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# Tolosa Winery

Established Edna Valley estate gets winemaking overhaul

By Andrew Adams

**J**ean Hoefliger has made a reputation for making Cabernet Sauvignon wines at Alpha Omega in Napa Valley but his first winemaking experience was with Pinot Noir.

A native of Switzerland, Hoefliger had initially pursued law in college but dropped out when he said it became clear he didn't have either the interest or the passion to be an attorney. Because he had neglected his law studies by playing cards and drinking wine, Hoefliger said, he went to work for his godfather, who owned a winery.

After his first day at the winery tasting dozens of tanks, many of which were filled with Pinot or Gamay — the most common reds of Switzerland — Hoefliger knew he wanted to become a winemaker and also learned the importance of spitting when tasting. That first cellar job was followed by others in California, South Africa and France before he returned to Switzerland to earn a degree in winemaking. After university, Hoefliger worked at Château Lynch-Bages in Bordeaux and then Newton Vineyard in Napa Valley.

Hoefliger was at Newton when he was approached by Robin Baggett, who had purchased Esquisse winery in Rutherford, Calif., and wanted to hire him to launch a new estate winery on the site. "They showed me the property, and I said no at the beginning because I

really didn't see or understand the vision," Hoefliger recalled in an interview with *Wines & Vines*. "The building had no A.C., the tanks were really bad, and I was the winemaker at Newton, which is pretty much a paradise."

After the first refusal, Baggett came back and offered Hoefliger the chance to upgrade the winery however he needed. "Honestly, when you have the occasion to spend other people's money, which is great, I decided right away to say yes."

That was in 2006, and since then Alpha Omega has become a popular stop for Napa Valley tourists, earned the requisite scores, and its 10-case lot fetched one of the highest winning bids, \$75,000, in the 2018 Premiere Napa Valley Auction.

In 2015, Baggett approached Hoefliger about breathing new life into Tolosa Winery in the Edna Valley, near San Luis Obispo in California's Central Coast. Baggett and his partners, Jim Efirm and Bob Schiebelhut, started by planting more than 800 acres to vines and then opened Tolosa in 1998 followed by, a second and larger, custom-crush winery Courtside Cellars. Courtside Cellars, in San Miguel, Calif., was later sold to E. & J. Gallo Winery in 2012. Today, the Tolosa estate has about 720 acres in total, of which 100 are used for the Tolosa brand wines. What isn't used by Tolosa is sold to other wine companies, and the winery

The name Tolosa comes from the Mission San Luis Obispo de Tolosa that was established in the area in 1772.

## KEY POINTS

Revamped cellar is designed to better express vineyard.

New equipment includes optical sorter, smaller tanks.

Tolosa produces wine from 100 acres of an estate comprising 720 acres of vines.

still is used for custom-crush winemaking.

Baggett, with a few other investors, bought out some of the other shares of Tolosa and wanted Hoefliger to revitalize the cellar.

### Expressing Edna Valley

The focus would be to produce Pinot Noir and Chardonnay wines that would express the true potential of the Edna Valley. “I saw that not only do we have a diversity of soil that is outstanding but also probably one of the best *terroirs* in California for Pinot,” Hoefliger said of his initial impressions of the estate.

The Edna Valley AVA is one of California’s true coastal appellations. The northwestern boundary of the appellation is a few miles from Morro Bay and the Pacific Ocean, and that pronounced marine influence creates one of the longest ripening seasons in the state. Bud break at the Tolosa vineyard can start in mid- to late February but picking for red Rhône varieties may not finish until the end of October.

After agreeing to work on Tolosa, Hoefliger said, he walked the vineyard, dug soil points and reviewed NDVI maps to gain a better sense of the vineyard. Nearly all of the estate’s grapes are sold to other wineries, and Hoefliger took a hard look at the 100 acres that would remain for the Tolosa brand. “At the same time, we injected a lot of capital to redo the cellar,” he said.

