impacts of the wine industry are driven by retailers, winery employees, and tourism-related activities.

California drives nearly one-third of the country’s wine impact, accounting for \$88 billion of economic impact. Other high-performing states in the amount of economic impact produced include Texas (\$20.3 billion) and Washington (\$9.5 billion). California has nearly five thousand wineries and employs 513,700 individuals in the industry. The only other states with more than five hundred wineries are Washington (836) and Oregon (726).

## Overview of Industry Leaders, by Producers and State

### Wine Rankings

The lists below depict the top wine producers and wine-producing states. While Iowa does not fall in the top ten, it is included in the list for reference.

#### Top 10 US Wine Producers, by Cases<sup>8</sup>

1. E. & J. Gallo Winery (Modesto, CA) – 70 million
2. The Wine Group (Livermore, CA) – 53 million
3. Constellation (Victor, NY) – 35 million
4. Trinchero Family Estates (Napa, CA) – 20 million
5. Delicato Family Wines (Napa, CA) – 13 million
6. Bronco Wine Company (Ceres, CA) – 10 million
7. Ste. Michelle Wine Estates (Woodinville, WA) – 8.2 million
8. Jackson Family Wineries (Santa Rosa, CA) – 6 million
9. Deutsch Family Wine & Spirits (Stamford, CT) – 4.34 million
10. Viña Concha y Toro (Hopland, CA) – 2.75 million

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<sup>6</sup> Statista – [Wine, United States](#)

<sup>7</sup> National Association of American Wineries – [United States Economic Impact Study 2022](#)

<sup>8</sup> BatchGeo – [Largest Wineries in US, 2020](#)

### **Top 10 US Wine-Producing States, by Volume in Gallons<sup>9</sup>**

1. California – 680.3 million
2. Washington – 40.7 million
3. New York – 28 million
4. Pennsylvania – 12.4 million
5. Oregon – 11.8 million
6. Ohio – 5.9 million
7. Michigan – 2.6 million
8. Kentucky – 2.2 million
9. Vermont – 2.2 million
10. Virginia – 2.2 million
25. Iowa – 335,500

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<sup>9</sup> World Population Review – [Wine Production by State, 2024](#)

## Iowa Wine Industry Overview

Fourth Economy’s analysis of data, sourced from, among other locations, Lightcast™ and web scraping, estimates that there are 138 wineries.<sup>10</sup> In 2022, wine production came in at 280,982 gallons.<sup>11</sup> This places Iowa at twenty-fifth among all states in wine production. The industry produces around \$36 million in sales annually, creating key business revenue, tax revenue, and jobs across the state.

## Market Data

### Taxable Sales by Volume and Market Share

In FY2023, Iowa sold 4,472,429 total gallons of wine, 2.32 percent (103,678) of which was *native Iowa wine*, or wine for which a majority of production lies in, and ingredients are sourced from, Iowa.<sup>12</sup> This represents a slight decline over the previous fiscal year (-0.36 percentage-point difference over FY2022, and a total decrease of 18.8 percent in native wine sold). This reflects only taxable sales subject to Iowa’s gallonage tax on wholesale wine.<sup>13</sup> Many wineries are shifting to direct sales that are not subject to this tax.

### Wine Gallonage Tax Revenue

The sale of beer, wine, and liquor in the state resulted in \$478,259,852 total revenue earned in FY2023, derived from a combination of liquor sales, license fees, wine gallonage tax, bottle deposit/surcharge, and split-case revenue.<sup>14, 15</sup> Native wine derived tax revenue of \$181,436 in FY2023. This revenue decreased year over year from FY2022, due in part to fee structure updates from the Iowa State Senate, as well as shifts in how Iowa wineries sell their product. Other taxes generated by winery operations provided additional state and local revenues (see [Overall Economic Impacts of the Wine Industry](#)).

