

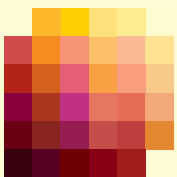


WINEMETRICS

2010

Chain Restaurant

Wine Distribution Report



WINEMETRICS

PUBLISHED BY:
Winemetrics LLC
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Fairfield, CT 06824
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**Winemetrics
2010 Chain Restaurant**

**WINE
DISTRIBUTION
REPORT**

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INTRODUCTION

The inspiration for Winemetrics 2010 Chain Restaurant Wine Distribution Report came from my experience as a wine brand manager at a major supplier in the mid-1990s. Although my national account and regional sales managers could tell me which chains were selling my brands, I was never able to get a complete picture of where they weren't selling or why. Furthermore, I had no idea how successful my competitors were in these venues. In short, there was no resource I could put my hands on that would provide me with the necessary information to find growth opportunities in the chain restaurant segment. That is until now. Our Chain Restaurant Wine Distribution Report is designed to provide answers to all of the above questions for 104 of the top Casual and Upscale Casual chains, including distribution opportunities and wine list data.

Our 2010 Chain Restaurant Report will provide answers to any questions you may have about a particular chain's wine list selection and its distribution opportunities for your products.. It shows which accounts are not keeping pace with their competitive set in providing wines of specific varieties, regions and price segments. It will also supply a summary of recommendations for each account, based on our regional, varietal and pricing analysis, allowing suppliers and distributors to pre-plan sales calls with greater efficacy. Finally, it provides vital information on the performance of your competitors in the chain restaurant segment.

To provide the most timely and actionable information, the wine list data for this report was compiled in June and July of 2010. I hope you find this report of great benefit in your efforts in managing your wine brands and improving their presence in the chain restaurant segment.

Yours truly,

A handwritten signature in cursive script that reads "Charles Gill".

Charles Gill
Founder & CEO
Winemetrics LLC
cgill@winemetrics.com

Casual American Chains Summary

Competitive set

Account Name	No. Wines BTB	No. Wines BTG	BTB List Size Index
Bar Louie	23	23	77
BJ's Brewhouse	21	22	70
CA Pizza Kitchen	29	27	97
Champps	18	18	60
Cheesecake Factory	35	30	117
Copeland's	28	22	93
Daily Grill	38	33	127
Gordon Biersch	38	29	127
Grand Lux Café	38	28	127
Houlihan's	20	21	67
Marmalade Café	27	24	90
Mimi's Café	22	22	73
Not Your Average Joe's	32	32	107
Ram Brewery	39	28	130
Ruby Tuesday's	22	22	73
Sam Snead's Tavern	30	25	100
Stanford's	39	23	130
Stonewood Grill & Tavern	42	24	140
Tommy Bahama	40	20	133
Tony Roma's	16	17	53
Uno Chicago Grill	15	15	50
Wood Ranch BBQ	29	21	97
Yardhouse	43	16	143
Z-Tejas	30	31	100
Average	30	24	

Wine Distribution by Country

	BTB%	BTG%
Argentina	1%	2%
Australia	5%	6%
Chile	2%	2%
France	4%	1%
Germany	1%	1%
Italy	8%	9%
New Zealand	3%	3%
Portugal	0%	1%
South Africa	0%	1%
Spain	1%	1%
U.S.	75%	75%

