

#### CERTIFIED CERTIFIED VINEYARD WINERY

## CARING FOR NATURE AND COMMUNITY ELEVATES QUALITY AND EXPERIENCE

## Napa Green Ambassadors

- What is sustainability?
- Sustainability v. Organic
- What does it mean to be Napa Green?
- Importance of Third-Party Certification
- Evidence visitors and guests want to hear about "doing well by doing good"



#### Water Efficienc

#### **Energy Efficiency**

Waste Prevention & Supply Chain

## SIX PILLARS OF SUSTAINABLE WINEGROWING LEADERSHIP

#### Proactive Farming & Biodiversity

Social Equity, Diversity, and Inclusion

Climate Action & Regenerative Ag

#### How is Sustainability Different from Organic?

#### ORGANIC

- Farm system only
- Focused on Don't: Eliminate Synthetic Pesticides

#### SUSTAINABLE

- Vineyard AND Winery
- Focus on Do: Resource
   Efficiency; Climate Action;
   Social Equity
- Includes phasing out the use of potentially harmful pesticides

NAPA GREEN VINEYARD	NAPA GREEN WINERY	ORGANIC*	BIODYNAMIC*	NAPA GREEN LAND (Phased out 2021)
Required for entry to program	Required for entry to program			✓
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\*Essential to recognize that Organic and Biodynamic certification DO NOT include sustainability and environmental stewardship standards for the winery.

## **U.S. Sustainable Winegrowing Certifications**

**Comprehensive - Soil to Bottle** 

**Vineyard Only** 













#### **Environmental Compliance Certifications**





#### **Environmental Certifications**





#### NAPA GREEN LAND



- Launched in 2004.
- Practices to improve the health of the Napa River and watershed by preventing erosion & soil runoff.
- In 2017, the Water Board adopted these best practices and "Farm Plan" as regulatory compliance for vineyard Waste Discharge Requirements (WDR).
- Environmental compliance is fundamental. Our mission is to help our members continuously take sustainability leadership to the next level.

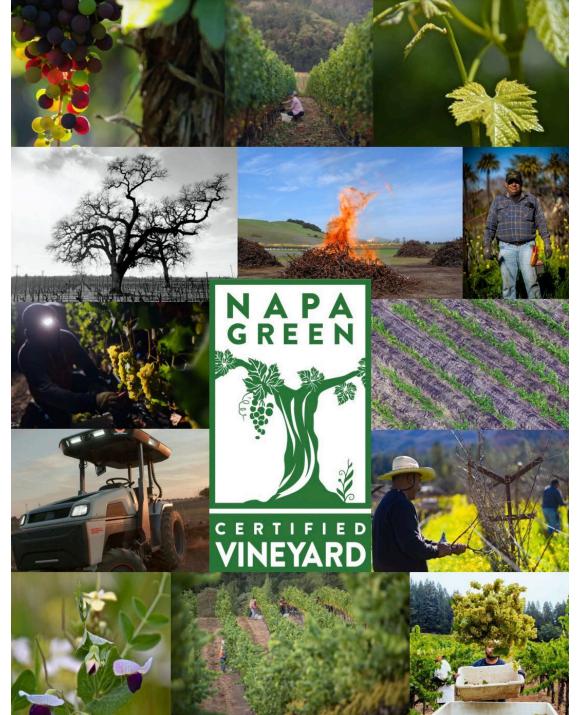
#### NAPA GREEN VINEYARD

X



Springboard

- REPLACES Land program as of Jan. 2022. Members have one-year to transition.
- First wine industry sustainability certification to focus on climate action, regenerative farming, and social equity.
- Cutting edge program to address the critical issues of today and tomorrow.



#### >100 required practic

# What is a grape but the year's climate distilled down to a small orb?

Eric Asimov, NYT











## BHAG: CARBON NEUTRAL IN SIX YEARS AND CLIMATE POSITIVE IN NINE YEARS

Agriculture is the ONE sector that has the ability to transform from a net emitter of CO<sub>2</sub> to a net sequesterer of CO<sub>2</sub> — there is no other human managed realm with this potential.