### Estimated Sales Revenue

Not all wine sold in Iowa is subject to the gallonage tax, and the estimates of alcohol sales based on available sources vary widely. Lightcast™ provides estimates of detailed industry sales, employment, and gross regional product (or GRP, a state-level equivalent of the national gross domestic product). The sales data is available only for 2022, but historical and forecast data is available for GRP and employment. Fourth Economy estimated the annual sales revenue using

<sup>10</sup> Fourth Economy Analysis of Lightcast™ and Internal Data

<sup>11</sup> Iowa State University – [Iowa Native Wine Production and Sales Report 2022](#)

<sup>12</sup> In 2021, the standards for tracking total wine produced and sold in Iowa shifted with the introduction of the Electronic Licensing and Permitting System. Effects from this shift caused a short-term lag in clear industry data, which may still be present in current data.

<sup>13</sup> For more on the wine gallonage tax, see [Wine gallonage tax and related funds. Iowa Code § 123.183](#).

<sup>14</sup> Iowa Alcoholic Beverages Division – [Annual Report FY2023](#)

<sup>15</sup> This tax revenue includes ciders with an ABV of 6.25 percent or higher, according to the definition of wine in IA Code 123-3-(53).

annual GRP and employment compared to the 2022 GRP and sales per employee. While the taxable sales have declined, overall wine sales (and employment) have grown.

**Estimated Annual Sales of Native Iowa Alcohol 2017–23**

Year	Wineries
2023	\$36,272,573
2022	\$36,072,245
2021	\$33,446,380
2020	\$29,233,449
2019	\$35,857,272
2018	\$39,379,969
2017	\$35,719,425

Source: Estimated using Lightcast™ GRP, sales, and employment..

For native Iowa wineries, the top five producers by volume, whose names are not reported, produced the following amounts in gallons in 2022:

1. 43,915
2. 27,673
3. 24,435
4. 20,251
5. 18,029<sup>16</sup>

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<sup>16</sup> Iowa State University – [Iowa Native Wine Production and Sales Report 2022](#)



## Wine Industry Workforce

In our analysis, we considered the Iowa wine industry as composed of the following NAICS codes to fully capture its extent:

- 312130 – Wineries
- 424820 – Wine and Distilled Alcoholic Beverage Merchant Wholesalers

In addition, portions of employment from the retail sales of wine from the following two NAICS codes were included as wine retailing. The portion for beer, wine, and liquor was allocated based on contributions to gross state product for each industry.

- 445320 – Beer, Wine, and Liquor Retailers
- 722410 – Drinking Places (Alcoholic Beverages)

Employment in winery operations was impacted by the COVID-19 pandemic. Employment recovered somewhat in 2022 but did not return to the peak of 2018. Employment in vineyards grew slightly, but not enough to offset the declines. Some wineries have shifted from wholesale sales toward retail sales, which has reduced the revenue for the wine gallonage tax and resulted in a small decrease in jobs related to wine wholesaling. Growth in wine-related retail employment offset the losses elsewhere, bringing 2022 total employment to 1,597.<sup>17</sup>

<b>Wineries</b>	<b>2018 Jobs</b>	<b>2019 Jobs</b>	<b>2020 Jobs</b>	<b>2021 Jobs</b>	<b>2022 Jobs</b>	<b>2018–22 Change</b>	<b>2018–22 % Change</b>
Winery Operations	464	423	345	394	437	-27	-6%
Vineyards	146	150	152	155	162	16	11%
Wine Wholesaling	141	132	127	130	139	-3	-2%
Wine Retailing	837	836	694	819	859	23	3%
<b>Wine Operations and Trade Total</b>	<b>1,588</b>	<b>1,541</b>	<b>1,318</b>	<b>1,498</b>	<b>1,597</b>	<b>9</b>	<b>1%</b>