That all took place over six months, but Hoefliger was able to oversee the 2015 vintage, his first working on-site at Tolosa. The 2015 vintage was one of the hottest on record in the Edna Valley. “But even in such an exceptional vintage as far as heat is concerned, the *terroir* is that the air circulation between the Arroyo Grande (valley) and Morro Bay, you have an ocean flow of air that cools down the air and it protects really well the integrity of Pinot,” he said.

Hoefliger splits his time among Tolosa,



One of the first changes to enhance wine quality was to begin picking into smaller, FYBs.

Alpha Omega and Baggett’s latest investment, Perinet winery in the Priorat region of Spain. Those three wineries now make up what’s called the Alpha Omega Collective.

Many of the initial improvements at Tolosa took place under the watch of winemaker Jim Kress, who joined the winery in 2015 after working at Vine Cliff Winery in Napa Valley. Kress and Hoefliger had gotten to know each other when Kress was winemaker at Domaine Chandon and had to take red wine production to custom-crush facilities that included Alpha Omega.

Day-to-day winemaking at Tolosa is now managed by Frederic Delivert, who joined the winery in time for the 2017 vintage. Hoefliger

and Delivert met when both were consulting for Clark-Claudon Vineyards in the Howell Mountain appellation of Napa Valley. Delivert is a native of France and remained in California in 1997 after an internship at Newton Vineyard. He previously worked at Tamber Bey, a Napa Valley winery that was the subject of a Technical Spotlight article in the June 2017 edition of *Wines & Vines*.

One of the first changes Hoefliger made was to pick in FYBs (fine yellow bins), which was a major departure for how the estate had previously been managed.

Hand picking is the exception in much of the Central Coast, where growers of highly profitable crops like berries can pay a premium



Frederic Delivert (left) and Jean Hoefliger previously worked together at wineries in Napa Valley and manage winemaking at Tolosa Estate.

to retain or attract workers. Tolosa contracts with Mesa Vineyard Management in Templeton, Calif., and pays the company more to ensure that a crew of the same workers always is ready for whatever is needed in the blocks designated for Tolosa wine.

Picking will continue to be done by hand, although Hoefliger is quick to say that any winemaker who says “always” about something is lying. He said if he was faced with a storm with the potential to drop several inches on a crop of Pinot Noir, he’s going to bring in the machines.

On the crush pad, Hoefliger went all-in on sorting and processing technology.

He was an early adopter of optical sorting at Alpha Omega after the 2009 vintage, in which a storm forecast to bring less than an inch of rain dropped 5 inches in mid-October, and that was followed by warm and humid conditions. “We had to bring fruit in very, very fast because a lot of the Cab, despite their thicker skins, was starting to rot,” he said.

At one point, Hoefliger recalled having 32



After destemming and sorting, the berries are collected into stainless steel sumps that are dumped into open-top tanks.

## ELEVATING THE DIRECT-TO-CONSUMER EXPERIENCE



The hospitality areas of the winery were also enhanced to bolster DtC sales.

Not all of the changes at Tolosa Winery took place in the cellar. At the recent WiVi conference in Paso Robles, Calif., the winery’s general manager June Mclvor took part in a panel discussion in which she discussed how the winery’s tasting room and direct-to-consumer program have been elevated.

Mclvor, described the changes as a revolution, rather than an evolution. Before August 2015, she said, Tolosa sold “some pretty good wines” in several varieties between \$15 and \$45. “The winery was a really fun place to visit, with a modern tasting room, great hospitality. The lawn was a great place to throw down a beach blanket for an afternoon with kids, dog and a bottle of wine. Our pickup parties were the place to be with music and food. We were voted number-one tasting room [in the area]. So why did we change?”

Working with a marketing consultant, Tolosa’s first step to increase in DtC sales consisted of clarifying the brand assets; through that exercise, said Mclvor, Tolosa’s team discovered that it aspired to be

a luxury brand, focused on Chardonnay and, especially, Pinot Noir. Mclvor’s team removed extraneous varietals, then added SKUs of single-vineyard wines and a new flagship Pinot Noir at significantly higher price points. “It turned out that most of our strengths were not strengths for the DtC model,” Mclvor said. “We had too many varietals, we were trying to be all things to all people.”