First 12 growers certified and >40 actively in transition, representing 16% of Napa County vineyard acreage



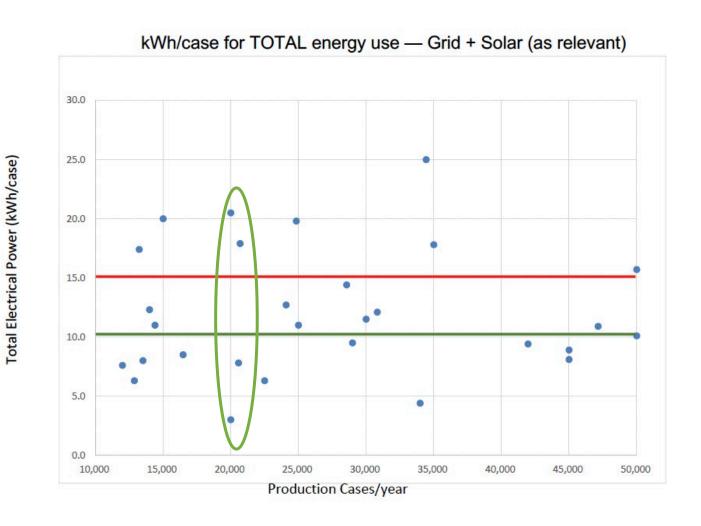
#### Napa Green Certified Wineries implement >120 sustainability practices to:

- Save energy and water and increase efficiency
- Prevent waste through recycling, composting and "green" supply chain
- Reduce GHG emissions and the winery's carbon footprint
- Commit to social equity, diversity, and inclusion
- The whole facility is certified from production to administration to hospitality

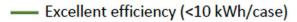


## Water : Energy : Climate Nexus

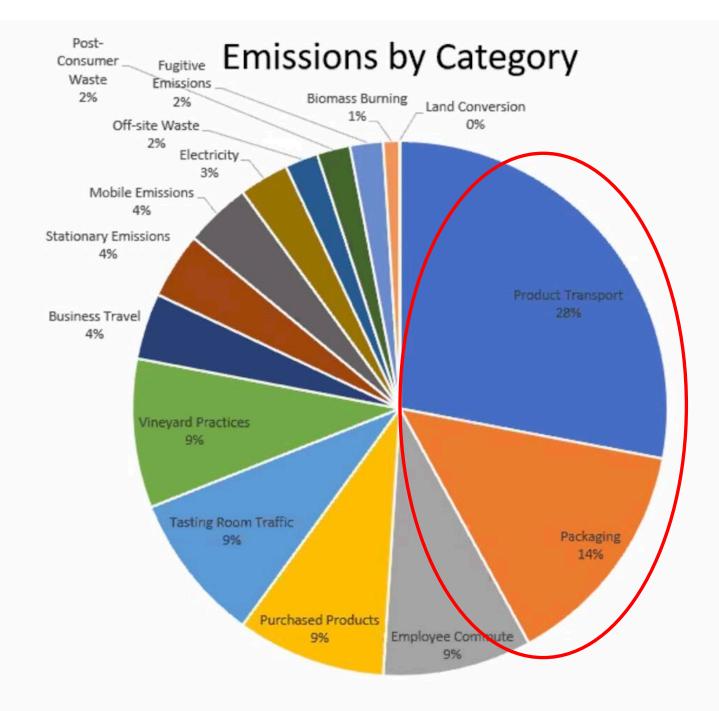
#### Energy Intensity Metrics for Wineries Producing >10k to 50k Cases



Two wineries making 20,000 cases of wine. Efficiency Difference: \$108,000 a YEAR in savings



- Okay efficiency (<15 kWh/case)</li>
- Total Electrical usage





Value: \$100 Bottle Weight: 650 g 1.4 lbs. Value: \$100 Bottle Weight: 580 g 1.3 lbs.

wine napanook Sellared & bottle

hapanook 2019 christian mouel Value: \$50 Bottle Weight: 470 g 1 lb.