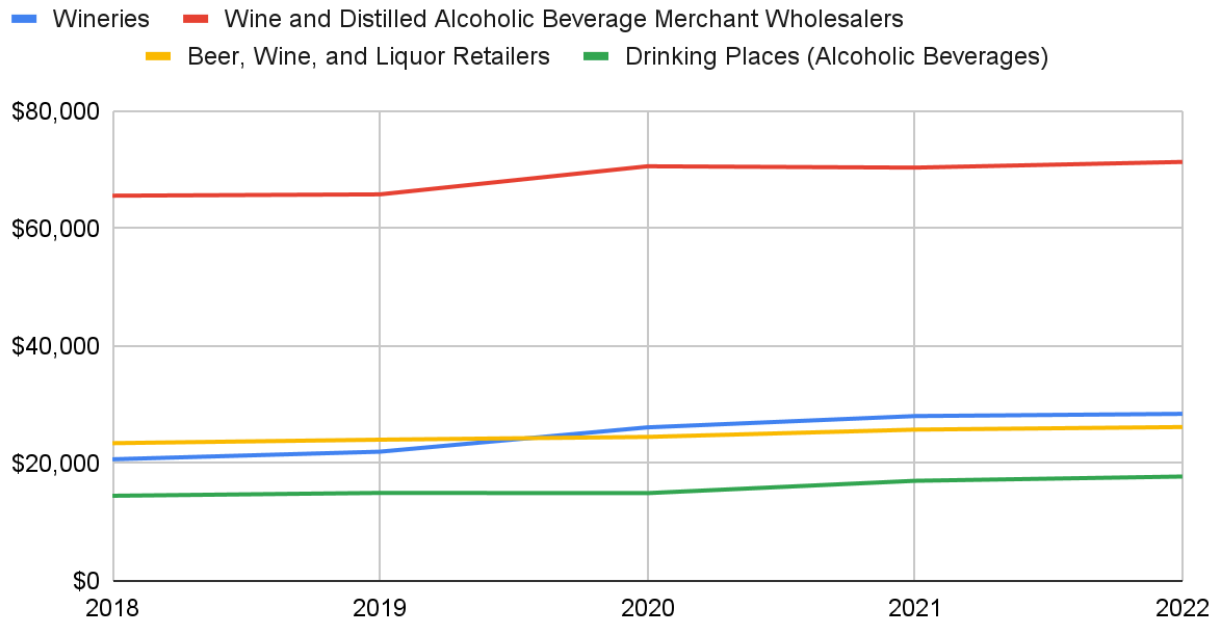
Source: Fourth Economy Analysis of Lightcast™ Data, 2018–22

Average earnings for jobs among core and supporting jobs in the winery industry ranged from \$17,761 for Drinking Place (Alcoholic Beverages) to \$71,310 for Wine and Distilled Alcoholic Beverage Merchant Wholesalers in 2022.<sup>18</sup>