Secondly, they looked at all the different DtC revenue channels, including on-property sales, events, wine clubs, digital and inside sales. “We wanted to turn a great hospitality experience into a great hospitality and wine-buying experience,” she said, and started by increasing staff pay and setting slightly higher yet attainable sales goals for the team.

She also moved many part-time staff toward full time and staffed up during busier times to ensure no guest was left underserved. Next, Mclvor’s team enhanced the productivity of the winery’s spaces, starting with the lawn, which is now no longer a lawn but a tasting space with tables and chairs. “It’s really about controlling the experience for guests,” said Mclvor.

The seated tastings have proved to be more enjoyable for the guests who in turn are buying more wine. “They’re greeted at the door and led to a spot and it ends forty-five minutes later with a wine sale.”

Other changes to Tolosa’s DtC strategy include the launch of a futures program (which enables near-immediate capitalization on new vintages); phone sale check-ins for repeat buyers; a tasting space exclusive to wine club members; upscale events that end with dessert strategically placed beside the cash register; in-home tastings (in which sales expectations are set at \$20,000 to \$40,000 each); and a new elite wine club solely for single vineyard and flagship wines set at \$2,500 for a member’s inaugural year. “Our staff was terrified to start selling this but success breeds success,” Mclvor said. “You sell a couple and it becomes exciting. Our team is now totally jazzed.”

— Jaime Lewis

tons of grapes in the winery parking lot and trying to work through that with a hand crew processing at around 1.5 tons per hour. “I had the assistant winemakers actually smell every cluster because that is the only way to detect pre-destemmer the impact or the presence of rot,” he said.

### An investment in flexible processing

After that experience, Hoefliger said, he invested in a Pellenc destemmer with optical sorter and has never regretted it. “Being a small winery that, if I do my job right, makes high-end wines, I have to have the luxury of picking faster, and since then we’ve never had a problem,” he said. “We have to be able to respect the integrity of the fruit, and we have to be able to harvest it faster, and it worked really, really well.”

On the crush pad at Tolosa, grapes are emptied from the FYBs onto conveyors leading to the Pellenc Selectiv’ Process Winery that destems and sorts the berries, which are collected into stainless steel bins. Sometimes referred to as “gravy boats,” the bins have a fluted side that directs the flow of berries into open-top tanks.

The process is gentler on the Pinot berries and also works well for the variety of tanks at the winery. All of the tanks were built by Quebec-based La Garde. The square-sided tanks range in size from 3 tons to 10 tons so wine lots can be as small or as large as needed. All of the tanks are also hooked up to hot and cold glycol for temperature control, which was another significant investment to protect wine quality.

Fermentations are managed by manual punchdowns. Despite having the opportunity



Both the Pinot Noir and Chardonnay ages in French oak barrels with about 30% new.

to invest in some type of punchdown device, Hoefliger said it would have been too restrictive for the layout of the cellar, and it’s easier to regulate the pressure and intensity of punchdowns when done by hand.

Once fermentation is complete, the reds are pressed with a new Bucher Vaslin JLB press. Hoefliger admitted the trendy choice at premium wineries is to go with a basket press but stressed it’s really about quality over quantity. “Lots of people think, ‘oh gosh, it’s so trendy to do a basket press.’ Yeah, yeah, sure, sure it’s

trendy to have a basket press, but there’s a cost to it because your yields of pressing are lower, but most people forget if you can use 20% of your press wine rather than 3%, then your investment is fairly fast recovered,” he said.

The tanks are supported with tall legs that allow cellar workers to position the press basket directly beneath the main hatch, so they can simply rake out the pomace from outside of the tank.

