## A POLITICAL QUAGMIRE WITHIN THE OKLAHOMA WINE INDUSTRY

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The history of viticulture and vinification in Oklahoma began in the early 1890's. As time passed and Oklahoma achieved statehood in 1907, the stipulations laid down within the newly constructed state constitution forbade wineries from selling their products to anyone. In 1918, the United States (U.S.) created a prohibition on alcohol that would permeate all alcohol-related industries. In 1933, Prohibition ended nationally and many alcohol-related industries reopened. It was not until 1959, however, that Oklahoma repealed prohibition. Stagnated for the next forty years because they still could not sell their products right from the source, the grape growers and wine makers stepped forward in 1999 to urge Oklahoma legislators to change the Oklahoma statutes and allow wineries to sell/ship their products directly. In 2000, the Oklahoma populace voted to change the Oklahoma statutes. Roadblocks, however, continue to arise and hamper the growth of the industry in the state.

Before Oklahoma became a state, Oklahoma and Indian Territories had the beginnings of a vineyard and wine industry. As time passed and Oklahoma achieved statehood in 1907, the stipulations laid down within the newly constructed state constitution forbade wineries from selling their products to anyone. Indeed, when the United States (U.S.) in 1918 created a prohibition on alcohol that would permeate all alcoholrelated industries throughout the forty-eight continental states, winemaking and for the most part grape-growing in Oklahoma ceased (Struby 2006). Prohibition ended nationally in 1933 and many alcohol-related industries reopened. It was not until 1959, however, that Oklahoma repealed prohibition within the state constitution to allow the sale and distribution of "intoxicating liquors;" and the wine industry remained in a state of stagnation for the next forty years (Adcock 2007).

In the 1990s, grape growers and wine makers stepped forward to urge Oklahoma legislators to change the Oklahoma statutes back to the way laws were in the territory days and allow wineries to sell/ship their products directly (Nascenzi 2000). In 2000, Oklahoma legislators and voters changed the Oklahoma statutes in order to allow wineries to sell their products directly to retailers and restaurants (Struby 2006). Thus the Oklahoma wine industry began to pick itself up by the bootstraps wineries and vineyards have blossomed all over the state, growing from only three registered in 2000 to 55 wineries in 2008. Roadblocks, however, continue to arise and hamper the growth of the industry in the state.

Older than any recorded history is the story of wine (Johnson and Robinson 2007). Hugh Johnson and Jancis Robinson, in The World Atlas of Wine (7<sup>th</sup> edition), assert that, while the Egyptians painted vivid pictures involving wine, it was the Phoenicians and Greeks who began wine production as we know it today (Johnson and Robinson 2007). In fact, the Vikings, circa 1000 AD, called America "Vinland for the profusion of native vines" (Johnson and Robinson 2007, 12). According to Tim Unwin, author of Wine and the Vine: An Historical Geography of Viticulture and the Wine Trade, when the European settlers came to America, they brought with them their cultural interest in the production and consumption of wine and took immediate advantage of the grapegrowing potential in the New World (Unwin 1991). Although prone to "pests, disease, climatic extreme, and disaster," North America stands today as the world's second foremost wine manufacturer and purchaser; Europe easily holds the number one spot (Johnson and Robinson 2007, 290).

Working their way up to number two status, however, was a lengthy process for Americans. One reason, Johnson and Robinson explain, was that native American grapes made odd-tasting wines. To remedy this, Europeans began bringing their own vine clippings with them to America (Johnson and Robinson 2007; Johnson 2005). For 300 years Europeans attempted to grow their own native vines in their new homeland but they learned over time that diseases and pests ruined their crops almost as soon as they would plant them (Johnson and Robinson 2007). Finally, in the 1800s, American enologists realized that instead of wasting time trying to grow foreign vines they needed to push a grape vine more accustomed to American pests, diseases, climatic extremes, and disaster (Johnson 2005). As a result, an effort to produce European/American hybrid grape vines began and America's wine industry has enjoyed success ever since (Johnson and Robinson 2007; Johnson 2005).