<sup>17</sup> Fourth Economy Analysis of Lightcast™ Data, 2012–22

<sup>18</sup> Fourth Economy Analysis of Lightcast™ Data, 2018–22

## Average Annual Wages (PT and FT Workers)



Source: Fourth Economy Analysis of Lightcast™ Data, 2018–22

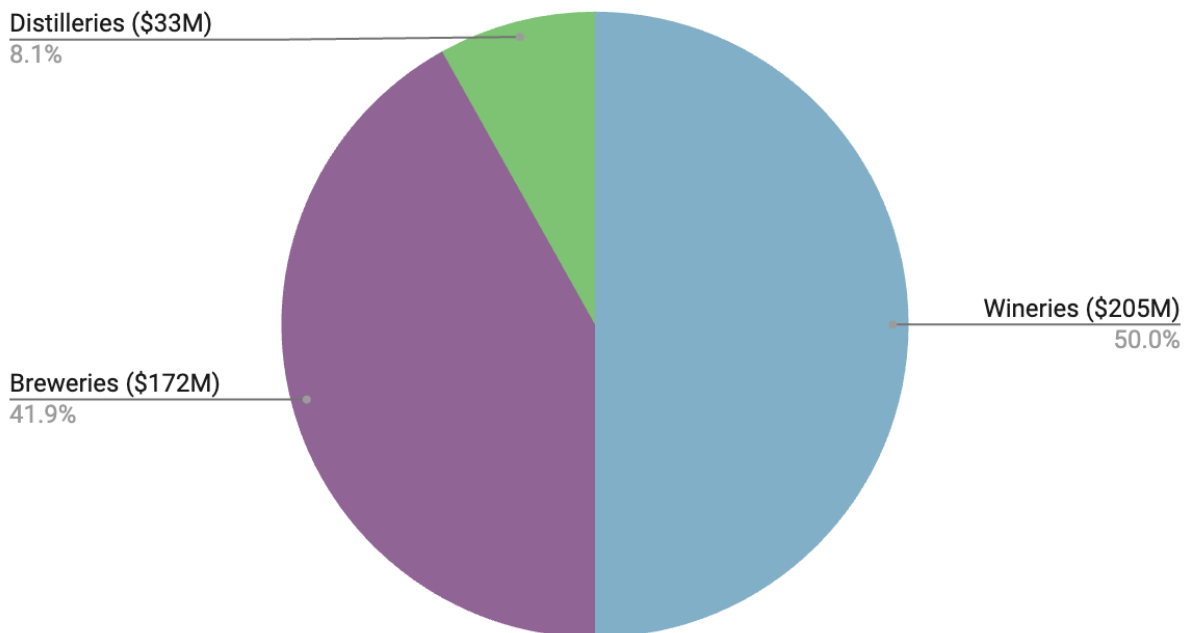
## Wine Industry Role in Tourism

In 2022, the Iowa Tourism Office’s annual economic impact report estimated nearly \$7 billion in total visitor spending in Iowa, with \$1.5 billion in total visitor spending for food and beverage, a 11.7 percent growth over the previous year.<sup>19</sup>

Per the 2022 National Economic Impact Study of the Wine Industry from WineAmerica, the National Association of American Wineries in Washington, Iowa wine alone generated 80,686 visits from 24,508 tourists that year.<sup>20</sup> This resulted in a total spending of \$27,382,500, but that does not reflect the full impact of tourism expenditures.

Based on the number of tourists who visited wineries, and their expenditures in Iowa for transportation, food, beverages, retail, recreation, and entertainment, visitors to Iowa breweries, distilleries, and wineries spent a total of \$410 million in 2022. Half of these expenditures, or \$205 million, were related to tourism at Iowa’s wineries. Considering the volume of wineries and wine sales in the states relative to breweries and distilleries, Iowa’s wine industry punches above its weight in generating tourism.

### \$410 Million in 2022 Visitor Spending



<sup>19</sup> Iowa Tourism Office – [2022 Economic Impact Report](#)

<sup>20</sup> [Iowa Wine Industry – WineAmerica Economic Impact Study](#). This study includes retail sales that account for a significant share of impact that is not included in our estimate.

### Calculating Tourism Impact

According to the Iowa Tourism Office’s visitor profile research for 2022, wineries and wine tastings are a personal passion or hobby for 25 percent of the tourists visiting Iowa, compared to 22 percent for breweries and distilleries. In terms of what visitors did on their trips to Iowa, 13 percent reported visiting a winery or brewery. Distilleries were not included in the report. Iowa visitors spent nearly \$7 billion in the state in 2022, but counting 13 to 25 percent of that impact would seem to overinflate the benefits that breweries, wineries, and distilleries provide to Iowa. Fourth Economy developed an estimate on the range of activities and the share of visitors who engaged in them to better allocate the tourism impacts to these sectors. This resulted in a more conservative estimate of 3 percent of visitor spending, which was distributed to each sector based on its share of employment.

Events and festivals are a common way for individual craft breweries, wineries, and distilleries as well as industry leaders to promote locally sourced and produced beverages to state residents and tourists alike. With industry trade associations leading the charge of organizing events at which producers can sell their products, the beer and wine industries specifically can excel in leveraging these opportunities for increased sales and brand awareness. The spirits industry has a sparser events calendar due to the lack of a statewide organizing body. Key winery events include:

1. Iowa Specialty Producers Conference (Statewide)
2. Iowa Wine Experience at the Iowa State Fair (Statewide)
3. Iowa Wine Month (Statewide)
4. Iowa Wine and Cider Festival (Des Moines)
5. Winefest (Des Moines)

## Overall Economic Impacts of the Wine Industry

The economic impact of breweries, wineries, and distilleries is a combination of their operations, wholesale and retail trade activities, and the visitors whom these industries attract for the state’s tourism sector.