PETER PAUL

2019 CABERNET SAUVIGNON Napa Valley

WINES -

Value: \$30 Bottle Weight: Value: \$300 Bottle Weight: 560 g 1.2 lbs.

TERRA D'ORO

DEAVER VINEYARD ZINFANDEL



25,000 cases: ADDITIONAL 210,000 lbs. or 105 tons

## Don't Overlook What is Essential

We have two women leading an all-Latino winemaking team. Our small cellar team of six has all been here 15 plus years, with a 50:50 split of women to men. At least once a year we visit another winery that is a leader in sustainability. This helps keep everyone engaged and thinking about both low-hanging fruit and long-term dreams for saving water and energy, reducing emissions, and building resilience. Laura Orozco, our Assistant Winemaker, is bullish about recycling and composting and keeping the team trained. We focus on development and opportunities for advancement, and have a budget for education to support professional and personal growth. Edgar Lona joined as a cellar intern in 1997, and is now the Cellar Master & Facility Supervisor. We are working with The Roots Fund to hire interns for harvest to broaden and diversify our talent pool. We also try to be generous with work-life balance, especially with the home-schooling challenges during COVID. Napa Green has broadened our perspective of what sustainability really means – it is so much more than how we grow our grapes. Diversity and social inclusion are a part of our fabric, essential to sustain our business and make us better. -Elizabeth Vianna, Winemaker & General Manager, Chimney Rock Winery

NAPA GREEN CERTIFIED WINERIES: Accendo Cellars, ADAMVS, Alpha Omega, Amici Cellars, Artesa Vineyards & Winery, Ashes & Diamonds, Ballentine Vineyards, Bennett Lane Winery, Beringer Vineyards, Bladdbird Vineyards, Boeschen Vineyards, Bouchaine Vineyards, BRAND Napa Valley, CADE Estate Winery, Cakebread Cellars, Cardinale, Castello di Amorosa, Chateau Boswell Winery, Chimaey Rock Winery, Cliff Lede Vineyards, Clas Du Val, Conn Creek Winery, Covert Estate, Crocker & Starr Wines, Cuvaison, Dalla Valle Vineyards, Domaine Cameros, Damaine Chandon, Etude, Far Niente Winery, Frank Family Vineyards, Gamble Family Vineyards,

Neinte Vinery, trans ramity Vineyaras, Gamole ramity Vineyards Estate Winery, Jessup Cellars, Joseph Phelps Vineyards Materra | Cunat Family Vineyards, Merryvale Vineyards, Estate Winery, Peju Winery, Peter Paul Wines, Phifer Pavitt Wine, Provenance Vineyards, Raymond Vineyards, RD Winery, Winery, Rombauer Vineyards, Rutherford Hill Winery, Seavey Vineyard, Slenus Winery, Silver Oak, Sloan Estate, Sutter Home Winery, The Caves at Soda Canyon, Tres Sabores, Trois Noix, Truchard Vineyards, Vineyards & Winery, Wheeler Farms Winery, aison, Dalla Valle Vineyards, Domaine Carneros, Domaine Chandon, Eiude, Far Grgich Hills Estate, Hagafen Cellars, Handwritten Wines, Hyde Judd's Hill Winery, Larkmead Vineyards, Markham Vineyards, Mumm Napa, Nickel & Nickel, O'Brien Estate, Odete Pine Ridge Vineyards, Porter Family Vineyards, Priest Ranch, Robert Biele Vineyards, Robert Craig Winery, Robert Mondavi Salvestrin, Schramsberg Vineyards, Stagi Leap Wine Cellars, The Prisoner Wine Cellars, Twoby Ineyards, Viader Wintehall Lane, Young Inglewood Vineyards, ZD Wines





#### **Key Accomplishments:**

- Over the past six years, Napa Green has identified more than **\$5 million** in energy cost savings and rebate opportunities for our winery members
- Napa Green Wineries have saved more than 15 million kWh of electricity
- Napa Green Wineries have saved more than 27 million gallons of water.
- Our 90 Napa Green Certified Wineries (40% of all of the certified sustainable wineries in CA) make >14 million cases of wine.