Hugh Johnson makes clear in The Story of Wine that "three things determine the direction of a new wine industry: its natural conditions; the techniques, traditions and intelligence brought to it by its pioneers; but more even than these, it is the market-place that points the way" (Johnson 2005, 195). What Johnson says makes sense and there lies the problem for Oklahoma winemakers. The basic legal issue of allowing the consumption of wine has been resolved; but many aspects of the wine-making business as a profit-making entity and of the nature of its marketplace have been inadequately addressed by Oklahoma lawmakers over the years, thus the failure to bolster the local industry (Ervin 2008). Oklahoma's twentieth and twenty-first century winemakers have increased their knowledge by attending oenological courses at various universities in the state and have continued to work hard to put their training to practice over the years, but Oklahoma lawmakers have not allowed them to develop and serve a broad enough marketplace (Francis-Smith 2008a).

The history of viticulture and vinification in Oklahoma began in the early 1890's when Edward B. Fairchild moved to Oklahoma Territory from New York. Fairchild was born to an uprooted English family that had introduced viticulture to Steuben County, New York. While Fairchild was growing up, he received unsurpassed oenological and vinification training from his father (Fisher 1977; Ruth 1974). In 1889, Fairchild went to Oklahoma to participate in the land run (Fisher 1977; Ruth 1974). Fairchild settled on a section of land in present day Oklahoma City; and, making use of his background in viticulture and enology, he proceeded to make the new territory a wine-producing territory (Ruth 1974). Fairchild planted grape vines in 1891 and shortly afterwards constructed a wine vault in the side of a hill, a structure that is still standing today (Fisher 1977; Ruth 1974).

By the time Fairchild finished planting his "Concord, Delaware, and Catawaba" grape vines, his vineyard was reported to be about 200

acres, an area which by 1900 would produce about 5,000 gallons per year (Fisher 1977, 141; Ruth 1974). Singularly, Fairchild's oenological training in New York allowed him to monopolize the wine industry in Oklahoma City; he had the product to supply all of Oklahoma Territory with his "uniformly considered," "choice quality" wine (Fisher 1977, 147; Ruth 1974). Interestingly, his wine business did so well that he was often not able to keep the wine for the entire fermentation process, normally a solid year (Fisher 1977). As Oklahoma neared statehood, however, Fairchild became ever more concerned about whether or not his success in the wine industry could continue (Fisher 1977; Ruth 1974).

By 1906, it was obvious to most that Oklahoma would soon become a state and that the new constitution would undoubtedly prohibit the sale and/or production of all alcoholic beverages in the state (Ruth 1974). Speculators were correct: the constitution, along with "the article on state-wide prohibition separately submitted to a vote of the people," passed on September 17, 1907, and became law on November 16, 1907 the day that President Theodore Roosevelt signed Oklahoma into the Union (Murray to Filson, letter, 1907, in Jekel, 31). Prohibition ended Fairchild's wine years in Oklahoma; exactly two weeks after statehood day, he sold his quarter section complete with vineyard and orchard (Fisher 1977; Ruth 1974). At the time, no other state possessed such stringent laws on alcoholic beverages; but, in a little over a decade, that would all change when Amendment XVIII would prohibit alcohol throughout the U.S.