For Chardonnay, the winery has a Europress EHM-120 press that is loaded with whole clus-

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# Tolosa Winery

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**OWNERS**  
Robin and Michelle Baggett

**WINEMAKER/PARTNER**  
Jean Hoefliger

**WINEMAKER**  
Frederic Delivert

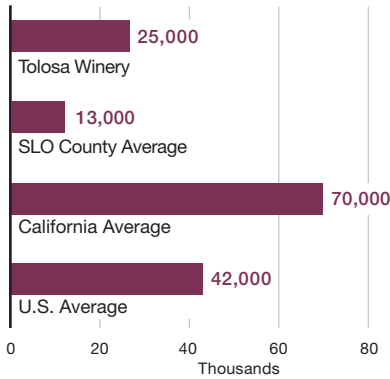
**GENERAL MANAGER**  
June McIvor

**YEAR BONDED**  
1998

**DIRECT-TO-CONSUMER SALES**  
30%

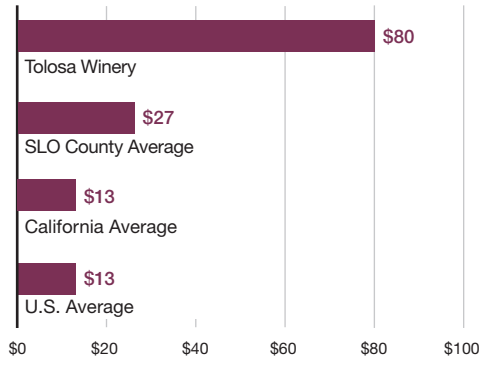
**VINEYARD ACREAGE**  
720

## WINERY CASE PRODUCTION



Source: Wines Vines Analytics

## WINERY AVERAGE BOTTLE PRICE



Source: Wines Vines Analytics

The Technical Spotlight is a regular feature highlighting wineries in North America that have recently opened or undergone major renovations and improvements. *Wines & Vines* seeks to report how facility design and winemaking equipment is used to achieve a particular winemaking style while also exploring new trends and techniques being used in the industry. If you think your winery would be a good candidate for the feature, contact us at [edit@winesandvines.com](mailto:edit@winesandvines.com).

## MAKING THE WINE

Destemmer/optical sorter	<b>Pellenc America, Inc.</b> , <a href="http://pellencus.com">pellencus.com</a>
Fermentation tanks	<b>La Garde</b> , <a href="http://lagardeinox.com">lagardeinox.com</a>
Temperature control, tank monitoring	TankNet, <b>Acrolon Technologies, Inc.</b> , <a href="http://acrolon.com">acrolon.com</a>
Presses	JLB, <b>Bucher Vasin North America</b> , <a href="http://bvnorthamerica.com">bvnorthamerica.com</a> ; Europress EHM-120, <b>Euro-Machines, Inc.</b> , <a href="http://euromachinesusa.com">euromachinesusa.com</a>
Pumps	Waukesha and air pumps, <b>Carlsen &amp; Associates</b> , <a href="http://carlsenassociates.com">carlsenassociates.com</a>
Racking wands	<b>Bulldog Manufacturing</b> , <a href="http://bulldogmfg.com">bulldogmfg.com</a>
Barrels	Tonnellerie Marsannay, <b>Nadalié USA</b> , <a href="http://nadalie.com/the-range-marsannay">nadalie.com/the-range-marsannay</a> ; <b>Francois Frères USA</b> , <a href="http://francoisfreres.com">francoisfreres.com</a> ; <b>Tonnellerie de Mercurey USA, Inc.</b> , <a href="http://tonnellerie-de-mercurey.com">tonnellerie-de-mercurey.com</a> ; <b>Ermitage Tonnellerie</b> , <a href="http://tonnellerie-ermitage.com">tonnellerie-ermitage.com</a> ; <b>Tonnelleries Billon, Damy, Bouchard Cooperages</b> , <a href="http://bouchardcooperages.com">bouchardcooperages.com</a> ; <b>Tonnellerie Sirugue</b> , <a href="http://sirugueusa.com">sirugueusa.com</a> ; <b>Tonnellerie Rousseau</b> , <a href="http://tonnellerie-rousseau.com">tonnellerie-rousseau.com</a>
Barrel racks	<b>Western Square Industries, Inc.</b> , <a href="http://westernsquare.com">westernsquare.com</a>
Barrel washer	<b>Tom Beard Co.</b> , <a href="http://tombeard.com">tombeard.com</a>