Top 25 Producers BTB and BTG

Rank		# BTB Listings	Ave\$ BTB	# BTG Listings	Ave\$ BTG
1	Chateau Ste. Michelle	27	\$29.21	23	\$7.31
2	Beringer	24	\$23.10	23	\$6.33
3	Kendall-Jackson	21	\$31.70	21	\$9.07
4	Ravenswood	15	\$27.38	13	\$7.50
5	Sonoma-Cutrer	14	\$42.50	13	\$11.55
6	Coppola, Francis	14	\$37.71	12	\$10.14
7	Ecco Domani	12	\$23.56	12	\$6.88
8	Blackstone	12	\$26.15	11	\$7.62
9	Clos du Bois	12	\$32.06	11	\$8.31
10	Rodney Strong	11	\$33.00	5	\$8.73
11	Santa Margherita	11	\$44.18	3	\$10.85
12	Moet & Chandon	11	\$69.18	1	\$19.00
13	J. Lohr	10	\$32.32	9	\$8.99
14	La Crema	10	\$39.90	8	\$11.03
15	Cakebread	9	\$68.11	1	\$12.00
16	Estancia	8	\$31.78	8	\$8.96
17	Mirassou	8	\$22.56	8	\$6.77
18	Hogue	8	\$25.75	7	\$7.21
19	Barefoot	7	\$18.57	7	\$5.61
20	Columbia Crest	7	\$24.00	7	\$7.04
21	Mondavi Private Selection	7	\$26.18	7	\$7.32
22	Crawford, Kim	7	\$36.14	6	\$9.79
23	Penfolds	7	\$33.29	5	\$7.05
24	Merryvale	7	\$45.86	3	\$10.42
25	Folie a Deux	6	\$28.96	6	\$8.00
26	Sterling	6	\$29.38	6	\$8.46

Top Varieties by Distribution

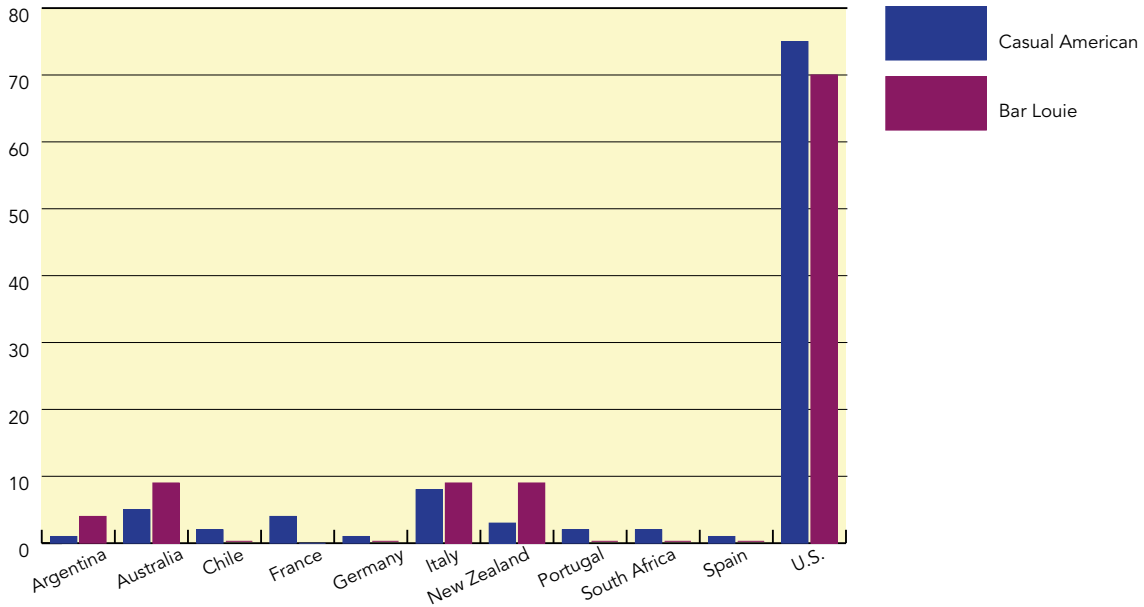
	BTB%	BTG%
Chardonnay	18%	19%
Cabernet Sauvignon	16%	14%
Merlot	11%	11%
Pinot Noir	9%	9%
Pinot Grigio/Gris	8%	8%
Sauvignon Blanc	6%	6%
Syrah/Shiraz	5%	5%
Riesling	5%	5%
Brut	4%	4%
Zinfandel	4%	4%
White Zinfandel	3%	4%
Malbec	2%	2%