"Companies have an opportunity to deepen relationships with consumers by serving as the educator, the convener and the catalyst for those wanting to make a difference...

Although consumers unequivocally stand ready to reward companies for their responsibility efforts, they need to hear about it first."

-Nielsen Corporate Social Responsibility Survey



**Competition for Market Share** 

8 companies have ~60% of the market share 32 companies have ~75% of the market share

The rest competing with 7600+ wineries for attention ~125,000 wine SKUs

Four largest distributors >60% of revenue share Ten largest distributors >70% of revenue share

SUSTAINABILITY COULD BE A

DISTINGUISHING FACTOR BUT.

### Who Cares about Sustainability?

#### Sustainably produced wine has the highest future purchase consideration



"Sustainable wine - that's going to be good for me and the world around me... organic wine, that's just going to be good for me" Age 30-45

#### Alternative wine styles: **Consideration** by generation

% who would consider buying the following alternative wine styles in the future Base = All aware of the following alternative wine styles

		Generations		
	All US regular wine drinkers	Gen Z + Millennials (21-39)	<b>Gen X</b> (40-54)	<b>Boomers +</b> (55 +)
1 Sustainably produced wine	74%	73%	77%	75%
1 Environmentally friendly wine	74%	74%	75%	73%
1 Fairtrade wine	74%	76%	77%	70%
4 Organic wine	70%	74%	76%	62%
4 Preservative free wine	70%	67%	75%	71%
4 Sulphite free wine	70%	70%	70%	70%
4 Orange / skin contact wine	70%	69%	78%	57%
8 Wine from a carbon neutral winery	68%	68%	68%	69%
9 Biodynamic wine	58%	59%	60%	53%
9 Vegetarian wine	58%	60%	66%	36%
11 Vegan wine	55%	61%	53%	39%

#### How will COVID-19 change the consumer?

Data-driven insights into consumer behavior

Accenture COVID-19 Consumer Pulse Research: Wave 7



60% of consumers making more environmentally friendly, sustainable or ethical purchases since the pandemic began, with 90% intending to do so long-term.

**Vinebase**: We've created tags and filters for wine attributes and find that consumers enjoy **searching based on values**. More importantly, consumers really want to know the **story behind the wines**. They want to go to a dinner party and beyond the varietal or AVA, they want to be able to tell the story of the people that made the wine, their **ethos** and winemaking philosophies. CONSUMER-GOODS' BRANDS THAT DEMONSTRATE COMMITMENT TO SUSTAINABILITY OUTPERFORM THOSE THAT DON'T

U.S. purchasing of consumer packaged goods across 36 categories and >71,000 SKUs:

50% of CPG growth from 2013 to 2018 came from sustainabilitymarketed products; sustainable product sales have grown 5.6 times faster than their conventional counterparts.

-2019 study, NYU Stern's Center for Sustainable Businesses

A 2018 Nielsen study found **2% growth for mainstream products but 5% growth for sustainable products**.