## PACKAGING

Bottling	<b>SLO Bottling Services, Inc.</b> , <a href="http://slobottling.com">slobottling.com</a>
Glass	<b>Encore Glass</b> , <a href="http://encoreglass.com">encoreglass.com</a>
Corks	<b>Portocork America</b> , <a href="http://portocork.com">portocork.com</a>
Screwcaps	<b>Amcork Flexibles American Canyon</b> , <a href="http://stelvin.com">stelvin.com</a>



Mesa Vineyard Management oversees the estate vineyard. All of the picking for the Tolosa wines is done by hand.

ters, which are picked at night into MacroBins. Delivert said one lot of Chardonnay is destemmed and sits on the skins for a few hours as a special blending lot. The free and hard press wines are kept separate through fermentation and aging. Almost all of the Chardonnay ferments in 100% French oak barrels of which about 25% to 30% are new.

Delivert said he will stir the lees regularly and the vintage dictates how often. The wine goes through ML in barrel and generally spends about 10 months in oak. Tolosa also produces one Chardonnay that is fermented and aged in stainless steel and typically bottled after six months.

All of the Tolosa Pinot Noir is also aged in 100% French oak barrels, of which about 25% to 30% are new. Another key element of the cellar upgrade was the addition of a temperature-controlled room that can be warmed and cooled as needed.

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**“Last year we had a couple of thunderstorms, and it was in the middle of harvest because the picks were canceled for the safety of the crews.”**

—Frederic Delivert

Hoefliger and Delivert say they are still evaluating the wines and vineyard with the goal of matching barrels to specific vineyard blocks. “It’s still a work in progress,” Delivert said. “To me, it takes a few years to really fine-tune your oak program.” Some of the cooperages used at Tolosa include Tonnellerie Marsannay, François Frères, Tonnellerie de Mercurey, Ermitage Tonnellerie, Tonnelleries Billon, Damy and Tonnellerie Rousseau.

The evaluation will take time, Hoefliger said, because he and Delivert want to make sure their decisions are based on what they are tasting from the vineyard and not the weather. “You want to make sure that you don’t adapt to a vintage but to a block, right?” Hoefliger said. “So you have to really measure year to year what works.”

But adapting to the weather is something that both winemakers say one has to be quick to do when growing grapes in the Edna Valley. Because of the proximity to the ocean and the larger weather patterns of the Central Coast, the valley can see wild swings in temperature and conditions. “Last year we had a couple of thunderstorms, and it was in the middle of



A blending trial in the winery's technical tasting room.

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harvest because the picks were canceled for the safety of the crews,” Delivert said. “And then the next morning and for a couple of days we had fog. And that moisture sits there, and it’s not cold, it’s muggy.”

“You want to make sure that you don’t adapt to a vintage but to a block.”

— Jean Hoefliger

Having a vineyard team on standby then pays for itself, because they can quickly get into the vineyard and make the necessary adjustments. Decisions on such things as canopy and fruit exposure also need to be made while keeping in mind the potential for quickly changing conditions. The vineyards are also monitored with weather stations and regular NDVI reports by the aerial imagining company TerrAvion. Tule evapotranspiration monitoring stations are being installed this year.

Delivert said that after the rain, Edna Valley went through one of its hottest heat waves



Pumpovers or punchdowns in the winery’s open-top tanks are all done by hand.

during the Labor Day weekend, when the high temperature hit 105 degrees. He said he had to bring in nearly all the Tolosa grapes, just over 100 tons, in about 48 hours. “We had the heat wave plus three thunderstorms,” he said

“Yeah,” interjected Hoefliger, “a few curveballs.”

But after a multimillion-dollar renovation, the winemaking team has the ability to swing out of the strike zone if needed. 🍷

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