BAR LOUIE

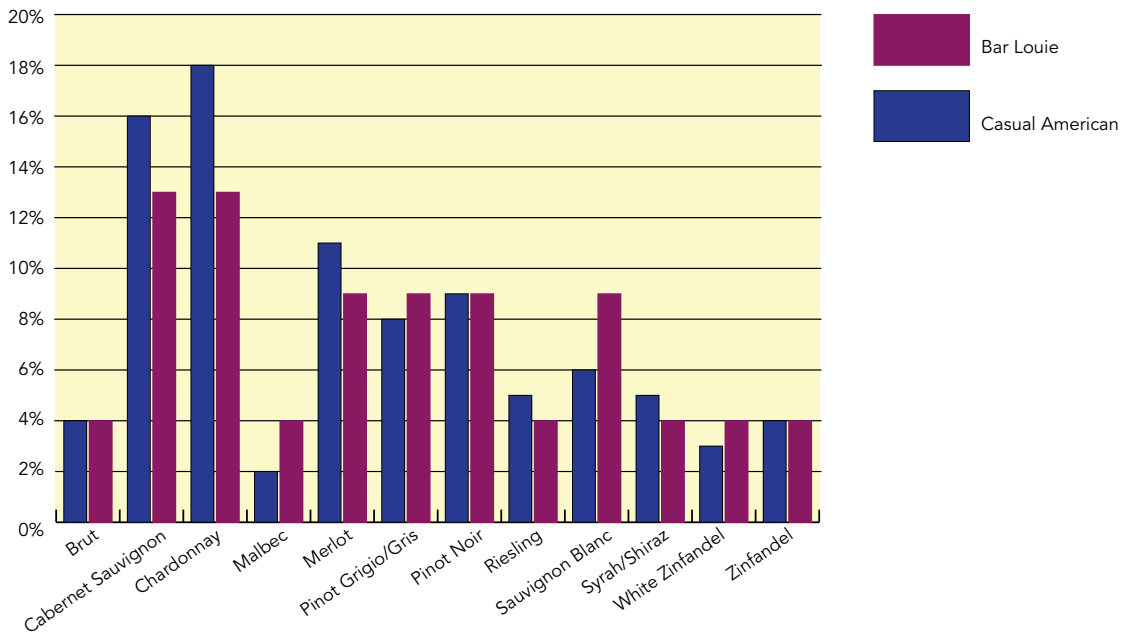
Corporate Ownership: Restaurants America

Account Type	Casual	Wine List Type	Traditional
Cuisine	American	Wines BTB	23
Total # Units (2010)	47	Wines BTG	23
# Units/State	See Chains By State Summary Page	Wine List Size Index BTB	77
		Wine List Special Features:	All BTB wines available BTG