During the ensuing years of prohibition, Oklahoma was far from being dry. A reporter for the *Tulsa World* searched the records and reported that Oklahoma was a "hotbed of illicit alcoholic activity during Prohibition, a clash of Bible Belt and Wild West mentalities" (Adcock 2007). Furthermore, the oil boom during the 1920s brought in workers and a need for "spirits to keep them happy" (Adcock 2007). Of the prohibition era, it is well known that few imbibers stopped drinking and that abuse of the law occurred on both sides of the law (Adcock 2007). In 1933 Amendment XXI ended the much-disobeyed and widely halfheartedly-enforced law. With the repeal, Oklahomans were able to buy 3.2 beer, considered by Oklahoma statute to be non-intoxicating; however, even though votes were taken in "1936, 1940, 1949, respectively, aimed at repealing the state's prohibition laws, intoxicating beverages were not legal in Oklahoma until 1959 and even after repeal there were many restrictions on alcohol, some that last to this day" (Adcock 2007). Some states, like California, had been able to get a head start on developing and serving the all-important marketplace; and some of Oklahoma's neighboring states, like Missouri and Texas, became wine marketplaces for Oklahoma customers due to their inveterate cultural history in the wine making industry.

Oklahoma lagged behind in producing grapes and wine, both before and after the U.S. repeal of prohibition. California's wine industry, however, revived quickly after the repeal and helped spur a wine boom throughout the U.S. in the 1970s and 1980s, particularly after they beat France in a blind wine tasting in 1976. The wine industry began in California in 1769, the same year construction of the first mission occurred (Amerine 1962). With its Mediterranean-like climate, California was ideal for wine-growing and vineyards flourished there (Peters 1997). As a result, until nationwide prohibition became the rule, vineyards and their accompanying wineries dotted the Californian landscape (Peters 1997). Many wineries shut down in 1918 for almost two decades until the repeal in 1933 (Phillips 2000). Wineries then began to reopen, not only in California but also in other grape and wine producing states, such as Missouri and Texas.

Before Amendment XVIII, the Missouri grape and wine industry was even stronger then than it is today ("Missouri Wine Timeline"). Germans and Italians had migrated to northern, eastern, and southwestern Missouri and reported it excellent for grape growing. In fact, Missouri became the second largest grape growing state in the union in 1866. As a result, by the beginning of the 20th century, over 100 wineries dotted the Missouri landscape; but prohibition abruptly ended the thriving industry ("Missouri Wine Timeline"). The grape and wine industry would not begin to invigorate until the late 1960s and early 1970s in Missouri ("Missouri Wine Timeline;" Ruth 1987). During those years, Missourians revamped old vineyards and began producing succulent wines ("Missouri Wine Timeline;" Ruth 1987). Since 2000, Missouri's wine industry has thrived, "producing diverse, complex and sophisticated wines, wines that easily earn top awards in national and international competitions," but Missouri's wine industry does not enjoy as many Oklahoma visitors as do the wine makers in Texas ("Missouri Wine Timeline;" Ruth 1987; Lang 2000).

Johnson and Robinson say that Texas is the "botanical heart of

America—and can boast more indigenous grapevine species than any other region on earth;" and, before prohibition, Texas had the vineyards and wineries to bear that out (Johnson and Robinson 2007, 312). Prohibition eradicated Texas' entire commercial wine industry, just as it did in Oklahoma; but after 1933 Texas' grape and wine industry began a sluggish movement towards expansion (Johnson and Robinson 2007; "The History of Texas Wines;" Giordano 1984). By 1986, after Texas wineries began winning awards, Texas even entered the world wine stage, even though over sixty of the 254 counties in the state are dry counties today ("The History of Texas Wines"). Furthermore, the fact that Texas had so many dry counties did not stop Oklahomans from crossing the Red River to indulge their appetites for wine (Ruth 1987; Lang 2000). Possessing wine cultures that dated back to the 1800's enabled these states to return to their wine cultures more quickly (Johnson and Robinson 2007, 312; de Blij 1983). Oklahoma wine producers realized something needed to be done to get a better hold on the marketplace that seemed to be escaping them; the antiquated alcohol laws inscribed in the state's constitution continued to trouble the Oklahoma winery marketplace.