WINER

VEIGHTED AVERAGE

OF 3 CATEGORIES

M

CHOCOLATE

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RATH PRODUCTS

SUSTAINABILITY SELLS overall category sales growth

+5%

+16%

+1%

+14%

+2%

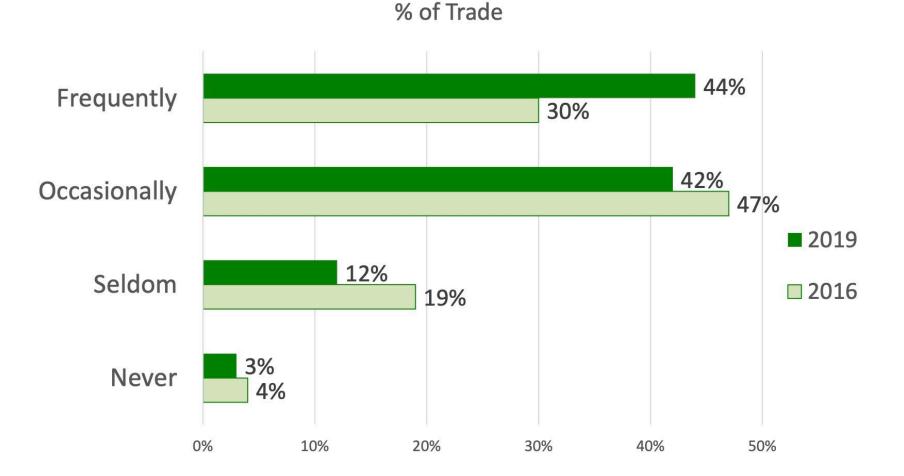
+5%

-1%

+1%

Source: Nielsen Answers on Demand (Health & Wellness Characteristics) & Nielsen Product Insider, powered by Label Insight | Total US FDMx | 52 Week Period Ending 03/24/2018 vs Year Ago

## How often do you recommend and/or feature wines that are sustainably produced?



## Market Outlook for Sustainably Produced Wines

Statements	% Endorsing	
Demand for sustainably produced products will increase steadily in the next 5 - 10 years.	76% 🗲	66% in 2016
Demand for sustainably produced products has increased over the past 5 - 10 years.	73%	
All things being equal, I would purchase or support a wine that is sustainably produced over one that is not.	71% 🗲	NA in 2016
I have significantly more customers asking about sustainability or environmental impact now than 5 years ago.	52% 🔫	NA in 2016
Sustainability is too vague a concept to give confidence.	33%	
Wine has a reputation for being produced sustainably relative to other food and beverage products.	27%	

## "Underselling Sustainability"

While 81% of consumers say they are more likely to buy from a brand with a positive approach to sustainability, **almost half (45%) also say they are unaware of the sustainable practices that brands have adopted**.

Consumers may be willing to pay more for sustainable wines, but they can't tell for sure which ones they are.

-Is Sustainable Winegrowing Sustainable?

"For several wineries, I had no idea sustainability was part of their identity."

-David Glancy, MS, CWE, Founder, CEO, San Francisco Wine School

# Top Obstacles to Selling More Sustainably Produced Wine

l	Lack of understanding and familiarity by consumers	72%
	The wines are hard to identify or not clearly labeled	<b>48%</b>
	Lack of promotion or advertising of such wines	36%

# Which Promotions would be Most Useful?

-	Promotion or Action	% endorsing
	Clear and highly visible labeling or identification on the package of wine (e.g. logo, certifying organization)	69%
	Back label information highlighting methods of sustainable production (e.g. cover crops, minimized pesticides, etc.)	68%
	Tastings or seminars at consumer events	60%
	Articles and coverage of sustainability in traditional media (e.g. magazines, newspapers, online news, radio, TV)	58%
	Social media outreach	57%
	Back label information specifying the benefits of sustainability (e.g. lowering carbon emissions, preserving environment)	53%
	Advertising identifying sustainable wines and their benefits	50%
	Point of sales materials identifying and promoting sustainable wines	48%

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Differentiate your wine. Tie-breaker on shelf. Build consumer loyalty.

Wente - Measuring impact of added retail shelf space

Jackson Family - Canada bottleneckers and windmill shelf displays

# **Bordeaux's St.-Emilion Mandates Sustainable Viticulture**

Increase in demand for wine made from organic or sustainably grown grapes, particularly from Nordic countries, Canada, Switzerland, Germany, Japan and certain regions in China and the U.S.

"In the last two to three years, I've seen my revenue double. I've had very significant demand from the West Coast and New York." -Thierry Valette, owner of Clos Puy Arnaud

# CCOF Gertified Porgan

"I used to feel awkward having the signs out there, like we were bragging, which is not my thing. **But then, it occurred** to me that customers see our signs and then they may go into the tasting room next door and ask why they're not organic. So now I like the signs, because I think they're inspiring a conversation, which is great."

Kevin Morrisey, Winemaker, Ehlers Estate

# Demand generation to get the virtuous cycle spinning...





Percentage of leisure travelers to California who live in California

### **Destination Stewardship & Sustainable Travel, 2020**

Sustainability is not just what California does, but what it is as a destination and a leisure brand. California will become recognized as a global leader in sustainable tourism practices.