DISTRIBUTION BY COUNTRY

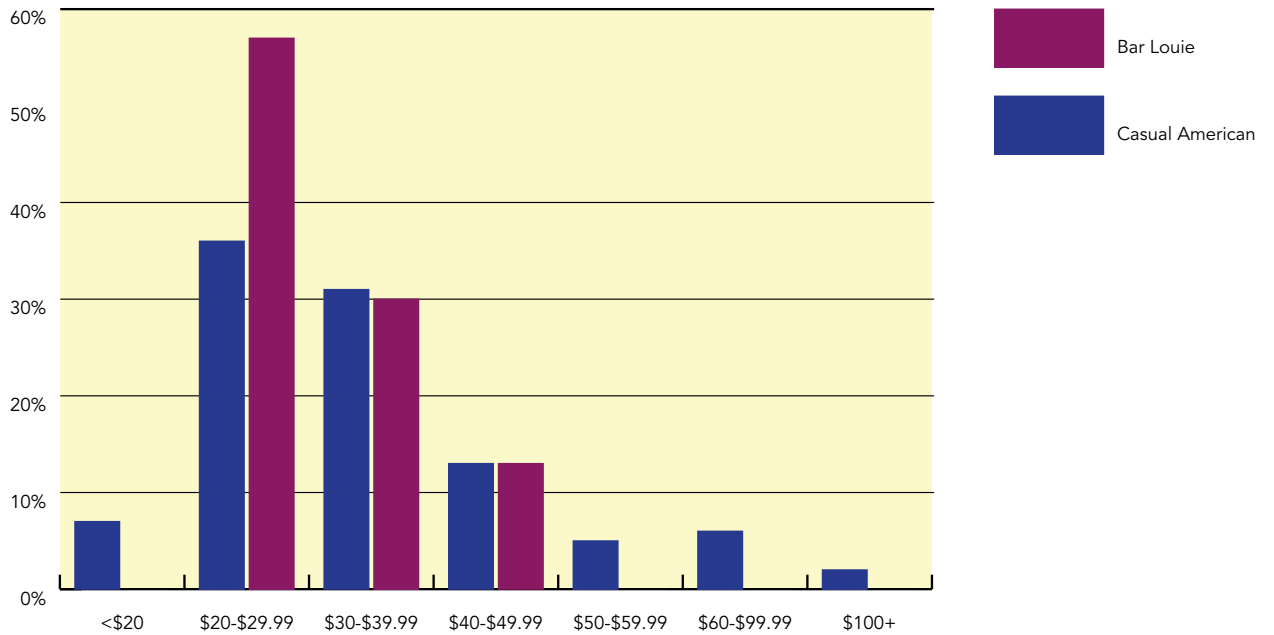


DISTRIBUTION BY VARIETY

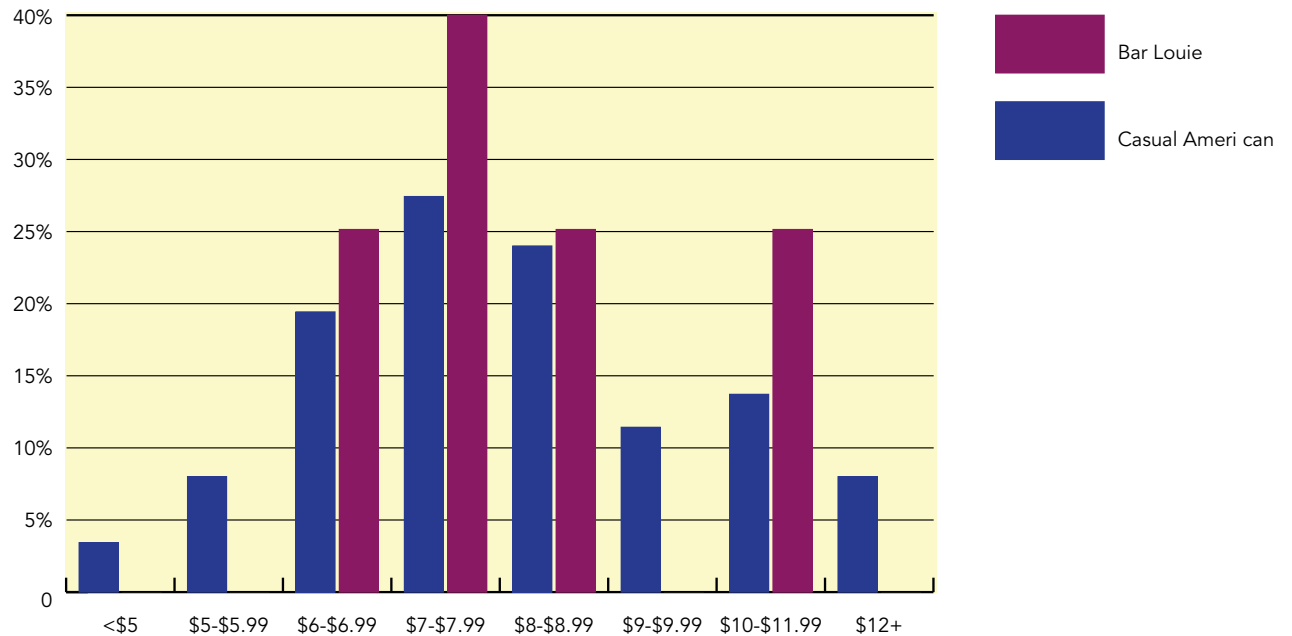


BAR LOUIE (cont'd)