After the repeal of prohibition, each state obtained control over their own alcohol laws regarding right to use and sales (LaFond). However, attempting to change alcohol laws in Oklahoma was more difficult than in any other state because they were part of the state constitution (Ervin 2008). In 1999, Oklahoma grape growers pushed legislation to change a law in the state's constitution that would aid wineries in production and in sales by allowing them to sell directly to restaurants and retail stores; and in 2000 State Question 688 became part of the ballot (Jones 2000; 2005a). Oklahoma's grape growers and wine producers argued the benefits of the law. Former Enid State Representative Curt Roggow aided the winemakers by proposing the state question that "would remove a constitutional barrier that prevents local wineries from being successful, namely, a requirement that they may sell only to consumers on site or to wholesalers" (Jones 2000). He was one of many who realized by then the truth of what the Oklahoma Grape Growers and Winemakers Association states today: "Small wineries are important to rural economies. They generate capital investment, create jobs, spur tourism and economic development, advance farmland protection and discourage urban sprawl" and "in areas where wineries flourish, restaurants, bed-and-breakfasts, inns, retail boutiques, farm and other craft businesses also succeed" (Nascenzi 2004; Averill, 2000; Ervin 2008). On November 7, 2000, Oklahomans voted and passed the state question, with a seventy percent approval ("Oklahoma Wine Current Issues;" Ervin 2000).

Oklahoma wineries then enjoyed the advantage of the return to the territory days statutes and winemakers began to take pleasure and profit in a beneficial trade within the state (Francis-Smith 2007a). Oklahoma's three-tier system for distributing alcoholic beverages (producer-wholesaler-retailer) turned into a two-tier system when wineries were able to ship directly to retail stores and restaurants; however, they were still not able to ship directly to individuals interstate or intrastate (Francis-Smith 2007a; Zizzo 2000). Unfortunately, in 2004 and 2005 angry wholesalers and retailers in other states raised questions for the U.S. Supreme Court to answer that would bring about change to the direct shipment statute yet again in Oklahoma (Struby 2006; Gearan 2004; Barber 2004). Winemakers in Oklahoma expected trouble in their own state when the Supreme Court ruled in favor of the wholesalers by confirming the U.S. Constitution "implicitly prohibits states from passing laws that discriminate against out-of-state businesses," a ruling that meant "if they are going to let in-state wineries ship directly to a customer, they must also let out-of-state wineries ship to the customer" and that would seem to affect the Oklahoma law that went into effect with the passage of State Ouestion 688 (Associate Press 2004; Yen 2005; Hoberock 2005). This marked the beginning of another period of struggle as small grape growers and wine makers fought hard to regain and maintain ground and their marketplace. Attorney General Drew Edmondson at the time stated that Oklahoma's laws "may be challenged" (Staff Reports 2005). In August 2005, Edmondson offered the opinion that "Oklahoma wineries can ship wine to retail package stores and restaurants in the state but are prohibited from shipping their products directly to consumers;" even though Missouri allowed direct shipment to customers with a two case limitation per month per winery-in state or out of state-and Texas law limited direct-shipped wine to three gallons (2005b; "Missouri Wine Shipping Laws;" "Texas Wine Shipping Laws"). For Oklahoma, the expected trouble came in 2006 when three major Oklahoma wholesalers, Action Wholesale Liquors, Central Liquor, and Jarobe Sales Company, led by attorney Robert McCampbell, filed suit stating that Oklahoma's State Question 688 contravened the Interstate Commerce Clause (Houghton 2006; Hoberock 2006). The federal court judge in Norman, on November 15, 2006, agreed with the wholesalers and with the Supreme Court decision and deemed the state law unconstitutional; instead of immediately striking down the law, however, the judge gave legislators, grape growers, and wine makers a chance to fix the problem by the deadline of June 2007 (Butler 2006; Marks 2006, Evans 2007; Francis Smith 2007b).

Wine makers were hopeful and urged their lawmakers to help them (Marks 2006). Oklahoma Grape Growers and Wine Makers Association President Gary Butler pleaded:

Wine distribution has been managed in Oklahoma in a way that's antiquated and stifles competition. Why not move forward, not backward? Why not a solution that favors the consumer's choice over wholesalers' controls? Why damage the small farm-based family owned businesses that employ thousands, either directly or indirectly? Why keep an antiquated distribution system that was created before computers and the Internet (Butler 2006)?