Iowa wineries created an economic impact of \$347 million in 2022. This impact includes nearly \$194 million in earnings impacts, \$33.6 million in tax impacts, and 5,432 jobs across the state. Projected growth is slower for the wine industry than for the craft beer and distillery industries. Projected 2022–27 output growth is less than 2 percent, with a 3.6 percent increase in jobs. This insight aligns with the perspective of interviewees from key stakeholders: Iowa’s wine industry is more saturated than its beer and distilled spirits counterparts.

From an employment perspective, key industry personnel indicated that many wineries employ seasonal help, meaning they hire extra employees in the spring and summer to work their music events, festivals, farmers’ markets, and more. In addition, some wineries have added kitchens, so they are hiring extra employees to staff the kitchen as well.

### Winery Impact Overview 2022 and Projected 2027

	Output (\$M)		Change 2022–27	Total Job Impacts		Change 2022–27
	2022	2027		2022	2027	
<b>Winery</b>	<b>2022</b>	<b>2027</b>		<b>2022</b>	<b>2027</b>	
Winery Operations	\$86	\$89	3.7%	587	609	3.7%
Vineyard Operations	\$39	\$40	3.7%	269	279	3.7%
Winery Trade	\$15	\$17	10.4%	1,498	1,654	10.4%
Winery Tourism	\$235	\$235	0.3%	3,078	3,087	0.3%
<b>Total</b>	<b>\$374</b>	<b>\$381</b>	<b>1.8%</b>	<b>5,432</b>	<b>5,628</b>	<b>3.6%</b>

The 1,597 jobs in winery and vineyard operations and trade also supported another 2,317 jobs in winery-related tourism for a total direct impact of 3,914 jobs. Indirect jobs in the supply chain accounted for 628 jobs, with another 890 jobs from related worker spending, for a total impact of 5,432 jobs in Iowa.

### 2022 Winery Job Impacts

	Direct	Indirect	Induced	Total
Winery Operations	437	49	101	587
Vineyard Operations	162	52	55	269
Winery Trade	998	208	292	1,498
Winery Tourism	2,317	319	442	3,078
<b>Total</b>	<b>3,914</b>	<b>628</b>	<b>890</b>	<b>5,432</b>

Winery employment provided nearly \$109 million in direct earnings, with total earnings of nearly \$194 million.

### 2022 Winery Earnings Impacts (\$M)

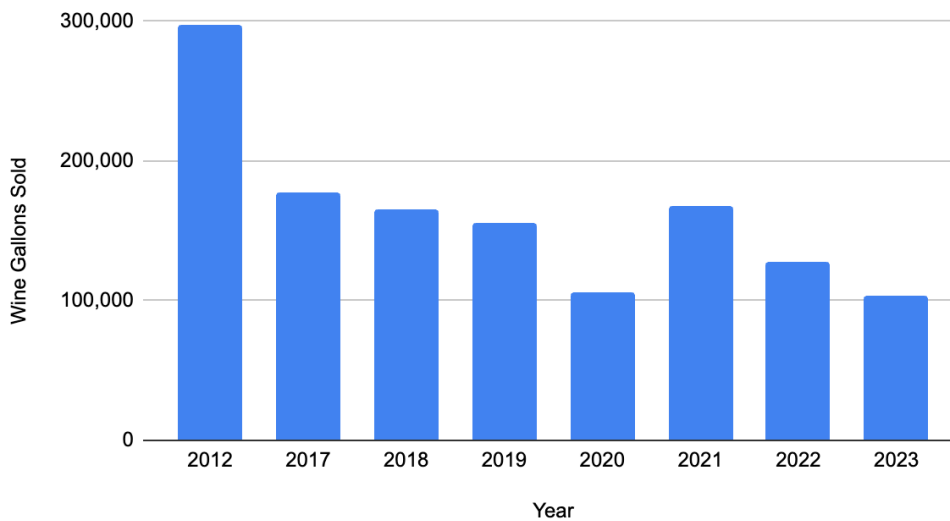
	Direct	Indirect	Induced	Total
Winery Operations	\$12.2	\$2.9	\$5.3	\$20.5
Vineyard Operations	\$9.7	\$3.6	\$4.5	\$17.8
Winery Trade	\$30.9	\$11.7	\$15.4	\$58.0
Winery Tourism	\$56.1	\$18.5	\$22.8	\$97.4
<b>Winery Total</b>	<b>\$108.9</b>	<b>\$36.8</b>	<b>\$48.0</b>	<b>\$193.7</b>