DISTRIBUTION BY BTB PRICE



DISTRIBUTION BY BTG PRICE



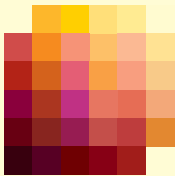
DISTRIBUTION RECOMMENDATIONS

1. Bar Louie has about the average number of wines BTG for its segment but only 77 for BTB - add a few more wines
2. Offer selections above the \$40-\$50 BTB segment allowing 'trade-up' for customers seeking better wines.
3. BTB price range is below average but the range of BTG pricing is more moderate. Bringing BTG prices in line with BTB might boost more BTG volume
4. Add or transfer higher priced selections of BTG wine in the \$9-\$9.99

BAR LOUIE (cont'd)

SAMPLE WINE LIST

Producer	Country	Region	Appellation	Variety	Designation	Glass	Bottle	Half-Bottle
White, Still								
Trinity Oaks	U.S.	California	California	Chardonnay		\$6.50	\$24.00	\$0.00
Brancott	New Zealand	Marlborough	Marlborough	Sauvignon Blanc		\$8.00	\$30.00	\$0.00
Blackstone	U.S.	California	California	Pinot Grigio/Gris		\$8.00	\$30.00	\$0.00
Clos du Bois	U.S.	California	Alexander Valley	Chardonnay	Selection	\$8.50	\$32.00	\$0.00
Hogue	U.S.	Washington	Columbia Valley	Riesling		\$7.50	\$28.00	\$0.00
Beringer	U.S.	California	California	Chardonnay	Founder's Estate	\$7.50	\$28.00	\$0.00
Trentino-Alto								
Mezzacorona	Italy	Adige	Trentino	Pinot Grigio/Gris		\$6.50	\$24.00	\$0.00
Markham	U.S.	California	Napa Valley	Sauvignon Blanc		\$10.00	\$36.00	\$0.00
White, Sparkling								
Trentino-Alto								
Rotari	Italy	Adige	Trentino	Brut		\$7.50	\$28.00	\$0.00
Red								
Norman Estates,								
Greg	Australia	South Australia	Coonawarra	Cabernet				
La Terre	U.S.	California	California	Sauvignon Blend		\$11.00	\$40.00	\$0.00
Nobilo	New Zealand	Marlborough	Marlborough	Cabernet Sauvignon		\$6.50	\$24.00	\$0.00
Estancia	U.S.	California	Central Coast	Pinot Noir	Icon Series	\$11.00	\$40.00	\$0.00
Terrazas de				Cabernet Sauvignon		\$11.00	\$40.00	\$0.00
Los Andes,								
Bodegas	Argentina	Cuyo	Mendoza	Malbec		\$7.50	\$28.00	\$0.00
Napa Cellars	U.S.	California	Napa Valley	Merlot		\$10.00	\$36.00	\$0.00
Mondavi Private Selection	U.S.	California	California	Merlot	Meritage	\$8.00	\$30.00	\$0.00
Stone Cellars	U.S.	California	California	Merlot		\$6.50	\$24.00	\$0.00
Ravenswood	U.S.	California	California	Zinfandel	Vintners Blend	\$7.50	\$28.00	\$0.00
Penfolds	Australia	South Australia	Barossa Valley	Syrah/Shiraz Blend	Koonunga Hill	\$8.00	\$30.00	\$0.00
Folie a Deux	U.S.	California	California	Red Blend	Menage a Trois	\$7.00	\$26.00	\$0.00
Trinity Oaks	U.S.	California	California	Pinot Noir		\$7.50	\$28.00	\$0.00
Concannon	U.S.	California	Central Coast	Cabernet Sauvignon	Selected Vineyards	\$7.50	\$28.00	\$0.00
Rosé								
Sutter Home	U.S.	California	California	White Zinfandel		\$6.50	\$24.00	\$0.00



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