Gary Butler regarded this as a power struggle rather than a money issue: after all, Oklahoma wineries already contributed strongly to the Oklahoma economy (Snyder 2007). Butler went on to state that the businesses he represented "construct trellis systems from material purchased from Oklahoma vendors," buy agricultural chemicals and materials from Oklahoma companies, "irrigate vines with drip line and emitters supplied by fellow Oklahomans," purchase "tractors, all-terrain vehicles, trailers, fuel and fertilizer from Oklahoma agribusiness, purchase corks, bottles and labels from newly formed Oklahoma firms that believed in this new and vibrant agriculture sector," remunerate fees to attain permits and licenses that pump money back into Oklahoma, buy insurance, and expand Oklahoma's employment opportunities by hiring workers (Hoberock 2006; Snyder 2007). The industry was growing, up to forty-one wineries and over 300 vineyards in the state by 2006, and a change in the law was "vital for their survival" (Associated Press 2006; Marks 2006). Nonetheless, legislators failed to listen and most of the bills that might have assisted the small wineries and still might have met constitutional provisions sat untouched on legislators' desks while wholesalers' lobbyists raised their voices in Oklahoma's capitol building (Ervin 2008).

One bill survived. On April 24, 2007, Governor Brad Henry signed Representative Trebor Worthen's House Bill 1753 into law; the law reflects the typical attitude of the legislature:

The state's system of regulating the manufacture, distribution and sale of alcoholic beverages has served this state and its civilians well and has contributed to the economic growth and stability of this state. Changes in market dynamic and advances in technology may have altered the way the alcoholic beverage industry operates, but have not changed the state's desire for strict regulation (Francis-Smith 2007b; Mock 2007).

The law, which went into effect November 1, 2007, permitted shipping to out-of-state customers but not to in-state customers: "Oklahoma wineries may ship products manufactured in the state to consumers in other states, so long as the recipient is of legal age and the laws of the recipient's state allow such shipments" (Francis-Smith 2007b; Mock 2007; Evans 2007). That change, however, was not enough; so the federal court judge ended the uncertainty and changed the law in Oklahoma with his final ruling on June 15, 2007 (Evans 2007).

From 2000 to the middle of 2007, Oklahoma wine producers were able to take a giant step forward in the growth of their industry in the state. In 1999, before the state question passed, there were two licensed wineries in the state; today over fifty wineries and 400 vineyards dot the Oklahoma landscape (Struby 2006; Bledsoe 2008, 2). After the court decision in 2007, Oklahoma winemakers were stymied about their on again, off again rights to peddle their products; wineries had to rely on wholesalers to buy and resell their products but the wholesalers could buy or not buy whatever they pleased (Francis-Smith 2007b; Ervin 2007). As Gary Butler had pointed out, Oklahoma started out at a disadvantage because the market for wine "isn't as much a part of the state's heritage and history as it is in other states," but the state did not have to continue that way (Ervin 2008).

One attempt to help since then, first proposed in 2007 by Representative Jeff Hickman and most recently as proposed by Representative Don Armes, involves setting a "production cap" of 10,000 gallons for the requirement of using a wholesaler (Ervin 2008; Evans 2007; 2008; Francis-Smith 2008a; Francis-Smith 2008b). *The Journal Record* reports that wineries that produce more than 10,000 gallons would require a wholesaler because the "size of the operation would make self-distribution impractical" (Francis-Smith 2008a; Francis-Smith 2008b). Currently in Oklahoma, about five wineries produce over 10,000 gallons, ten wineries produce between 5,000 and 10,000 gallons, and forty wineries are still below 5,000 gallons in production (Francis-Smith 2008a; Francis-Smith 2008b).