In addition to the wine gallonage tax, other taxes generated by wineries and vineyards operations, trade, and tourism generated nearly \$16 million in local taxes and \$13 million in state taxes out of a total tax impact of nearly \$34 million. These taxes include the gallonage tax on wine; other business property taxes, licenses, and sales and gross receipts taxes; federal taxes on goods and services from the direct operations; and the broader supply chain (indirect impacts) and worker spending (induced impacts).

### 2022 Winery Tax Impacts (\$M)

	Local	State	Federal	Total
Winery Operations	\$1.4	\$1.1	\$0.5	\$3.1
Vineyard Operations	\$0.8	\$0.7	\$0.4	\$1.8
Winery Trade	\$6.5	\$5.2	\$2.0	\$13.6
Winery Tourism	\$7.2	\$5.7	\$2.1	\$15.0
<b>Winery Total</b>	<b>\$15.8</b>	<b>\$12.7</b>	<b>\$5.0</b>	<b>\$33.6</b>

### Annual Gallons of Native Iowa Wine Sold



Source: The 2012 data comes from *The Economic Impact of Iowa Wine and Wine Grapes – 2012*, and data from 2017 to 2023 from the Iowa Alcoholic Beverages Division Annual Reports. Note that the jump from 2012 to 2017 is due to available data from reports.

In 2012, Iowa produced 297,000 gallons of native wine and had 1,250 acres of grape-bearing vineyards, according to the 2012 impact report.<sup>21</sup> Grape production has declined, with 721 grape-bearing acres in wineries and independent vineyards, as reported in the 2022 Census of Agriculture. The declines in grape-bearing acres and native wine production may impact the growth of the winery sector in the future, unless the industry imports more grapes and/or increases production of nonnative wines. While the volume of wine produced has grown to 335,522 gallons per year as of May 2023, the wine sold at wholesale and therefore subject to the wine gallonage tax has fallen drastically.<sup>22</sup> According to the 2023 annual report, Iowa sold less than 104,000 gallons of native wine, 35 percent of the 2012 level.<sup>23</sup>

Key industry personnel indicated that the reason for the decrease in taxable production can be attributed to wineries moving away from wholesale wine sales. In addition, some wineries had leftover inventory from production during COVID-19.

<sup>21</sup> Frank, Rimerman + Co. LLP. 2014. *The Economic Impact of Iowa Wine and Wine Grapes – 2012*. Commissioned by Iowa State University.

<sup>22</sup> Iowa Legislative Service Agency. *Iowa’s Winery and Distillery Industries*, 2024.

<sup>23</sup> Iowa Alcoholic Beverages Division. Annual Report, FY2023. Accessed on Jan. 12, 2024, from [https://abd.iowa.gov/sites/default/files/media/publications/abd\\_2023\\_annual\\_report.pdf](https://abd.iowa.gov/sites/default/files/media/publications/abd_2023_annual_report.pdf).

## Economic Impact of the Wine Industry Supply Chain

For wineries, machinery manufacturing accounts for the highest volume of total purchases. However, this \$4.71 million figure is small in comparison to total purchase leaders in the brewery and distillery industries. Truck transportation sees the highest rate of in-state purchases at 68 percent. However, this share is less significant due to total purchases being only \$1.25 million.