**Brands that take a stand outperform their competitor brands, growing at a much faster rate.** Today, consumers will no longer invest their time, money and loyalty to brands that are just selling a product or experience. 75% of Generation Z travelers said the environmental impact travel has on a destination is an important factor to consider when making travel plans. The same study showed **nearly 80 percent of Millennials and Baby Boomers likely to choose sustainable options when booking travel.** 

-2019 booking.com 2019 Sustainable Travel Report

Sustainable tourists, on average, spend 50 percent more than other leisure travelers.

-2016 Visit California study, "The Role of Sustainability in Travel and Tourism"



77% of consumers say they have **stronger emotional bonds to purpose-driven companies**, according to a Cone Porter Novelli study.

64% of consumers across 14 major markets, including the U.S., China, India, Mexico, UK, the Netherlands, Germany, Brazil, Japan and more, are **belief-driven buyers**, and the belief-driven mindset now spans generations, according to a 2018 Edelman study.

62% of consumers want companies to stand up for the issues they are passionate about, and **52% believe that brands should stand for something bigger than just the product they sell**, found Accenture, in From Me to We, The Rise of the Purpose-Led Brand.

A Kantar study found that **brands that were recognized as** having higher commitment to purpose grew at more than twice the rate of others.

# IF YOU SHARE IT, THEY WILL USE IT.

1 A

NAPA





#### ENGAGING EMPLOYEES

- Monthly trainings focused on water conservation and efficiency
- Visual feedback of actual water usage
- Providing a platform to discuss and amend SOP's
- Incentive to compete with prior years
- Plan to expand this to all departments

#### PRODUCTION WATER | 2015 - 2017







#### Cakebread Cellars Cellars February 12 · 🌣

Sustainability has been a priority at Cakebread since our founding in 1973. How have we continued this focus as we're starting the next chapter in our new Visitor Center? Forbes shares the details in "The Best New Tasting Room in Napa is Also One of the Most Sustainable": https://bit.ly/37luPG0

PC: Rocco Ceselin



🕂 🗘 You and 2.1K others

25 Comments 124 Shares

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GAMBLE

**Napa River Restoration: Donated more than ten acres** from our Rutherford and Oakville properties to remove vineyards and a house to allow the river to run its course **(equivalent value of \$4 million.)** 

The final mile of the river restoration on the Gamble property is in full swing. Banks have been laid back and river alcoves have been created. **More than 4,000 trees have been planted just in this mile.** 

Gamble working with the Resource Conservation District on the **Million Tree Project**. The goal is public support and involvement in planting one million trees in Napa County.









Day 11 of #Nestinginplace : Find those Roots! Essential nutrients for the soil and quality grapes. Essential nutrients for you: Eat your root vegetables, everyone, and stay healthy.

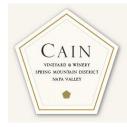
#nestinginplace #loveinthetimeofcorona #loveinthetimeofcovid19
#rutherford #rutherforddust #rutherfordbench #zinfandelwine #wineloves
#winelove #cabernet #roséallday #roseallday #dryfarming #organicfarming
#organicfarm #napagreen #napawine #familyfarm #farmtotable
#stayhomechallenge #socialdistancing #tressaboresgoldens
#tressaboreswinery #tressabores #itsfromnapa #songsofcomfort



🖞 💟 You and 44 others

9 Comments 9 Shares

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#### **Certified Napa Green**

Cain Vineyard and Winery has been recognized as Napa Green Certified Land by the Napa Valley Vintners, in conjunction with Fish Friendly Farming, since June, 2005.