Since 2003, State Representative Danny Morgan had taken an interest in trying to boost the wine industry as a vital part of growth in the state (Ervin 2008; Snyder 2005; 2005c). Morgan asserted that trying to meet legal, wholesaler, and local winery owners' needs and concerns is tough; however, both this newly proposed production cap law, Senate Bill 995, and Joint Resolution 29, which would once again create a ballot item "asking voters to decide if wineries may sell directly to retailers and restaurants," had the support of the Oklahoma Farm Bureau (Francis-Smith 2008a; Francis-Smith 2008b; Jenkins 2008). Morgan believes that the Farm Bureau's view of wine as a "new cash crop" provides a different and more comprehensible point-of-view as winemakers try to influence lawmakers (Francis-Smith 2008a). Even though the bills sought to be constitutional and treat small out-of-state wineries the same, these bills seemed to be unlikely to pass because of cost effectiveness issues for out-of-state wineries (Francis-Smith 2008a; Francis-Smith 2008b; Jenkins 2008). To explain, out-of-state wineries. like local wineries, would be obligated to transport their merchandise to Oklahoma vendors in their own company vehicles; thus, an out-of-state winery would not be able to use a "common carrier" (Ervin 2008; Francis-Smith 2008a; Francis-Smith 2008b). Indeed, small winery owners who wanted to transport their products would also have to purchase compulsory transportation licenses and permits from the Oklahoma Alcoholic Beverage Laws Enforcement Agency (Francis-Smith 2008a; Francis-Smith 2008b). Obviously a California or New York winery would be unlikely to want to pay the additional expenses that would be required to transport their wines to Oklahoma.

On the 4 November 2008 ballot, Senate Bill 995 and Joint Resolution 29, became State Question 743 and passed by a margin of over 70 percent with support all across the state (Associated Press 2008). This new law allows in-state as well as out-of-state wineries that produce less than 10,000 gallons of wine a year to self-distribute to restaurants and liquor stores (Associated Press 2008). Presently few wineries in the state produce wine in excess of that amount (DelCour

2008). Other stipulations in the law will pose a few problems for these small businesses: every winery has to use a company vehicle, meaning that a common carrier can not be used, and delivery charges "must be identical for all customers regardless of transportation costs" (Associated Press 2008; DelCour 2008). This decision by the voters marks the beginning of another chapter in the history of the Oklahoma wine industry and another step forward in the protracted struggle to effect changes in the law. Indeed, parts of this change in the law may be put to the test of constitutionality just as the November 2000 law was (DelCour 2008). The outcomes of both the vote of 2000 and also the vote of 2008 have sent a message to local grape growers and wine producers that the people of the state support the industry.

Will Rogers once joked that they ought to pass an amendment "prohibiting anybody from learning anything" and that, if it worked the way it did for the prohibition of alcohol, he thought that "in five years we would have the smartest race of people on earth" (Adcock 2007). Clearly, prohibiting alcohol did not work out in this country; prohibiting winemakers from selling their products without going through a wholesaler was not working out for the wine industry in Oklahoma. Oklahoma certainly has made significant strides toward success in the first two requirements of Hugh Johnson's formula for winemaking success. When legislators and wholesalers come between supply and demand, however, Johnson's third and most important requirement becomes difficult to effectively realize. Consumers and producers then either reap the benefits or suffer the consequences. The return of what have been called "arcane," "antiquated," and "squirrelly" laws hampered Oklahoma's wine industry and the development of a strong marketplace (Ervin 2008). Wine producers continue to try their best to keep their concerns on the agendas of their lawmakers. However, Oklahoma legislators still treat this industry as a stepchild, and few legislators in the state want anything attributed to alcohol associated with their names as they campaign-the result is a mostly closed-door policy (Ervin 2008). Thus, with changing legal limitations on transporting in and out of state, new and small wineries must continue to make an effort to be seen and heard. Time will tell for the liquor laws in Oklahoma; in the meantime, Oklahoma winery owners must continue to work together to improve their products and advance their case for their fair share of the marketplace.

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