<b>Purchases from</b>	<b>Total Purchases</b>	<b>In-Region Purchases</b>	<b>Share in State</b>
Machinery Manufacturing	\$4,707,569	\$536,262	11%
Merchant Wholesalers, Nondurable Goods	\$3,591,491	\$1,073,554	30%
Crop Production	\$2,283,536	\$903,866	40%
Merchant Wholesalers, Durable Goods	\$1,435,324	\$480,832	33%
Truck Transportation	\$1,254,253	\$851,028	68%
<b>Subtotal Top 5</b>	<b>\$13,272,173</b>	<b>\$3,845,542</b>	<b>29%</b>



## National Economic Outlook for Craft Beer, Wine, and Distillery Industries

Total alcoholic beverage sales in the United States stood at \$259.8 billion in 2022, increasing from \$244.9 billion the previous year (+6.1 percent year-over-year growth) after a pandemic-era low of \$215.3 billion.<sup>24</sup> According to the Brewers Association, the overall beer market was worth \$115.4 billion in 2022, of which retail dollar sales for the craft beer market increased 5 percent to \$28.4 billion (24.6 percent of the overall market).<sup>25</sup> However, overall US beer volume sales were down 3 percent in 2022.<sup>26</sup>

The wine industry, meanwhile, was worth \$53.3 billion and projected to grow to \$70.5 billion by 2027.<sup>27</sup> The US spirits industry experienced year-over-year revenue growth from 2021 to 2022, growing 5.1 percent from \$35.8 billion to \$37.6 billion.<sup>28</sup> Indeed, over the past twenty years, the spirit industry's average annual growth was 5.4 percent, compared to 75 percent in the past five years.<sup>29</sup>

Overall, the sales market share of the alcohol industry in the US, by beverage, was broken down with beer accounting for 41.9 percent, wine accounting for 16 percent, and spirits accounting for 42.1 percent.<sup>30</sup> Beer has had a declining market share since 2000, when it accounted for more than half (55.5 percent) of all sales, while spirits have increased significantly over this period, growing from just 28.7 percent of the market in 2000.<sup>31</sup>

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<sup>24</sup> [Alcoholic beverage sales in the U.S. 2022 | Statista](#)

<sup>25</sup> [National Beer Sales & Production Data – Brewers Association](#)

<sup>26</sup> [National Beer Sales & Production Data – Brewers Association](#)

<sup>27</sup> [Wine – United States | Statista Market Forecast](#)

<sup>28</sup> Distilled Spirits Council of the United States – [Annual Economic Briefing](#)

<sup>29</sup> Distilled Spirits Council of the United States – [Annual Economic Briefing](#)

<sup>30</sup> [Alcohol market share by segment U.S. 2022 | Statista](#)

<sup>31</sup> [Alcohol market share by segment U.S. 2022 | Statista](#)

## Appendix A – Key Stakeholder Interviews

We conducted our interviews as part of a broad study of the impact of breweries, distilleries, and wineries. The full list of interviewees is included below:

### Breweries

1. John Martin – Founder, [Confluence Brewing](#)
2. Noreen Otto – Executive Director, [Iowa Brewers Guild](#)
3. Megan McKay – Owner, [Peace Tree Brewing](#)

### Distilleries and Orchards

4. Jeff Quint – Owner, [Cedar Ridge Distillery](#)
5. Ryan Burchett – Chief Financial Officer, [Mississippi River Distilling Company](#)
6. Paul Rasch – Owner, [Wilson’s Orchard](#)
7. Benji Deal – Owner, [Deal’s Orchard](#)

### Wineries

8. Kevin Fifo – Owner, [Covered Bridges Winery](#)
9. Anne Zwink – Owner, [Soldier Creek Winery](#)
10. Tara Kohlhaas – Founder, [Wijn House](#)
11. Christie Jensen – Executive Director, [Iowa Wine Growers Association](#)
12. Erin Norton – Director, [Iowa State University Midwest Grape & Wine Industry Institute](#)

### Public Sector

13. Zhi Chen – Senior Planner, [Des Moines Area Metropolitan Planning Organization](#)
14. Stephen Larson – Director, [Iowa Alcoholic Beverages Division](#)