#### Weed Control

- \* No herbicides are used. We rely on our vineyard crew to deal with this issue.
  - + Many under-the-vine pieces of equipment for mowing and tillage
  - A flock of weed eaters

#### Pest Control-Low Input

Organic Fungicides

\* Good canopy management and other cultural practices to reduce disease pressure and therefore the amount of fungicides necessary

- No Insecticides
  - Predatory mite releases
  - \* Gravel roads to reduce dust and therefore mite pressure
  - \* Vegetated berms and winter cover crop to increase biodiversity and habitat for beneficial insects
- ✤ Barn Owl boxes and raptor roosts to encourage predation of rodents

#### **Erosion Control**

- + Erosion Control Plan in place
- During the winter, our entire vineyard is covered with vegetation, hay, or gravel to prevent erosion.
- Extensive system of drains and cover cropping to limit sediment runoff in order to maintain water quality in the creeks

#### **Our Crew**

- Permanent, year-round crew
- Have medical and dental insurance
- 🚸 Earn a living wage
- Have extensive safety and accident prevention training
- In order to keep the vineyard sustainable we have created a safe environment where employees can be productive at work and in the community.

#### 6 6 6 B ONE EARTH



As a multigenerational family business that is firmly grounded in stewardship and based on agriculture, Spottswoode is committed to doing everything we possibly can to be a part of bringing about change in caring for our natural environment and our community.

One Earth signifies the interconnectedness of our planet and the impact our decisions have on the natural environment and communities near and far. Our holistic approach to everything we do is a key part of our success, both as a business and as an environmental partner and advocate.

Below are the organizations that we belong to and support, the specific efforts we make on our property, and the contributions we make to our community. Download Spottswoode's One Earth PDF for more information. Our wish is to inspire others to join in these endeavors, and to underscore how much we care about our One Earth and aspire to make it a better place for all of us.

SW





#### Certified B Corporation"

The first Napa Valley winery to become a Certified B Corporation, Spottswoode is committed to socially and environmentally responsible business practices that will have a positive impact for generations to come. LEARN MORE



#### Organic Estate Vineyard

One of the first wineries to have adopted organics, Spottswoode has farmed organically since 1985. Our vineyard acquired California Certified Organic Farmers (CCOF) certification in 1992.

International Wineries

Spottswoode is among the

first six member wineries to

for Climate Action

Z DIG DEEPER



#### **Biodynamic Farmers**

Our biodynamic winegrowing practices focus on caring for our land as a single living organism, harnessing the power of the entire interconnected ecosystem to bring health and life to every corner of our Estate.

Z DISCOVER



#### 1% for the Planet

Spottswoode has supported 1% for the Planet since 2007, contributing a minimum of one percent of our gross revenue on an annual basis to organizations that share our environmental values.

CONE PERCENT



Powered by Solar

Spottswoode's energy needs in the winery, office, and vineyard are largely supplied



Land Trust of Napa County

> Protecting open spaces in Napa County has long been a



As one of the first wineries to achieve both Napa Green Vineyard and Winery











#### COMMITTED TO A BETTER TOMORROW

It's easy to talk about making a difference, but at Brooks, we've set out to make the world a little bit better each day. One percent of everything you spend with Brooks works to make that happen, thanks to our partnership with 1% for the Planet. Plus, we're Demeter certified and a B Corp, so you know that when we talk about what matters to us, we really mean it.

Learn more about what drives us









Thank you for purchasing our wine.



We hope that you will enjoy this wine for many years. If you can't resist trying it, please let the wine rest from its travels for at least twenty-one days and carefully decant before serving.

Kindly take note that our foam and pulp packaging materials are made from recycled products and are 100% recyclable in areas that offer recycling.

Cheers,

colgin

# Tastes like Saving the Planet



"Winegrowing is among the most visible and influential agricultural enterprises in the world. As the best-known American wine region, Napa's response can be both a model and a call to action."

Eric Asimov, NYT

# "The only way for things to truly change long-term is if we have a wholesale redefinition of what a luxury wine should encapsulate."

#### Climate Pledges Are Falling Short, and a Chaotic Future Looks More Like Reality

With an annual summit next month, the United Nations assessed progress on countries' past emissions commitments. Severe disruption would be hard to avoid on the current trajectory.



"This isn't the time to be lazy, to be reserved, to be complicit, to be quiet. We're living in a time when it's so important for business to drive this new economy, this new view, this aspirational future of business as a force for good."

-Patagonia CEO Rose Marcario

